

**Oracle® Retail Plan Pre-Season 2.6.1**  
User Guide

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# Preface

## Audience

This document is intended for users and administrators of the Oracle Retail Plan Pre-Season application.

## Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Accessibility standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For more information, visit the Oracle Accessibility Program Web site at

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## Related Documents

For more information, see the following documents in the Oracle Retail Plan Pre-Season 2.6.1 documentation set:

- *Oracle Retail Plan Pre-Season Installation Guide*
- *Oracle Retail Plan Pre-Season Configuration Guide*
- *Oracle Retail Plan Pre-Season Operations Guide*
- *Oracle Retail Plan Pre-Season Online Help*
- *Oracle Retail Plan Pre-Season Release Notes*
- *Oracle Retail Plan Administration Guide*

## Conventions

The following text conventions are used in this document:

Convention	Meaning
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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# Getting Started

Welcome to Oracle Retail Plan, a web-based tool designed to help you create, forecast and manage merchandise planning easily and more effectively. The Oracle Retail Plan tool may be used to support the entire planning process from historical analysis to mock item planning, plan refinement and in-season tracking.

This user guide is designed to help you understand the Plan solution and how to make it work for you. This chapter includes the following topics:

- About Plan
- Logging On
- Changing Your Password
- Understanding Timeouts
- Understanding Navigation

## About Plan

The foundation of Oracle's Retail Plan solution is advanced forecasting and optimization analytics that drive better, faster decisions. Oracle Plan provides integrated assortment and Item planning, automating the flowcharting process and enabling merchants to tailor assortments to local demand. Additionally, Plan supports in-season planning and is integrated with allocation optimization to ensure that merchant's assortment strategy is effectively executed to the stores.

To maximize the analytic potential of the Plan application, Oracle Analytic Insights; including Optimized History, Optimized Size Profiles and Optimized Pre-Pack Configurations, will provide insight into missed historical opportunities in terms of sales and gross margin at all levels of the merchandise and location hierarchies. Furthermore, these analytics will provide predictive recommendations for how to maximize future performance through informing a range of strategic, tactical and operational decisions - from informing what the driving parameters for a given assortment should be with Optimized History, to automatically executing on the assortment with optimized size profiles and pre-packs.

## Logging on to Plan

If you are using the application without the Merchant Desktop feature, follow the instruction below. If you are using Merchant Desktop with the application, follow the log on instructions in Merchant Desktop Help.

Before you access the application for the first time, do the following:

- Check your settings for Microsoft Internet Explorer. For details, see [Checking Your Application Browser Settings](#).
- Obtain the following from the application administrator:

The URL (uniform resource locator); the URL is sometimes referred to as the "web address." This is what you will enter from your Internet browser to access to the application. The URL will look similar to the following:

`https://yourcompanyname.p4p.Oracle.com`

- A username and password. You will enter your username and password on the login screen.

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**Note:** For Single Sign-On to work correctly, the hostname in the URL specified should be consistent with the URL's specified for the various common apps - reports, BRPM, and UM in suite.properties and plan.properties files.

For example: If the URL is <hostname>.us.oracle.com:<portNumber>, then the suite and plan properties configuration for URLs should contain us.oracle.com.

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To access the application

1. Start Internet Explorer as you normally do.
2. In the Address field, enter the URL for your company and press Enter.

If you have not downloaded the Microsoft Common Dialog control yet, a prompt appears asking you to do so. Otherwise, the login screen appears.

To avoid further prompts of this security warning, click the Always trust content from Microsoft Corporation check box and click the Yes button.

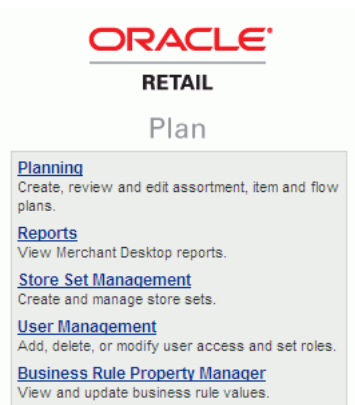
The Microsoft Common Dialog control is downloaded to your computer and appears in the Downloaded Program Files directory. After you click Yes, the login screen appears.

3. On the login screen, enter your username and password in the appropriate fields and then click the Login button.

Your username and password are case-sensitive. If you are unable to log in, check your keyboard to make sure that the Caps Lock key is not selected.

If you forget your password, contact the application administrator to get a new password.

When you successfully enter your username and password, the Main Menu appears as in Figure 1-1.

**Figure 1–1 Plan Main Menu screen**

### What to Do Next

For information on how to use the user interface, see the section [Understanding the Plan User Interface](#). Otherwise, select any of the following links from the Main Menu, depending on what you want to accomplish:

- Planning - see [Chapter 4, "Using The Plan Worklist"](#) and [Chapter 8, "Using Plan Review"](#) to create, review, and edit Assortment, Item, and Flow plans.
- Buy Parameters - see [Chapter 7, "Buy Parameters"](#) to define merchandising, forecast and receipt flow parameters.
- Pack Optimization - see [Chapter 9, "Pack Optimization"](#) to identify the best pre-pack configuration with the store-level demand.
- Reports - see [Chapter 11, "Reports"](#) to view the Merchant Desktop Reports.

You can return to the Main Menu by clicking the Main Menu link in the upper-right of most screens.

## Changing Your Password

After you log in to the application for the first time, it is a good idea to change your password from the one given to you by the administrator.

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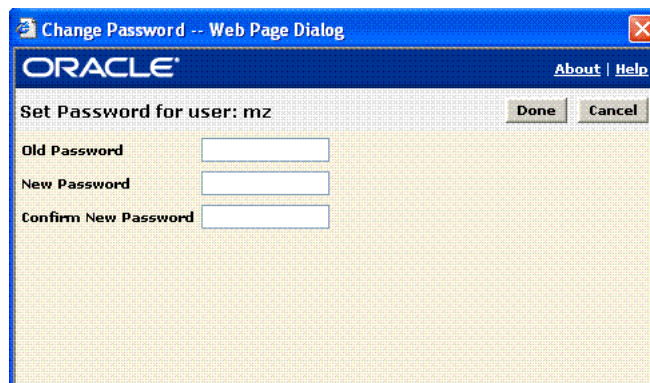
**Note:** If you forget your password, contact your system administrator to get a new password.

---

To change your password:

1. From the Main Menu, click the User Management hyperlink.

The following Change Password dialog screen appears, as in Figure 1-4.

**Figure 1–2 Change Password Dialog Box**

2. Navigate to the Old Password field.

Enter your current password in the field.

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**Note:** All passwords are case-sensitive. Make sure that the Caps Lock key is not selected.

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3. In the New Password field, enter a new password.

You may use any combination of letters, numbers, and symbols, up to 50 characters.

4. In the Confirm New Password field, retype the new password.

5. Click the Done button.

If the new password does not match the confirmation password, an error message appears. Click OK on the error message dialog box and complete the New Password and Confirm New Password text boxes again.

Otherwise, the dialog box closes and the above screen appears. There is no confirmation message.

Your password is changed to the new password you entered. You must use this password the next time you want to log into Plan.

## Understanding Time-outs

After you are logged on, the application will time out after one hour of inactivity on the server. This means that although you may be working with various screens in the application, the time-out message could still appear because the server is inactive. Therefore, it is recommended that you save your work regularly.

If your session does time out, a message appears warning you the session is going to time out.

When this occurs, click OK. The Login screen appears and you must enter your username and password again.

Additionally, the Business Rules Property Manager utility, Store Set utility and Administration utility (not available to most users) have separate time-outs. See the Business Rules Property Manager Help and Store Set Management Help.

Thus, if you access either of these utilities and then leave them inactive, similar time-out messages will appear.

## Understanding Navigation

While you use the application, always use the application buttons, menus, and links to navigate from screen to screen. For example, when you are finished with a screen and want to return to another place in the application, click the Done button rather than clicking the X or the Back button in the upper-right corner of the Internet Explorer window.

If you do click the X or Back button, the following warning appears.

**Figure 1–3 Navigation Error**



Click Cancel on this dialog box and then navigate from the screen using the application buttons or links.



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## Application Information

This Oracle application runs in the Microsoft® Internet Explorer web browser, version 6.0 or newer. This chapter contains the following sections:

- Checking Your Application Browser Settings
- Understanding Plan User Interface

### Checking Your Application Browser Settings

This Oracle application is a web application that runs in the Microsoft® Internet Explorer web browser.

In addition to the Internet Explorer web browser, your PC must be set up with Microsoft Excel 2000 or newer if you want to export data or access standard reports (if available).

Before you attempt to access the application, check your browser settings for the following:

If you are using the Merchant Desktop feature, there are additional browser settings you must check as explained in the Merchant Desktop user guide.

- Security settings for the application URL - Add the URL to the appropriate zone (Local intranet or Trusted sites) to ensure that the application will use the security settings for this zone.

Important: Do not use the Internet zone to configure browser settings for the application. Use only the Local intranet zone or the Trusted sites zone, as explained in the following table.

**Table 2-1 Security Settings**

If	Configure browser settings for
The application is installed and hosted by your company	Local intranet zone  Note: The default security settings for the Local intranet zone are not sufficient. Therefore, make sure that you adjust the security settings as explained in the following procedure.

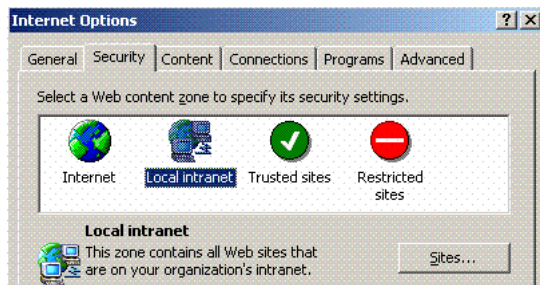
**Table 2–1 (Cont.) Security Settings**

<b>If</b>	<b>Configure browser settings for</b>
The application is installed and hosted by Oracle	<p>Trusted sites zone</p> <p>When Oracle hosts the application for you, Internet security settings apply by default, and these settings are not sufficient for the application. Therefore, add the URL to the list of Trusted sites. Even though the default security settings for Trusted sites may be sufficient for the application, it is highly recommended that you check them as explained in the following procedure.</p>

- Scripting - Typically, the Internet Explorer default settings are sufficient. However, it is a good idea to check scripting options for the application-specific zone (Local intranet or Trusted sites) as outlined in the following procedure. Scripting is required for most application functions, including reporting.

To configure Internet Explorer for the application:

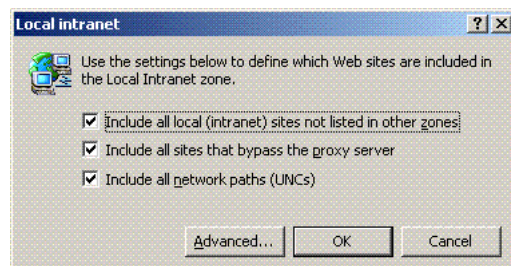
1. Start Internet Explorer as you normally do.
2. From the Tools menu, select Internet Options.
3. On the Internet Options dialog box, click the Security tab
4. On the Security tab, click Local intranet, or, if you have been instructed to do so by the administrator, Trusted sites, and then click the Sites button.

**Figure 2–1 Internet Option Dialog Box**

**Important:** Do not select Internet unless you have been instructed to do so by the administrator. In most cases, the application will be available on your company's intranet or on a Oracle trusted site.

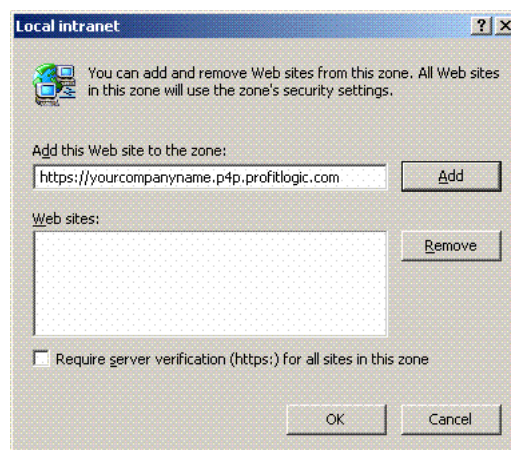
If you selected Local intranet, go to step 5. If you selected Trusted sites, go to step 6. (The Local Intranet dialog box in step 5 does not appear when you select Trusted sites.)

5. On the Local intranet dialog box, click the Advanced button (as in the following example).

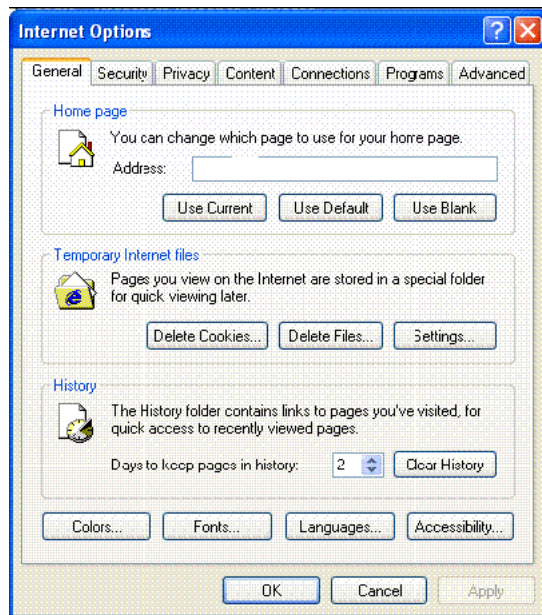
**Figure 2–2 Local Intranet Zone Dialog Box**

6. On the resulting Local intranet or Trusted sites dialog box, add the application URL if it is not already listed.

To do so, type the application URL in the Add this Web site to the zone text box (similar to the following example) and click Add. When the URL appears in the Web sites list, click OK.

**Figure 2–3 Local Intranet Dialog Box**

7. If the Local Intranet dialog box from step 5 is still open, click OK to close it.
8. On the Internet Options dialog box, Security tab, select Local intranet or Trusted sites and then click the Custom Level button.

**Figure 2–4 Local Internet Dialog Box**

9. On the Security Settings dialog box, make sure the following commands are set to Prompt or Enable, and then click OK.

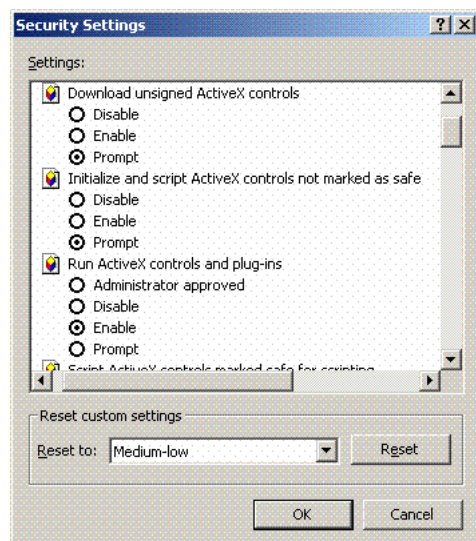
The Prompt setting provides a message box each time Internet Explorer encounters the specified command (e.g., Download signed ActiveX controls).

The Enable setting bypasses the message box and instead performs the specified command without notifying you.

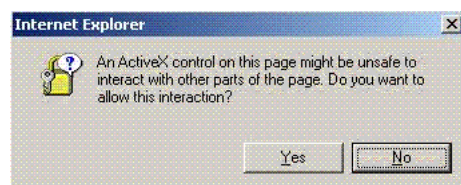
In general, you could select Prompt for the download options because the downloads typically occur one time. For the running and scripting options, however, you could select Enable because those commands occur frequently. (If you would set these options to Prompt, you might have to respond to a message box several times in one application session.)

- Download signed ActiveX controls
- Run ActiveX controls and plug-ins
- Run ActiveX controls marked safe for scripting
- File download
- Active scripting
- Initialize and script ActiveX controls not marked as safe - A Microsoft ActiveX® control is required each time you export to Excel. While this ActiveX control is signed, it is not marked as safe (meaning that it could potentially be used to do unsafe things). If you set this option to Prompt, you will be prompted each time you select the application Export action.

This example uses the Prompt setting for the Initialize and script Active X controls not marked as safe command.

**Figure 2–5 Security Settings for ActiveX**

This prompt appears when there is a request from an application to use an ActiveX control that is not marked as safe.

**Figure 2–6 Internet Explorer Prompt**

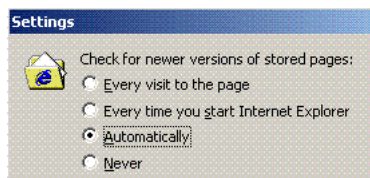
10. On the Internet Options dialog box, click OK to return to the browser.

## Cache Settings

In most cases, you do not need to check your cache settings. The Internet Explorer default cache setting is Automatic, which is sufficient for the application. The Automatic setting ensures that Internet Explorer checks for updates to the application software. If you do want to check your cache settings, use the following procedure.

To check Internet Explorer cache settings:

1. From the Tools menu, select Internet Options.
2. On the Internet Options dialog box, General tab, Temporary Internet Files section, click the Settings button.
3. On the Settings dialog box, select Automatically (as in the following example) if it is not selected already, and click OK.

**Figure 2–7 Setting Dialog Box**

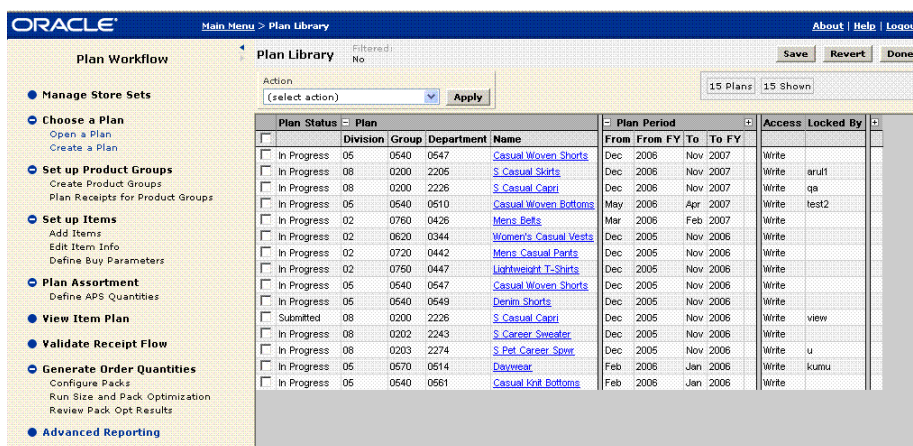
Note: You can also select Every visit to page.

- On the Internet Options dialog box, click OK to return to the browser.

## Understanding the Plan User Interface

The following illustration shows features common to most Plan screens.

**Note:** Although your Plan screens will have the same features, the column names and metrics are typically customized for each site. Therefore, your screens may display column headings and metrics that do not appear in the screen captures.

**Figure 2–8 Plan User Interface****Table 2–2 Plan User Interface Descriptions**

Screen area	Description
Plan Workflow Bar	This area to the left of most planning screens is an optional navigational tool. Close the Workflow bar by selecting the left arrow in the upper right corner of the Workflow Bar.
Main Screen Area	<p>Located to the right of the Workflow Bar. In this case, the Plan Library screen. Most Main screens include the following sections:</p> <p>Title Section - includes the gray bar across the top of the screen.</p> <p>Action Section - includes an Action button and other task related buttons.</p> <p>Grid Section - includes columns and rows. Usually columns may be expanded or collapsed</p>

**Table 2–2 (Cont.) Plan User Interface Descriptions**

Screen area	Description
General Links	<p>Located at the top of a main screen and may include some or all of the following links:</p> <p>About - Shows the version number, build number, date, time, and status of Plan.</p> <p>Help - Opens a browser that displays the online help system. When you click the Help link, a File Download dialog box may appear, asking if you would like to open the file or save it to your computer. It is recommended that you click Open to use the help system from its current location.</p> <p>Logout - Click this link to end your Plan session.</p>
Screen name	All screens are referred to by a screen name, usually located in the upper left corner of the screen.
Command buttons	The names of the buttons vary slightly from screen to screen, but in general most screens provide a Save button and a Done button. It is important to regularly save your changes, especially if a time out message appears.
Hyperlinks	<p>Navigate the Workflow Bar or most screens using hyperlinks. Hyperlinks take you to other screens within the Plan application.</p> <p>Most hyperlinks are colored dark blue and are underlined for emphasis.</p>
Action list	<p>An Action list contains actions you may perform on the current screen. Some actions require that you select one or more items first, and other actions apply to all of the data on the screen.</p> <p>After you select an action, click the Apply button.</p>
Tabs	<p>From some screens you may perform additional actions using tabs to selected the task.</p> <p>Tabs may be found in the Customize Table section of the Action drop-down lists, if available.</p>
Scroll Bar	Use the Scroll Bar located at the bottom and sides of the most screens. This will expand the view of information on the screen.
Summary metrics and status	These are customized to reflect the metrics that are most important to your company.



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## Using the Workflow Bar and Plan Library

The Plan Workflow, also called the Plan Workflow Bar, is an optional, navigational aid that may display on almost any screen within the planning process of the application. The sequence of screens listed within the Workflow Bar display a typical planning process that may be followed when using the application.

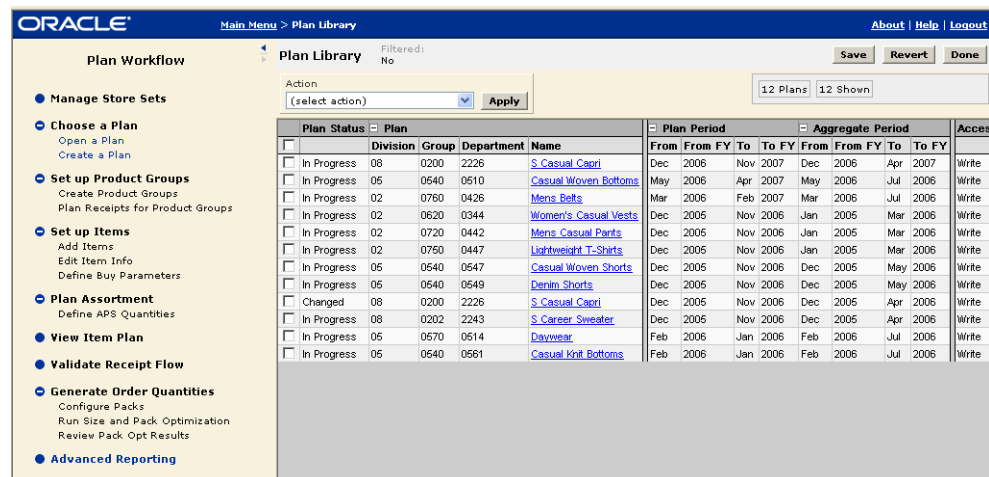
This chapter section contains the following topics:

- ["Understanding the Workflow Bar and Library Screen"](#) on page 3-1
- ["Using the Plan Workflow Bar Hyperlinks"](#) on page 3-3
- ["Identifying the Plan Library Screen Layout"](#) on page 3-5
- ["Create a Plan from the Plan Library"](#) on page 3-8
- ["Delete a Plan from the Plan Library"](#) on page 3-10
- ["Publish Selected Plans to RDM"](#) on page 3-10
- ["Customize Table"](#) on page 3-11
- ["Print or Export"](#) on page 3-13

### Understanding the Workflow Bar and Library Screen

The Plan Workflow Bar is an optional navigational aid, when selected may appear automatically on the left side of any planning screen. When you access the Planning section of the application, the first screen visible is the Plan Library screen.

Click the expand button, located in the upper left corner of the Plan Library screen. The Workflow Bar will appear and share the left side of the Library screen.

**Figure 3–1 The Workflow Bar and Library Screen**

You may collapse (hide) the Workflow Bar by clicking on the arrows located in the top right of the bar.

The Workflow Bar lists a sequence of available screens arranged in such a way as to mimic a typical planning process within the application. You may navigate using the hyperlinks within the Workflow Bar, or using the Plan Library screen, go directly to a plan and navigate screen by screen to perform related tasks.

Use the Plan Workflow Bar to:

- visualize, from beginning to end, all screens used when navigating through an example planning process
- click on an available hyperlink to access screens, perform tasks and actions
- quickly navigate to planning screens within the application

The purpose of the Plan Library screen is to allow users to create, delete and access plans. As the name of the screen implies, this is your first point of access to the library of plans. All plans for which you have access to edit or view will be listed within the Plan Library screen.

Use the Plan Library screen (or navigate using the Workflow Bar) to:

- access plans listed in the library
- create new plans or delete plans
- access the Plan Worklist screen

Plan level security is configured by department within the administration section of the application. See your plan administrator if you have questions about your level of access within the Plan Library screen.

## Accessing the Workflow Bar and Plan Library

To access the Workflow Bar and Plan Library screen:

1. Log into Plan using your user id and password.
2. From the Main Menu, select the Planning option
3. The Plan Library screen will appear.

Click the expand arrow in the upper left of the screen to access the Workflow Bar. When expanded the Workflow Bar will appear sharing the left side of the Plan Library screen.

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**Note:** The Plan Workflow Bar may be expanded or collapsed. To do this:

In the upper left corner of the Plan Library screen (or any planning screen), locate a small arrow pointing right/left.

Click the right arrow to display the Workflow Bar.

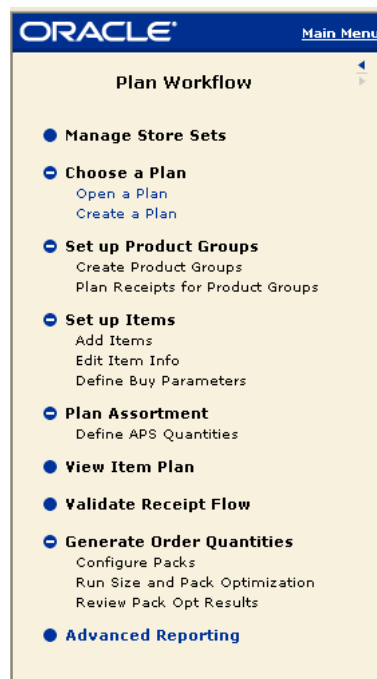
Click the left arrow to hide the Workflow Bar.

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## Using the Plan Workflow Bar Hyperlinks

The Plan Workflow Bar will display from top to bottom on the far left side of almost any screen within the Plan application. It is clearly identified by a light color background with an expandable list of screen topics in dark type. If you display the Workflow Bar from a screen that permits access to additional screens, then those screen topics will be available hyperlinks within the Bar. Hyperlinks are identified in dark blue colored text. Single click on the hyperlink text to access the screen. There may be multiple hyperlinks listed, depending from which screen you choose to display the Workflow Bar.

**Figure 3–2 The Plan Workflow Bar**



The Plan Workflow Bar lists the planning screens available within the application. Depending on the screen the Workflow Bar is sharing, different hyperlinks will be available. The following table identifies all of the screen titles listed in the Workflow Bar and a brief description of each:

**Table 3–1 Plan Workflow Bar Hyperlinks**

Hyperlink Name	Description
Manage Store Sets	<p>The Store Set Library screen appears. Use this screen to create new store sets, copy sets, rename existing sets, merge and add other users' sets.</p> <p>To learn how to Manage Store Groups, see the Store Set Management Help.</p>
Choose a Plan	<p>Open a Plan - Select an existing plan and go to the Plan Library.</p> <p>Create a Plan - Create a new plan.</p> <p>For detailed information on the Plan Library, see <a href="#">"Understanding the Workflow Bar and Library Screen"</a> on page 3-1.</p>
Set Up Product Groups	<p>A group of merchandise may have a large budget and an extensive list of items. In order to more easily manage these items:</p> <p>Assign items to each group and make these groups available to plans.</p> <p>Create Product Groups based on product attributes (create product group screen).</p> <p>Spread/allocate percentages of your budget to particular groups and/or hold budget in reserve for use later in the planning period.</p> <p>For detailed information on Plan Setup actions, see <a href="#">Chapter 5, "Using the Plan Setup Section"</a>.</p>
Set Up Items	<p>The Worklist screen allows you to perform all actions needed to successfully set up items to be used optimally within the Plan application. Add and Edit items and their associated details. Define buy parameters and related actions.</p> <p>For more information on how to Set Up Items, see <a href="#">Chapter 6, "Setting Up Items"</a>.</p>
Plan Assortment	<p>The Assortment View displays all the items contained in your plan with data on planned receipts by subset/store grade. Information may be viewed at the item or color level and you can choose to view data by particular subclasses and subsets. This is the area in which you can manually define and edit receipt quantities for the AP data segment.</p> <p>To learn about the Assortment View, see <a href="#">Chapter 8, "Using Plan Review"</a>.</p>
View Item Plan	<p>The Item View displays sales, receipts, inventory, and detailed metrics by week for a particular item, color, or group of items, such as class or subclass.</p> <p>For detailed information on the Item View, see <a href="#">"Understanding Item View"</a> on page 8-13.</p>
Validate Receipt Flow	<p>The Flow View shows the receipt flow plan for all items in the plan by week. Compare quantities planned for the data segments and compare them to financial planning constraints set for the class and subclass by month.</p> <p>To understand the Flow View, see <a href="#">"Understanding Flow view"</a> on page 8-18.</p>

**Table 3–1 (Cont.) Plan Workflow Bar Hyperlinks**

Hyperlink Name	Description
Generate order Quantities	From this link you are able to:  Configure packs, run pack optimization and review pack optimization results.  For detailed instructions and information on Generating Order Quantities, see <a href="#">Chapter 9, "Pack Optimization"</a> .
Advanced Reporting	These are the reports available through the Merchant Desktop.

## Identifying the Plan Library Screen Layout

**Figure 3–3 The Plan Library Screen**

The screenshot shows the Oracle Plan Library screen. At the top, there's a blue header with 'ORACLE' and 'Main Menu > Plan Library'. Below that, a navigation bar contains 'About | Help | Logout'. The main content area has a 'Plan Library' section with a 'Filtered: No' indicator. There are buttons for 'Save', 'Revert', and 'Done'. Below this, there's an 'Action' dropdown menu with '(select action)' and an 'Apply' button. To the right, it says '12 Plans 12 Shown'. The main part of the screen is a table with columns: Plan Status, Plan (Division, Group, Department, Name), Plan Period (From, From FY, To, To FY), Aggregate Period (From, From FY, To, To FY), Access, Locked By, and Plan Updater (Auto-Update, Last Updated). The table lists 12 plans, each with a checkbox, status, and various details.

The Plan Library screen is organized into the following three sections:

1. **Title Section** - lists informational fields and screen action buttons.
2. **Action Section** - an action drop down field lists available actions that may be taken while accessing the Plan Library screen.
3. **Plan Library Grid** - the columns on the Plan Library grid provide information about each of the plans listed.

### 1. Title Section:

There are three informational fields listed within the Title Section of the Plan Library screen:

**Figure 3–4 Title Section of the Plan Library Screen**

This screenshot shows the top portion of the Plan Library screen, focusing on the title section. It includes the Oracle logo, the breadcrumb 'Main Menu > Plan Library', and links for 'About | Help | Logout'. Below the header, the 'Plan Library' section is visible, showing 'Filtered: No' and buttons for 'Save', 'Revert', and 'Done'.

- Screen Title: Plan Library
- Filtered: Identifies with a Yes or No if a Filter has been applied.  
You may apply filters from the Action drop-down field.  
To do this:

Select the Customize Table option from the drop-down list. From the pop-up screen, select the Filter Tab. For details on setting and deleting filters see: ["Customize Table"](#) on page 3-11 of this user guide.

- # Plan # Shown: Located below the three action buttons and report the following metrics about the plans listed on the Plan Library screen:

The first field (# Plans) lists the number of plans within the Plan application.

The second field (# Shown) lists the number of plans displayed on the Plan Library screen.

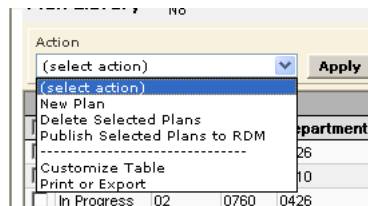
Also within the Title Section of the Plan Library screen are three buttons. These buttons allow for the following actions to be applied to the whole Plan Library screen.

- Save: Saves any changes made from the Plan Library screen.
- Revert: If you have made changes to the Plan Library screen, before saving them, you can use the Revert button to ignore the changes made and refresh the screen to the same data before making changes.
- Done: Allows you to exit out of the screen without saving any changes.

## 2. Action Section:

The Action drop-down field, located directly below the screen title, works in conjunction with plans listed within the Plan Library grid. Select one or more plans listed within the grid, choose an action from the list of available actions from the Action drop-down field, then click the Apply button. Whatever action selected will be applied to the plan(s) selected.

**Figure 3–5 Action Drop-Down Field**



The following is a list of actions available from the Action drop-down list:

- New Plan  
Using the New Plan option from the Action drop-down list, you may create new plans within the Plan application. To Create a New Plan using this option, see ["Create a Plan from the Plan Library"](#) on page 3-8.
- Delete Selected Plan  
Using the Delete Selected Plans option, in conjunction with the selection box listed as the first column within the Library grid, you may delete one or many existing plans. To Delete Selected Plans, see ["Delete a Plan from the Plan Library"](#) on page 3-10.
- Publish Selected Plan  
You can publish the selected plan information by using the Publish Selected Plans to RDM option. To publish the selected plan, see ["Publish Selected Plans to RDM"](#).
- Customize Table

The display of information on the Plan Library screen may be altered using the following three Tab options: Sort, Filter and Change. Each of these options are explained in detail in "[Customize Table](#)" on page 3-11.

- Print of Export

Information may be printed or exported to an excel spreadsheet. Follow the procedure illustrated in "[Print or Export](#)" on page 3-13.

### 3. Plan Library Grid:

The following table describes the columns within the Plan Library Grid:

**Table 3–2 Plan Library Grid Columns**

Column Heading	Description
Selection Box	Check this box to select one or more plans listed.
Plan Status	<p>The Plan Status column displays the status of the plan. The status is derived based on the lowest valued item within the plan.</p> <p><b>In Progress</b> is the default status indicating that the plan is currently under development.</p> <p><b>Ready</b> indicates that the plan has been completed and is ready to be reviewed by another user.</p> <p><b>Validated</b> indicates that the plan has undergone validation and is prepared to be submitted.</p> <p><b>Submitted</b> indicates the plan has been submitted to other downstream systems.</p> <p><b>Changed</b> indicates a plan has been submitted and now it is being edited.</p>
Plan	<p>The various columns within the Plan group columns may vary depending on how your company implemented Oracle Plan. You may see the following columns:</p> <p>The <b>Division</b> columns provide detailed descriptive information about your company and a level in the merchandise hierarchy.</p> <p>The <b>Group</b> may be a numeric code identifying another level of the merchandise hierarchy.</p> <p>The <b>Department</b> may be a numbered code identifying the department level within your company's merchandise hierarchy.</p> <p>The <b>Name</b> is the Plan name. The name is a hyperlink to open the plan and access the Plan Worklist screen.</p>
Plan Period	<p>The <b>Plan Period</b> columns provide information about the effective dates for each plan.</p> <ul style="list-style-type: none"> <li>■ <b>FY</b> is the plan's fiscal year.</li> <li>■ <b>From</b> is the date from which the plan period begins.</li> <li>■ <b>To</b> is the date on which the plan period ends.</li> </ul>
Aggregate Period	Time frame that stores are available to the plan and indicates to which volume group they belong.
Access	<p>The <b>Access</b> field displays your access rights to a specific plan. <b>Write</b> access enables you to edit the plan. <b>Read-Only</b> access lets you review the plan. <b>Locked</b> access means another user currently has access to that plan. Only one user may have write access to a plan at any time.</p>
Plan Updater	These columns contain dates last updated by the plan update process.

**Table 3–2 (Cont.) Plan Library Grid Columns**

Column Heading	Description
Locked By	The plans locked by a particular user.

**Note:** Auto-Update Check Box: select this box to tell the nightly Plan update process to include this plan in its updating processes.

You may notice some delay accessing your plan due to the update process.

## Create a Plan from the Plan Library

The **New Plan** option within the Action drop-down field will allow you to create plans. This newly created plan will then be listed on the Plan Library screen.

1. From the Main Menu, select the Planning hyperlink. The Plan Library will display.
2. Navigate to the Action drop-down field. From the drop-down list provided select: New Plan.
3. Click the Apply Button.
4. The following New Plan pop-up screen will appear:

**Figure 3–6 New Plan Pop-up screen**

Fill in the necessary information using the drop-down fields.

5. When complete, select the OK button. This saves the newly created plan.

## Carry Over Item

A carry over item is an item whose lifecycle extends beyond the plan in which it was initially created, and is automatically created in the next plan.

The carry over feature allows an item's lifecycle to flow into multiple plans and automatically create items in subsequent plans that coincide with an item's lifecycle. The calculation parameters required for forecasting are associated with the item's lifecycle and forecasts are run for the item's entire lifecycle, producing continuous lifecycle sales and receipt data for the NEED segment.

Carry over is now enabled by default, via a plan.property setting in *plan.flow.dates.validate.oos.within.plan*

- Setting to 'false' enables carry over. If set to 'true', flow date validation ensures that the item's out of stock date is not after the end of the plan.

Here is an overview of the carry over process:

- When you open a plan, the system checks to see if there are any styles or colors that should be carried over from the previous plan. An item qualifies for carry over, if it is actualized, not already in the plan, and the Out-Of-Stock (OOS) date for any store subset is blank or greater than or equal to the plan's start date. This occurs only on plan open, Plan updater will not carry over items.

Only colors that flow into the current plan carry over. Carry over items are re-actualized when they are first created in the second plan.

- A user is not notified that carry over items have been automatically populated in the plan.
- Forecasting requires an OOS date. When unspecified, the OOS date defaults to a configurable (see below) number of months (12 by default) after the end date of the last plan that contains this carry over item.

There are two *plan.properties* settings that govern the behavior of the application when an OOS date is not specified:

1. `plan.flow.dates.item.types.oos.not.required=B`

Indicates what types of item can have a blank out of stock date.

Comma-separated list of item types, blank if all types require OOS date.

2. `plan.params.flowDates.basic.forecastLength = 12`

# Number of months to run a forecast for if out of stock date not specified.

A carry over indicator column and Item Selector screens indicate that an item has been carried over. The flag is 'N' for the first planned item in an item's lifecycle, and the flag is 'Yes' for items carried over into subsequent plans.

### Carry Over Implementation Details

Changing an item's OOS date, so that it is no longer a carry over item will not automatically remove the Item from the subsequent plan(s), or change the carry over indicator for the item in those plans. In this case, you must manually delete the item from subsequent plans.

Copy Need to AP only applies to weeks in the current plan, and to any unplanned weeks of the lifecycle beyond the current plan.

Default Population of Carry over items:

- Like Item information, Store Flow Dates, DC Delivery dates, Pricing Events are common across all plans for a carry over item.
- Pack Configuration also applies to the lifecycle of the item.
- Need Storebase Selections and Delivery Frequency defaults to the settings from the previous plan, but may be changed in each individual plan:
  - Need Storebase VG selections:
    - \* Storebase VG selections default to the settings from the previous plan for VGs that are common to both plans.
    - \* When an item is carried over, then storebase is 'Done', if previous storebase was done in the previous plan, even if no VGs are selected (due to lack of common VGs).

- Min and Pres Min are carried over from the previous plan for settings at the Chain Level, but may be changed in each individual plan. The receipt flow is impacted only by the Presentation Min in the first plan. Presentation Min must be set at the level at which the forecast is being generated (Style or Color) in order for it to effect the Receipt flow.
- When viewing AP and Need data in the Item View:
  - The Need data is filtered by the Need Storebase for the Plan associated with that week.
  - The AP data displays data only for stores eligible for the Plan associated with that week.
- Receipt Flow Calculations:
  - Assortment View displays receipts for the current plan only.
  - Adjusting the Store AP quantities scales the receipts based on the ratio between AP and Need receipts in the Plan. AP Sales are then scaled up or down based on the AP receipts.
  - Running Pack Opt and Editing Receipt % constraints only the sales (never increase sales).

## Delete a Plan from the Plan Library

The **Delete Selected Plans** option within the Action drop-down field allows you to delete one or more plans listed on the Plan Library screen. If you delete a Plan, you cannot retrieve it.

1. From the Main Menu, select the Planning hyperlink.  
The Plan Library displays.
2. Navigate to the bottom of the Library screen where all the plans are listed. Decide which plan(s) you want to delete. Navigate to the selection box directly to the left of the Plan name.
3. Click the selection box in front of the plan to select the plans.
4. Navigate to the Action drop-down field. From the drop-down list provided select: Delete Selected Plans
5. Click the Apply button.

Notice the plan(s) selected will not be listed on the Plan Library screen.

## Publish Selected Plans to RDM

The Publish Selected Plans to RDM option within the Action drop-down field will allow you to publish plan information to a system outside of Oracle Plan.

1. From the Main Menu, select the Planning hyperlink.  
The Plan Library displays.
2. Navigate to the bottom of the Library screen where all the plans are listed. Decide which plan(s) you want to Publish. Mouse to the Selection Box directly to the left of the Plan name.
3. Click the Selection Box in front of the plan to select the plans.

4. Navigate to the Action drop-down field. From the drop-down list provided select: Publish Selected Plan
5. A pop-up will appear asking you to confirm you wish to Publish.  
Click the OK Button.

## Customize Table

Using the Customize Table option, you may change the display of Plans listed within the Plan Library screen. Do this in the following ways:

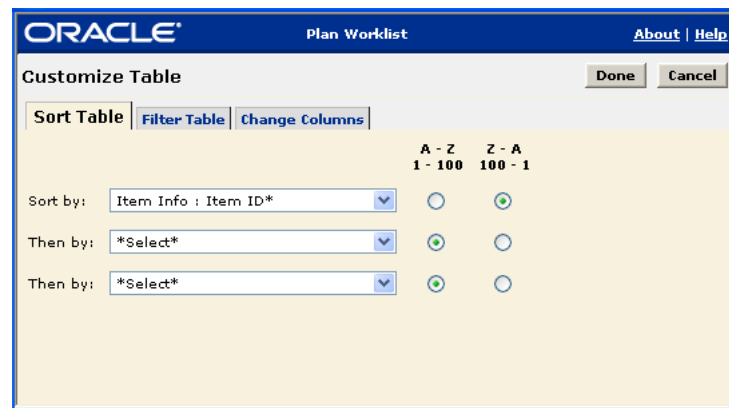
Sort the display by up to three options. Each of the options may be ordered in ascending/alphabetical or descending/reverse alphabetical order.

You have the option to select which columns to show or hide and rearrange the vertical layout of the columns. **Note that column names preceded by an asterisk are required columns** and cannot hide.

You may also create filters to limit certain information from the display of the Library screen.

1. From the Main Menu, click Planning.  
The Plan Library appears.
2. Locate the Action drop-down field. From the list, select Customize Table and click the Apply button.  
The Customize Table pop-up screen appears:

**Figure 3–7 Customize Table Pop-Up**



3. Three Tabs are visible on the Customize Table pop-up screen:
  - Sort Table** - allows you to sort three fields in the grid. Select A-Z, 1 - 100 for ascending and Z - A, 100 - 1 descending.
  - Filter Table** - Filter the items in the grid by a field or fields and their values that you apply.
  - Change Columns** - allows you to hide/display move columns in the Library Grid.
4. Decide if you would like to Sort, Filter or Change Columns within the Library Grid.

## To Sort

Sort using the first tab on the Customize Table screen. There are three drop-down fields to choose from, these are the three sort options available.

For each field you select to sort, you may choose:

Ascending/alphabetical (A -Z / 1 - 100) or descending/reverse alphabetical order (Z - A / 100 - 1). This defines the initial sort options for the screen.

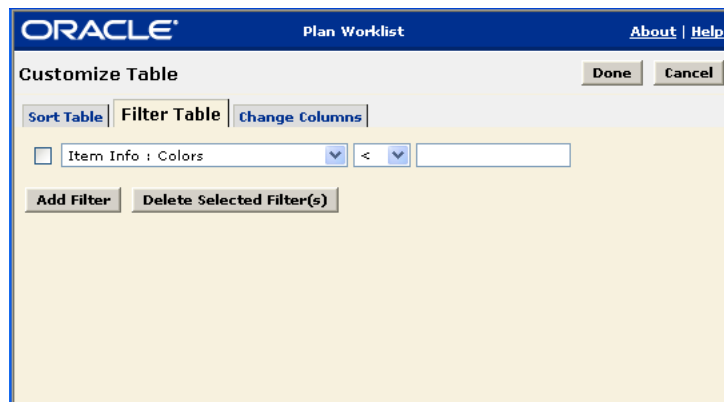
Use the drop down lists and round radio buttons to make your selections.

Click the Done button.

## To Filter

Select the Filter tab. The Filter screen will display:

**Figure 3–8 The Filter Tab**

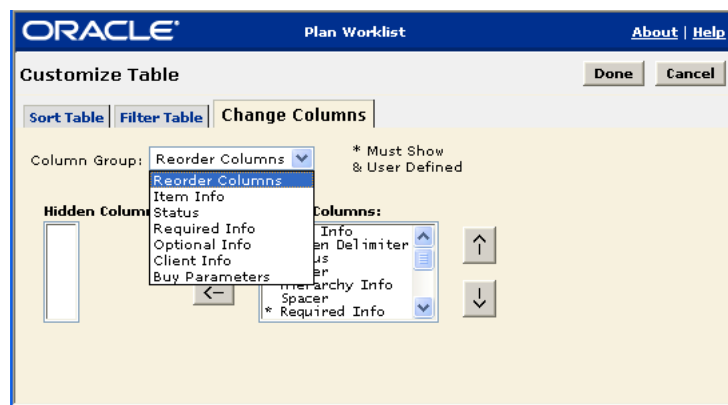


- From the first drop-down field, a drop-down list will display.  
All available fields to filter will be in the drop-down list.
- Click on a field from the list that you wish to filter.  
Move to the next drop-down field. Click on the down arrow to view the options in the drop-down list:  
< (less than), <= (less than and equal to), = (equal to), >= (greater than and equal to), > (greater than), is equal to (enter a word, not a number), is not equal to (enter a word, not a number).
- In the last box, enter the corresponding value (either a number or a word value).
- Click the Add Filter button.  
To delete, select the filter(s) you want to delete by using the selection box to the far left. All filters are visible from the Filter tab.  
Click the Delete Selected Filter(s) button.
- Continue to add Filters in this manner. When all Filters have been added, click the Done Button.
- Notice the Filtered display field within the Title Section of the Plan Library screen will now display: Yes.

## To Change Columns

Select the Change Columns Tab. The Change Columns screen displays:

**Figure 3–9 The Change Columns Tab**



1. Click the down arrow of the Column Group drop-down field. The following options are in the drop-down list:

Reorder Columns - allows you to hide/un-hide and move a group of columns to the left or right in the grid.

Allows you to select a key field within a group of columns so you may select more fields listed within the Column box. You will be able to hide or un-hide, move right or left, the items selected.

---

**Note:** To Hide a column - you may only select fields in the Column box that are available to be hidden (do not have an \* asterisk).

---

2. Navigate to the Columns box. Select a field to move.

Use the UP arrow button to move a field UP in the Columns box, this moves the column in the Library Grid to the left.

Use the Down arrow button to move a field DOWN in the Columns box, this moves the column in the Library Grid to the right.

Use the LEFT arrow button (arrow points to the Hidden Columns box), to move a field into the Hidden Columns box, this hides the column in the Library Grid.

Use the Right arrow button (arrow points to the Columns box), to move a field from the Hidden Columns box into the Columns box, this displays the column in the Library Grid.

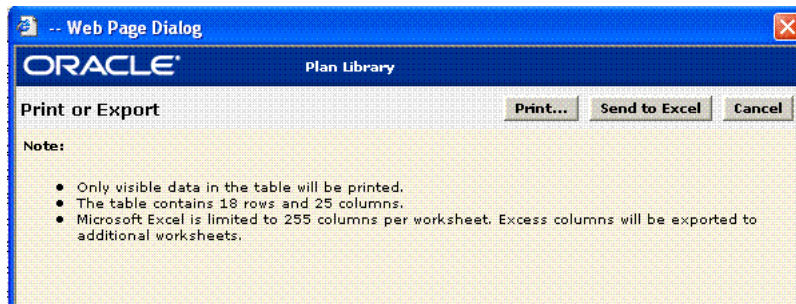
3. Click the Done Button.

## Print or Export

1. From the Main Menu, click Planning.  
The Plan Library appears.
2. Navigate to the Action drop-down field.
3. From the Action list, click the down arrow. From the list, select the Print or Export option. Click the Apply button.

The Print or Export dialog appears:

**Figure 3–10 The Print Dialog Box**



4. Click the Print button to whole Items Grid with all of the items in the Plan.  
BE CAREFUL OF THE ORIENTATION OF THE PAPER WHEN PRINTING.
5. Click the Send to Excel button. Navigate to a local drive to save your file.  
Follow your local print dialog pop-up directions  
Save the file in Excel for future use or to manipulate further.

---

## Using The Plan Worklist

Once a Plan is created, the next step in the planning process is to develop an assortment skeleton by adding mock items to the plan. The mock item is actualized by copying the item attributes from the Plan application. Use the Plan Worklist screen to manage all activities related to the items within a plan, view important metrics and navigate to important setup activities.

This chapter section contains the following topics.

- ["Identifying Plan Data Segments"](#) on page 4-1
- ["Understanding the Purpose of the Plan Worklist"](#) on page 4-2
- ["The Plan Worklist Screen Layout"](#) on page 4-2

### Identifying Plan Data Segments

Since the Plan Worklist screen is the center point of contact when creating a plan, it is important to mention that the data within a plan may be organized and created for different purposes.

The Plan application has three data segments: AP (Assortment Plan), Need and LSP (Last Submitted Plan).

The item information entered on the Plan Worklist through the Plan Setup screens are common to all data segments; however, each segment has its own receipt quantities which are accessed using the Plan Review screen.

- AP is the assortment plan of record. Upon submit, its information will be sent to other down stream systems (if configured to do so). AP Receipt quantities may be derived by a number of methods including: manual input, calculation tools, or by copying other segments.
- Need is a plan based on the bottom-up forecast generated by the system. After you enter item information on the Plan Worklist and complete all calculation parameters for an item, triggering the generation of a forecast, the Need segment will auto calculate. This data segment can be modified only by altering the calculation parameters, and thus changing the forecast.
- LSP is the last submitted plan. When an item is submitted, its AP segment is copied to LSP. This version of the LSP now becomes the AP that was last submitted.

Each screen accessed from the Plan Review section: Assortment View, Item View and Flow View will allow you to view all data segments maintained within the application.

## Understanding the Purpose of the Plan Worklist

The Plan Worklist screen is the central point of contact for managing, viewing and navigating to all planning activities within a plan.

The purpose of this screen is to:

1. Navigate to the Plan Setup section to access Store Sets, Product Groups and, if necessary, allocate budget or reserve dollars across Product Groups within a plan. For more information on the Plan Setup section of the application see [Chapter 5, "Using the Plan Setup Section"](#).
2. Develop an assortment skeleton by adding 'mock' items to a plan and manage all activities related to the items within a plan. See [Chapter 6, "Setting Up Items"](#) about managing items within a plan

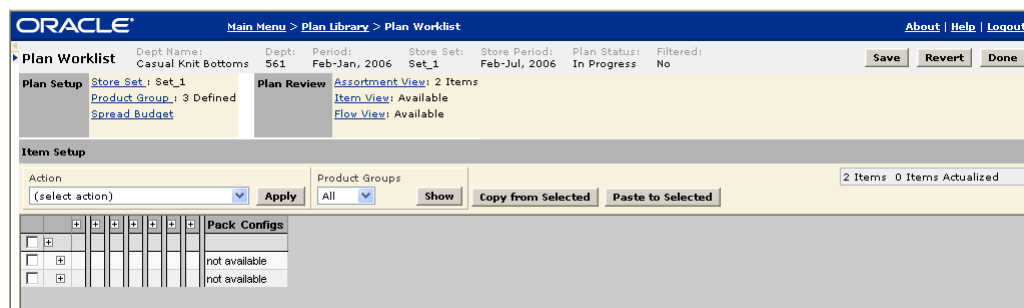
The Plan Worklist screen is also where you can access buy parameters. See [Chapter 7, "Buy Parameters"](#).

3. Navigate to the Plan Review section and view data for planned receipts by Store Set/Store Grade, detailed metrics relating to sales, receipts, and inventory. Also view the receipt flow plan for all items in the plan by week. For detailed information about the Plan Review section of the application see [Chapter 8, "Using Plan Review"](#).

## The Plan Worklist Screen Layout

Once you access the Plan Worklist, you may notice that the screen can be divided into four specific sections:

**Figure 4–1 Plan Worklist Screen**



1. Title Section - This section spans the top of the Plan Worklist screen, directly beneath the Oracle heading. It includes informational fields and screen action buttons.
2. Plan Setup - This section is located in the upper left, gray, shaded box, labeled Plan Setup. This gray box includes three hyperlinks to various setup screens.
3. Plan Review - This section is located in the upper right, gray, shaded box, labeled Plan Review. This gray box includes three hyperlinks to various views within the application.
4. Item Setup - Located in the bottom half of the Plan Worklist screen and includes an Action drop-down field, a Product Groups drop-down show field, copy and paste buttons, display fields and the Item Grid.

The Item Grid is Located within the lower section of the Item Setup section of the Plan Worklist screen. This section contains item, hierarchy, required, optional and

client information, item status, buy parameters and pack configuration columns. To view this section in its entirety, please use the scroll bar on the bottom of the screen, then expand all the columns in the grid.

## Title Section

There are eight informational fields listed within the Title Section of the Plan Worklist screen. The display and location of these fields cannot be changed and are a permanent part of the screen.

**Figure 4–2 Title Section of the Plan Worklist Screen**



**Table 4–1 Title Section Fields**

Field	Description
Plan Worklist	Screen title
Dept Name	The department's name for which this plan applies.
Dept	The department, may be a numeric code, for which this plan applies.
Period	The date range this plan is eligible to be
Store Set	The name of the Store Set that has been assigned to this plan. For procedures on assigning Store Sets to a Plan, see Store Set Management Help.
Store Period	The date range stores are eligible for this plan.
Plan Status	The Plan's status is derived based on the lowest value of any item in the Plan: In Progress - default status indicating that the Plan is currently under development Ready - completed and is ready to be reviewed by another user Validated - items have undergone validation and prepared to be submitted Submitted - saved to the database Changed - once submitted, must be in Changed status in order to edit
Filtered	Indicates with Yes or No if the Plan has any previously applied filters. For procedures on setting table filters, see <a href="#">"Customize Table"</a> on page 3-11. For procedures on how to set a Product Group filter see, <a href="#">"Product Groups Drop-Down Field and Show Button"</a> on page 4-6.

Also within this section of the screen are three buttons. These buttons allow for the following actions to be applied to the whole Plan Worklist screen.

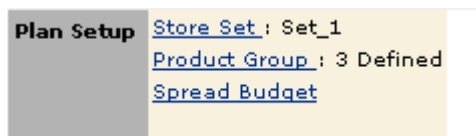
**Table 4–2 Title Section Buttons**

Button Name	Description
Save	Use this button to save any changes made to the database and remain on the screen
Revert	Discards any changes made to the screen and reverts to the last saved state. The user remains on the current screen, and the data refreshes.
Done	Use this button when you are finished with any actions on the screen and wish to exit out of the current screen. If you have made changes to the screen, you are prompted to save your changes.

## Plan Setup Section

The Plan Setup Section of the Plan Worklist screen facilitates access to various plan setup actions. See Table 1-3 for hyperlinks and descriptions.

**Figure 4–3 Plan Setup Section**



**Table 4–3 Plan Setup Hyperlinks**

Hyperlink	Description
Store Set	<p>A Plan may include many stores. In order to manage these stores, you may need to create smaller groups of stores, called subsets. A subset could be a group of stores that share a similar characteristic, such as: climate, fashion segment or region. View, Print or Export Store Sets from this hyperlink.</p> <p>For information on using the Store Sets within the Plan Setup section of the Worklist screen see <a href="#">Chapter 5, "Using the Plan Setup Section"</a>.</p> <p>Go to the Store Set Management utility for details and procedures on how to Create, Edit, Delete, Merge, Copy and View Store Sets, see Store Set Management Help.</p>
Product Group	<p>Use Product Groups to manage similar types of items. Product Groups allow you to assign items to a Product Group - based on a common attribute such as style, fashion segment or region.</p> <p>Create, View, Edit, or Delete a Product Group from the Plan Setup Section. See <a href="#">Chapter 5, "Using the Plan Setup Section"</a>.</p> <p>Assign Product Groups to individual items from the Items Grid using the drop-down list. For procedures see <a href="#">Chapter 6, "Setting Up Items"</a>.</p> <p>Filter the view of items on the Plan Worklist by applying the Product Group show filter, see <a href="#">"Product Groups Drop-Down Field and Show Button"</a> on page 4-6.</p>
Spread Budget	<p>This hyperlink allows you to assign budget dollars (or reserve budget) across one or all Product Groups assigned to items in your plan.</p> <p>For information and Procedures on using this hyperlink, see <a href="#">Chapter 5, "Using the Plan Setup Section"</a>.</p>

## Plan Review Section

The Plan Review section includes hyperlinks to three views which allow you to manage and track your plans. In each view, you may access and view AP, LSP and Need data segments and other important information.

**Figure 4–4 Plan Review Section**



**Table 4–4 Plan Review Hyperlinks**

Hyperlink	Description
Assortment View	Displays all the items contained in your plan with data on planned receipts by Store Grade and Store Subsets. Information may be viewed at the item and color level by specific Product Groups and Subsets. This is the area in which you may define and edit receipt quantities for the AP data segment. For more information see <a href="#">"Understanding Assortment View"</a> on page 8-4.
Item View	This hyperlink displays Sales, Receipts, Inventory and detailed matrix by week for a particular item, color or group of items such as class or product group. See <a href="#">"Understanding Item View"</a> on page 8-13.
Flow View	This hyperlink shows the receipt flow plan for all items in the plan by week. Compare them to the top down financial planning constraints set for the class and Product Group by month. See <a href="#">"Understanding Flow view"</a> on page 8-18.

## Item Setup Section

The Item Setup Section includes a mixture of the following types of fields, buttons and most notably the Item Grid:

- Action drop-down field
- Product Groups drop-down show field
- Copy and Paste buttons
- Display fields
- Items Grid

**Figure 4–5 Item Setup Section**

Item Info				Status	Hierarchy Info			Required Info					
Item ID*	Description	Purch Type	Colors	Actualize AP	Sub-Department	Class	Sub-Class	Product Group	Cost*	Retail*	IMU Pack*	Min*	Pres Min
3	skirt	F	1	Mock	01 Core Casual	07 Skirts	00 History	Other	40.00	50.00	20.0		
1	short	F	1	Mock	03 In-Fashion Casual	01 Pant Regular	00 History	Other	30.00	40.00	25.0		

## Action Drop-Down Field

The Action drop-down list on the Plan Worklist screen is used to execute actions for creating, reviewing and modifying item data. Table 1-5 lists the Action drop-down list field options that are available from the Item Setup section of the Plan Worklist screen:

**Figure 4–6 Action List**

Action

(select action) ▼ Apply

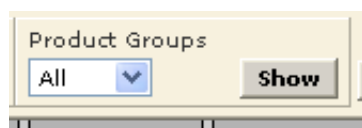
- (select action)
- Add Items
- Change Selected Status
- Submit Selected Items
- 
- Delete Selected
- 
- Validate Items
- 
- Request a Forecast
- 
- Customize Table
- Print or Export

**Table 4–5 Action Drop-Down Field Options**

Action Drop Down Options	Descriptions
Add Items	Select this option to add mock or real items to your Plan. The Add items pop-up window appears and prompts you to enter a number of new style-level item rows. When the Add item button
Change Selected Status	After selecting an item for the Plan Worklist Grid, you may change items' AP status: In Progress - item is currently being planned and is not complete. Ready - item is ready to be planned. Validated - item has been actualized and confirmed to be a valid item. Changed - once an item has been submitted, assign Changed status to make further edits.
Submit Selected Items	After an item or group of items, have been: actualized, planned, pack optimizations complete, and all checks have been done and are correct, you may submit items to the database. When correctly submitted, the item status will be: S (Submitted).
Delete Selected	Remove selected items from the Plan. Use this option in conjunction with the selection box, located in the first column of the Items Grid.
Validate Items	Compare actual items to the item master to check for any discrepancies/errors.
Request a Forecast	Re-Forecasts a selected item based on current Buy Parameters. If the forecast is currently complete or pending, a printable window with errors and status of any pending forecast requests will appear.
Customize a Table	Hide/Show columns, sort columns and filter columns Using the Workflow Bar and Plan Library, Customize Table. See " <a href="#">Customize Table</a> " on page 3-11.
Print or Export	Print a grid or export the grid to Excel. See " <a href="#">Print or Export</a> " on page 3-13.

## Product Groups Drop-Down Field and Show Button

Filter the Item data located in the Items grid by a Product Group assigned to the plan. Using the Product Groups drop-down field, you can apply a filter to display a Product Group's items within the Plan Worklist Screen.

**Figure 4–7 Product Groups Drop-Down Field**

If the Worklist screen already has a Product Group Filter applied you will see the indicator Yes located in the Title section of the Plan Worklist screen. Follow these steps to create a Product Group filter:

1. From the Items Set-up Section within the Plan Worklist screen, navigate to the Product Groups drop-down field.
2. Click the down arrow located to the right of the field. Select an available Product Group from the drop-down list.  
Important - To display all Product Groups and get rid of the filter, select the ALL option.
3. Click the Show Button located to the right of the Product Groups field. Notice the Items Grid will only contain items that belong to the selected Product Groups

---

**Note:** To take off a Product Group filter, navigate to the Product Group drop-down field, select ALL from the list of options. This will display all items within the Worklist and remove the filter.

---

4. Notice within the Title section of the Worklist screen, under the Filter display field the word Yes, is displayed.

## Copy and Paste Buttons

Copy item information from one item to another by using the Copy/Paste Buttons. Selecting the Copy button will launch a Copy Items pop-up screen prompting you to select item information from various columns.

From the Worklist screen, navigate to the Items grid. Select the item you wish to copy:

1. Select the item to copy by clicking inside the selection box in front of the item to copy. You may only copy one item at a time.
2. Click the Copy button, the following Copy Item pop-up screen will appear:

**Figure 4–8 Copy Item Pop-Up Screen**

ORACLE Main Menu > Plan Library > Plan Worklist

**Copy Item** Copy Cancel

Select the fields to copy from the chosen item to the destination items.

Item Info	Hierarchy Info	Required Info	Optional Info	Client Info	Buy Parameters
<input checked="" type="checkbox"/> Description	<input checked="" type="checkbox"/> Sub-Department	<input checked="" type="checkbox"/> Product Group	<input checked="" type="checkbox"/> Brand	<input checked="" type="checkbox"/> Fabric	<input type="checkbox"/> Like Item
<input checked="" type="checkbox"/> Purch Type	<input checked="" type="checkbox"/> Class	<input checked="" type="checkbox"/> Cost*	<input checked="" type="checkbox"/> Vendor	<input checked="" type="checkbox"/> Fit	<input type="checkbox"/> Store Base
	<input checked="" type="checkbox"/> Sub-Class	<input checked="" type="checkbox"/> Retail*	<input checked="" type="checkbox"/> Collection	<input checked="" type="checkbox"/> Rise/Sleeve	<input type="checkbox"/> Store Flow
		<input checked="" type="checkbox"/> Pack*	<input checked="" type="checkbox"/> Size Range	<input checked="" type="checkbox"/> Fabric Characteristics	<input type="checkbox"/> Pricing Plan
		<input checked="" type="checkbox"/> Min*	<input checked="" type="checkbox"/> Floor Set	<input checked="" type="checkbox"/> Reg/Petite/Tall	<input type="checkbox"/> DC Flow
		<input checked="" type="checkbox"/> Pres Min*	<input checked="" type="checkbox"/> Color Family	<input checked="" type="checkbox"/> Lifestyle	
			<input checked="" type="checkbox"/> Season Code	<input checked="" type="checkbox"/> Features	
			<input checked="" type="checkbox"/> Vendor Style	<input checked="" type="checkbox"/> Neck	
			<input checked="" type="checkbox"/> Prod Type	<input checked="" type="checkbox"/> Theme Code	
			<input checked="" type="checkbox"/> Origin Ind	<input checked="" type="checkbox"/> Theme Name	
			<input checked="" type="checkbox"/> Alloc Flag		
			<input checked="" type="checkbox"/> Attribute 1		
			<input checked="" type="checkbox"/> Attribute 2		
			<input checked="" type="checkbox"/> Attribute 3		
			<input checked="" type="checkbox"/> Attribute 4		
			<input checked="" type="checkbox"/> Attribute 5		
			<input checked="" type="checkbox"/> Notes		

3. Click inside the boxes in front of the information you wish to copy.

---

**Note:** Click the selection box located in the column heading to select all information in the list.

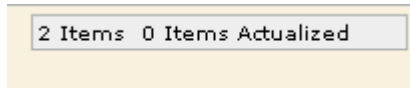
---

4. When all information has been selected to copy, click the Copy button.
5. Navigate to the item in the Items grid you wish to paste the selected Copy information.
6. Select the item. Click the Paste button.

## Display Fields

Located to the right of the Copy and Paste buttons are two numeric display fields:

**Figure 4–9 Display Fields**



The display fields communicate important metrics about the items within the plan selected:

- number of items included in the plan
- number of actualized items in the plan

## Items Grid

The Item Grid Section includes item information displayed within a grid (columns and rows).

Columns contain information about the items. Columns are grouped into heading categories which may be expanded + or collapsed -, use the expand/collapse buttons located within the grid.

Rows contain all of the items within your plan.

**Table 4–6 Items Grid**

Column Heading Categories	Description
Item Info	The item information columns include the following columns: expand/collapse, Item ID #, Description, Type, Colors
Status	Actualize items and access AP information from the Status columns.
Hierarchy Info	The hierarchy columns include three client specific levels within your company that is appropriate when creating Plans.
Required Info	These fields are specific to your company and how you do business.
Optional Info	These fields are specific to your company and business.
Client Info	These fields are specific to your business.
Buy Parameters	The buy parameters columns include the following: Like Items, Store Base, DC Flow, Store Flow, Pricing Plan and Forecast.
Pack Configurations	If the item is actual, click on the available hyperlink to view and edit pack configurations.

Use the expand buttons to view all the columns in a column category. For detailed procedures and information on working with items in plans, see [Chapter 6, "Setting Up Items"](#) and [Chapter 10, "Submitting Items"](#).

---

## Using the Plan Setup Section

The Plan Setup Section of the Worklist screen is designed to facilitate some of the setup activities relating to managing a plan. Use this section of the Worklist screen to access information about store sets, subsets and stores assigned to a plan. Also, create product groups to filter plans and assign them to individual items within a plan. Finally, assign budget or reserve budget dollars for future use. You can do this here by allocating budget to store subsets across one or many product groups.

In order for a plan to be considered complete (and before you create a forecast) you must set up product and store groupings as described in this section.

This chapter contains the following topics:

- ["Understanding Store Sets, Subsets and Stores"](#) on page 5-1
- ["Accessing and Viewing Store Sets, Subsets and Stores"](#) on page 5-2
- ["Assigning a Primary Store Set to a Plan"](#) on page 5-4
- ["Exporting or Printing Subset Metric Information"](#) on page 5-4
- ["Understanding Product Groups"](#) on page 5-5
- ["Creating a Product Group"](#) on page 5-5
- ["Deleting a Product Group"](#) on page 5-6
- ["Understanding Spread Budget"](#) on page 5-7
- ["Showing Subsets and Allocating Budget Across Product Groups"](#) on page 5-9
- ["Allocating Reserve Budget"](#) on page 5-10

### Understanding Store Sets, Subsets and Stores

A plan may contain many items that may be managed more efficiently by grouping similar items into smaller groups. Store sets are simply a group of smaller grouped stores (called subsets). Store sets are assigned to plans in order to assist you in managing items within your plan.

A store set is a group of stores that share a common characteristic, for example: a region, climate, fashion segment, ad designation, or some other attribute. A store can only be a member of one subset in a given store set. However, stores may be in more than one store set.

Subsets are created, edited, deleted and assigned to store sets using the store set manager utility within the Plan application. If you do not have access to the store set manager option within Plan, see your Plan Administrator. For information on the store set manager utility, see the Store Set Management Help.

From the Plan Worklist screen use the following hyperlinks to perform the associated tasks:

- Store Set - View and access store sets, subsets and stores. Also assign a primary store set to a plan. See, "[Accessing and Viewing Store Sets, Subsets and Stores](#)" on page 5-2., for procedures.
- Product Groups - Create/Delete a Product Group. See, "[Creating a Product Group](#)" on page 5-5 and "[Deleting a Product Group](#)" on page 5-6.
- Spread Budget - Show subsets, Allocate Budget and Reserve Budget dollars. See, "[Showing Subsets and Allocating Budget Across Product Groups](#)" on page 5-9 and "[Allocating Reserve Budget](#)" on page 5-10 for detailed procedures.

## Accessing and Viewing Store Sets, Subsets and Stores

Many stores may be included in a subset. Multiple subsets may be assigned to a store set. When you access a plan, you can see the store set assigned to the plan to the right of the store set hyperlink.

Stores can possibly shift to another volume group and be removed from the plan or new stores can be added. This depends on whether or not the store ratios defined in the new group are applied in budget generation.

Use the store set hyperlink to discover which subset(s) and stores are assigned to the store set.

To View and Access store set, subset and store information:

1. From the Plan Main Menu, select the **Planning**  
The **Plan Library** screen displays.
2. Locate the Plan name you want to access from the Plan Library columns grid located on the lower portion of the screen.
3. Click the Plan Name hyperlink.  
The Plan Worklist screen displays.
4. Locate the Plan Setup section in the upper left corner.  
Click the **Store Set** hyperlink.  
The Primary Store Set screen appears.

Primary Store Set		Dept Name: Blouses	Dept: 701	Period: Dec, 2005-Nov, 2006	Store Set: ALL	Store Period: Dec, 2005-Apr, 2006	Plan Status: In Progress	Filtered: No						
Store Set		Created By	Subsets											
Climate_Winter	mz	<table><tr><th>Subset</th><th># Eligible Stores</th></tr><tr><td>ALL</td><td>71</td></tr><tr><td>RemainingSubset</td><td>0</td></tr></table>							Subset	# Eligible Stores	ALL	71	RemainingSubset	0
Subset	# Eligible Stores													
ALL	71													
RemainingSubset	0													
brillyStoreSet	root													
kumu_storeSet	root													
testset-Winter	mz													
testset	mz													
Climate	root													
Winter	mz													
Tanya StoreSet	qa													
ALL	root													

**Table 5–1 Primary Store Set Fields**

Field Name	Definition
Primary Store Set	
Dept. Name	Name of your company's department
Dept.	Numeric code for your company's department
Period	Time frame the plan is valid

**Table 5–1 (Cont.) Primary Store Set Fields**

Field Name	Definition
Store Set	Name of the primary store set applied to the plan
Store Period	Time frame stores are available to the plan and volume group
Plan Status	<p>The Plan's status is derived based on the lowest value of any item in a plan:</p> <p>In Progress - default status indicating the plan is currently under development</p> <p>Ready - plan is completed and ready to be reviewed</p> <p>Validated - plan has undergone validation and is now ready to be submitted</p> <p>Submitted - plan has been saved to the database</p> <p>Changed - plan has been submitted and now in changed status to make further edits</p>
Filtered	<p>Indicates with a Yes or No if a Customize Table and/or Product Group filter have been applied. For procedures on how to select and delete a Customize Table filter, see <a href="#">"Customize Table"</a> on page 3-11.</p> <p>For procedures on how to set a Product Group filter, see <a href="#">"Product Groups Drop-Down Field and Show Button"</a> on page 4-6.</p>

- Navigate to the store sets box, click the **Store Set** name that you want to view.  
When you click a store set name, the list of available subsets changes according to the store set selected.
- View the list of subsets in the subsets box. Click on the subset you wish to view, the following subset metrics screen will appear:

**Figure 5–1 Subsets Screen**


Store #	Store Shopping Center	City	State	Financial \$	Store Grade
2200	PEN CENTRE	St. Catharines	ON	140772.00	4
2201	SOUTHCENTRE MALL	Calgary	AB	136894.00	4
2202	SOUTHGATE S.C.	Edmonton	AB	243113.00	3
2203	GUILDFORD TOWN CENTR	Surrey	BC	170236.00	4
2204	MAYFAIR SHOPPING CTR	Victoria	BC	232193.00	3
2205	CHAMPLAIN PLACE	Dieppe	NB	114671.00	4
2206	MASONVILLE PLACE	London	ON	133303.00	4
2207	PDG/PACIFIC CENTRE	Vancouver	BC	269933.00	3
2208	PROM. DE LA CATHEDR	Montreal	QC	207357.00	4
2209	PLACE STE-FOY	Ste-Foy	QC	197912.00	4

View subset and store information from this subset pop-up screen. Notice the metric information is displayed within a grid.

Note that the column headings are the metric headings and the row contents are the metric contents.

**Table 5–2 Subset Metrics**

<b>Metric Heading</b>	<b>Metric Definition</b>
store #	Your company has given a specific store code. This will be listed in the Store # column.
Store Shopping Center	The name of the Shopping Center where the store is located.
City	The City of the store
State	The State of the store
Financial \$	Budget for the store
Store Grade	Analytical optimized ranking using various attributes for each store.

7. Click the **OK** button when you are ready to navigate away from the subsets metrics pop-up screen.

## Assigning a Primary Store Set to a Plan

When you access the Plan Worklist, you may see a store set assigned to the plan.

If a store set is assigned to a plan, the name of the store set will be displayed to the right of the store set hyperlink.

If no store set has been assigned, you may access the store set hyperlink and assign a store set from the store set box.

1. From the Plan Worklist, navigate to the Plan Setup Section.
2. Click on the Store Set hyperlink
3. The Primary Store Set screen will appear. Navigate to the store set box.
4. Click on the name of the store set you would like to assign to the plan.  
View the subsets assigned to the store sets.
5. Click the OK button
6. The store set will now be assigned to the plan.

## Exporting or Printing Subset Metric Information

To export to Excel or print subset metric information:

1. Navigate to the Plan Set Up section of the Plan Worklist screen.
2. Click the Store Set hyperlink.
3. From the Primary Store Set screen, click the store set name located in the store sets box.
4. Notice the list of available subsets change according to the store set selected.
5. Click the subset name you want to print or export.

The subset pop-up screen appears with subset metrics.

- Click the **Export** button located on the upper right of the subset pop-up screen.
- Follow the pop-up screen's instructions for export

**Figure 5–2 Subset Information Export Option**


The screenshot shows the Oracle Plan Worklist interface. At the top, the breadcrumb trail is 'Main Menu > Plan Library > Plan Worklist'. Below this, the title bar reads 'Subset "AD"'. To the right of the title bar are three buttons: 'Export', 'Print', and 'OK'. A red arrow points from the 'Export' button to the 'Print' button. Below the buttons is a table with the following columns: 'Store #', 'Store Shopping Center', 'City', 'State', 'Financial \$', and 'Store Grade'. The table contains 10 rows of data.

Store #	Store Shopping Center	City	State	Financial \$	Store Grade
2200	PEN CENTRE	St. Catharines	ON	140772.00	4
2201	SOUTHCENTRE MALL	Calgary	AB	136894.00	4
2202	SOUTHGATE S.C.	Edmonton	AB	243113.00	3
2203	GUILDFORD TOWN CENTR	Surrey	BC	170236.00	4
2204	MAYFAIR SHOPPING CTR	Victoria	BC	232193.00	3
2205	CHAMPLAIN PLACE	Dieppe	NB	114671.00	4
2206	MASONVILLE PLACE	London	ON	133303.00	4
2207	PDG/PACIFIC CENTRE	Vancouver	BC	269933.00	3
2208	PROM. DE LA CATHEDR	Montreal	QC	207367.00	4
2209	PLACE STE-FOY	Ste-Foy	QC	197912.00	4

6. To print the subset metrics as you see them in the subset pop-up screen:
  - Click the **Print** button located to the upper right of the subset pop-up screen.
  - Follow the Print pop-up screen's instructions to print from your local printer.
7. To exit out of the subset pop-up screen, click the **OK** button.

## Understanding Product Groups

Use product groups to help manage your plan budget of a large set of merchandise. When product groups are assigned to items you can allocate budget dollars across all or some product groups to better manage your merchandise. Also use product groups from the Worklist screen to filter the view of items in a plan.

From the Product Group hyperlink you can create a Product Group and then designate percentages of your plan budget for each Product Group.

Use the Spread Budget hyperlink from the Create Product Group screen or navigate directly from the Spread Budget hyperlink.

Use product groups to do the following:

- Create and/or delete product groups
- Filter the view of Items within a Plan. You may do this from the Item Setup section within the Plan Worklist screen.
- Assign product groups to individual Items within a Plan. Do this from the Item Grid within the Worklist screen.
- Manage large groups of items with similar characteristics by assigning product groups to each Item.
- Allocate budget dollars and/or set aside reserve dollars by Product Group by using the Set Product Groups/Reserve% Action button
- Set Product Group Reserve%

## Creating a Product Group

To create a Product Group:

1. From the Plan Setup section, click the Product Groups hyperlink.  
The Create Product Groups screen appears.

**Figure 5–3 Create Product Group Screen**

Use the Name box to create Product Group names. Once a Product Group name is created, you may use the Set Product Group/Reserve% button to assign budget dollars to the new Product Group.

Also, this Product Group name now appears on the drop-down list within the Item Set-Up section of the Plan Worklist screen and within the Item Grid section (within the Required Info columns) of the same screen.

The following Action Buttons are located on the Create Product Groups screen:

**Table 5–3 Action Buttons**

Action Button	Description
Set Product Groups/Reserve%	Assign budget dollars to a reserve category or various product groups by store grade and subset
OK	Applies any updates or changes made to the screen
Cancel	Exit out without applying or saving changes
More Product Groups	Creates additional lines within the Name box so you are able to create more Product Group names
Delete Selected	Used in conjunction with the Name box and the selection box directly in front of the name. Deletes a Product Group from the Name box.

2. In the Name box, enter the name of the product group you want to create.  
You can add as many product groups as needed.  
If you need to enter product groups, click the More Product Groups button. Additional fields appear below the existing ones.
3. After you have entered names for all of the product groups you need, click OK.  
Your product groups are saved.

## Deleting a Product Group

To delete a Product Group:

1. From the Plan Setup section, click the **Product Groups** hyperlink.  
The Create Product Groups screen appears.

2. Navigate to the Name box, locate the selection box to the left of the name of the Product Group you want to delete.
3. Click inside the selection box. After selecting all of the product groups you want to delete, click the **Delete** Selected button.

---

**Note:** Items previously contained in a deleted Product Group are automatically re-assigned to the other available product groups within that Plan.

---

4. Click the **OK** button.

The selected product groups are deleted.

## Understanding Spread Budget

You can now manage a plan's financial budget to a level of detail never available before. By allocating dollars to subsets and then dividing the budget across product groups, you can control your budget down to the smallest groupings possible.

Each store's financial budget is spread across the various product groups based on the percentage values indicated within the subset/store grade intersections identified on the Setup Product Group Percent screen.

In addition to assigning budget dollars to various product groups, you are able to set aside financial dollars for future use. Use the Reserve bucket for cases where late developing product exists or opportunistic buys might become available.

Use the Spread Budget hyperlink to:

- Show subsets and Allocate Budget Dollars Across Product Groups
- Allocate Reserve Dollars

**Figure 5–4 Set Up Product Groups Screen**

Product Group	Total %	Total \$	Total by Volume Group for ALL													
			VG1(4)		VG2(8)		VG3(25)		VG4(31)		VG5(29)		VG6(42)		VG7(1)	
			%	Avg \$ per Store	%	Avg \$ per Store	%	Avg \$ per Store	%	Avg \$ per Store	%	Avg \$ per Store	%	Avg \$ per Store	%	Avg \$ per Store
Total VG \$		10877357		140794		113287		102193		82068		63682		47463		
Reserve	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0
Total Less Reserve	100.0	10877357	100.0	140794	100.0	113287	100.0	102193	100.0	82068	100.0	63682	100.0	47463	100.0	
girls	0.0	0		0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0
teens	0.0	0		0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0
Other	100.0	10877357	100.0	140794	100.0	113287	100.0	102193	100.0	82068	100.0	63682	100.0	47463	100.0	

The Setup Product Group Percent screen is organized into three sections:

- Titles Section
- Store Set drop-down field and Show button Section
- Boxes Section

1. Title Section:

The title section displays across the top of the Setup Product Group Percent screen. Table 1-5 lists the fields in the Title section:

**Table 5–4 Title Section Field Definitions**

Field Name	Definition
Screen title	Setup Product Group Percent screen
Dept. Name	Your company's department name
Dept.	Your company's department code
Period	Time frame the plan is valid
Store Set	The name of the Store Set applied to the Plan
Store Period	Time frame stores are available to the plan and volume groups
Plan Status	<p>The Plan's status is derived based on the lowest value of any item in a plan:</p> <p>In Progress - default status indicating the plan is currently under development</p> <p>Ready - plan is completed and ready to be reviewed</p> <p>Validated - plan has undergone validation and is now ready to be submitted</p> <p>Submitted - plan has been saved to the database</p> <p>Changed - plan has been submitted and now in changed status to make further edits</p>
Filtered	<p>Indicates with a Yes or No if a Customize Table and/or Product Group filter have been applied. For procedures on how to set and delete a Customize Table filter, see <a href="#">"Customize Table"</a> on page 3-11.</p> <p>For procedures on how to set a Product Group filter, see <a href="#">"Product Groups Drop-Down Field and Show Button"</a> on page 4-6.</p>

## 2. Store Set drop-down field and Show button and Display fields Section:

This section includes a Store Set drop-down field, Show button, and four display fields:

- Store Set drop-down field and Show button - select the subset from the drop down list. Once selected, click the Show button and you are now able to view important budget information for the selected store set according to the available product groups listed in the product group box. You are also able to allocate budget against this subset using the boxes section.
- Display Fields - In the upper right corner of the screen (under the Action buttons), there are four numeric display fields.
 

Total/Plan - Dollar value for the budget of this plan

Total/Stores - Total count of stores in the plan.

Subset Name (picked from the Store Set Show field)/Plan - Dollar value for that subset.

Subset Name (picked from the Store Set Show field)/Stores - Total count of stores for that subset

## 3. Box Sections:

This section is located within the lower half of the Setup Product Group Percent screen. Navigate to the white shaded fields to enter percentages.

Notice you are allowed to enter percentages to be applied against reserve and/or product groups.

For more details on how to use these fields, see the following procedures, ["Showing Subsets and Allocating Budget Across Product Groups"](#) on page 5-9.

## Showing Subsets and Allocating Budget Across Product Groups

Within a Plan, there may be multiple subsets assigned to the primary Store Set. Follow these procedures to show one or all and then allocate budget dollars to all store sets across product groups:

1. From the Plan Setup section of the Worklist screen, click the **Spread Budget** hyperlink.

The **Setup Product Group Percent** screen appears:

**Figure 5–5 The Setup Product Groups Percent Screen**

ORACLE

Main Menu > Plan Library > Plan Worklist

Help | Logout

Setup Product Group Percent

Dept Name:

Casual Knit Bottoms

Dept:

561

Period:

Feb-Jan, 2006

Store Set:

ALL

Store Period:

Feb-Jul, 2006

Plan Status:

In Progress

Filtered:

No

Save

Revert

Done

Store Set

ALL

Show

Plan

Stores

Total: \$10,877,357 152

ALL: \$10,877,357 152

Product Group	Total		Total by Volume Group for ALL												
	%	\$	VG1(4)		VG2(8)		VG3(25)		VG4(31)		VG5(29)		VG6(42)		VG
			%	Avg \$ per Store	%	Avg \$ per Store	%	Avg \$ per Store	%	Avg \$ per Store	%	Avg \$ per Store	%	Avg \$ per Store	
Total VG \$		10877357		140794		113287		102193		82068		63682		47463	
Reserve	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Total Less Reserve	100.0	10877357	100.0	140794	100.0	113287	100.0	102193	100.0	82068	100.0	63682	100.0	47463	100.0
girls	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
teens	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Other	100.0	10877357	100.0	140794	100.0	113287	100.0	102193	100.0	82068	100.0	63682	100.0	47463	100.0

2. Navigate to the Store Set drop-down field.
3. Click the drop-down arrow located to the right of the Store Set drop-down field.

The subsets assigned to the store set display as the drop-down list.

4. Select the **All** Subset option (this will show all subsets).

To show one subset, select the one you are interested in Showing from the list. See Figure 6-6.

Click the **Show** button.

**Figure 5–6 Set Up Product Group Data Grid**

Product Group	Total	Total by Volume Group for QC		
	%	\$	VG2(1) VG3(3) VG4(4)	
			%	Avg \$ per Store
Total VG \$		1805806		288001
Reserve	0.0	0	0.0	0
Total Less Reserve	100.0	1805806	100.0	288001
Other	100.0	1805806	100.0	288001

---

---

**Note:** By selecting and showing the ALL option from the Store Set drop-down list you are now able to allocate budget across all subsets equally by selected product groups.

---

---

5. Navigate to the **Total by Volume Group** box.

Enter the budget dollars for all store sets by entering percentages for one or all of the product groups listed on the screen. You must enter the amount as a percent. Once you type in the percentage, the system automatically calculates:

- Total percent
- Total dollars

6. Enter 0% in the Reserve field within the Total by Volume Group box if you do not want to set aside a percentage of your budget for future use.

Enter 0% in any of the product groups listed for which you do not want to allocate budget dollars.

When finished entering the percentages across one or all of the product groups, click the **SAVE** button.

These dollar values are now allocated to the relevant product groups and Items.

7. Click the **Done** button to return to the Plan Worklist screen.

## Allocating Reserve Budget

Due to the need to put aside budget for future use, you may be interested in using the Reserve Dollars option within the Setup Product Group Percent screen. Follow these procedures to allocate reserve dollars to a selected plan:

1. From the Plan Setup section of the Worklist screen, click the **Spread Budget** hyperlink.

The Setup Product Group Percent screen appears.

2. Navigate to the Store Set drop-down field.
3. Click the drop-down arrow located to the right of the Store Set drop-down field.  
The subsets assigned to the store set will display as the options in the list.
4. Click either a specific subset from the list or select All for all subsets. Click the Show button.

---

---

**Note:** By selecting and showing the ALL option from the Store Set drop-down list shows budget dollars for all store sets and their subsets. Selecting a subset from the list shows specific subset information.

---

---

5. Navigate to the Total by Volume Group box and locate the Reserve% field. This is the field used to set aside budget dollars for reserve.

Enter the amount as a whole percent. Once you type in the percentage, the system automatically calculates:

- Total percent
- Total dollars

Figure 5-7 Set Up Product Group - Setting Reserve Budget

ORACLE Main Menu > Plan Library > Plan Worklist

Setup Product Group Percent Dept Name: Lightweight T-Shirts Dept: 447 Period: Dec, 2005-Nov, 2006 Store Set: STORE\_STATE

Store Set:

Product Group	Total		Total by Volume Group for QC					
	%	\$	VG2(1)		VG3(3)		VG4(4)	
			%	Avg \$ per Store	%	Avg \$ per Store	%	Avg \$ per Store
Total VG \$		1805806		288001		256885		186788
Reserve	0.0	0	0.0	0	0.0	0	0.0	0
Total Less Reserve	100.0	1805806	100.0	288001	100.0	256885	100.0	186788
Other	100.0	1805806	100.0	288001	100.0	256885	100.0	186788

- Enter 0% in the Reserve field within the Total by Volume Group box if you do not want to set aside a percentage of your budget for future use.

Enter 0 or a percentage in any of the product groups listed if you do or do not want to allocate budget dollars across that Product Group.

When finished entering the percentages within the Reserve% field, click the **SAVE** button.

The reserve dollar values are now allocated to the associated product groups and Items.

- Click the **Done** button.

The Plan Worklist screen appears.



## Setting Up Items

The **Item Setup** section on the **Plan Worklist** screen contains a list of valid actions that you can perform on an item or group of items from the selected plan. The screen provides descriptive data about every item contained in the plan and allows you to add, delete, validate, or copy and paste item attributes.

**Figure 6–1** *Item Setup Screen*

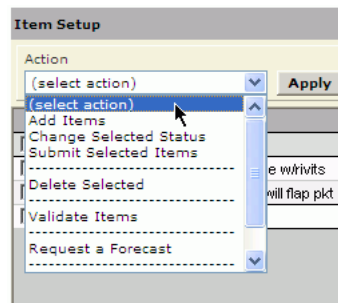
Item Info					Status		Hierarchy Info		
Item ID*	Description	Purch Type	Colors	Actualize	AP	Sub-Department	Class	Sub-Class	
208013	Stretch twill skoote w/rivits	F	3	Actual	I	01 Core Casual	03 Skorts	01 Stretch	
644490	short ctn peach twill flap pkt	F	4	Actual	C	01 Core Casual	01 Structured	08 Other	
afdf	afdf	F	0	Mock	I	01 Core Casual	02 Pullons	06 Sugar	

This chapter includes the following sections:

- Using the Action List
- Using Product Group Show
- Using Copy from Selected / Paste to Selected Buttons
- Using Display Box
- Understanding Item Grid

### Using the Action List

The **Action** drop-down list on the **Item Setup** section enables you to execute actions for creating, reviewing, and modifying item data. You can select an item or a group of items from your worklist, select an action you wish to perform, then click **Apply** to proceed with the desired task.

**Figure 6–2 Item Setup Action List**

The **Actions** drop-down list includes:

- Add Items
- Change Selected Status
- Submit Selected Items
- Delete Selected
- Validate Items
- Request a Forecast
- Customize Table
- Print or Export

## Adding Items

Once you have created a plan, the next step is to add items to the **Plan Worklist**. The **Add Items** screen develops an assortment of items by adding mock items to the plan at the style or color level.

### To add items to the worklist:

1. On the **Main Menu**, click **Planning**.  
The **Plan Library** screen appears.
2. Click the name link of a plan to select from **PlanLibrary**.  
The **Plan Worklist** comprising of **Plan Setup**, **Plan Review** and **Item Setup** sections appear.
3. Click the down arrow on the **Action** drop-down list of **Item Setup**, select **Add Item**, and click **Apply**.  
The **Add Items** pop-up screen appears.

**Figure 6–3 Add Item Screen**

4. Click **Cancel** to exit out of the **Add Items** pop-up screen if you do not wish to add any items.
5. Enter the number of items you want to add in the **Number of items to be added to plan** field, then click **Add Items**.

One blank row will display for each new item you added in the **Plan Worklist**.

6. Enter the appropriate data in the various fields of the grid for each new item.  
The fields to be entered are Item ID, Description, Purch Type, Colors, Hierarchy Info, and Required Info (IMU column in Required Info is a calculated field).

---

**Note:** The Required Info fields are configurable as per user requirements.

---

After entering the required information, click **Save**. The new entries are added to your **Plan Worklist** and you may continue working. If you are finished working with your **Plan Worklist**, click **Done**.

## Changing Selected Item Status

You can change the status of items in your plan after you finish making any additions or modifications and you are satisfied with the parameters.

### To change the status of selected items in your plan:

1. On the **Main Menu**, click **Planning**.  
The **Plan Library** screen appears.
2. Click the name link of a plan to select it from the **Plan Library**.  
The **Plan Worklist** of the plan you selected appears.
3. Click the checkbox of the item(s) you want to change status.
4. Click the down arrow on the drop-down **Action** list, select **Change Selected Status**, then click **Apply**.

The **Change Status** window appears.

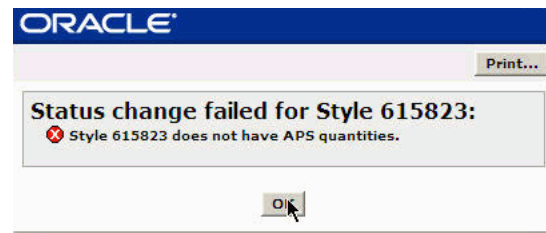
**Figure 6–4 Change Status Screen**

5. Click the down arrow on the **New AP Status** drop-down list, select a new AP status from the following choices:
  - **No Change** indicates that no changes have been made.
  - **In Progress (I)** indicates that the item is being edited and is not yet complete.
  - **Ready (R)** indicates the item is ready for review.
  - **Validated (V)** indicates that the item data is completed validated.
  - **Changed** indicates the Submitted Items status is changed.
6. When you have finished, click **Change Status**.  
 If the change was successfully done, a pop-up window appears displaying that the change was done successfully.

**Figure 6–5 Change Status Confirmation Screen**

The item's status is changed to the current status in the **Status** column.

If there are validation errors, a pop-up window displays change status request failed validation and the reasons for it as shown in the figure below.

**Figure 6–6 Item Status Change Message Window**

7. Click **OK** and complete the required criteria to change status.

Status change requests can be implemented only when all required criteria on the **Plan Worklist** has been entered properly. If no failures are reported, the change is recorded in the **Status** column.

## Submitting Selected Items

You can submit item(s) after all the required criteria is completed without any validation errors. After you have successfully submitted the item, the status is changed to **Submitted** and the item is eligible to interface with external systems. If there are validation errors, the item can not be submitted and a pop-up message appears displaying the reason for the failure.

The AP data segment is read-only for the submitted item, and the LSP or Last Submitted Plan data segment is overwritten with the current AP quantity.

If you wish to make any changes to a submitted item, you must change the item's status to **Changed** to bring the AP segment back to an editable status.

### To submit an item:

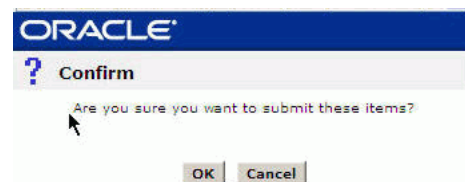
1. On the **Main Menu**, click **Planning**.

The **Plan Library** screen appears.

2. Click the name link of a plan to select it from the **Plan Library**.

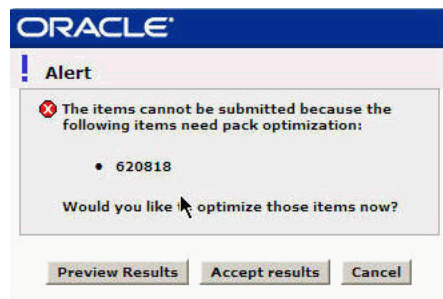
The **Plan Worklist** of the plan you selected appears.

3. Click the checkbox of the item(s) you want to submit.
4. Click the down arrow on the drop-down **Action** list, select **Submit Selected Items**, and click **Apply**. A confirmation pop-up window appears.

**Figure 6–7 Submit Item Window**

5. Click **OK** to submit the item(s) or click **Cancel** to revert the action.

If there are no validation errors, the item(s) is submitted. If there are validation errors, like pack optimization or buy parameters not completed, an alert pop-up window displaying the reason for the validation failure appears.

**Figure 6–8 Submit Item Error**

6. Click **Accept Results** to optimize the items or **Cancel** to revert.

Clicking **Accept Results** overwrites the AP quantities with results of pack optimization. Clicking **Preview Results** runs pack optimization and allows you to see the results in the AP view prior to overwriting the AP quantities.

Pack optimization results must be accepted before an item can be submitted. You need to Submit the item after pack optimization is completed. The item is eligible to interface with external systems after submission.

## Deleting Selected Items

You can delete item or items from the **Plan Worklist**.

### To delete items from your Plan Worklist:

1. On the **Main Menu**, click **Planning**.  
The **Plan Library** screen appears.
2. Click the name link of a plan to select it from the **Plan Library**.  
The **Plan Worklist** of the plan you selected appears.
3. Click the checkbox next to the item(s) whose status you want to delete.
4. Click the down arrow on the **Action** drop-down list, select **Delete Selected**.  
A warning prompt appears asking to confirm your request.
5. Click **Ok** to confirm to delete the selected items. The items are deleted from the **Plan Worklist**. Or, click **Cancel** to cancel your request.

## Validating Items

The Common Item Setup (CIS) system, which contains the master list of products, must be consistent with the plan. The **Validate Item** function validates the actualized items with the item setup information.

If a style is reclassified to a different subclass, then there is a discrepancy in the Validate Items popup. Mock items point to the old subclass. The user must fix the subclass ID from the Plan Worksheet UI before actualizing the mock item.

### To validate the consistency of information related to actualized items on the Plan Worklist:

1. On the **Main Menu**, click **Planning**.  
The **Plan Library** appears.

2. Click the name link of a plan to select it from the **Plan Library**.  
The **Plan Worklist** screen appears.
3. Click the checkbox next to the item(s) for which you wish to validate the items.
4. Click the down arrow on the **Action** drop-down list, select **Validate Item**, and click **Apply**.

If there are no discrepancies or errors, a pop-up window appears on the screen informing that there are no errors in the actualized items.

**Figure 6–9 Validation Message**



5. Click **OK** or **Print** to print the report.

## Requesting Forecast

You can generate /regenerate a forecast for a selected item based on buy parameters. The Request Forecast popup window shows details of forecast request, any errors, and status of any pending forecast requests for the item.

### To request a forecast for selected items:

1. On the **Main Menu**, click **Planning**.  
The **Plan Library** screen appears.
2. Click the name link of a plan to select it from the **Plan Library**.  
The **Plan Worklist** screen appears.
3. Click the checkbox next to the item(s) for which you wish to generate the forecast.
4. Click the down arrow on the **Action** drop-down list, select **Request a Forecast**, then click **Apply**.

The pop-up window displays the forecast request, any errors, or status of any pending forecast.

**Figure 6–10 Request Forecast Window**

5. Click **OK** to continue, or click **Print** to print the report.

If the selected item already has a generated forecast, a pop-up window informs that a forecast may not be necessary for this item.

6. If you wish to re-run the forecast, select the item and click **Run Forecast**.

While the system generates the forecast, the status of the **Forecast** column is displayed as **Pending**. After generating the forecast, the **Forecast** column status changes to **Complete**.

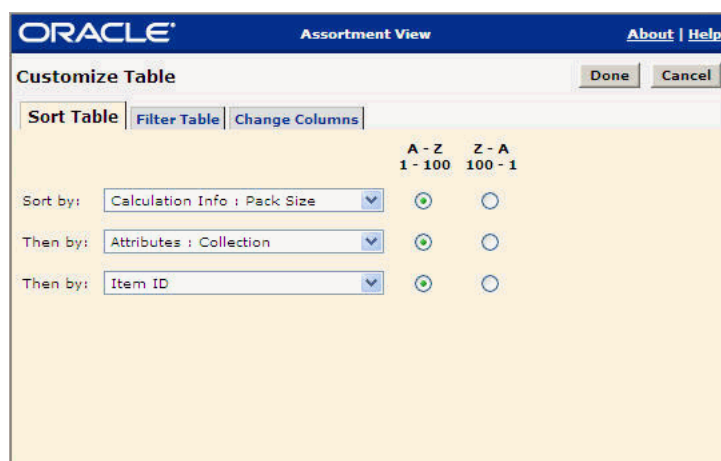
## Customizing Table

The customize table functionality allows you to customize display of data in the **Plan Worklist** screen. You can perform multiple sorts, show /hide columns, re-order columns and filters.

### To customize the table:

1. On the **Main Menu**, click **Planning**.  
The **Plan Library** screen appears.
2. Click the name link of a plan to select it from the **Plan Library**.  
The **Plan Worklist** screen appears.
3. Select the item for which you wish to modify the table.
4. In the **Item Setup** section, click the down arrow on the **Action** drop-down list, select **Customize Table**, and click **Apply**.  
The **Customize Table** screen appears.

Figure 6–11 Customize Table Window



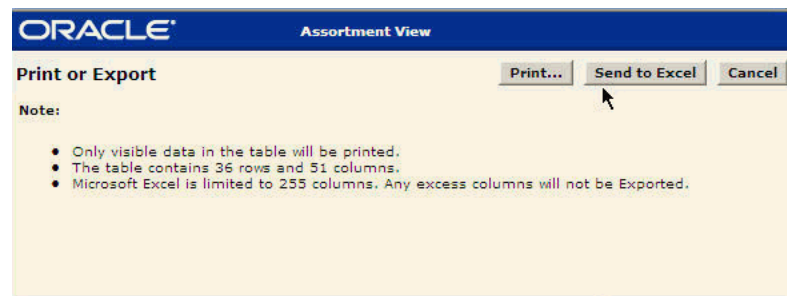
5. Select from the **Sort Table**, **Filter Table**, or **Change Columns** to customize your table.
  - **Sort Table** - You can sort in ascending or descending order and in different column orders.
  - **Filter Table** - You can filter column data by setting your criteria, add a new filter or delete an existing filter. Any number of filters can be added.
  - **Change Columns** - You can re-order columns, hide/show columns, or move/up any existing column. Columns that have stars (\*) cannot be hidden.
6. Click **Done** to save the changes, or click **Cancel** to revert the changes.

## Printing / Exporting Data

You can print or export the item data using the **Print or Export** functionality.

### To print or export data:

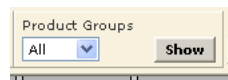
1. On the **Main Menu**, click **Planning**.  
The **Plan Library** screen appears.
2. Click the name link of a plan to select it from the **Plan Library**.  
The **Plan Worklist** screen appears.
3. Select the item for which you wish to print or export data.
4. In the **Item Setup** screen, click the down arrow on the **Action** drop-down list, select **Print or Export**, then click **Apply**.  
The Print or Export window appears noting the number of columns and rows that are visible.

**Figure 6–12 Print or Export Window**

5. Click **Print** if you wish to take a print document of the screen, or, click **Send to Excel** if you wish to send the data to an Excel sheet.
6. Click **Cancel** to revert.

## Using Product Group Show

The product group **Show** section of the **Item Setup** screen enables you to filter the item data based on product groups in the plan setup. You can choose to display in the grid the various defined product groups for the selected items in the plan.

**Figure 6–13 Worklist Product Group Show**

The product groups are user-specific and can be defined during the Plan setup level.

## Using Copy from Selected / Paste to Selected Buttons

The **Copy from Selected / Paste to Selected** buttons on the **Item Setup** section allows you to copy the selected item attributes and paste the attributes to destination item(s). This helps to avoid duplication of adding item attributes to the newly created items. If the items are similar, the attributes can be easily copied from the existing items.

### Coping from Selected Items

The **Copy from Selected** button enables you to copy the item attributes like item information, hierarchy, client information or the buy parameters of the chosen items to the destination items from the **Copy Item** pop-up window.

**Figure 6–14 Copy Item Window**

**ORACLE** Main Menu > Plan Library > Plan Worklist

**Copy Item** Copy Cancel

Select the fields to copy from the chosen item to the destination items.

Item Info	Hierarchy Info	Required Info	Optional Info	Client Info	Buy Parameters
<input checked="" type="checkbox"/> Description	<input checked="" type="checkbox"/> Sub-Department	<input checked="" type="checkbox"/> Product Group	<input checked="" type="checkbox"/> Brand	<input checked="" type="checkbox"/> Fabric	<input type="checkbox"/> Like Item
<input checked="" type="checkbox"/> Purch Type	<input checked="" type="checkbox"/> Class	<input checked="" type="checkbox"/> Cost*	<input checked="" type="checkbox"/> Collection	<input checked="" type="checkbox"/> Fabric Characteristics	<input type="checkbox"/> Store Base
	<input checked="" type="checkbox"/> Sub-Class	<input checked="" type="checkbox"/> Retail*	<input checked="" type="checkbox"/> Color Family	<input checked="" type="checkbox"/> Features	<input type="checkbox"/> Store Flow
		<input checked="" type="checkbox"/> Pack*	<input checked="" type="checkbox"/> Floor Set	<input checked="" type="checkbox"/> Fit	<input type="checkbox"/> Pricing Plan
		<input checked="" type="checkbox"/> Min*	<input checked="" type="checkbox"/> Notes	<input checked="" type="checkbox"/> Lifestyle	<input type="checkbox"/> DC Flow
		<input type="checkbox"/> Pres Min*	<input checked="" type="checkbox"/> Season Code	<input checked="" type="checkbox"/> Neck	
			<input checked="" type="checkbox"/> Size Range	<input checked="" type="checkbox"/> Reg/Petite/Tall	
			<input checked="" type="checkbox"/> Supplier	<input checked="" type="checkbox"/> Rise/Sleeve	
				<input checked="" type="checkbox"/> Theme Code	
				<input checked="" type="checkbox"/> Theme Name	

To copy from selected items:

1. On the **Main Menu**, click **Planning**.  
The **Plan Library** screen appears.
2. Click the name link of a plan to select it from the **Plan Library**.  
The **Plan Worklist** screen appears.
3. Click the checkbox next to the item for which you wish to copy the item attributes.  
You can only copy from a single item or color. If you have selected two items, a pop-up alert window suggests selecting only one item and trying again.
4. Click the **Copy from Selected** button.  
The **Copy Item** pop-up window appears displaying the item data that can be copied to other items.
5. Select the fields by checking the checkbox.
6. Click **Copy**. Or, if you wish to revert the changes, click **Cancel**

## Pasting to Selected Items

The **Paste to Selected** button is the next step to **Copy from Selected**. The item information copied is pasted to selected items.

To paste to selected items:

1. On the **Main Menu**, click **Planning**.  
The **Plan Library** screen appears.
2. Click the name link of a plan to select it from the **Plan Library**.  
The **Plan Worklist** screen appears.
3. Click the checkbox next to the item for which you wish to paste the copied item attributes.
4. Click the **Paste to Selected** button.  
The copied fields are copied to the destination items.

## Using Display Box

The display box on **Item Setup** displays the total number of items and the number of actualized items in the Plan.

## Understanding Item Grid

The Item View grid has the following columns:

**Table 6–1** *Item grid fields and description*

Column Heading	Description
<b>Item Info</b>	
Item ID	Actual or mock item number
Description	Item description
Type	Displays the item type - <ul style="list-style-type: none"> <li>■ <b>F - Fashion</b></li> <li>■ <b>B - Basic</b></li> </ul>
Colors	Number of item colors in the plan and the number (for example 12) hyperlinks to Color pop-up to add colors.
<b>Status</b>	
Actualize	Mock or actual item
AP	Item Status: <ul style="list-style-type: none"> <li>■ <b>I - In Progress</b></li> <li>■ <b>R - Ready</b></li> <li>■ <b>V - Validated</b></li> <li>■ <b>S - Submitted</b></li> <li>■ <b>C - Changed</b></li> </ul>
<b>Hierarchy Info</b>	
Sub-Department	Sub-departments within the plan department
Class	Class within the Sub-Department. You must select Sub-Department first.
Subclass	Sub-Class within the Class. You must select Class first.
<b>Required Info</b>	
Product Group	Product group of the item.
Cost	Initial Cost of the item.
Retail	Initial Retail cost of the item.
IMU	Calculated value based on Cost and Retail (1 - Cost/Retail).
Pack	Approximate size of an average prepack for an item.
Min	Minimum receipt quantity per store for an item for the plan period. Min is for all stores, but can be set at a store grade or the primary store set level on the <b>Assortment View</b> .
Pres Min	Presentation Minimum. It refers to the initial presentation quantity to support the item setup stores. Pres Min is for all stores, but can be set at the store grade or the primary store set level on the <b>Assortment View</b> .

**Table 6–1 (Cont.) Item grid fields and description**

<b>Column Heading</b>	<b>Description</b>
<b>Optional Info</b>	
Brand	Brand name of the item.
Supplier	Supplier for the item.
Collection	Name of the collection of the item.
Size Range	Current distinct size ranges for a department.
Floor Set	Current distinct size ranges for a department.
Color Family	Color group of the item.
Season code	Indicates the fiscal month when you want to start selling the item.  Need default values for Season code: Spring, Summer, Fall Holiday, Carry Through.
Attributes 1-5	User Defined Attribute used for sorting, filtering, and mix reporting.
Notes	Need default values for notes
<b>Client Info</b>	Configurable data attributes
Fabric	The fabric description as determined by user.
Fit	Fit value as determined by user.
Rise/Sleeve	The design description of the item.
Fabric Characteristic	Any specific information about the fabric.
Reg/Petite/Tall	The size specification of the item.
Lifestyle	The end user for the item.
Features	The unique features of the item.
Neck	The specific design description of the item.
Theme Codes	Collection of items to be planned and displayed together.
Theme Name	Name to describe the theme code
<b>Buy Parameters</b>	
Like Item	Indicates if the Like item is set for the item.
Store Base	Indicates if the eligible stores for the plan are selected.
Store Flow	Indicates if the store item flow is defined.
Pricing Plan	Indicates if the pricing strategy for the item is done.
DC Flow	Indicates if the DC flow is completed.
Forecast	Indicates the forecast status for the item <ul style="list-style-type: none"> <li>■ <b>Completed</b></li> <li>■ <b>Pending</b></li> <li>■ <b>Failed</b></li> <li>■ <b>Invalid</b></li> </ul>

**Table 6–1 (Cont.) Item grid fields and description**

<b>Column Heading</b>	<b>Description</b>
<b>Pack Configs</b>	<p>Pack Configs column indicates whether there are valid packs for the item:</p> <ul style="list-style-type: none"><li>■ View - Item has valid packs, you can click on this hyperlink to configure the packs for each delivery.</li><li>■ Not Available - Item doesn't have valid packs (Mock items always have a Pack Config of 'Not Available').</li></ul> <p>Only if the items are actualized, you can view the pack configuration of the item by clicking the <b>View</b> status in the <b>Pack Configs</b> column.</p>

---

## Buy Parameters

Buy Parameters helps you define merchandising, forecast, and flow parameters that drive the bottom up forecast and receipt flow for an item or a group of items.

This chapter describes how you can define Buy Parameters for a planned item, and preview the forecast results using the Calculate What-If feature.

To access the Buy Parameters screen:

- On the Plan Workflow bar, click Define Buy Parameters in the Set up Items section.

The Buy Parameter screen appears with the following tabs:

- Like Item
- Store Clusters
- Store Flow
- Pricing Plan
- DC Flow

### Like Item Tab

Use the Like Item tab to associate an item(s) to an item or a group of items with similar characteristics. This action in turn helps you drive the product lifecycle curve (PLC) for the forecast. You can select the like item based on the items past performance at stores.

The forecast for an item consists of the following elements:

- Shape (product lifecycle curve) – select a like item to drive the product lifecycle curve.
- Scale (magnitude of demand) – adjust like item parameters to adjust overall sales volume.

Force Basic PLC functionality on the Like Item screen allows you to elect to force the Calc Engine to use the Basic PLC.

Like Item Screen

Figure 7–1 Buy Parameters - Like Items Tab

ORACLE

Main Menu > Plan Library > Plan Worksheet > Buy Parameters

About | Help | Logout

Buy Parameters

Dept Name: S Casual Sweaters    Dept: 2203    Period: Dec, 2006-Nov, 2007    Store Set: TV Created in PLAN    Store Period: Dec, 2006-Apr, 2007    Filtered: No

Calculate What-If    Save    Revert    Done

Edit Selected    Show All

Item Info

Item ID	Description	Purch Type	Colors
635392	COTTON STRIPE V-NK3/4 SLV F	F	2

Hierarchy Info

Sub-Department	Class	Sub-Class
01 PULL OVER	01 Crew	01 Solid

Buy Parameters

Like Item	Store Base	Store Flow	Pricing Plan	DC Flow	Forecast
done	done	done	done	done	Failed

Like Item    Store Base    Store Flow    Pricing Plan    DC Flow

Action (select action)    Apply    Force Basic PLC Fit No

Like Item	Description	Action dates	Forecast Dates	Style	Colors
635393	JRSEY CTN/NYL HOOD FRT ZIP 3/4	10/04/2006	Sys 01/16/2005 10/01/2005		635392001 BLACK/WHITE 635392067 PEONY
635393050	VINTAGE ROSE	10/04/2006	Sys 01/16/2005 10/01/2005		
642390	2X2 RIB V CARDIGAN L/S W/SLIT	10/19/2006			10.0
642390010	WHITE	10/19/2006			
642390023	SAP GREEN	10/19/2006			
642390051	SPORT NAVY	10/19/2006			
Total Weight				0.0	10.0
Adjust Sales Volume				100.0	
Store Weight					

Style Like Item    Sub-Department    Sub-Department

Here are the fields that appear on the Like Item tab:

Table 7–1 Like Item Tab Fields

Field	Description
Like Item	The identification number of the Like item.
Description	The description of the Like item.
Hierarchy Section	
Division	The identification number of the division.
Group	The identification number of the group.
Department	The identification number of the department.
Subdepartment	The identification number of the subdepartment.
Class	The identification number of the class.
Subclass	The identification number of the subclass.
Item Info	
Retail	The retail price of the item.
Cost	The cost price of the item.

**Table 7-1 (Cont.) Like Item Tab Fields**

<b>Field</b>	<b>Description</b>
Purch Type	Indicates the purchase type, where: <ul style="list-style-type: none"> <li>■ K - Key</li> <li>■ F - Fashion</li> <li>■ B - Basic</li> </ul>
IMU	Indicates the initial markup unit (IMU) for the item. IMU is the ratio of retail price to the cost price of the item.
Season Code	Indicates the fiscal month when you want to start selling the item.
Floor Set	The identification number of the sub-season (such as early spring or late spring) when you want to introduce the item on the floor.
Size Range	Indicates the size of the item.
Vendor	Indicates the name of the vendor.
Vendor Style	The identification number of the style that the vendor specifies for the item.
Prod Type	Indicates the product group.
Origin	Indicates the origin of the item (Domestic or Import).
Alloc	Indicates an automated replenishment of the item.
#Stores	Number of stores with sales or receipts.
<b>Clients Info Section</b>	The client info section is configurable data attributes specific to your company.
Fit	Fit value as determined by user.
Fabric	The fabric description as determined by user.
Rise/Sleeve	The design description of the item.
Fabric Characteristic	Any specific information about the fabric.
Reg/Petite/Tall	The size specification of the item.
Lifestyle	The end user for the item.
Features	The unique features of the item.
Neck	The specific design description of the item.
Theme Code	Collection of items to be planned and displayed together.
Theme Name	Name to describe the theme code
<b>Receipts Section</b>	
Rcpt Units	Receipt units for the item in the allocated stores.
Avg Rcpt Units	Average receipt units in each store.
Rcpt \$	Receipt value (in dollars) for the item in the allocated stores.
Avg Rcpt \$	Average receipt value (in dollars) for the item in each store.
Receipt AUR	Average unit retail (AUR) for the item. AUR, a widely used performance metric, indicates the average price at which an item is sold.
<b>Sales Section</b>	

**Table 7-1 (Cont.) Like Item Tab Fields**

<b>Field</b>	<b>Description</b>
Sales Units	Number of units sold in the allocated stores.
Avg Sales Units	Average number of units sold in each store.
Sales \$	Sales (in dollars) for the item in the allocated stores.
Avg Sales \$	Average sales (in dollars) for the item in each store.
<b>Markdowns Section</b>	
MD \$	Markdown (in dollars) in the store.
Avg MD \$	Average markdown (in dollars) in the allocated stores.
Perm MD \$	Permanent markdown (in dollars) in the store.
Avg Perm MD \$	Average permanent markdown (in dollars) in the allocated stores.
POS MD \$	Markdown (in dollars) at the point of sale (POS).
Avg POS MD \$	Average markdown (in dollars) at the point of sale (POS) at the allocated stores.
<b>Perm MD Sales Section</b>	
Perm MD Sales Units	Number of units sold with permanent markdown at the store.
Avg Perm MD Sales Units	Average number of units sold with permanent markdown at the allocated stores.
Perm MD Sales \$	Sales (in dollars) for the item in the store, after the permanent markdown.
Avg Perm MD Sales \$	Average sales (in dollars) for the item in the allocated stores, after the permanent markdown.
<b>POS Sales Section</b>	
POS Sales Units	Number of units sold at the point of sale.
Avg POS Sales Units	Average number of units sold at the point of sales in the allocated stores.
POS Sales \$	Sales (in dollars) for the item at the point of sale.
Avg POS Sales \$	Average sales (in dollars) for the item at the point of sales in the allocated stores.
<b>Gross Profit Section</b>	
GP \$	Gross profit for the item at the store.
Avg GP \$	Average gross profit for the item at the allocated stores.
GP%	Percentage of gross profit for the item.
<b>Lifecycle Section</b>	
First Rcpt Dt	Date of the first receipt.
Planned OOS Dt	Planned out of stock date for the item.
Selling Weeks	Number of weeks the item sold.
<b>Aggregation Dates Section</b>	
Start	Date when the aggregation starts.
End	Date when the aggregation ends.
<b>Style Section</b>	

**Table 7–1 (Cont.) Like Item Tab Fields**

Field	Description
Store Weight	Select the Store Weight Option for a Style Item. The option selected will be used to determine the Store Weights for that particular Style Item.
<b>Colors Section</b>	
Store Weight	Select the Store Weight Option for a Color Item. The option selected will be used to determine the Store Weights for that particular Color Item.

## Like Item Forecast Start and End Dates

There may be cases where the Like Item Start and End dates calculated by the Analytical Engine, when generating a forecast, may not match your expectations. Typically this would happen when there were stockouts in the middle of lifecycles, or with basic items that had more or less uniform sales throughout history, and would lead to inaccuracies in forecasts.

Since users of Oracle Retail Plan often have a better idea of what the start and end dates should be, users can now optionally specify start and end dates for each like item. These dates are used to forecast the item.

Following are several typical use cases:

- You initially set up the Calc Parameters at color level, leaving the forecast start/end dates columns empty. You then save the Calc Parameters, and returns to the Like Item screen. The forecast has run, and the system-optimized dates are populated in the Forecast Dates columns in the grid. The Source column shows Sys (system-optimized) for all dates.
- You are not satisfied by the forecast, and suspect that the system-optimized start/end dates are wrong for one of the like style/colors. Accordingly, you edit the start/end dates for that like style/color, and save.

The Source column for that like item shows User (user-defined). The forecast comes back with better numbers. Consequently you notice that the start/end dates entered might have been slightly modified because a portion of the specified time interval had no history for the like style/color.

- You had previously set up own start/end dates for one or more like items, but then did not like the resulting forecast, and want to revert back to system-optimized dates.

You can run the Clear Forecast Dates action to clear all the user-defined dates (and the Source column). Then you can trigger a fresh forecast, which populates the grid with system-optimized dates for all like items. The Source column says 'Sys' for all like items.

- The source and start/end date columns is blank, until a forecast is run, or until user-defined dates are entered.
- System-optimized dates are returned only at the level at which the like item is mapped. Likewise, User-defined dates are applied only at the level at which the like item is mapped. Style-level, user-defined dates are not inherited at the color level.
- Running What-If populates the Start/End date columns with dates returned by the Calc Engine, although these dates persist, only if you choose to save changes on the Buy Parameters screen.

## Accessing the Like Item Tab

To access the Like Item tab:

1. On the **Main Menu**, click **Planning**. The **Planning Library** screen appears.
2. In the **Plan** section, under **Name**, click the plan you want. The **Plan Worklist** screen appears.
3. In the **Buy Parameters** section, click the link in the **Like Item** field for the item you want. The **Like Item** tab appears on the **Buy Parameters** screen.

## Adding Like Items

To add like items for a planned item:

1. On the **Like Item** tab, select **Add Like Item** in the **Action** field.
2. Click **Apply**. The **Add Like Item** screen appears.
3. In the **Find Item** section, select an applicable search criterion.

You can add a like item using one of the two options - Expert Find or Item ID.

4. Enter the required data fields to find the like item and click **Find**.

If you search the item by the **Expert Find** option, enter the following data fields:

- Active Sales Between Dates - the start and end date of the sale.
- Division - division to which the item belongs.
- Group - class to which the item belongs.
- Department - department to which the item belongs.
- Optional Filters - you can use the optional filters or create new filters to search the item.

If you search the item using the **Item ID** option, enter the following data fields:

- Active Sales Between Dates - the start and end date of the sale.
- Item ID - valid item ID.

5. Click **Find**. Records of items that match your search criteria display in the **Search Results** section.

6. Select the item(s) you want to add to the like item list and click **Add Like Item**.

The **Like Item** tab appears with the like items you added.

7. Select the like item you want, and then click **Add Selected Like Item** button.
8. On the **Like Item** grid, you can now associate the like item information using store weights at the style or color level from the Style or Color section of the grid. Select a merchandise hierarchy level from the Style or Colors Store Weight field.
9. Enter a weight proportion for each item in the appropriate field.  
If you add more than one like item, you can weigh each like item proportionately based on the similarity between the like items and planned item. For example, you might think that this year's Capri pants will sell 80% as well as last year's Capri pant and 20% like another pant style.
10. To scale the item's sales forecast, enter an applicable value in the **Adjust Sales Volume** field.

Once you weigh the planned item based on the like items, you can scale the item's

sales forecast up or down based on the expected performance and the past performance of the like item.

---

**Important:** In the **Adjust Sales Volume** field, a value 100 indicates that the item will sell the same as the previous year's volume of a like item. A value 125 indicates that the item will sell 25% more than last year's sales volume of a like item. A value 75 indicates that the item will sell 25% less than last year's sales volume of a like item.

---

11. Click **Save**.

## Removing Like Items

To remove the like items:

1. On the **Like Item** grid, select the items you want.
2. Under **Action**, click **Remove Selected Like Item**, and then click **Apply**.

## Store Base Tab

Use the Store Base tab to determine the stores eligible for the forecast. You can set a planned store base for an item based on whether the item is targeted for all stores, specific store grades, specific store subsets, or an intersection of store grades and store subsets.

## Store Base Tab Screen

Figure 7-2 Store Base Tab

**ORACLE** Main Menu > Plan Library > Plan Worklist > Buy Parameters About | Help | Logout

**Buy Parameters** Dept Name: Denim Shorts Dept: 549 Period: Dec, 2005-Nov, 2006 Store Set: ALL Store Period: Dec, 2005-May, 2006 Filtered: No Calculate What-If Save Revert Done

Edit Selected Show All

Item Info				Buy Parameters						
Item ID	Description	Purch Type	Colors	Like Item	Store Base	Store Flow	Pricing Plan	DC Flow	Forecast	
1001	Item1	F	2	done	done	done	done	done	Complete	

Like Item Store Base Store Flow Pricing Plan DC Flow

Storesets: ALL Show Set to AP Store Base

Item ID	Description	Need	AP Stores	Need	AP Stores	Need	AP Stores	Need	AP Stores	STORES
<input checked="" type="checkbox"/>	Store Subset ALL	VG6(2)		VG7(43)		VG8(106)				
<input checked="" type="checkbox"/>	1001 Item1	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>				151
<input type="checkbox"/>	Store Subset RemainingSubset	VG6(0)		VG7(0)		VG8(0)				
<input type="checkbox"/>	1001 Item1	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>				0

Here are the fields that appear on the Store Base tab:

**Table 7–2 Store Base Tab Fields**

Field	Description
Item ID	The identification number of the item.
Description	The description of the item.
Need	Number of eligible stores that will receive the item.
AP Stores	Number of stores that have AP quantities (specified in the active plan).
STORES	Number of eligible stores in the store subset.

## Accessing the Store Base Tab

To access the Store Base tab:

1. On the **Main Menu**, click **Planning**. The **Planning Library** screen appears.
2. In the **Plan** section, under **Name**, click the plan you want. The **Plan Worklist** screen appears.
3. In the **Buy Parameters** section, click the link in the **Store Base** field for the item you want. The **Store Base** tab appears on the **Buy Parameters** screen.

## Setting Up Stores to Receive Items

To set up stores to receive items:

1. On the **Store Base** tab, click the check box next to the item for store grades you want. To view the number of stores you select, see the **STORES** field.

Or

To select all stores in a store subset, click the check box next to the store subset you want.

Or

To select the stores, store grades, or intersection of store grades and store subsets with AP quantities (set in Assortment View), click **Set to AP StoreBase**.

2. Click **Save**.

## Store Flow Tab

Use the Store Flow tab to define the selling period for an item. You can set the in store dates and out of stock dates for the item you want in all stores or set specific dates by store subsets. You can also define the frequency of store deliveries to drive the receipt plan and the date after which the store will not receive any more receipts from the distribution center.

The Store Flow algorithm determines the coverage period for each delivery based on the delivery frequency. For each delivery, the algorithm sums up the weeks of supply needed for the coverage period, the safety stock (set up in the Business Rule Process Manager), and the minimum presentation quantity.

## Store Flow Screen

**Figure 7–3 Buy Parameters - Store Flow Tab**

Here are the fields that appear on the Store Flow tab:

**Table 7–3 Store Flow Tab Fields**

Field	Description
Item ID	The identification number of the item.
Description	The description of the item.
In Stores	Date when the item will be in stores.
Out of Stock	Date when the item will go out of stock.
Last Receipt Date	Date after which the store will not receive any more receipts from the distribution center.

## Accessing the Store Flow Tab

To access the Store Flow tab:

1. On the **Main Menu**, click **Planning**. The **Planning Library** screen appears.
2. In the **Plan** section, under **Name**, click the plan you want. The **Plan Worklist** screen appears.
3. In the **Buy Parameters** section, click the link in the **Store Flow** field for the item you want. The **Store Flow** tab appears on the **Buy Parameters** screen.

## Setting Up a Selling Period for an Item

To set up a selling period for an item:

1. On the **Store Flow** tab, select the delivery frequency in the **Deliveries** field.
2. For each item or item color type, enter applicable dates in the **In Stores**, **Out of Stock**, and **Last Receipt Date** fields.

Printing or Exporting Store Flow Information

To print or export the information on the Store Flow tab:

- In the **Action** field, click **Print** or **Export**.

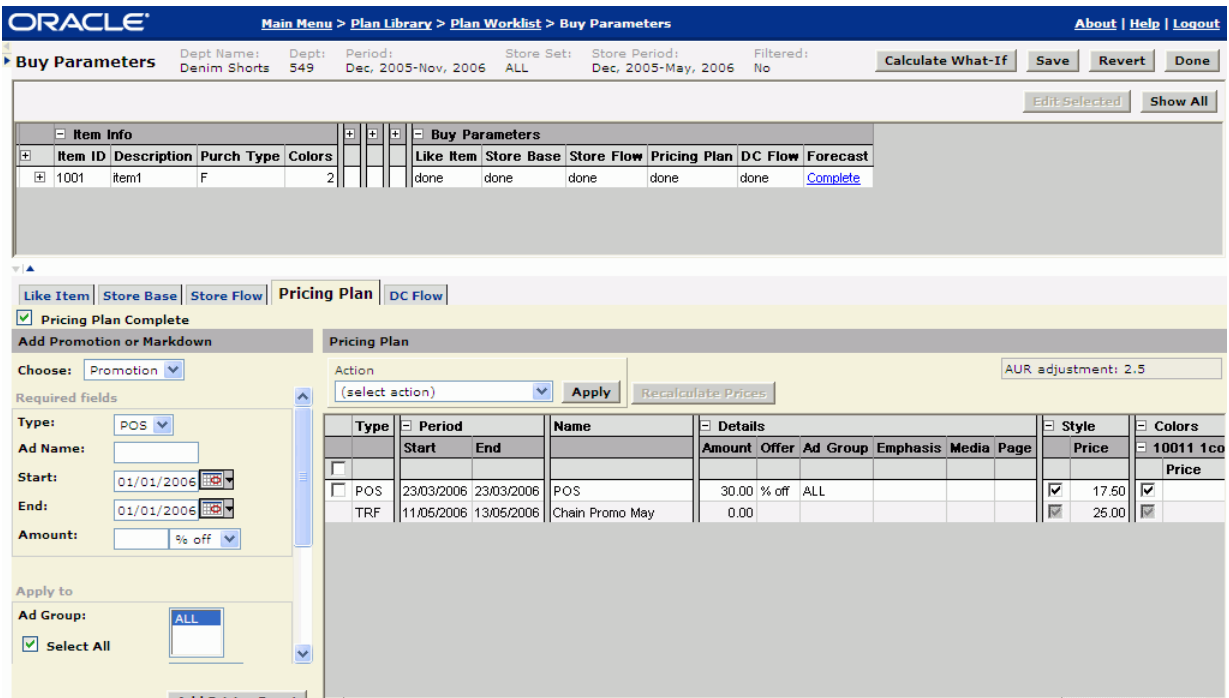
Pricing Plan Tab

Use the Pricing Plan tab to define the pricing strategy of an item or a group of items, and then derive forecast to observe the sales lift and gross margin impact from planned promotions and markdowns.

If you do not want to add any pricing events, click the Pricing Plan Complete check box to indicate that the pricing plan is complete (required to generate the forecast). You can now preview the forecast results, and then generate the forecast.

Pricing Plan Tab Screen

Figure 7–4 Buy Parameters - Pricing Plan Tab



The Pricing tab consists of the following two frames:

- Add Promotion or Markdown
- Pricing Plan Grid

Here are the fields that appear on the Add Promotion or Markdown frame:

Table 7–4 Add Promotion or Markdown Frame Fields

Field	Description
Choose	Select whether you want to add a promotion or a markdown.

**Table 7–4 (Cont.) Add Promotion or Markdown Frame Fields**

Field	Description
<b>Required Fields Section</b>	
Type	Select the type of promotion or markdown.
Ad Name	Type a name for the promotion.
Start	Select an applicable start date for the promotion.
End	Select an applicable end date for the promotion.
Amount	Type the amount or percentage waived.
<b>Apply To Section</b>	
Ad Group	Select the stores by advertisement group you want for the plan.
Colors	Select the colors you want to include in the promotion.
<b>Optional Fields Section</b>	
Ad Emphasis	Select the type of publicity.
Media Type	Select the medium for the promotion.
Page Indicator	Indicates the place (front or back of a page) where you want to print the information on the promotion.

---

**Note:** The **Apply To** and **Optional Fields** sections appear when you choose to add a promotion.

---

Here are the fields that appear on the Pricing Plan Grid:

**Table 7–5 Pricing Plan Grid Fields**

Field	Description
Type	Indicates the type of promotion.
<b>Period Section</b>	
Start	Date when the promotion starts.
End	Date when the promotion ends.
Name	Name of the promotion.
<b>Details Section</b>	
Amount	Indicates the amount or percentage waived for the promotion.
Offer	Indicates the type of waiver.
Ad Group	Indicates the stores by advertisement group for the plan.
Emphasis	Indicates the colors you want to include in the promotion.
Media	Indicates the medium of promotion.
Page	Indicates the place (front or back of a page) where you want to print the information on the promotion.
<b>Style Section</b>	
Price	Price of the item after the promotion.
Colors	Price of the colors (of the item) after the promotion.

---

**Note:** The AUR adjustment factor (appears on the right hand corner of the Pricing Plan frame) is configured to account for point-of-sale (POS) promotions, employee discounts, or any other unplanned discounts taken directly at the POS terminal. This factor affects the sales and gross margin metrics. You can configure this factor in the Business Rule Processing Manager (BRPM) module.

---

## Accessing the Pricing Plan Tab

To access the pricing plan tab:

1. On the **Main Menu**, click **Planning**. The **Planning Library** screen appears.
2. In the **Plan** section, under **Name**, click the plan you want. The **Plan Worklist** screen appears.
3. In the **Buy Parameters** section, click the link in the **Pricing Plan** field for the item you want. The **Pricing Plan** tab appears on the **Buy Parameters** screen.

## Adding Promotional Events and Markdowns

To add promotional events and markdowns:

1. On the **Pricing Plan** tab, under the **Add Promotion or Markdown** frame, select **Promotion or Markdown** in the **Choose** field.
2. Enter applicable information in the **Required fields** section.
3. You can also enter additional information on the promotion in the **Optional fields** section.
4. Click **Add Pricing Event**. The promotion or markdown event appears in the **Pricing Plan** grid.
5. Repeat steps 1-4 to add more promotional events and markdowns.

---

**Note:** If no pricing plan applies to the item, click the **Pricing Plan Complete** check box.

---

6. Click **Save**.

## DC Flow Tab

Use the DC Flow tab to define the number of deliveries to the distribution center (DC) based on the recommended receipt flow. Once you set the other buy parameters, click the Recalculate button to generate optimal shipment dates for each shipment. This also generates a new forecast. You can accept these dates or select the AP User-Defined radio button, and enter the dates you want.

The DC Flow algorithm uses the sum of all store flow needs by week, adds transit time by store/merchandise, and then calculates the optimal number and frequency of deliveries as well as the quantity for each delivery.

## DC Flow Tab Screen

**Figure 7–5 Buy Parameters - DC Flow Tab**

Here are the fields that appear on the DC Flow tab:

**Table 7–6 DC Flow Tab Fields**

Field	Description
Maximum Number of Deliveries	Maximum number of deliveries for the item to the distribution center.
Need System Optimized	Delivery dates set based on the expected forecast for the item.
AP System Optimized	Delivery dates set based on the active plan for the item.
AP User Defined	Delivery dates you want to set for the item.

## Accessing the DC Flow Tab

To access the DC Flow tab:

1. On the **Main Menu**, click **Planning**. The **Planning Library** screen appears.
2. In the **Plan** section, under **Name**, click the plan you want. The **Plan Worklist** screen appears.
3. In the **Buy Parameters** section, click the link in the **DC Flow** field for the item you want. The **DC Flow** tab appears on the **Buy Parameters** screen.

## Setting Up Deliveries from the Distribution Center

To set up deliveries from the distribution center:

1. On the **DC Flow** tab, enter the number of deliveries in the **Maximum Number of Deliveries** field.

- Under **AP User-Defined**, enter the deliveries dates you want.

Or

To set up deliveries based on the optimal dates (calculated based on the parameters such as store flow needs and transit time information on the Item View screen), click **Recalculate**.

## What-If Calculations

Before you save the buy parameters and generate a forecast, you can use the What-If feature to preview the results for the item based on the sales, receipt, inventory, gross margin by week and month.

Use the Data field to display and compare the need forecast with the actual plan (AP), last submitted plan (LSP), or like item last year (LILY). The AP column displays information based on the AP quantities you have set up in the Assortment View.

## What-If Screen

**Figure 7-6 Buy Parameters - What If Screen**

ORACLE® Main Menu > Plan Library > Plan Worklist > Buy Parameters													
What-If <span>Recalculate</span> <span>Close Window</span>													
Action		Data											
(select action)		Need											
Fiscal Week	Sales	Store Receipts	Mark Down	Gross Profit	BOH	Sell Through							
	Need	Need	Need	Need	Need	Need							
	Sales U	Receipt U	Receipt \$	Perm MD\$	POS MD\$	Total MD\$	MD IND	GP%	BOH U	%ST U	%ST \$		
Total	2654	2654	66362	0	1844	1844		58.9	0	100	97.2		
Dec	0	0	0	0	0	0		0.0	0	0	0.0		
44	0	0	0	0	0	0		0.0	0	0	0.0		
45	0	0	0	0	0	0		0.0	0	0	0.0		
46	0	0	0	0	0	0		0.0	0	0	0.0		
47	0	0	0	0	0	0		0.0	0	0	0.0		
48	0	0	0	0	0	0		0.0	0	0	0.0		
Jan	571	1544	38600	0	353	353		59.0	0	37	36.1		
49	79	921	23025	0	48	48		59.0	0	9	8.4		
50	91	0	0	0	56	56		59.0	842	18	18.0		
51	147	0	0	0	90	90		59.0	751	34	33.6		
52	254	623	15575	0	160	160		59.0	604	37	36.1		
Feb	897	437	10925	0	562	562		59.0	973	74	72.3		
1	280	0	0	0	173	173		59.0	973	55	53.7		
2	220	0	0	0	139	139		59.0	694	69	67.6		
3	209	437	10925	0	131	131		59.0	474	65	63.0		
4	189	0	0	0	119	119		59.0	702	74	72.3		
Mar	658	563	14080	0	602	602		58.6	513	84	81.2		
5	172	0	0	0	106	106		59.0	513	83	80.7		
6	135	327	8169	0	84	84		59.0	341	77	75.0		
7	129	0	0	0	81	81		59.0	533	82	80.4		
8	118	0	0	0	265	265 POS		56.4	404	88	85.1		
9	105	236	5911	0	66	66		59.0	287	84	81.2		
Apr	348	105	2618	0	216	216		59.0	418	93	90.8		
10	110	0	0	0	68	68		59.0	418	88	85.4		
11	91	0	0	0	56	56		59.0	308	91	88.9		
12	89	105	2618	0	56	56		59.0	217	91	88.6		

Here are the fields that appear on the What-If screen:

**Table 7-7 What-If Screen Fields**

Field	Description
Fiscal Week	Fiscal week numbers grouped according to the calendar months.
Sales Section	

**Table 7–7 (Cont.) What-If Screen Fields**

<b>Field</b>	<b>Description</b>
Sales U	Sales units for the item in the week.
<b>Store Receipts Section</b>	
Receipt U	Receipt units for the item in the week.
Receipt \$	Receipt amount for the item in the week.
<b>Mark Down Section</b>	
Perm MD \$	Amount of permanent markdown in the week.
POS MD \$	Amount of markdown at the point of sale (POS).
Total MD\$	Amount of markdown in the week.
MD IND	Indicates the type of markdown.
<b>Gross Profit Section</b>	
GP%	Percentage of gross profit in the week.
<b>BOH</b>	
BOH U	Beginning On Hand (BOH) units for the week.
<b>Sell Through Section</b>	
%ST U	Percentage of sell through units.
%ST \$	Percentage of sell through dollars.

## Previewing a Forecast

To preview a forecast:

- Once you set up the buy parameters, click **Calculate What-If**. The **What-If** window appears.

---

**Note:** Once the **What-If** screen is open, you can continue to make changes to the buy parameters. Each time you update the buy parameters, click **Recalculate** (on the What-If screen) to see the updated information.

---

## Extending Time Period

Use the Extend Time Period feature to extend the time period for the forecast and observe the effect on the sales, receipts, and inventory.

To extend the time period:

1. On the **What-If** screen, under **Action**, click **Extend Time Period**.
2. Click **Apply**. The **Extend Time Period** window appears.
3. Enter the applicable start and end dates for the extended period, and then click **OK**.



---

## Using Plan Review

The **Plan Review** screen on **Plan Worklist** is a compilation of **Assortment View**, **Item View**, and **Flow View**. The **Plan Review** screen enables you to manage and track plans by access the three views from **Plan Review**.

This chapter contains the following sections:

- [Understanding the Data Segments](#)
- [Understanding the Common Sections and Actions Groups](#)
- [Understanding Assortment View](#)
- [Understanding Item View](#)
- [Understanding Flow view](#)

### Understanding the Data Segments

In the **Assortment View**, you can access and view Active Plan (AP), Last Submitted Plan (LSP), and Need data segments. In the **Item View**, you can view AP, LSP, Like Item Last Year (LILY), and Need data segments, and in the **Flow View**, you can only view the AP data segment.

The different data segments in the Plan application are:

- **Active Plan or AP** - this data segment is the official plan of record populated by the user and represents the data that is submitted to the supplier to determine the purchase quantity of the merchandise.
- **Need** - the data segment is derived by the item's forecast generated by the system. The Need segment is not editable, but can be modified by changing the buy parameters and regenerating a forecast.
- **Last Submitted Plan or LSP** - this data segment represents the last AP that was submitted. You can compare an updated AP segment with the LSP to review any changes to the last plan set to Purchasing.
- **Like Item Last Year or LILY** - This data segment refers to previous year's like item.

**Figure 8–1 Plan Review Screen**

The **Assortment View** link displays all the items contained in the plan. The items are grouped by primary store set/volume group. You can view the planned receipts at the item or color level and view data by particular subclasses and subsets in the assortment view. You can manually define and edit receipt quantities for the AP segment.

The **Item View** link displays sales, receipts, inventory, and detailed metrics by week for a particular item, color, or group of items, such as class or subclass. You can view the AP, Need, LILY, and LSP data segments within the screen.

The **Flow View** link shows the receipt flow plan for all items in the plan by week. You can compare the quantities planned for the AP segment and compare them to the top-down financial planning constraints set for the class and subclass by month.

## Understanding the Common Sections and Actions Groups

There are common components and actions groups that can be accessed from the Assortment view, Item view, and the Flow view. The common sections and actions groups of the Plan Review screen are:

- Title
- Tabs
- Customize Table
- Print or Export

### Understanding the Title section

The **Title** section is a common component to all the main Plan pages. The screen has pre-populated informational fields listed on top of every screen. It displays the information of the selected plan from of the Plan Worklist screen.

The display and location of the Title section fields cannot be changed or moved from the screen.

**Table 8–1 Title fields of the Plan Review screen**

Field Name	Description
Assortment Planning	Screen title.

**Table 8–1 (Cont.) Title fields of the Plan Review screen**

Field Name	Description
Dept Name	Merchandise description for the plan.
Dept	Department ID.
Period	Period of the plan.
Store Group	Name of the store group applied to the Plan.
Store Period	Fiscal period of the plan.
Plan Status	<p>The Plan's status is derived based on the lowest value of any Item in the Plan:</p> <ul style="list-style-type: none"> <li>■ <b>In Progress</b> - default status indicating the plan is under development.</li> <li>■ <b>Ready</b> - plan has been completed and is ready to be reviewed.</li> <li>■ <b>Validated</b> - plan has undergone validation and is ready to be submitted.</li> <li>■ <b>Submitted</b> - plan has been submitted to the database.</li> </ul>
Filtered	Indicates with a <b>Yes</b> or <b>No</b> , if a filter has been applied to the current screen.

## Using the Common Tabs

The Tab section on the **Assortment View**, **Item View** and **Flow View** tab contains links to other view screens on the **Plan Worklist**. Select the item name from the **Plan Worklist** window and click on any of the view from the **Plan Review** section to view the selected items in the desired screen.

## Customizing Table

The **Customize Table** functionality is common to all the three views in the **Plan Worklist** window. It allows you to customize display of data in certain screens in the **Assortment**, **Item**, and **Flow** views. You can perform multiple sorts, show /hide columns, re-order columns and filters.

### To customize the table:

1. On the Main Menu, click Planning. The Plan Library screen appears.
2. Click the name link of a plan to select it from the **Plan Library**. The **Plan Worklist** of the plan you selected appears.
3. In the **Plan Review** links, click the desired view screen. The selected view screen appears.
4. Click the down arrow on the **Action** drop-down list, select **Customize Table**, then click **Apply**. The **Customize Table** screen appears.

Figure 8–2 Customize Table Screen

5. Select from the **Sort Table**, **Filter Table**, or **Change Columns** to customize your table.
  - **Sort Table** - You can sort in ascending or descending order and in different column orders.
  - **Filter Table** - You can filter column data by setting your criteria, add a new filter or delete an existing filter. Any number of filters can be added.
  - **Change Columns** - You can re-order columns, hide/show columns, or move/up any existing column. Columns that have stars (\*) are displayed by default.
6. Click **Done** to save the changes, or click **Cancel** to revert the changes.

## Printing or Exporting data

You can print your data or export the data to an excel sheet.

### To print or export data:

1. On the **Main Menu**, click **Planning**. The **Plan Library** screen appears.
2. Click the name link of a plan to select it from the **Plan Library**. The **Plan Worklist** of the plan you selected appears.
3. In the **Plan Review** links, click the desired view screen. The selected view screen appears.
4. Click the down arrow on the **Action** drop-down list, select **Print or Export**, then click **Apply**. The **Print or Export** window appears noting the number of columns and rows that are visible.
5. Click **Print** if you wish to take a print document of the screen, or click **Export** if you wish to send the data to an Excel sheet.

## Understanding Assortment View

The **Assortment View** screen displays planned receipts of merchandise at the item and color level by volume groups and subsets for the designated plan period. The display also provides top-down financial budget data at the total and volume groups/subset

levels for the designated plan period and shows how the assortment plan compares to budget constraints.

**Figure 8–3 Assortment View Screen**

Planned product receipt units are modified in the Assortment view based on storesets and volume groups. Receipt quantities for the AP data segment can be derived in several ways:

- **Manual** is default calculation method for the Assortment Plan. You can enter data to generate average per store (APS) quantities so that every store within a volume group receives the same quantity.

You can edit the store-level AP quantities in the Assortment View by clicking the **# Stores** column in the VG Intersection. You can identify the store for which you need to adjust the AP quantities and modify the quantities. This allows you to override the quantities, if necessary.

To modify the AP quantity at the store level:

1. Identify the item at the VG intersection and click the **# Stores** cell.

The AP quantity on the **# Stores** is a hyperlink. Clicking the AP quantities hyperlink opens the Store Quantities window. The Store Quantities window displays the Identification Number and the stores names in the intersection, the Min and the actual AP quantity for each store, and the variance from the Average for each store.

The AP quantity cell is editable and you can edit the quantities for each store individually.

**Figure 8–4 Edit Store Quantities Window**

ORACLE® Assortment View					
Store Quantities					
		Item: 635393	Subset: ALL	VG: VG5	OK Close Window
ID	Name	Min	AP	Qty	Diff % Diff
	APS			1154	
4002	Champlain Place	2		110	-1044 -90.47%
4005	Place Versailles	2		1246	92 7.94%
4012	CENTRE COMMERCIAL LE	2		1246	92 7.94%
4022	La Grande Place des	2		1246	92 7.94%
4029	Erin Mills Town Cent	2		1246	92 7.94%
4040	The Promenade	2		1246	92 7.94%
4043	Upper Canada Mall	2		1246	92 7.94%
4047	Bramalea City Centre	2		1246	92 7.94%
4054	Midtown Plaza	2		1246	92 7.94%
4055	Bower Place	2		1246	92 7.94%
4507	Rene-Levesque Drummo	2		1246	92 7.94%
4518	Bayfield - Barrie, O	2		1246	92 7.94%
4520	Eglinton Town Centre	2		1246	92 7.94%
4524	Cambridge Power Cent	2		1246	92 7.94%
4526	Meadowlands Centre	2		1246	92 7.94%
4530	LaSalle Square	2		1246	92 7.94%
4532	LindenWoods	2		1246	92 7.94%

2. Click the AP quantities cell of the store and enter the required AP quantities.
3. Click OK.

The system displays the new percentage variance in the % Diff column and closes the window. The modified AP quantity is reflected in the refreshed screen for all the stores in the volume group.

- **Calc %** spreads the top-down financial budget at the class or subclass level down to units based on various user inputs.
- **Spread Item Total** calculation spreads a specific number of units as entered by the user at the item/chain level to stores given a defined store cluster.
- **Copy Need to AP** enables you to use the receipt quantities derived through the bottom-up or the Need data segment for the AP.

#### To access the Assortment View screen:

1. On the **Main Menu**, click **Planning**. The **Plan Library** appears.
2. Click the name link of a plan to select from the **Plan Library**. The **Plan Worklist** of the plan you selected appears.
3. In the **Plan Review** links, click **Assortment View**. The **Assortment View** tab appears on the screen.

The **Assortment Planning** tab consists of following sections:

- Title section
- Action drop-down list
- Show section
- Assortment View Grid

## Understanding Title section

The Assortment View tab has three buttons, which allows the following actions to be applied to the complete **Assortment view** screen.

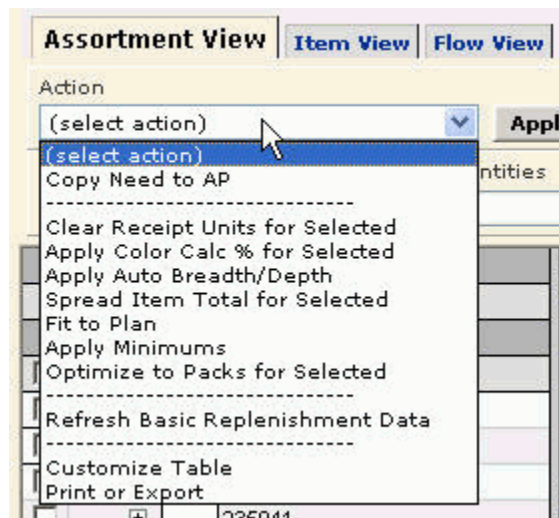
**Table 8–2 Title section buttons**

Button Name	Action
Save	Use this button to save any changes made to the database.
Revert	Use this button to discard any changes made to the screen and revert to the last saved state.
Done	Use this button when you are finished with any action on the screen and wish to exit out of the current screen.

This view also has the pre-populated informational fields that are common to all the three screens in the **Plan Worklist** window. Refer [Understanding the Common Sections and Actions Groups](#) for details.

## Using the Action List

The **Action** drop-down list on the **Assortment View** tab includes actions that enable you to modify your assortment plans. You can select an item or a group of items from the grid, select an action you wish to perform on the selected merchandise, and click **Apply** to proceed with the desired task.

**Figure 8–5 Assortment View Action List**

**The actions on the drop-down list include the following functionality:**

- Copy Need to AP
- Clear receipt units for selected
- Apply Color Calc% for selected
- Apply Auto Breadth/Depth
- Spread Item total for Selected
- Fit to Plan
- Apply Minimums
- Optimize to Packs for Selected

- Refresh Basic Replenishment data - Not for the current release
- Customize Table
- Print or Export

### Copying Need to AP

The **Copy Need to AP** functionality from the **Action** drop-down menu copies the Need segment by store for the plan period to the AP data segment based on the item's generated forecast for the selected items. APS quantities for each volume group/subset are then recalculated and displayed in the grid, and they are available for manual edit.

To copy an item's need data to AP:

1. On the **Main Menu**, click **Planning**.  
The **Plan Library** screen appears.
2. Select the plan from the **Plan Library**.  
The Plan Worklist of the selected plan is displayed.
3. In the **Plan Review** links, click **Assortment View**.  
The Assortment View tab is displayed.
4. Click the checkbox next to the item description to select an item whose need you want to copy.
5. Click the down arrow on the **Action** drop-down list, select **Copy Need to AP**, then click **Apply**.  
The detailed receipt data by store is copied to the AP and displays in the **APS** receipts by volume groups column.

### Clearing Receipt Units for Selected

The **Clear Receipts Unit for Selected** functionality clears the receipt units from the AP data segment.

To clear receipts units for selected:

1. On the **Main Menu**, click **Planning**. The **Plan Library** screen appears.
2. Select the plan from the **Plan Library**. The **Plan Worklist** of the selected plan is displayed.
3. In the **Plan Review** links, click **Assortment View**. The **Assortment View** tab is displayed.
4. Click the checkboxes next to item descriptions to apply Clear receipts units.
5. Click the down arrow on the **Action** drop-down list and select **Clear Receipts unit for selected**, then click **Apply**.

The Receipt item units are deleted from the **Store Receipts** column.

### Applying Color Calc% for Selected

The **Apply Color Calc % for Selected** functionality spreads the total quantity of item at the style level down to color/store/week level. This supports the development of style/color quantities and achievement of the assortment strategy's color mix.

**To apply color calc % for selected:**

1. On the **Main Menu**, click **Planning**.

The **Plan Library** screen appears.

2. Select the plan from the **Plan Library**.

The **Plan Worklist** of the selected plan is displayed.

3. In the **Plan Review** links, click **Assortment View**.

The **Assortment View** tab is displayed.

4. Click the checkboxes next to item descriptions to apply color calc %.

5. Enter the Calc% for each item in the **Calculation Info** column.

6. Select the **Apply Color Calc %** from **Action** drop-down list.

7. Click **Apply**.

This will spread the total quantity at the style level down to the style/color level.

**Applying Auto Breadth/Depth**

Once the AP plan is set, you can tailor buy quantities by store sets and volume groups as per their merchandising strategy. You can edit APS quantities for all stores, by volume groups or store set by adjusting buy quantities for each item/color by chain, climate, volume groups, etc. The adjustment will not overwrite store level demand, it will scale up or down the store level demand by manipulating the average.

The Apply Auto Breadth/Depth functionality calculates the optimal depth and breadth of the assortment plan, based on the financial budget dollars available by store at the Department or Sub-Department level, the Min for each item, the retail price, and the percent of contribution each item in the assortment.

**To apply auto breadth/depth:**

1. On the **Main Menu**, click **Planning**.

The **Plan Library** screen appears.

2. Select the plan from the Plan Library.

The **Plan Worklist** of the selected plan is displayed.

3. In the **Plan Review** links, click **Assortment View**.

The **Assortment View** tab is displayed.

4. Click the checkboxes next to item descriptions to apply auto breadth/depth.

5. Enter the ratio or % contribution into the **Calc %** field.

6. Select the **Apply Auto Breadth/Depth** from **Action** drop-down list.

7. Click **Apply**.

This will effectively spread the financial receipt budgets to each store based on what each store can afford.

**Spreading Item Total for Selected**

**Spread Item Total for selected** spreads the total chain receipt units in the AP data segment for an item to stores using the financial budget per store as a spread metric.

### Fitting to Plan

The **Fit to Plan** functionality automatically reconciles the total item receipt quantities to individual store level financial plans within the specified Financial Plan Tolerance, by scaling the assortment plan item quantities up or down by store. This function adjusts receipt quantities in the AP data segment to match the overall department budget by store to ensure that each store is within its defined tolerance level as configured in Business Rules Process Management.

### Applying Minimum

The assortment **MIN** is a constraint set by the user, indicating the quantity for an item in units that must be achieved at the store level. The **Apply Minimums** functionality ensures that every item and store combination is receiving at least the minimum units and adjusts the stores that are receiving less than the minimum units.

The **MIN** is set at the Chain, subset, or subset/volume group level. This feature uses the chain level values set on the **Plan Worklist**, unless the subset or volume group values have been specified in the assortment view, in which case it uses the values set at the lower level.

If no **Mins** are set at the color level, the system assumes a color minimum equal to the pack size and calculates units as a total percentage of the item.

#### To apply minimums to the subset /volume group level:

1. On the **Main Menu**, click **Planning**.  
The **Plan Library** appears.
2. Click the name link of a plan to select it from the **Plan Library**.  
The **Plan Worklist** of the plan you selected appears.
3. In the **Plan Review** links, click **Assortment View**.  
The **Assortment View** tab appears.
4. Click the checkbox next to the item description to select an item to which you want to apply minimums.
5. Click the down arrow on the **Action** drop-down list, select **ApplyMinimum**, then click **Apply**. The AP table adjusts to display the Min inputs.

### Optimizing to Packs for Selected

Optimize to Packs enable you to convert selling units to ordering units by applying pack constraints. The optimization process first applies size profiles to break item and color information down to SKU and then rounds SKU store-level receipt units based on available pack configurations.

Pack optimization occurs upon item submittal and you can execute pack optimization at any point in the planning process.

#### To optimize plan quantities to pack configurations:

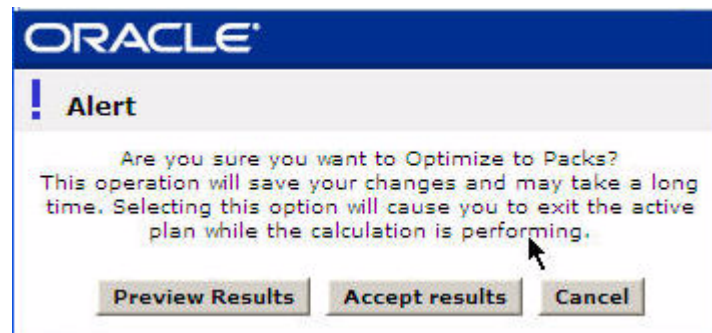
1. On the **Main Menu**, click **Planning**.  
The **Plan Library** appears.
2. Click the name link of a plan to select it from the **Plan Library**.  
The **Plan Worklist** of the plan you selected appears.
3. In the **Plan Review** links, click **Assortment View**.

The **Assortment View** tab appears.

4. Click the checkbox next to the item description to select an item or items that you want to optimize to packs.
5. Click the down arrow on the **Action** drop-down list, select **Optimize to Packs**, then click **Apply**.

A pop-up alert window appears confirming to optimize the packs.

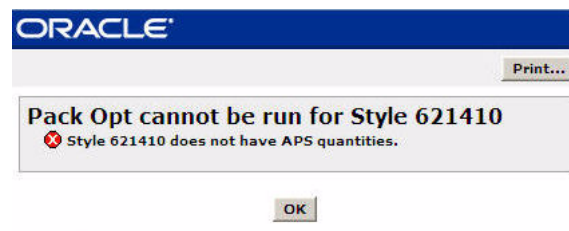
**Figure 8–6 Pack Optimization Validation Message**



6. Click **Preview Results** to view the pack optimization. Or **Accept Results** to accept the pack optimization results.

If there is a validation error, another pop-up window appears displaying the reason for failure for pack optimization.

**Figure 8–7 Pack Optimization Error Message**



7. Click **OK** and set the APS quantities in the **Assortment View**. Follow from step 1 to step 5 to regenerate pack optimization.

The system logs you out of the plan while it executes the Optimize to Packs calculation and the plan is locked. You may re-enter the plan from the Plan Library on a read-only basis until the calculation is complete.

Once the calculation is complete, you may enter the plan with write access. The receipt quantities shown on the **Assortment View** or the relevant items are updated based on the results of the pack optimization calculation. The **P-OPT** column within the **Assortment View** is updated with a 'D' to indicate optimization calculation is complete.

## Using Show button

The **Show** section of the Assortment Planning screen enables you to display the filter data as set by you. The **Show** drop-down list has five options to select the drop-down values to view the data at different levels of details.

To view the data, select from the drop-down values of the following fields and click the **Show** button to refresh the **Assortment View** grid:

**Table 8–3 Show section fields and description**

Fields	Description
Storesets	Use the Storesets drop-down list to flip the view by changing the store set from the default primary store set to the selected store set.  The storeset list can be configured using the Store Management link on the Main Menu.
Subsets	Use the Subsets drop-down list to filter the assortment view by any subset of a selected store set.
Quantities	Use the Quantities drop-down list to select any combination of APS, Min, or Pres Min to display in the Assortment View grid.
Data	Use the data drop-down list to select any combination of AP, Need, or LSP data segments to display in the Assortment View grid.
Product Group	Use the product group to filter Assortment View by any product group.
Show	After drop down values are chosen, click the <b>Show</b> button to refresh the Assortment View grid.

## Understanding Assortment Tab Grid

**Table 8–4 Assortment view tab fields**

Column Heading	Description
Expand/Collapse	Use the collapse/expand functionality by row, controlled by clicking [-] or [+], to view different cuts of data at the item or color level.
Hide/Show	Use the hide/unhide functionality available by column grouping to expand or collapse sections in the Assortment View screen.
Seq	Sequence displays the item's place in the assortment sequence.
Item ID	Item identification number.
Item Information	Provides item details. <b>Description</b> - brief explanation of the item/color. <b>Purchase Type</b> - displays the item type, can be customized For example- F (Fashion), B (Basic) <b>AP</b> - displays the Item's Status: <ul style="list-style-type: none"> <li>■ I - In Progress</li> <li>■ R - Ready</li> <li>■ V - Validated</li> <li>■ S - Submitted</li> <li>■ C - Changed</li> </ul> <b>P-OPT</b> - displays the pack optimization status. D indicates that the optimization is complete. <b>Colors</b> - displays the number of planned colors in the item.
Attributes	Client Configurable

**Table 8–4 (Cont.) Assortment view tab fields**

Column Heading	Description
Calculation Info	<p>Displays data that affects calculations, including:</p> <p><b>Source</b> - indicates calculation method for item's averages per store (APS) quantities. The default value is Manual, but can be overridden with Calc %, Spread, or Need.</p> <ul style="list-style-type: none"> <li>■ Manual - user-generated APS</li> <li>■ Need - copied from the forecast data segment</li> <li>■ Spread - spread item total</li> <li>■ Calc% - item calc %</li> </ul> <p><b>Pack Size</b> - lowest pack size associated with the item.</p> <p><b>Min</b> - the minimum quantity of item stores (optional at volume grade and store subset) must receive on average in order to be eligible for that item. Validation will fail if the quantity is less than the minimum specified.</p> <p><b>Pres Min</b> - minimum number of units needed in stores to support item or color presentation for the last receipt date. The default value is entered in Plan Worklist, but can be overridden at the volume grade or store subset in the Assortment View screen.</p> <p><b>Calc %</b> - percent contribution to apply to each item within the assortment or color within a particular item. The % value is used in various Assortment Planning calculations.</p> <p><b>Cost</b> - wholesale cost of an item. It is read-only in the Assortment View.</p> <p><b>Retail</b> - displays the item's retail price.</p> <p><b>IMU</b> - initial markup percentage of an item.</p>
All XXX	APS for each data segment, where XXX is the total number of stores.
Volume Grades	<p>APS - for all stores within a volume group, display can be set to AP/Need/LSP data segments and Min and Pres Min from the Quantities drop-down list.</p> <p># Stores - selecting the # Stores cells in the VG intersection, displays the stores in the volume grade, the actual AP quantity for each store, and the variance from the Average for each store.</p>
Store Receipts	<p>Displays the average receipt quantities per store.</p> <ul style="list-style-type: none"> <li>■ <b>Receipts Units</b> - total receipt units.</li> <li>■ <b>% Receipts Units</b> - receipt unit percent contribution to Plan.</li> <li>■ <b>Receipts \$</b> - total receipt value of the merchandise in Dollars</li> <li>■ <b>% Receipts \$</b> - receipt Dollars percent contribution to Plan.</li> </ul>
# Stores	Number of stores in the set carrying the item.

## Understanding Item View

The **Item View** screen displays an item or group of items and their metrics by week. The **Item View** screen provides you the visibility to planned sales, receipt, inventory, gross margin and key metrics by week and month.

The system creates item plans by week based on forecasted or adjusted buy quantities and sales curves. The system also creates optimal product store and DC flow plans

based on forecasted sales, delivery frequency, flow dates, and various other data input in the plan.

**Figure 8–8 Item View Screen**

The screenshot displays the Oracle Item View screen. At the top, the navigation bar includes 'Main Menu > Plan Library > Plan Worklist > Item View'. Below this, the 'Item Plan Review' section shows filters for Class Name (CASUAL), Class (8457), Period (P10, 2004-P3, 2005), Store Group (ALL), Store Period (P10, 2004-P3, 2005), Plan Status (In Progress), and Filtered (No). A 'Select items to edit' table lists items 101 (Haggar) and 102 (Barrel crofts). Below this, the 'Assortment View', 'Item View', and 'Flow View' tabs are visible, with 'Item View' selected. An 'Action Groups' dropdown is set to '(select action)'. The main table displays performance metrics for various fiscal weeks, including columns for Perm MD\$, POS MD\$, Total MD\$, MD%, MD IND, Sales, AUR, AUC, GP\$, GP%, GPROI, %ST\$, %ST U, TO\$, TO U, WOS, St w, INV, St w, and REC.

Fiscal Week	Perm MD\$	POS MD\$	Total MD\$	MD%	MD IND	Sales	AUR	AUC	GP\$	GP%	GPROI	%ST\$	%ST U	TO\$	TO U	WOS	St w	INV	St w	REC
Assortment Plan Total	0	0	0	0.0		\$0.00	\$0.00	0	0.0	0.0	0	0	0.0	0.0	0.0					
Nov	0	0	0	0.0		\$0.00	\$0.00	0	0.0	0.0	0	0	0.0	0.0	0.0					
40	0	0	0	0.0		\$0.00	\$0.00	0	0.0	0.0	0	0	0.0	0.0	0.0					
41	0	0	0	0.0		\$0.00	\$0.00	0	0.0	0.0	0	0	0.0	0.0	0.0					
42	0	0	0	0.0		\$0.00	\$0.00	0	0.0	0.0	0	0	0.0	0.0	0.0					
43	0	0	0	0.0		\$0.00	\$0.00	0	0.0	0.0	0	0	0.0	0.0	0.0					
44	0	0	0	0.0		\$0.00	\$0.00	0	0.0	0.0	0	0	0.0	0.0	0.0					
Nov Financials			0			\$0.00	\$0.00	0	0.0	0.0	0	0	0.0	0.0	0.0					
Nov Variance			0			\$0.00	\$0.00	0	0.0	0.0	0	0	0.0	0.0	0.0					
Dec	0	0	0	0.0		\$0.00	\$0.00	0	0.0	0.0	0	0	0.0	0.0	0.0					
45	0	0	0	0.0		\$0.00	\$0.00	0	0.0	0.0	0	0	0.0	0.0	0.0					
46	0	0	0	0.0		\$0.00	\$0.00	0	0.0	0.0	0	0	0.0	0.0	0.0					
47	0	0	0	0.0		\$0.00	\$0.00	0	0.0	0.0	0	0	0.0	0.0	0.0					
48	0	0	0	0.0		\$0.00	\$0.00	0	0.0	0.0	0	0	0.0	0.0	0.0					
Dec Financials			0			\$0.00	\$0.00	0	0.0	0.0	0	0	0.0	0.0	0.0					
Dec Variance			0			\$0.00	\$0.00	0	0.0	0.0	0	0	0.0	0.0	0.0					
Jan	0	0	0	0.0		\$0.00	\$0.00	0	0.0	0.0	0	0	0.0	0.0	0.0					
49	0	0	0	0.0		\$0.00	\$0.00	0	0.0	0.0	0	0	0.0	0.0	0.0					
50	0	0	0	0.0		\$0.00	\$0.00	0	0.0	0.0	0	0	0.0	0.0	0.0					
51	0	0	0	0.0		\$0.00	\$0.00	0	0.0	0.0	0	0	0.0	0.0	0.0					

The **Item View** tab provides detailed performance information on how an item or group of items is expected to perform by week at the chain level. The view includes information on the AP, Need, LILY, and LSP data segments.

#### To view the Item View:

1. On the **Main Menu**, click **Planning**.  
The **Plan Library** screen appears.
2. Click the name link of a plan to select it from the **Plan Library**.  
The **Plan Worklist** of the plan you selected appears.
3. Click the checkbox of an Item you would like to view. Or, select multiple Items to view the items as a roll-up.

If you did not select an item prior to entering the **Item View**, or if you wish to change the selected items, you can use the **Edit Selected** and **Show All** buttons to switch items.

4. In the **Plan Review** links, click **Item Plan**. The **Item View** tab appears.

You can review the product flow plan contribution for each item by season, month, or week for open-to-buy and feasibility analysis. You can select an item or group of items on the **Assortment view** or the **Item Workplan** and click the **Item View** to display the flow chart for the selected items.

The **Item View** tab consists of following sections:

- Selected Items to Edit
- Action drop-down list
- Show

- Grid

## Selecting Items to Edit

The **Select Items to Edit** option displays the information of the selected item/items from the **Plan Worklist** screen or Assortment View tab. It is read only section. If you have selected multiple items, the **Item View** tab will display all the items and item related information like Item Info, Status, Required Info, Optional Info, and Buy Parameters.

If you have not selected an item prior to entering the **Item View**, or if you wish to change the selected items, you can use the **Edit Selected** and **Show All** buttons to switch items.

## Using Action list

The **Action** drop-down lists on the **Item View** tab enables you to extend time period for the planned items and copy need to AP. You can select an item or a group of items from the Plan Worklist or Select Items to Edit, select an action you wish to perform on the selected items, then click **Apply** to proceed with the desired task.

### Extending Time Period

The **Extend Time Period** functionality allows you to extend the time period for the selected item or items to financial periods prior to or after the plan period.

**Figure 8–9 Extend Time Period Window**

Current Plan		Extended Plan	
Start:	P1, 2005	Fy:	2005
End:	P3, 2005	Period:	P3

To extend time period:

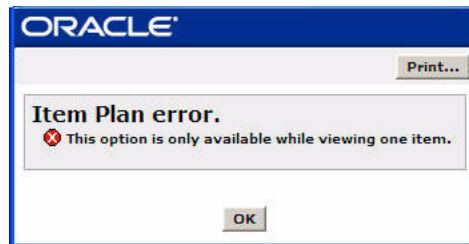
1. On the **Main Menu**, click **Planning**.  
The **Plan Library** screen appears.
2. Click the name link of a plan to select it from the **Plan Library**.  
The **Plan Worklist** of the plan you selected appears.
3. Click the checkbox of an Item for which you would like to extend the time period and click Item View tab.  
Alternatively, you can select the item from Select items to Edit and click Edit Selected.
4. Click the down arrow on the **Action** drop-down list, select **Extend Time Period**, then click **Apply**.  
The **Extend Time Period** pop-up window appears.
5. Change the dates in the **Extended Plan** Start and End dates and click **OK**.

### Copying Need to AP

The **Copy Need to AP** feature copies the forecasted need data segment to the AP data Segment. The functionality enables you to use the receipt quantities derived through the Need data segment for the AP data segment. Refer [Copying Need to AP](#) to know how to copy need to AP.

If no item is selected from the Plan Worklist, a pop-up window displays the error that this option is available only while viewing one item.

**Figure 8–10 Item Plan Error Window**



Click OK. Select one item from the Plan Worklist and click Item View tab. Select Copy Need to AP from the Action drop-down list and click Apply. The Need receipt quantities gets copied to the AP segment.

### Revert to System Flow

The Revert to System Flow option allows you to re-flow the item based on the sales forecast. It reverts any edits to receipt flow percentages and recalculates the receipt flow based on the forecast.

If you revert the style to system flow, the colors revert as well. If you revert the color to system flow, the style flow continues to be a roll-up of the color flow on a weekly basis.

### Using Show button

This section of the **Item View** screen enables you to display the filter item data as set by you. To view the data, select from the following **Data** drop-down values and click **Show** to refresh the **Item View** grid:

- Need
- Lily
- AP
- LSP

### Understanding Item View Grid

The Item View grid displays data relative to the selected item or group of items from the Select Item to Edit section for the data segments selected in the Data drop-down list. All columns in the Item View grid is replicated for each data segment selected from the Data drop-down list.

The Item View grid contains following columns:

**Table 8–5 Item View grid fields and description**

<b>Fields</b>	<b>Description</b>
Fiscal week	Planned fiscal week of the item.
Store Receipts	<p>Displays the actual receipt quantities for all stores as per data segment selected in the Data drop-down list.</p> <ul style="list-style-type: none"> <li>■ <b>Receipts Units</b> - total receipt units by time period.</li> <li>■ <b>% Receipts Units</b> - receipt unit percent contribution to Plan. This field is editable for the AP segment and allows to alter the receipt flow</li> <li>■ <b>Receipts \$</b> - total receipt value of the merchandise in dollars by time period.</li> <li>■ <b>% Receipts \$</b> - receipt dollars percent contribution to Plan.</li> </ul>
DC Receipts	<p>Displays the total DC receipts as per data segment selected in the Data drop-down list.</p> <ul style="list-style-type: none"> <li>■ <b>DC Receipt Unit</b> - total DC receipt units by time period.</li> <li>■ <b>DC Receipts \$</b> - total DC receipt dollars by time period.</li> </ul>
Sales	<ul style="list-style-type: none"> <li>■ <b>Sales U</b> - total sales units by time period.</li> <li>■ <b>% Sales U</b> - percentage of sales units by time period.</li> <li>■ <b>Sales \$</b> - total sales dollars by time period.</li> <li>■ <b>% Sales \$</b> - percentage of sales in dollars by time period.</li> </ul>
BOH	<ul style="list-style-type: none"> <li>■ <b>BOH U</b> - beginning on hand units for a time period.</li> <li>■ <b>BOH \$</b> - beginning on hand Dollars for a time period.</li> </ul>
EOH	<ul style="list-style-type: none"> <li>■ <b>EOH U</b> - ending on hand units for a time period.</li> <li>■ <b>EOH \$</b> - ending on hand Dollars for a time period.</li> </ul>
Mark Down	<p>Markdown planned for the item.</p> <ul style="list-style-type: none"> <li>■ <b>PermMD\$</b> - permanent markdown dollar totals per time period taken for selected item(s)</li> <li>■ <b>POS MD\$</b> - point of sale markdown dollar totals per time period taken at the register for selected item or items.</li> <li>■ <b>Total MD\$</b> - mark down in Dollars.</li> <li>■ <b>MD %</b> - mark down in percentage.</li> <li>■ <b>MD IND</b> - markdown indicator shows the most significant pricing event that was in effect that week determined by order of precedence.</li> </ul>
<b>POS/Perm MD Sales</b>	
MD Sales U	Permanent Markdown Units Sold.
MD Sales \$	Permanent Markdown \$ Sold.
MD Sales %	Ratio of MD \$ to Total Sales \$.
POS Sales U	Units sold at promotional/employee discount price.
POS Sales \$	\$ sold at promotional/employee discount price.
POS Sales %	Ratio of Promotional Sales \$ to Total Sales \$.
Avg Unit	<p>Displays the average retail quantities per store.</p> <ul style="list-style-type: none"> <li>■ <b>Sales AUR</b> - average unit retail for a time period.</li> <li>■ <b>AUC</b> - average unit cost for a time period.</li> </ul>

**Table 8–5 (Cont.) Item View grid fields and description**

<b>Fields</b>	<b>Description</b>
Gross profit	<ul style="list-style-type: none"> <li>■ <b>GP \$</b> - gross profit Dollars by time period [Unit Sales * (AUR - AUC)].</li> <li>■ <b>GP %</b> - gross profit percentage by time period [(AUR / AUC) - 1].</li> <li>■ <b>GPROI</b> - Gross Profit Return on Investment.</li> </ul>
Sell through	<ul style="list-style-type: none"> <li>■ <b>% ST \$</b> - % sell through in Dollars.</li> <li>■ <b>% ST U</b> - % sell through in units.</li> </ul>
Turn Over	<ul style="list-style-type: none"> <li>■ <b>TO \$</b> - turn over Dollars.</li> <li>■ <b>TO U</b> - turn over units.</li> </ul>
Num Stores	<ul style="list-style-type: none"> <li>■ <b>WOS</b> - weeks of supply</li> <li>■ <b>ST w/ Inv</b> - # of stores with inventory for a time period.</li> <li>■ <b>ST w/ Rec</b> - # of stores with receipts for a time period.</li> </ul>

## Understanding Flow view

The **Flow View** tab displays how the AP or Need receipt quantities are planned to flow by week throughout the relevant plan period. The screen enables a comparison of those receipt plans to the top-down financial plan. The totals are then broken down over time based on the forecast engine's sales curve and receipt flow parameters, including the In Store Date, Out Date, Break Date, Delivery Frequency, Safety Stock, etc. Data presented in the view is read only, but can be updated by adjusting each item's calculation parameters or the overall planned receipt quantities in the **Assortment View**.

The **Flow View** shows the whole plan at a chain level by weeks. The **Flow View** can be seen in the context of the receipt data for some of DC and Store. The receipt flow can be filtered based on Product Groups available in the plan or subsets available in the primary store set.

Figure 8–11 Flow View Screen

ORACLE

[Main Menu](#) > [Plan Library](#) > [Plan Worklist](#) > [Flow View](#)

[About](#) | [Help](#) | [Logout](#)

Flow Plan Review

Class Name: CASUAL

Class: 8457

Period: P10, 2004-P3, 2005

Store Group: ALL

Store Period: P10, 2004-P3, 2005

Plan Status: In Progress

Filtered: No

Assortment View

Item View

Flow View

Action

(select action)

Apply

Subsets

ALL

Receipts

DC

Data

AP

Show

Product Groups

All

Show

	Item ID	Item Info	# Stores	Total	Month Nov						
		Description	Product Group	Colors	Cost	Retail	AP	AP	Week		
							DC Receipt U	DC Receipt \$	DC Receipt U	DC Receipt \$	AP
											DC Rece

To view the Flow View tab:

1. On the **Main Menu**, click **Planning**.

The **Plan Library** appears.

2. Click the name link of a plan to select it from the **Plan Library**.

The **Plan Worklist** of the plan you selected appears.

3. In the **Plan Review** links, click **Flow View**.

The **Flow View** tab appears. You can also click the Flow View tab from any of the Plan Review screens. The Flow View tab appears.

**Note:** The AP data segment leverages the sales curve from the forecast to calculate Receipt flow by item/color, even if APS values are manually input or created using top-down tools. Therefore, you must set all calculation parameters for an item in order to see its Receipt flow.

The **Flow View** tab consists of the following sections:

- Action drop-down list
- Show
- Flow View Grid

## Using Action List

The **Action** drop-down list on the **Flow View** tab has links to customize table and print or export options. Refer [Customizing Table](#) and [Printing or Exporting data](#) to know more on the topics.

## Using Show button

The **Show** button of the **Flow View** screen displays the receipt item data as set by you. To view the data, select from the **Show** drop-down values of the following fields and click **Show** to refresh the **Flow View** grid:

**Table 8–6 Show drop-down values and description**

Fields	Description
Subsets	Use to display data for subsets in the main storeset for the plan.
Receipts	Use to filter data to view flow from/to on a weekly basis by receipts to the store or the DC.
Data	Use to display data segments in the grid.
Product Group	Use to filter data by any existing product group in the plan.

## Using Flow View Grid

**Table 8–7 Flow View grid fields and descriptions**

Fields	Description
Expand/collapse	Use the collapse/expand functionality by row, controlled by clicking [-] or [+], to view different cuts of data at the item or color level.
Item ID	Item identification number from Plan Worklist.
Item Info	<ul style="list-style-type: none"> <li>■ <b>Description</b> - brief explanation of the item/color.</li> <li>■ <b>Product Group</b>- product group of the item.</li> <li>■ <b>Color</b> displays the number of planned colors in the item.</li> <li>■ <b>Cost</b> - the wholesale cost of an item.</li> <li>■ <b>Retail</b> - displays the item's retail price.</li> </ul>
# Stores	Number of stores in the set carrying the item.
Total	<p>Store receipts</p> <ul style="list-style-type: none"> <li>■ <b>Receipts Units</b> - store receipt units.</li> <li>■ <b>% Receipts Units</b> - store receipt unit percentage to the total store receipts for the plan period.</li> <li>■ <b>Receipt \$</b> - store receipt Dollars.</li> <li>■ <b>% Receipt \$</b> - store receipt Dollars percentage to the total store receipts for the plan period.</li> </ul> <p>DC Receipts</p> <ul style="list-style-type: none"> <li>■ <b>DC Receipts Units</b> - distribution center receipt units.</li> <li>■ <b>% DC Receipts Units</b> - distribution center receipt Dollars.</li> </ul> <p>Receipts details for the month and weeks.</p>

---

## Pack Optimization

The pack optimization process helps you identify the best pre-pack configuration by matching the configuration with the store-level demand to determine the best possible pack quantities for an order.

The next step in the planning process, after you set up style and color level information for an item, is to generate optimal order quantities. This chapter describes how you can generate the optimal packs and order quantities for the items you want.

You need to complete the following to generate the optimal order quantities:

- Set the Buy Parameters and run a forecast
- Set APS quantities for the item at the style and the color level

You can run the Pack Optimization on Mock Items. This will round the receipt quantities to the pack size defined in the Plan Worklist.

### Different Methods of Pack Optimization

There are two kinds of pack optimization:

- Standard
- Adaptive

The standard pack optimization addresses the deliveries in parallel. In this case, the small stores with smaller assortment quantity remain under allocated as the per-delivery quantities are smaller than the available pack.

This issue is answered by the adaptive pack optimization by delivering in a sequence, and applying the deficit or excess allocation in one delivery to the requested quantity in the next delivery's pack optimization. The adaptive pack optimization closely fits the quantities between assortment and allocation for all stores.

For example, a store needs 12 units in a plan and the receipt flow has 4 deliveries of 7, 3, 1, 1 units respectively. The packs are configured such that the first delivery has only packs of 5 units eligible, and subsequent deliveries must use only loose stock. The standard pack optimization will recommend 5, 2, 0, 0 units respectively. This means that there is an overall deficit of 7 units.

In the adaptive optimization method with the same store requirements, the first request suffers a deficit of 2 units which is applied to the second request, that is,  $3+2=5$  units. The 3rd request is for 1 unit, which will get nothing. The last request is for  $1+1=2$  units, which is satisfied. Thus the pack-optimized receipt flow is 5, 5, 0, 2 units respectively with no deficit.

You can configure the *plan.properties* file to use any one of the pack optimization methods in the application. You can switch between parallel and adaptive pack optimization methods.

## Actualize Items

Items are actualized to map it or link it to the configured prepacks. You can do this by assigning an item identification number to the mock item. This maps the key item information, as well as supports its integration with the purchase order management, and in-season plan management.

To actualize an item:

1. On the **Plan Worklist**, in the **Item ID** column (**Item Info** section), type the actual identification number for the item you want.
2. In the **Actualize** column, click **Mock**.

---

---

**Note:** If the colors of the mock item in the plan do not match the colors of the actual item (in the Item Master), an **Actualize Item** window appears where you can map each color of the mock item to the colors of the actual item. Once you map the colors, click **Add Selected Colors to Plan**.

---

---

3. Click **Save**.

In the Action drop-down list, use the Validate Item Data option to validate that the item's information synchronizes with the information in the Item master.

## Selecting Pre-defined Packs

For each actual item, the pack configurations are defined based on the analytic insight, optimized size profiles, and escalation logic during implementation. Once you actualize an item, you can view and select the pre-defined optimal packs for the item. You can also set up delivery of specific configurations over different time intervals.

To view and select the pre-defined packs:

1. On the **Plan Worklist**, in the **Pack Configs** column, click **View**. The **Pack Configs** screen appears with all packs selected.
2. On the **Pack Configs** grid, clear the check box next to the pre-packs or loose sizes you want to exclude in the order quantities.
3. Click **Save**.
4. Click **Done**.

To select packs for specific shipping dates:

1. On the **Pack Configs** screen, in the **Add ship-to-store date** field, select a date you want.
2. Click **Add date**. The **Pack Configs** screen appears with an additional column for the ship-to-store date you selected.
3. In the **ship-to-store date** column, select the check boxes for the packs you want to be shipped on the delivery date.
4. Click **Save**.

5. Click Done.

Pack Configs Screen

Figure 9–1 Pack Configuration Screen

ORACLE

Main Menu > Plan Library > Plan Worklist > Pack Configs

About | Help | Logout

Pack Configs

Item: 616963   Dept Name: Mens Casual Pants   Dept: 442   Period: Dec, 2005-Nov, 2006   Store Period: Jan, 2005-Mar, 2006   Filtered: No

Save   Revert   Done

Add ship-to-store date

Action

(select action)

01/01/2006 In-store

(not set) Last-receipt

08/01/2006 OOS

PackID	Color Desc	Pack Contents	Pack Units	Defined By	Start of Time
		BLACK/TOKEN   TOKEN/BLACK			
		28 30 32 34 36 38 28 30 32 34 36 38			
<input type="checkbox"/> 1 Pack DEF	BLACK/TOKEN		AS		<input type="checkbox"/>
<input checked="" type="checkbox"/> 1 Pack DEF	TOKEN/BLACK		AS		<input checked="" type="checkbox"/>
<input type="checkbox"/> 2 Pack DEF	BLACK/TOKEN		AS		<input type="checkbox"/>
<input type="checkbox"/> 2 Pack DEF	TOKEN/BLACK		AS		<input type="checkbox"/>
<input type="checkbox"/> Loose	BLACK/TOKEN		AS		<input type="checkbox"/>
<input type="checkbox"/> Loose	TOKEN/BLACK		AS		<input type="checkbox"/>

Here are the fields that appear on the Pack Configs screen:

Table 9–1 Fields on the Pack Configs Screen

Field	Description
Add ship-to-store date	Select an applicable date when you want the packs to be shipped to the store.
Pack ID	The identification number of the pack.
Pack Contents	Contents of the pack based on the various attributes for the item. For example, loose sizes and fabric of a trouser.
Pack Units	Number of units in the pack.
Defined By	The source of the pack. For example, analytical services (AS) or client.
Start of Time	Date that represents the beginning of the life cycle.  If no other dates are added, this column represents the selections for the entire item life cycle. If you add a ship-to-store date, this column represents the pack selection for the beginning of the item's life cycle till the ship-to-store date.

## Optimizing Packs

Once you select the pre-defined pack configurations, you must now optimize the packs for the item.

To optimize the packs:

1. On the **Assortment View**, select the item you want.
2. In the **Action** drop-down list, click **Optimize to Packs for Selected**.  
A confirmation message appears.
3. To preview the pack optimization results, click **Preview Results**.

Or

To accept the pack optimization results without reviewing the results, click **Accept Results**.

---

---

**Important:** You have restricted (read-only) access to the plan till the pack optimization process completes. Once the optimization process starts, the Plan Library screen appears, and the plan gets locked by the Pack-Opt process.

---

---

4. Once the process is complete, click the plan, and navigate to the **Assortment View** for the item.

---

---

**Note:** On the Assortment View, the P-OPT column displays the pack optimization status for the item, where:

- D – Done
  - P – Preview
- 
- 

5. To preview the pack optimization results, in the **Action** drop-down list, click **Review Pack Opt Results**. The Assortment View now appears with additional **Pack Opt** columns that display the pack optimization results against the AP quantities.
6. To accept the pack optimization results, in the **Action** drop-down list, click **Accept Pack-Opt Results**.

Or

To continue working with plan without using the pack optimization results, in the **Action** drop-down list, click **Hide Pack-Opt Results**.

## Validate Quantities

You can validate the pack optimization results using the following Merchant Desktop reports:

- PO Detail report – displays the SKU and Pack level chain detail for an item. Both mock and actualized items are available for reporting within and across plans.
- Pre-Allocation Detail report – displays the SKU and Pack level detail by store for an item.

For more information, refer to the Merchant Desktop user's guide.

---

## Submitting Items

Item submittal is an important step in finalizing the item plan. By submitting the item, you can process the item plan data to an external system to create purchase orders.

In order to submit an item, the following item information must be complete and validated:

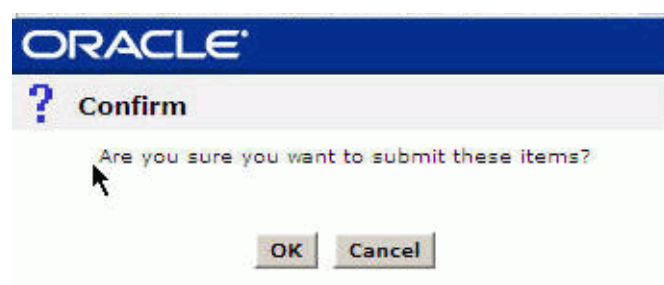
- Valid color-level with AP/APS quantities
- Valid ID #
- Actualized item
- Buy parameters
- Pack optimization
- Generated forecast

You can submit item(s) after all the required criteria is completed without any validation errors. If there are validation errors, the item can not be submitted and a pop-up message appears displaying the reason for the failure.

To submit an item:

1. On the **Main Menu**, click **Planning**. The Plan Library screen appears.
2. Click the name link of a plan to select it from the Plan Library. The Plan Worklist of the plan you selected appears.
3. Click the checkbox of the item(s) you want to submit.
4. Click the down arrow on the drop-down Action list, select **Submit Selected Status**, and click **Apply**. A confirmation pop-up window appears.

**Figure 10–1** *Submit an Item - Pop-up Message*

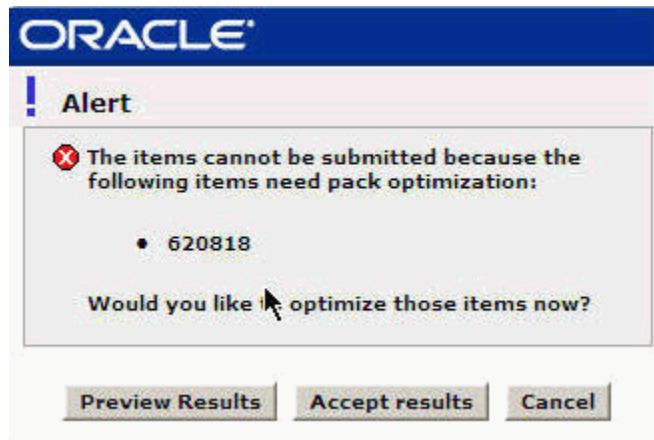


5. Click **OK** to submit the item(s) or click **Cancel** to revert the action.  
If there are no validation errors, the item(s) is submitted.

---

If there are validation errors, like pack optimization or buy parameters not completed, an alert pop-up window displaying the reason for the validation failure appears.

**Figure 10–2 Submit an Item - Error Message**



6. Click **Accept Results** to optimize the items or **Cancel** to revert.

Clicking **Accept Results** overwrites the AP quantities with results of pack optimization. Clicking **Preview Results** runs pack optimization and allows you to see the results in the AP view prior to overwriting the AP quantities. Pack optimization results must be accepted before an item can be submitted.

The AP data segment is read-only for the submitted item, and the LSP or Last Submitted Plan data segment is overwritten with the current AP quantity.

---

**Note:** If you wish to make any changes to a submitted item, you must change the item's status to C (Changed) to bring the AP segment back to an editable status.

---

After you submit the item, the item status is changed to S (Submitted) and the item is eligible to interface with external systems.

### Next Steps

Once all planning actions are complete, you can view reports that are available through the Merchant Desktop. These predefined reports are supplied to the Desktop by MicroStrategy.

Using Microstrategy, you can view and change the display of the information presented in reports.

See ["About Merchant Desktop Reports"](#) for general information on reports.

See ["Plan Reports Supplied by Merchant Desktop"](#) for a list of default reports supplied with Merchant Desktop.

See ["Accessing Reports"](#) on how to access reports within MicroStrategy.

This section includes the following information:

- [About Merchant Desktop Reports](#) on page 11-1
- [Understanding Metrics in Reports](#) on page 11-2
- [Plan Reports Supplied by Merchant Desktop](#) on page 11-3
- [Accessing Reports](#) on page 11-9
- [About Privileges](#) on page 11-10
- [Opening MicroStrategy Reports](#) on page 11-10
- [Sharing MicroStrategy Reports](#) on page 11-11

## 11.1 About Merchant Desktop Reports

Merchant Desktop is a flexible reporting tool used to access and display reports and data you may use to analyze application information. This detailed reporting system is provided by MicroStrategy Web Universal. Only administrators and report administrators have the ability to create original reports, however; you may have the ability to personalize reports if access is granted.

The administrator has assigned you a view within the Merchant Desktop. This view is the combination of tabs, screens, and components you are able to access when you log in to Merchant Desktop.

### 11.1.1 Accessing Reports

Once your application information is complete and all necessary actions are done, access the Reports option from the Main Menu to view predefined reports.

To access the Predefined Reports:

1. From the Main Menu, select the Reports hyperlink.  
If you do not have access and you need assistance, contact your system administrator.
2. Accessing the Reports link from the Main Menu will take you directly into the MicroStrategy Reports.
3. View and manipulate the reports that are available to your user ID account.

### 11.1.2 Predefined Reports

You may have been assigned a view that includes some (or all) of the predefined report types. The following is a list of the predefined reports that may be displayed as tabs within your Merchant Desktop view:

- Financial Reports
- Attribute Mix Reports
- Item by Time Reports

If access is granted, you may be able to personalize these reports within the Merchant Desktop.

### 11.1.3 MicroStrategy Reports

Along with the predefined reports, the administrator may have assigned you a Reports tab in your view. This Report tab will take you to the Merchant Desktop Portal from where you can access the Microstrategy reports.

## 11.2 Understanding Metrics in Reports

Within Merchant Desktop (and all throughout the application) are field labels that organize the presentation of information and calculations.

Metrics may be field headings (labels) and the field contents that display hyperlinks, numbers, dates and other results and calculations.

Attributes are listed on the left side of reports. In each report, there is a metric heading labeled: Metrics. Attributes are listed to the left of this field and may contain hyperlinks, numbers, dates and other results and calculations (depending on the type of Attribute).

Attributes and Metrics are configured during system set-up and reflect your company's unique business.

All Reports within the Merchant Desktop resemble tables with labels listed across the top in Green Headings and information listed below the Headings containing various types of information:

- Hyperlinks to pop up screens with additional information about the Metric and Attribute
- Hyperlinks to more detailed information (drill-down to more details and another screens)
- Attribute and Metric Results or Calculations (number, percentage, date or other characters)

See the following example:

**Figure 11–1 Report Metrics**

[illegible]

### 11.3 Plan Reports Supplied by Merchant Desktop

The following reports may be available to you as a part of your default view within Merchant Desktop:

**Table 11–1 Plan Reports in Merchant Desktop**

Report	Description
Financial Report	<p>Financial Reports allow the user to view for sales, receipts, gross margin by a selected time frame within various merchandise hierarchy levels.</p> <p>For Post Mortem, the sales and receipt inventory may be either the actual sales and inventory and/or optimized sales and inventory data.</p> <p>The data may be rolled up and drilled down to review metrics at various levels of the Merchandise Hierarchy.</p>
Attribute Mix Report	<p>Attribute Mix reports allow the user to view the percent contribution of sales and receipts by attribute for selected merchandise hierarchy levels.</p> <p>For Post Mortem, the sales and receipt inventory may either be the actual sales and inventory and/or optimized sales and inventory data.</p> <p>The data can be rolled up and drilled down to review percent contribution and other attributes and metrics within various levels of the Merchandise Hierarchy.</p>

**Table 11–1 (Cont.) Plan Reports in Merchant Desktop**

Report	Description
Item by Time	<p>Item by Time Reports allow the user to view item details over a specified period of time.</p> <p>For Post Mortem, the sales and receipt inventory can either be the actual sales and inventory and/or optimized sales and inventory data.</p> <p>The data can be rolled up and drilled down to review metrics at various levels of the Location and Merchandise Hierarchy.</p>
Purchase Order Report	<p>This report allows the user to view the output of the pack optimization process in a format that enables them to enter data into a purchase order management system.</p> <p>In this report, the elements you need to create a purchase order include, DC Receipt Date, Vendor, Receipt Units by SKU, Total Units Per Pack by SKU, and Total Number of Packs.</p>
Store Allocation Report	<p>This report allows the user to view the output of the pack optimization process in a format that enables them to view store-level shipment information.</p> <p>Use this report to review the store allocation strategy or to create purchase orders with store-level information.</p> <p>The elements you need to validate allocations or to create a store-level purchase order are Store Receipt Date, Vendor, Receipt Units by SKU, Total Units Per Pack by SKU, and Total Number of Packs.</p> <p>The report data can be rolled up and drilled down to review Location Hierarchy</p>

## 11.4 Plan Metrics Supplied with Merchant Desktop

The following table lists a subset of the metrics listed within your reports.

Metrics are listed in alphabetical order.

**Table 11–2 Plan Metrics with Merchant Desktop**

Metric	Metric Meaning	Metric Calculation
# of Customer Choices	Color Count	# of COLORS w/ BOH > 0
# of Selling weeks	Number of weeks an item has been selling to date	If EOH > 0 OR Sales > 0 then (System Date - First Receipt date) in weeks, rounded up; Else 0
# of Styles	Style Count	# of STYLEs w/ BOH > 0
% GP \$	Gross Profit \$ % Contribution to Total	GP\$/Total GP \$
% Receipt \$	Store Distributions \$ % Contribution to Total	Receipt \$/ Total Receipt \$
% Receipt U	Store Unit Distributions % Contribution to Total	Receipt U/ Total Receipt Units
% Sales \$	Sales \$ % Contribution to Total	Sales \$ / Total Sales \$
% Sales U	Sales Unit % Contribution to Total	Sales U / Total Sales Units
% ST U	Unit Sellthru %	LTD Sales Units / (LTD Receipt Units)

**Table 11-2 (Cont.) Plan Metrics with Merchant Desktop**

<b>Metric</b>	<b>Metric Meaning</b>	<b>Metric Calculation</b>
ADJ GP %	Gross Profit % Adjusted with terms for domestic items	$((\text{ADJ\_IMU} * 100) - ((\text{WeekTY Total MD\%} + \text{Shrink\%})) * (1 - \text{ADJ\_IMU}))$
ADJ IMU	Markup adjusted with terms for Domestic items	If Domestic (Retail - Cost*0.86) / Retail, else IMU
ASR	Average Selling Price	Sales \$ / Sales U
AUC	Weighted Average Cost	WeekTY COST
AVG INV \$	Store Average \$ Inventory	$(\text{SUM}[\text{WeekTY BOH\_DLRS}] + \text{MonthTY EOH\_DLRS}) / (\# \text{ of weeks} + 1)$
AVG INV \$ @ Cost	Store Inventory Weighted Average cost	$(\text{SUM}[\text{WeekTY BOH\_UNITS} * \text{COST}] + \text{MonthTY EOH\_UNITS} * \text{COST}) / (\# \text{ of weeks} + 1)$
AVG INV U	Store Average Unit Inventory	$(\text{SUM}[\text{WeekTY BOH\_UNITS}] + \text{MonthTY EOH\_UNITS}) / (\# \text{ of weeks} + 1)$
BOH \$	Store \$ Inventory at Beginning of the week (DC not included)	BOH U * CurrentPermPrice
BOH U	Store Unit Inventory at Beginning of the week (DC not included)	BOH U
Current Retail	Current Item Price	Current Retail
EOH \$	Store \$ Inventory Week ending (DC not included)	EOH U * CurrentPermPrice
EOH U	Store Unit Week ending Inventory (DC not included)	EOH U
First Receipt Date	Earliest date at which inventory was received	First week where EOH > 0 OR Sales > 0
FRESH STK	% of the new 6 weeks Receipts to total On Hand Inventory on Hand	$\text{SUM } n: 1 \text{ to } 6 [\text{Week } -n \text{ Receipt U}] / \text{current EOH}$
GP \$	Gross Profit \$	GP \$ {Derived for Optimized History: $(\text{GP\%} / 100) * \text{WeekTY Sales \$}$ }
GP \$ % Diff TY to OPT	OPT Gross Profit \$ % Change to TY Actual Gross Profit \$	$((\text{OPT GP \$} / \text{TY GP \$}) - 1) * 100$
GP %	Gross Profit %	$\text{GP\$} / \text{WeekTY Sales \$} * 100$ {Derived for Optimized History: $((\text{IMU} * 100) - ((\text{WeekTY Total MD\%} + \text{Shrink\%})) * (1 - \text{IMU}))$ }
GPROI	Gross Profit Return on Investment	$\text{SUM}[\text{WeekTY GP\_DLRS}] / \text{AVG\_INV\_DLRS\_COST}$
IMU	Weighted Markup %	(Retail - AUC) / Retail
Initial Retail	Original Item Price	Original Retail

**Table 11-2 (Cont.) Plan Metrics with Merchant Desktop**

<b>Metric</b>	<b>Metric Meaning</b>	<b>Metric Calculation</b>
LTD Rcpt \$	LTD Store \$ Distributions	Sum([LTD Rcpt Amt ToDate])
LTD Rcpt U	LTD Store Unit Distributions	Sum([LTD Rcpt Units ToDate])
LTD Sales \$	LTD Sales \$	Sum([LTD SlS Amt ToDate])
LTD Sales U	LTD Unit Sales	Sum([LTD Rcpt Units ToDate])
MD Sales \$	Permanent Markdown \$ Sold	MD Sales \$ {Derived for Optimized History: If Retail < Initial Retail, then = Sales \$, else 0}
MD Sales \$ % to Total	Permanent Markdown \$ Sold % Contribution to Total	MD Sales \$/Total Sales \$
MD Sales U	Permanent Markdown Units Sold	MD Sales U {Derived for Optimized History: If Retail < Initial Retail, then = Sales U, else 0}
NORM CHK	Normalized Checkout %	$(1 - ((EOH) / (LTD Receipt Units)) ^ (1 / \# \text{ of Weeks})) * 100$
Out Date	The date when the item should be sold out.	Out Date
Perm MD \$	Permanent Inventory devaluation Amount	Perm MD \$ {Derived for Optimized History: BOH U * (Retail[Week-1] - Retail)}
POS MD \$	Inventory devaluation Amount of units sold at Promo price	POS MD \$ {Derived for Optimized History: (Sales U * Retail) - Sales \$}
POS Sales \$	\$ Sold at Promo & Employee Discount price	POS Sales \$ {Can't derive for Optimized history unless we use TY % and assume constant}
POS Sales \$ % to Total	Promo \$ Sold at Promo & Employee Discount price % Contribution to Total	POS Sales \$/Total Sales \$
POS Sales U	Units Sold at Promo & Employee Discount price	POS Sales U {Can't derive for Optimized history unless we use TY % and assume constant}
Receipt \$	Store \$ Distributions	Receipt U * Retail
Receipt \$ % Diff TY to OPT	OPT Receipt \$ % Change to TY Actual Store Distributions	$((OPT Receipt \$ / TY Receipt \$) - 1) * 100$
Receipt U	Store Unit Distributions	Receipt U
Receipt U % Diff TY to OPT	OPT Receipt Unit % Change to TY Actual Store Distributions	$((OPT Receipt U / TY Receipt U) - 1) * 100$

**Table 11-2 (Cont.) Plan Metrics with Merchant Desktop**

<b>Metric</b>	<b>Metric Meaning</b>	<b>Metric Calculation</b>
Reg Sales \$	Reg Priced \$ Sold	Net Sales \$ - POS Sales \$ - MD Sales \$ {Can't derive for Optimized history unless we use TY % and assume constant}
Reg Sales U	Reg Priced Units Sold	Net Sales U - POS Sales U - MD Sales U {Can't derive for Optimized history unless we use TY % and assume constant}
Sales \$	Net \$ Sales	Net Sales \$
Sales \$ % Diff TY to OPT	OPT Sales \$ % Change to TY Actual Sales	$((\text{OPT Sales \$} / \text{TY Sales \$}) - 1) * 100$
Sales U	Net Sales Units	Net Sales Units
Sales U % Diff TY to OPT	OPT Sales U % Change to TY Actual Sales	$((\text{OPT Sales U} / \text{TY Sales U}) - 1) * 100$
Stores w/ Inv	Number of Stores with Inventory	# of Stores w/ BOH > 0
Stores w/ Rec	Number of Stores with Receipt U	# of Stores w/ Receipt U > 0
TO \$	\$ Turn over ratio	$\text{SALES\_DLRS} / \text{AVG\_INV\_DLRS\_RTL}$
TO U	Unit Turn over ratio	$\text{SALES\_UNITS} / \text{AVG INV U}$
Total MD \$	Tot Inventory Devaluation--POS MD \$ + Perm MD \$	POS MD \$ + Perm MD \$
WOS	Weeks of Supply	$\text{EOH} / \text{SALES\_UNITS}$
Sales Budget \$	Sales Budget	Dept Sales Budget \$
Sales Budget \$ % Diff	Percent difference between the Sales dollars and the Sales budget dollars	Dept Sales Budget \$
LY Sales U	Last Year Sales Units	Time shift Sales U 52 weeks into future
LY Sales \$	Last Year Sales Dollars	Time shift Sales \$ 52 weeks into future
Receipt Budget \$	Receipt Budget Dollars	Dept Receipt Budget \$
Receipt Budget \$ % Diff	Difference between the Receipt Dollar and the Receipt Budget Dollars	$((\text{Dept Receipt \$} / \text{Dept Receipt Budget \$}) - 1) * 100$
Budgeted IMU	Budgeted Initial Markup	Dept IMU Budget
Budgeted GP \$	Budgeted Gross Profit Dollars	Dept GP \$ Budget
Budgeted GP %	Budgeted Gross Profit Percentage	Dept GP % Budget
Budgeted GPROI	Gross Profit Return on Investment	Dept GPROI Budget

**Table 11-2 (Cont.) Plan Metrics with Merchant Desktop**

<b>Metric</b>	<b>Metric Meaning</b>	<b>Metric Calculation</b>
Budgeted Perm MD \$	Budgeted Permanent Markdown Dollars	Dept MD \$ Budget
Budgeted POS MD \$	Budgeted POS Markdown Dollars	Dept Promo \$ Budget
ST AVG INV \$ @ Cost	Stores Average Inventory Dollars at Cost	$(\text{SUM}[\text{weekly BOH\_UNITS} * \text{COST}] + \text{Monthly EOH\_UNITS} * \text{COST}) / (\# \text{ of weeks} + 1)$
ST AVG INV U	Units	$(\text{SUM}[\text{weekly BOH\_UNITS}] + \text{Monthly EOH\_UNITS}) / (\# \text{ of weeks} + 1)$
ST AVG INV \$	Stores Average Inventory Dollars at Retail	$(\text{SUM}[\text{weekly BOH\_DLRS}] + \text{Monthly EOH\_DLRS}) / (\# \text{ of weeks} + 1)$
Store GPROI	Stores Gross Profit Return on Investment	$\text{SUM}[\text{weekly GP\_DLRS}] / \text{AVG\_INV\_DLRS\_COST}$
Store TO U	Store Turnover Units	$\text{SALES\_UNITS} / \text{AVG INV U}$
Store TO \$	Store Turnover Dollars	$\text{SALES\_DLRS} / \text{AVG\_INV\_DLRS\_RTL}$
Item Status	Indicates whether an item is in regular, POS, or markdown status	
POS BOH U	POS Beginning on Hand Units	
POS BOH \$	POS Beginning on Hand Dollars	
POS EOH U	POS Ending on Hand Units	
POS EOH \$	Point of Sale Beginning On Hand Dollars	
MD BOH U	Markdown Beginning On Hand Units	
MD BOH \$	Markdown Beginning On Hand Dollars	
MD EOH U	Markdown Ending On Hand Units	
MD EOH \$	Markdown Ending On Hand Dollars	
Reg BOH U	Regular Beginning On Hand Units	
Reg BOH \$	Regular Beginning On Hand Dollars	
Reg EOH U	Regular Ending On Hand Units	
Reg EOH \$	Regular Ending On Hand Dollars	

**Table 11-2 (Cont.) Plan Metrics with Merchant Desktop**

<b>Metric</b>	<b>Metric Meaning</b>	<b>Metric Calculation</b>
DC Receipt Units	Distribution Center Receipt Units	DC Receipt Units
DC Receipt \$	Distribution Center Receipt Dollars	DC Receipt Units * Initial Retail
Pack Desc	Prepack or Loose description for a Pack ID	
Number of Packs	Number of Packs on the shipment for a given Pack ID	
Units Per Pack	Number of units (of all SKUs) in the Pack	
Total Receipt Units	Total # of Units received for a given Pack ID / Shipment	Number of Packs * Units Per Pack
Total Retail	Total Receipt \$ for a given Pack ID / Shipment	Total Receipt Units * Initial Retail
Total Cost	Total Cost \$ for a given Pack ID / Shipment	Total Receipt Units * Cost
Item Size	Item Size of a SKU within the Pack ID	
Quantities by Size	# of units for an individual SKU within the Pack	Inside Units

## 11.5 Accessing Reports

Merchant Desktop provides you with a variety of ways to access both the predefined reports and the MicroStrategy reports. See ["Opening MicroStrategy Reports"](#) on page 11-10.

You may be able to access reports that are displayed on or within a screen or tab. Access these reports by clicking directly on the tab (the name of the tab differs according to your set up) that contains the correct name of the report you want to view.

If you have access to the Reports tab (these are the MicroStrategy reports) displayed within your view, you can:

- View, modify the display, and copy the reports in the folder called Shared reports (if you have such privileges).
- Access your My Reports folder, from which you may view, modify, and create as many additional folders as necessary (if you have such privileges).
- Access MicroStrategy's online help system, by clicking on the Help icon from the MicroStrategy report screen.

See your Desktop administrator or a Reports administrator to change your assigned privileges.

## 11.6 About Privileges

The Merchant Desktop reporting system is provided by MicroStrategy Web Universal. Although you will always access reports (and graphs) from Merchant Desktop, the application that provides them is MicroStrategy Web Universal. Once you log on to Merchant Desktop, you are also logged on to MicroStrategy Web Universal.

To access the MicroStrategy Reports, select the Reporting tab from your Merchant Desktop view. MicroStrategy Web Universal appears within the Merchant Desktop Reporting screen.

- Administrators have all access to Merchant Desktop administration tools and MicroStrategy web professional privileges.
- Report Administrators have personalization privileges in the Merchant Desktop and Micro strategy web professional privileges.

Most of the time, you won't notice a difference between Merchant Desktop and MicroStrategy Web Universal. The biggest difference is probably in the help systems. Therefore, when you access reports or graphs from the Report tab, click the MicroStrategy help icon for information on how to share reports, customize reports, etc.

## 11.7 Opening MicroStrategy Reports

You may open reports only if the administrator has assigned the Reporting tab (screen) to your user account.

Note: The reporting system is provided by MicroStrategy Web Universal. When you access the Report tab, click the MicroStrategy help icon for information on how to subscribe to reports, customize reports, etc.

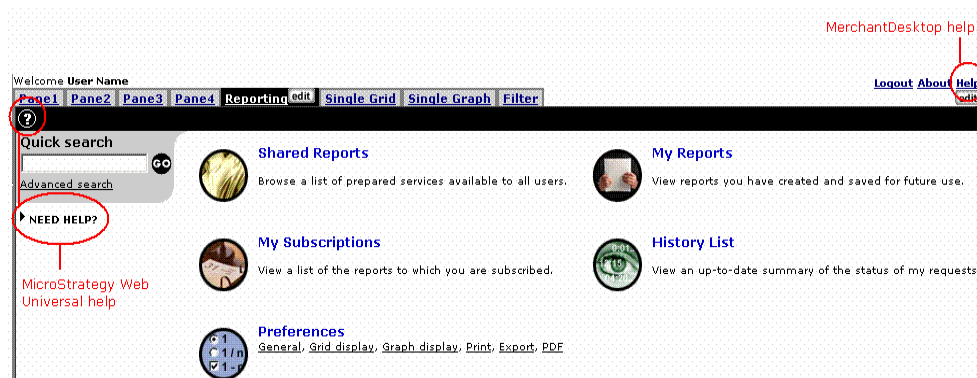
To access reports:

1. From your Merchant Desktop, click the Reporting tab.

Note: The first time you access reporting or any report or graph, there may be a delay before the actual MicroStrategy reporting screen appears. If this is especially slow, inform the administrator.

The Reporting screen appears with MicroStrategy Web Universal options.

**Figure 11–2 Report screen**



2. From the report options that appear, click one of the following links to access reports:

- Shared Reports - A list of reports created by administrators and other users that they have elected to share with other Merchant Desktop users
  - My Reports - A list of reports that you have created
  - My Subscriptions - A list of reports that you have scheduled to be executed, typically on a recurring schedule
  - History List - Depending on how the administrator has configured reporting, every report you have executed appears here, or only those reports you have selected for the history list appear here
3. Double-click the report you want to open. For information on navigating through reports, use the MicroStrategy help.

Note: If opening reports or drilling through reports is especially slow, inform the administrator.

## 11.8 Sharing MicroStrategy Reports

All users may share reports if given the Reports option by your Merchant Desktop administrator or Report administrator.

Note: The reporting system is provided by MicroStrategy Web Universal. When you access reporting, click the MicroStrategy help icon for information on how to subscribe to reports, customize reports, etc. It is recommended that you read the MicroStrategy help and any printed manuals thoroughly before modifying reports.

### 11.8.1 To Share Reports

1. Click the Reporting tab.

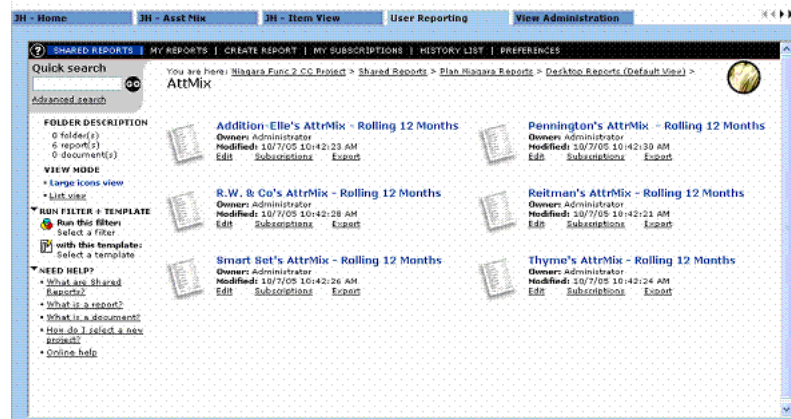
The Reporting screen appears with MicroStrategy Web Universal options:

**Figure 11–3 Reports screen with MicroStrategy options**



2. Click the Shared Reports icon.

The MicroStrategy Web Universal Shared Report screen appears:

**Figure 11–4 MicroStrategy Web Universal Shared Report screen**

3. Select an available report in the list. Click Next.
4. Locate the MicroStrategy help in the lower left side of the Shared Reports screen, and click Help for further instructions on how to share reports in MicroStrategy.

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## Troubleshooting

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The following section addresses some common issues occasionally encountered when using Oracle Retail applications.


### Application Problems and Solutions

The following is a list of some commonly encountered problems and their solutions. If you are having problems with the Merchant Desktop feature, see Merchant Desktop Problems and Solutions within the Merchant Desktop user guide.

**Table 12–1 Common Issues and Solutions to Oracle Retail Applications**

Problem	Solution
You attempt to access the application login screen, but a security warning message appears, asking if you want to install and run Service Pack 6 for Visual Basic.	This is a normal, expected message when your PC is missing a Microsoft Common Control dialog that the application uses. See, Application Information - Logging On.
When you attempt to access the application login screen, a blank screen appears instead.	See, Active X Downloads and Firewalls within Application Information.
After you enter your username and password and click Login, nothing happens.	It is possible that pop-up blocker software is prohibiting the application main menu from appearing. Try disabling the software and then attempt to log in to the application again.
One or both of the following error messages occur: 1. Error with Excel Initiation: Active X Component can't create object.  This occurs because of an Excel component that is marked as unsafe. The application does not install this component, but it does use it to export data to Excel.	These messages indicate that the internet browser setting are incorrect for the application zone (Local intranet or Trusted sites). To remedy this situation, follow the instructions in Application Information, Checking your Browser Settings, paying particular attention to the actual settings on the Security Settings dialog box.
.	

**Table 12–1 (Cont.) Common Issues and Solutions to Oracle Retail Applications**

Problem	Solution
2. Export did not succeed. The settings on your version of Internet Explorer may need to be altered to accommodate this feature. Please contact PC support to correct the problem.	<p>This occurs because the application requires the components to be scriptable even though not all of the components are marked as safe.</p> <p>These messages indicate that the internet browser setting are incorrect for the application zone (Local intranet or Trusted sites). To remedy this situation, follow the instructions in Application Information, Checking your Browser Settings, paying particular attention to the actual settings on the Security Settings dialog box.</p>
Your password is no longer working	<p>Passwords are case-sensitive, so make sure that the Caps Lock key has not been selected. In addition, if the administrator has changed your password or user name recently, it's possible that Internet Explorer is using the wrong stored password. This can occur when the only change in the user name or password is case.</p>
You have been working in the application, but a time-out message still appears.	<p>Time-out messages appear after a configured amount of time on the application server. Some of the actions you perform in the user interface do not communicate with the server and thus the server sends the time-out message.</p> <p>For more information, see Application Information, Timeouts.</p>
You can't figure out what some of the column names mean	<p>When a column name or meaning is unclear, hold the mouse pointer over the column name until the hover text appears, as in the example below. In most application implementations, each column has hover text that explains the column name.</p> 
<p>The following error message appears:</p> <p>A System error has occurred during this action. Please report this as a bug.</p> <p>In addition, the following link appears in the upper-right corner of the screen:</p> <p>Must define these in XActionServlet.java.</p>	<p>At least once a week, Professional Services must disable logins to the application (typically for about five minutes) so that they can synchronize data. If you are using the application while the logins are disabled, this message appears.</p> <p>.Just quit the application and check with an administrator or Professional Services to determine when it will be available again.</p>

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