**USEFUL EXCEL TIPS FOR WORFKLOW:**

CONTROL + SHIFT + L = REFILTER  
CONTROL + ALT + END = SELECT ALL  
CONTROL + - = DELETE ROWS  
CONTROL + SPACE BAR = HIGHLIGHTING A COLUMN  
CONTROL + ALT + PLUS SIGN = ADD ROWS  
ALT A + M = REMOVE DUPES

**DATA SOURCE: BM**

**NOS OH** – FOCUSES ON DOT.COM/DC OH

**DM job runs at 10 PM the night before**

**WF TABS:**

* **DETAILS PROD TAB** – EVERYTHING IN WF AT A PRODUCT LEVEL (EXCLUDES NEW COLORS)
  + RAW DATA COMES FROM DATAMART – WHICH PULLS FROM PIM (DATA SOURCE HOWEVER IS BM)
    - **CRITERIA HAS TO MATCH THE BELOW IN ORDER TO BE PULLED INTO THIS REPORT:**
      * **HAS TO BE IN WF AND HAVE ACTIVE SET BUT NOT RFP**
      * **HAS TO BE IN WORKFLOW AND NEITHER ACTIVE/RFP SET**
      * **HAS INVENTORY BUT IS NOT IN WF**
    - **\*\*\*WE ARE LEAVING THE DATA SOURCE AS BLUE MARTINI TO HAVE VISIBILITY INTO PRODUCTS THAT ARE ACTIVE Y RFP Y IN PIM BUT N IN BM**
    - **NOS OH** – FOCUSES ON DOT.COM/DC OH
* **INACTIVE** – NEW COLORS OH

**How-To: Saksoff5th Workflow Report**

In **Gmail**, download and open attachments from 2 emails listed below (subject title bolded):

**WF REPORTS**

1. **DM\_O5\_OH\_INACTV\_UPC**
2. **O5 NOS COMBINED** (we no longer use this)
   1. **O5\_DM\_WORKFLOW\_RPT have been posted to the I:\Merch Ops\Daily Workflow Report\O5**
   2. This email contains the number of products added with Final Copy Complete Date as yesterday and Count of Products with NOS date of Today. Make sure these are not 0 for either.
   3. **Monday mornings -** if we see product/item modified counts at 0 escalate to data to look into (may be okay if no one was working on the weekend but might also be a sign of sync issues with DM)

**DAILY ITEM COUNT REPORT:**

1. **O5 Items On Site Report** 
   1. (O5\_RPT\_ITEM\_COUNTS)

**O5 BIT REPORT:**

* Go to URL below and select BIT icon (IN internet explorer) <http://10.1.130.61/MicroStrategy/asp/Main.aspx?&r_d1446=CE84740F1623F0C18A0952641D11B651>
* Under Shared Reports section on bottom left, Select **Division Reports >** scroll down to find **Saks OFF Fifth> Saks Direct Site Ops> MIS-IB004A.2 – SO5- Ecomm by Colour Count.**
* If first time, under **4. Filter on Organization Hierarchy, select Organization- Saks OFF Fifth>Store/DC> 7789:OFF5TH.COM** and click right arrow to bring report in, then select Run Report on bottom left of screen then on next screen,  **Export** icon> Export

**DM FILE:**

* In the I drive the workflow Datamart file is saved down in the following path:

I:\Merch Ops\Daily Workflow Report\O5

* Download zip file for today’s date **O5\_DM\_WORKFLOW\_RPTYYYYMMDD.xls.zip**

**\*\*\*\*We don’t do this anymore!!\*\***

**Combined NOS Report**

1. Open combined NOS file
2. On column BS (WORKFLOW\_EXCEPTION\_TYPE) filter for blanks ONLY.
3. Then scroll over to column AO (SVS\_COLOR\_CODE) and copy entire column to new tab. Highlight from row 2 down. Remove duplicates. View count number at bottom right and subtract 1. This number populates the below sentence in the daily email.

Today’s total Colors Not on Site is 3,879 colors (please note that at present a % total is not currently available)

Write down number and close out.

**Summary Chart & Workflow Report Details**

* OPEN THE O5 DAILY WORKFLOW TEMPLATE:

I:\Merch Ops\Site Operations & Improvements\Saks Direct Site Operations\Work Flow\Master Templates\O5 TEMPLATE

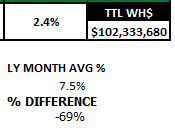
* **FILE NAME: O5\_All\_Banner\_Daily\_Workflow\_2019**
* FROM THE BIT REPORT - Open attachment and copy all data beginning from Cell D11-F22
* Go back to O5 Daily Workflow Template and paste data on yellow highlighted **Ttl\_Inv** tab starting in cell B4
* From O5\_DM\_WORKFLOW\_RPT copy all information (INCLUDING HEADERS) starting at Column A (PRODUCT) to Column CC (CATALOG\_CODE) and select all information in sheet for these columns
  1. On **DM\_Data** tab, paste data starting in cell A6 on the O5 Daily Workflow Template
* On **Details – Products** tab, click 1st **Clear Content,** thenmiddle light blue button 2nd **Paste** and wait for data to populate, then click black button 3rd **Paste Special** button to paste data as values.
* Click on “NOS Breakdown Chart” tab, this should now have populated the Products portion of the chart.
* Once macro has already completed, save as to the below path with today’s date as an “xlsx” file (not macro). Does not need to be read only

I:\Merch Ops\Site Operations & Improvements\Saks Direct Site Operations\Work Flow\Master Templates\O5 TEMPLATE\O5 WIP Daily

* 1. THIS WILL BE USED AS A WIP FILE, AS THE OTHER FILE WAS TOO BIG AND WOULD CRASH.
  2. **NAME:** O5\_MM.DD.YY\_All\_Banner\_Daily\_Workflow\_FINAL\_VH.xlsx
* On the Details Products Tab you will need to manually update:
* Rework\_Status (column BE): “Re-Work: Complete Fur Attributes”,
* Workflow Exception Type (column BG): “0”
* Update Current Workflow Status (column BH) to “Awaiting Complete Copy Attributes”
* Update Current Team (column BI) to “Sample Management”
* \*\*\*\*NOS Percentages can be found in the trend tab (look at combined %)
* FOR RIGHT NOW UNTIL DHAVAL GIVES UPDATES
  1. These are items that merchants need to flag for web; see steps:
  2. Filter on Active\_PIM=Yes, ReadyforProd\_PIM =Yes, Current Workflow Status=Workflow complete **or** Not in PIM workflow
  3. Manually Change Current workflow status= Not Flagged for eCOM and Current team= Merchants
  4. Unfilter

**Inactive UPC/ Additional Color Sizes Report**

1. Open **DM\_O5\_OH\_INACTV\_UPC** file
   1. Copy all data, minus the first Header row
2. On the UPCs tab paste as values the data you copied from **DM\_O5\_OH\_INACTV\_UPC**
3. Scroll over to columns team owner and Dupes removed (AR AND AS) and highlight + copy formulas in row 1 in red.
4. Click into cell AP3 and right click and paste as Formulas (3rd icon). USE CNTRL V. CNTRL shift down on Seasons to confirm.
5. Click on “NOS Breakdown Chart” tab, this should now have populated the Additional Colors/Sizes portion of the chart.
6. Go to the NOS breakdown chart tab and update the email with the summary chart information – total NOS $, % and difference
   1. If it’s the start of a new month update the LY month AVG % (7.5% in the ex below):



* 1. ADD THE % DIFFERENCE TO THE EMAIL:

1. Today’s total Not on Site is **$2,416,978**or **2.4%** of total Saksoff5th.com inventory ($102M); **-69%** to LY July Avg (7.5%)
2. Click “save” keep open.
3. Close **DM\_O5\_OH\_INACTV\_UPC**

**Workflow File for Teams**

1. Copy workflow-team file XX.XX.18\_Daily\_Workflow\_Report\_O5 saved in the following path:

*I:\Merch Ops\Site Operations & Improvements\Saks Direct Site Operations\Work Flow\Master Templates\O5 TEMPLATE*

1. Paste in the following path and open, **password**: ecom678

Path: I:\Merch Ops\Daily Workflow Report\O5

1. From the WIP file you have saved, copy all values from the Daily Dash sheet and paste as values into the file for teams.
   1. \*column AC on new file is conditional formatting based on the NOS target for O5
   2. COPY AND PASTE TODAY’S DATE AS VALUES.
      1. Cntrl copy the date and cntrl alt v.
2. In the WIP file, unfilter and copy all data from the “Details-Products” tab starting at C8:BR8 and down. (UNFILTER NOW)Paste as special values in blank workflow template tab Details.Cntrl alt v=paste as values.
3. In the WIP file select and copy all data from the “UPCs” tab starting at A3:AP3 and down. Paste as special values in blank workflow template tab Inactive UPC-New Color.
4. Delete extra column AQ, dupes.
5. Save
6. PDF of Daily Dash tab. Click “Save As” in the same path as above with same file name but as a PDF file.
   1. HIGHLIGHT/SELECT CHART AND GO TO PAGE LAYOUT 🡪 PRINT AREA 🡪 SET PRINT AREA 🡪 SAVE AS 🡪 SAVE AS A PDF
7. ATTACH PDF TO EMAIL
8. Copy the summary chart from NOS Breakdown Chart tab (WIP file) and paste as a picture into word, once it's in word expand the chart so it's larger. Then copy it into the email, once it's ready to be sent. When the teams click on the picture it will expand to the size it was in word.
9. Upload excel file into Google drive HBC Digital Ops Reports 🡪 Daily Workflow Report 🡪 O5

**Sending the Email;**

1. Update date in Subject line
2. Send to O5 Internal Distro
3. Change from my email to distro
4. Divide last year’s monthly average/today’s average
5. For the NOS Chart, copy into a word doc in Landscape layout, paste onto email as original size
6. Upload the team’s file to I:\Merch Ops\Daily Workflow Report\O5
7. Then attach this file to the email as g drive.
8. Attach pdf.

**Daily Product Counts**

1. Open latest **Daily Product Counts** report at path below:

I:\Merch Ops\Site Operations & Improvements\Saks Direct Site Operations\Work Flow\6. Daily Item Counts\O5

* 1. Copy last weeks excel file and paste into folder with updated date

1. Open each day’s cognos email one by one (search O5 RPT items in your email)
   1. **Subject**: **O5 Items On Site Report**
   2. Open **O5 Items On Site** **Report** file
2. Click into **Data** tab and scroll down to last row with data
3. In next blank row, enter today’s date into column A (ex. 7/12 – Excel will convert to proper date)
4. Copy all data, minus the first Header row
5. Go back to **Daily Product Counts** report and paste data into column B next to today’s date
6. Copy cell with today’s date in it and paste in column A down to bottom of data (ensure when you paste that the date remains the same)
7. Click into **Final\_Draft** tab and unhide hidden rows to show today’s date
   1. Hide all dates up to end of month
8. Hide all future dates.
9. Leave previous week up,
10. -enter the date for last Friday. Go to that Friday and copy and paste all numbers (not %) as values. For those numbers and all after up until today
11. WTD: In the blue numbered rows, press F2 and update
    1. -First one WTD to include last Friday and Saturday data
    2. -Second WTD update to use this weeks data (Sunday- Thursday)
12. For this weeks blue numbers, only have formula go to Thursday
13. Update MTD if still in the same month as last week, update the formula to include last week’s Friday + Saturday and this week
    1. **MTD IS BASED ON THE FISCAL CALENDAR MONTH**
14. Hide last weeks data, change first WTD to say Last week (AVG)
15. \*For the end of the month, update the first month to date and then hide it.
16. For the second month to date that will be shown, only show up to this weeks data. Delete all data after that.
17. Update the WTD\*\*\* values to include the average and/or sum for Total Products on Site, New Products Published\*, Products with New Inventory on Site\*\*, Products Through/Dropped off Site values
18. Save
19. Click on **Final\_Draft** tab and hold down the **Ctrl** key and click on **For PDF** tab.
20. 13. File 🡪 Save As 🡪 Save as PDF in the below path
    1. **I:\Merch Ops\Site Operations & Improvements\Saks Direct Site Operations\Work Flow\6. Daily Item Counts\O5**
    2. File name: Daily\_Product\_Count\_Report\_O5\_MM.DD.YY.pdf

**External Workflow Report**

1. Open NOS Dashboard with password hbc123
   1. I:\Merch Ops\Site Operations & Improvements\Saks Direct Site Operations\Dashboard
2. Go to O5 NOS tab
   1. Fill out data from today’s WIP file
3. Go to O5 YoY tab and make sure data looks correct. Ensure month and quarter are updated properly. For a new month, =TEXT(H7,"mmmm") in H8 on YoY chart.
4. Open blank excel sheet
   1. Move o5 yoy tab and daily dash tab to the new file
   2. (daily dash first)
5. Set print area
6. Format in bottom right corner
7. Move blue lines over
8. PDF save the blank doc
9. Daily dash tab- format button in corner and zoom out
10. Ctrl click both tabs and
    1. I:\Merch Ops\Daily Workflow Report\O5
11. Attach PDF to email and the daily product count pdf