

Logging In

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Logging In

1. Always use Google Chrome to login to o9

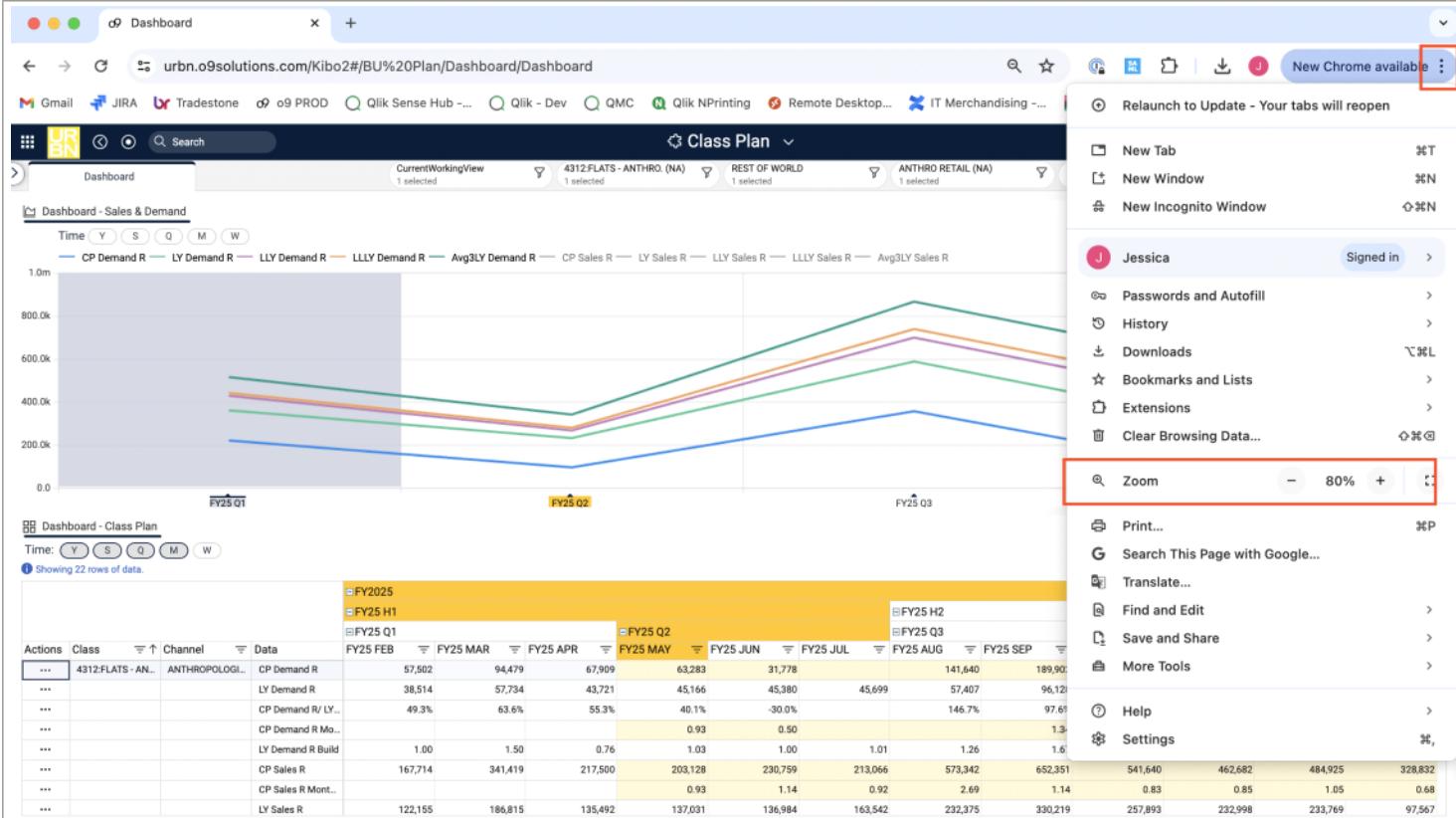


2. Use this link to access : <https://urbn.o9solutions.com/>

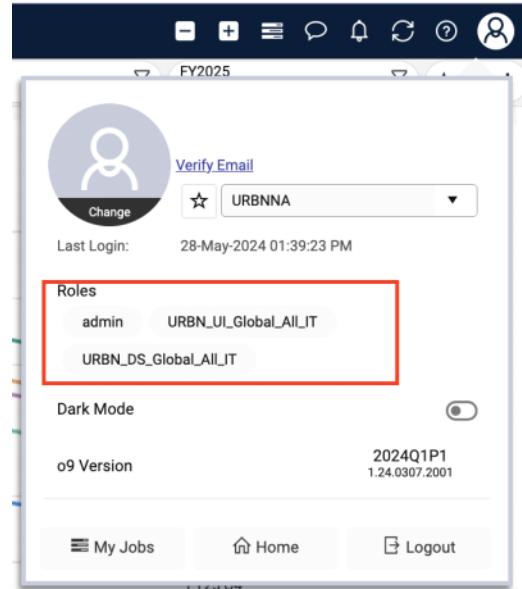
1. System Availability - o9 is expected to be available to users 8AM - 11:30PM Mon-Sat, 7PM-11:30PM Sunday

Tips & Tricks

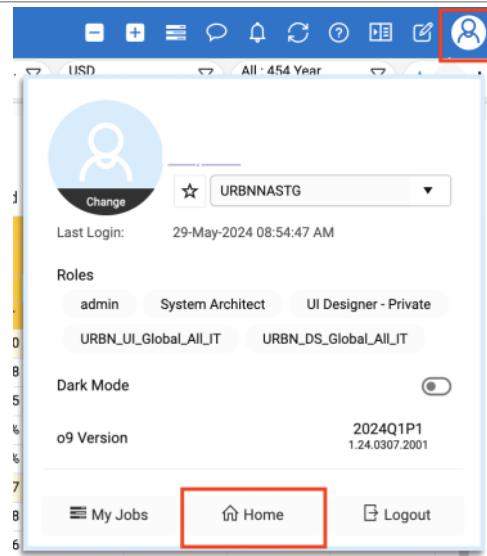
1. Use the zoom functionality in Chrome to maximize the space on the screen, recommendation is 80%



2. If you have issues with access within the tool, check the roles assigned to your user in the profile section



3. Set a home page in o9 so every time you navigate to the link, it takes you to your most commonly used page! Navigate to the page you want to set as your home page, then open up the profile section in the top right corner and click **Home**



Terminology

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Navigation Terminology

- **Workspace:** Workspaces are configured to support various planning activities such as Brand Plan, Division Plan, Class Plan, etc. A Workspace contains different Page Groups, Pages, Tabs, and Widgets which tie up a workflow to enable planning.
- **Page Groups:** Each workspace can contain sets of information in Page Groups.
- **Pages:** Each Workspace or Page Group can include multiple layers of information known as Pages, where Planners can execute their planning.
- **Tabs:** Each Page may contain Tabs within a page and breaks down the page into planning activities, such as Sales & Demand and Markdown & Margin.
- **Widgets:** Each Tab or Page may contain Widgets within, including a grid where you can see your plan data.
- **Filters:** The planner can alter the filters according to their requirements.
- **Layout:** The layout button can be used to manipulate rows/columns and make data fields visible/invisible.

The screenshot illustrates the O9 Planning Platform interface with several key components highlighted:

- Workspace:** On the left, a sidebar labeled "Workspace" contains links to "Brand Plan", "Division Plan", "Class Plan", "Daily Division Plan", "Attribute Plan", "Admin Data Management", "Data Hierarchy", "My Workspace", "Online Meetings", "My Documents", and "My Views".
- Page Groups:** A blue box highlights the "Brand Plan" section under "Page Groups".
- Pages:** A purple box highlights the "Summary", "Dashboard", and "Approval Status" pages under "Brand Plan".
- Tabs:** A green box highlights the "Sales...", "Mkd...", and "Inv & ..." tabs within the "Summary" page.
- Widget:** A yellow box highlights the main data grid titled "Brand Plan".
- Filters:** A blue box highlights the filter bar at the top of the grid, showing dimensions like "URBN OUTFL", "URBN RETAIL(NA)", "REST OF WORLD", and time periods "FY24, CY23".
- Favorites:** A red box highlights the "Favorites" icon in the top right corner.
- Layout:** An orange box highlights the "Layout" button in the top right corner, which is also shown as a blue box in the "Additional ways to filter" callout.
- Additional ways to filter:** A blue box with an arrow points to the "Layout" button, indicating it's another way to filter data.

The central data grid displays sales data across various dimensions:

Action	Channel	Version Name	Data
...	URBN OUTFL	CurrentWorkin...	LY Sales R
...	URBN OUTFL	CurrentWorkin...	LY Sales R
...	URBN OUTFL	CurrentWorkin...	LY Sales R Build
...	URBN OUTFL	CurrentWorkin...	LY Sales R Build
...	URBN OUTFL	CurrentWorkin...	LY Sales R Comp

Specific data points from the grid:

Period	Value
FY24, CY23	\$68,770,986
FY24, CY23 S1	\$67,490,765
FY24, CY23 S2	\$70,922,487
FY24, CY23 Q1	\$87,568,217
FY24, CY23 Q2	\$51,168,623
FY24, CY23 Q3	\$61,680,704
FY24, CY23 Q4	\$46,622,148
FY25, CY24	0.98
FY25, CY24 S1	1.04
FY25, CY24 S2	1.24
FY25, CY24 Q1	0.59
FY25, CY24 Q2	1.24
FY25, CY24 Q3	0.77
FY25, CY24 Q4	1.25
FY25, CY24 Comp	0.76

Filtering

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Page Filters (Scope Filters)

Page Filters allow you to set the parameters of the page you are viewing - this filter will apply to all Tabs/Widgets on that page and carry through to other pages as you navigate

The screenshot shows the o9 Brand Plan dashboard with several filters highlighted by red boxes:

- Top Filter Bar:** A red box highlights the top navigation bar where filters like "004:ANTHROPOLO..." (selected), "ANTHRO RETAIL (...)" (selected), "REST OF WORLD" (selected), "CurrentWorkingView" (selected), and "FY21_CY20 Sep" (selected) are applied.
- Approval Status Filter:** A red box highlights the "Approval Status" section with dropdowns for "Item", "Sales Domain", "Location", "Version", and "Time". The "Time" dropdown is set to "454 Month".
- Company Filter:** A red box highlights the "Company" section with a dropdown for "ANTHROPOLOGIE (NA)".
- Channel Filter:** A red box highlights the "Channel" section with three dropdowns: "ANTHROPOLOGIE (NA)-DIRECT", "ANTHROPOLOGIE (NA)-OTLT", and "ANTHROPOLOGIE (NA)-RETAIL".
- Sub-Channel Filter:** A red box highlights the "Sub-Channel" section with three dropdowns: "ANTHRO DIRECT (NA)", "ANTHRO HOME OUTLET (NA)", and "ANTHRO RETAIL (NA)".
- Table Data:** A red box highlights a table showing sales data for CY24. The table includes columns for Item, Sales Domain, Location, Version, Time, and various financial metrics. One row is selected, showing values for ANTHROPOLOGIE (NA).
- Time Filter:** A red box highlights the "Time" section at the bottom of the screen, which includes dropdowns for "Year", "Season", "Quarter", and "Month". The "Month" dropdown is set to "FY21_CY20 Sep".

Bulk Filters

Utilize Bulk filtering to filter within a widget on the screen

You can copy/paste lists from excel into o9 to filter by

Dashboard - Class Plan

Time: Y S Q M W

Showing 66 rows of data.

Actions	Department	Class	Channel	Data	FY25 Q1	FY25 Q2
...	0831:FP FOOTWEAR (..)			CP Demand R	83,758	
...				LY Demand R	112,168	
...				CP Demand R / LY % Chg	-25.3%	
...				CP Demand R Monthly...	1.07	
...				LY Demand R Build	0.34	
...				CP Sales R	160,110	
...				CP Sales R Monthly Bu...	0.90	
...				LY Sales R	234,066	
...				LY Sales R Build	0.45	
...				CP Sales R/LY % Chg	-31.6%	
...				CP Sales R Comp/LY C...	-32.1%	
...				CP MkdTot R % Sales R	184.6%	
...				LY MkdTot R % Sales R	35.1%	
...				CP MkdTot R	295,592	
...				CP GM R	809	
...				LY GM R	112,597	
...				CP GM %	0.5%	
...				LY GM %	48.1%	
...				CP IMU % COGS	65.04%	
...				LY IMU % COGS	61.58%	

Use the Filters dropdown at the top of the widget to **Clear Filters** or **Toggle Filters** to turn the filters off within the table

preprod-urban.09solutions.com/Kibo2#/BU%20Plan/Dashboard/Dashboard

Gmail JIRA Tradestone o9 PROD Qlik Sense Hub ... Qlik - Dev QMC Qlik NPrinting Remote Desktop... IT Merchandising ... Kibana STEP Prod All Bookmarks

Dashboard - Class Plan

Time: Y S Q M W

Showing 44 rows of data.

Actions	Department	Class	Channel	Data	FY25 Q1	FY25 Q2	FY25 H1	FY25 Q3	FY25 Q4
...	0831:FP FOOTWEAR (..)	(All)	(All)	CP Demand R	3,734,384	1,310,411	5,044,796	3,168,785	4,223,95
...				LY Demand R	4,860,164	3,369,096	8,229,260	8,965,449	11,602,58
...				CP Demand R / LY % Chg	-23.2%	-61.1%	-38.7%	-64.7%	-63.6%
...				CP Demand R Monthly...	0.94	0.83	0.91		
...				LY Demand R Build	0.31	0.69	0.31	2.66	1.29
...				CP Sales R	1,845,749	738,744	2,584,492	1,956,507	2,405,471
...				CP Sales R Monthly Bu...	1.02	0.83	0.96		
...				LY Sales R	2,690,063	1,949,973	4,640,036	5,501,879	6,641,284
...				LY Sales R Build	0.30	0.72	0.30	2.82	1.21

Use the **Manage Value Filters** to filter columns based on a specific value of a metric

Download Export Pivot Filters Layout Local Edit

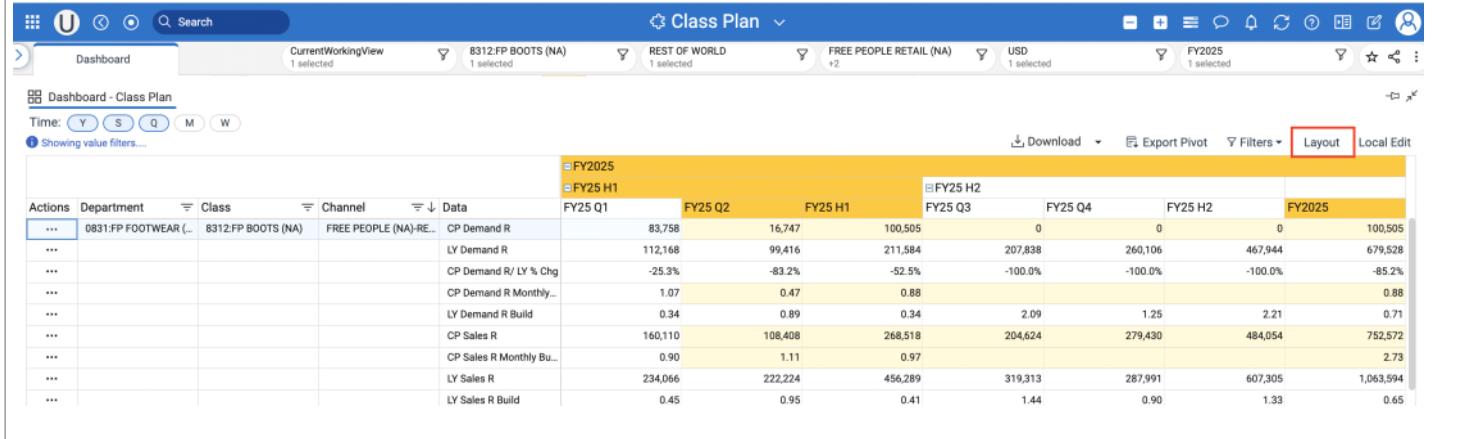
FY25 Q4	0	100,505
207,838	260,10	679,528

Customizing Views

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Layout Button

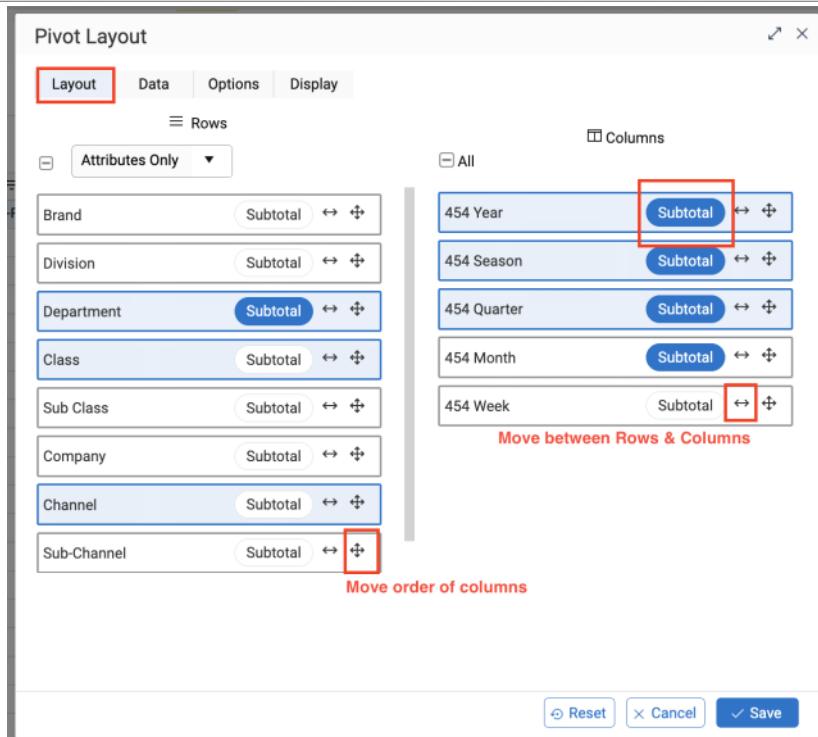
The **Layout** button can be used on any widget/view to customize the metrics - once you customize you can save and share favorites ([Favorites Sharing](#))



This screenshot shows a dashboard titled "Class Plan". The dashboard header includes various filters and a "Layout" button highlighted with a red box. Below the header is a grid of data for the fiscal year 2025 (FY2025). The grid has columns for Data (FY25 Q1, FY25 Q2, FY25 H1, FY25 Q3, FY25 Q4, FY25 H2, FY2025) and rows for different categories like CP Demand R, LY Demand R, etc.

Layout Tab - Managing Dimensions

- Fields with a blue highlight are showing as displayed in the widget, the white fields are available to choose
- Select a field to display by clicking it once to turn it blue
- Move the order of the fields or move the fields between rows and columns to see data differently in the widget
- Click on the subtotal field to turn it blue in order to turn on a subtotal for the lower level fields

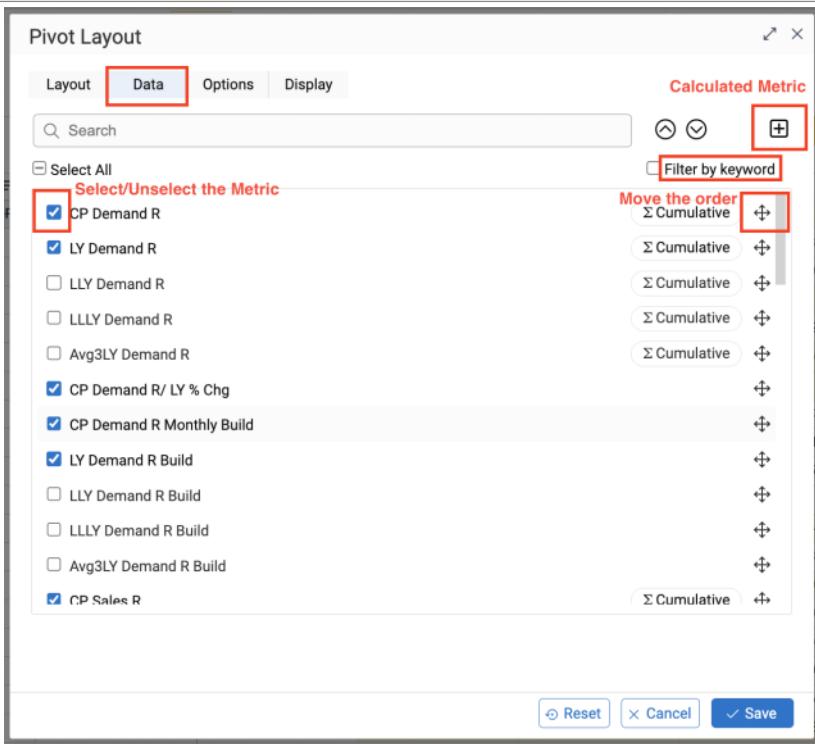


This screenshot shows the "Pivot Layout" dialog box. The "Layout" tab is selected. The "Rows" section on the left lists dimensions: Brand, Division, Department, Class, Sub Class, Company, Channel, and Sub-Channel. The "Columns" section on the right lists time dimensions: 454 Year, 454 Season, 454 Quarter, 454 Month, and 454 Week. Subtotal buttons are shown for each dimension. Red boxes highlight the "Subtotal" buttons for "454 Year", "454 Week", and the "Sub-Channel" dimension. A red arrow points from the "Sub-Channel" subtotal to the "Move between Rows & Columns" text below. Another red arrow points from the "Sub-Channel" subtotal to the "Move order of columns" text below. Buttons at the bottom include "Reset", "Cancel", and "Save".

In order to get a subtotal to display correctly, you should bring in a higher level in the hierarchy and create the subtotal at that level. For example if you want a subtotal of all Classes, you could bring in the Department row and add the subtotal on department.

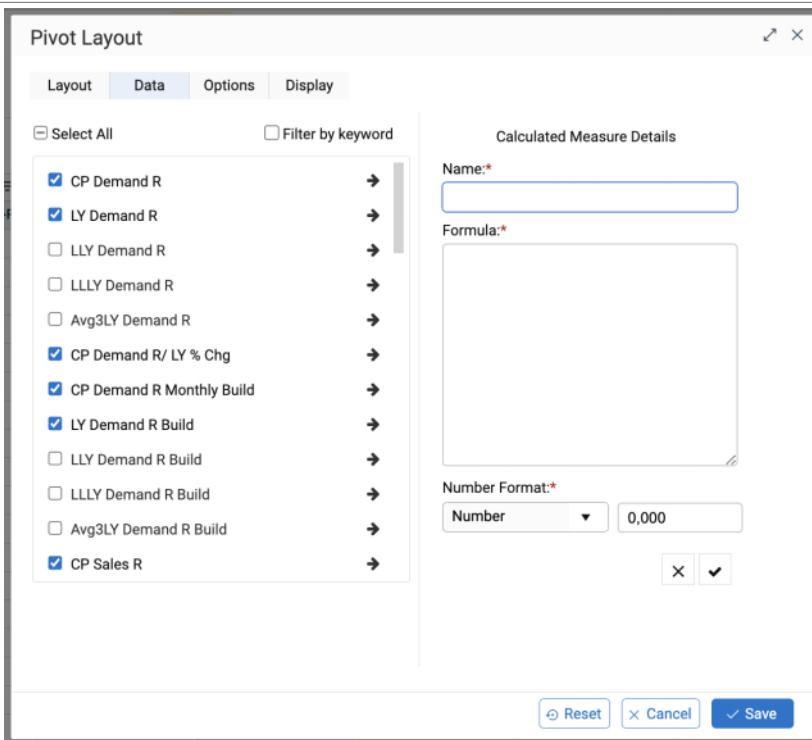
Data Tab - Managing Metrics & Calculated Metrics

- Check the box for any metrics you want displayed in the widget, uncheck any metrics that should not display
- Use the arrows to drag metrics in a different order
- Metrics can be searched in the search bar, use Filter by keyword to shorten the list to just metrics that were searched for
- Use the + button to create a calculated metric that can be added to the view



Use the + button to create a calculated metric that can be added to the view

- Enter a name for the metric
- Create the formula by using the arrow button to move a metric into the formula box
- Set the format for the metric and then click Save

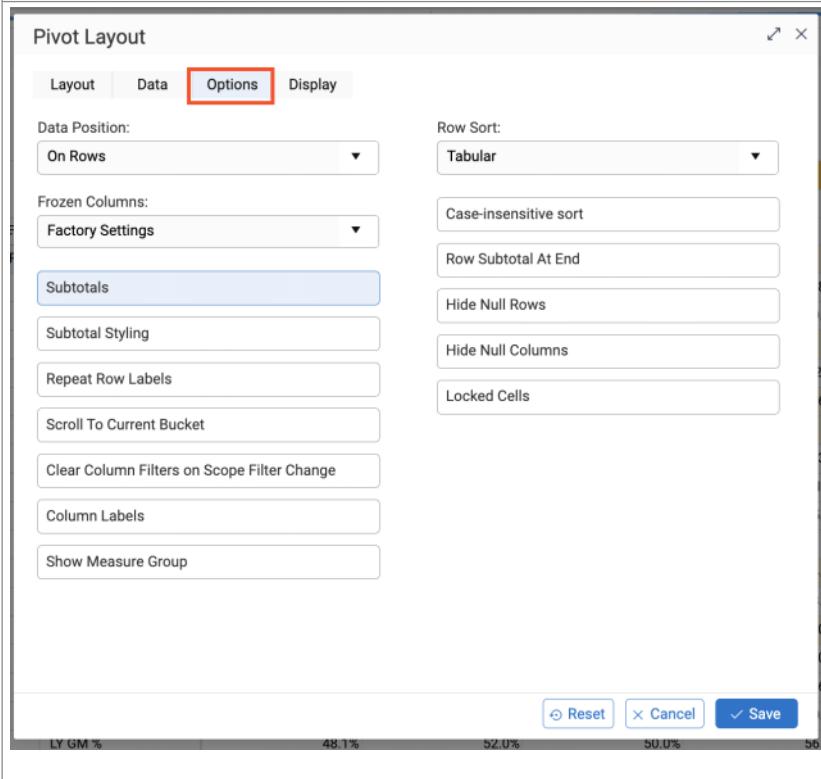


In order to prevent a divide by 0 error, anytime you are performing division it's best practice to use the SAFEDIVIDE function. This is utilized by SAFEDIVIDE(Numerator, Denominator).

Example - Instead of entering CP Sales R/LY Sales R, enter SAFEDIVIDE(CP Sales R, LY Sales R)

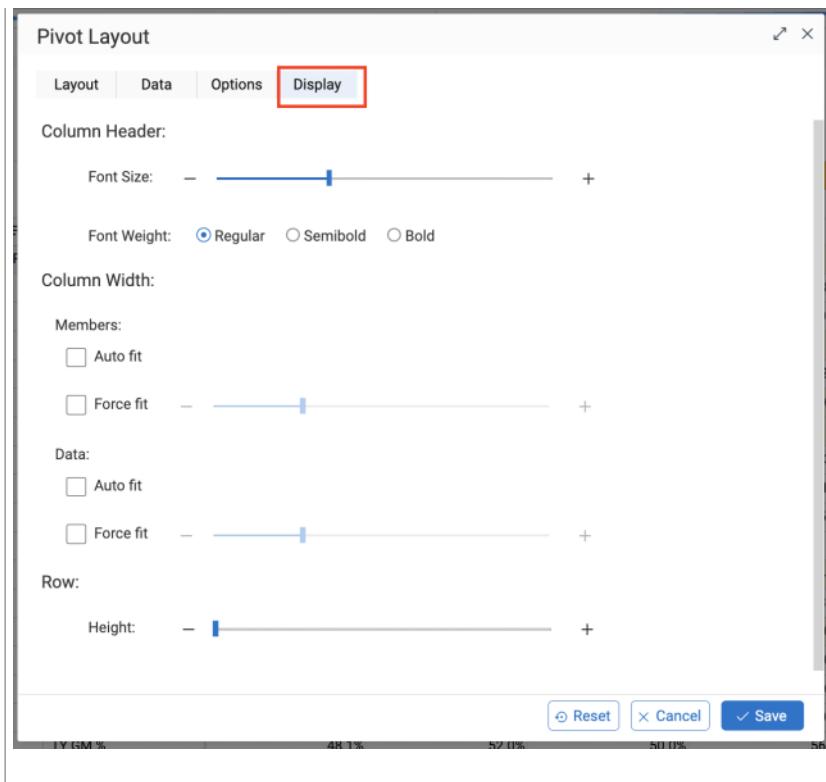
Options Tab - Managing Visuals

- Data Position - Move the metrics between displaying on rows or on columns.
- Subtotal Styling - Used to bold the subtotal columns & rows
- Repeat Row Labels - Show the dimensions on every metric row
- Scroll to Current Bucket - always scroll automatically to the current time period if you select historical time periods
- Locked Cells - filter view/widget to display only cells that have been locked



Display Tab - Managing Font & Size

- Adjust the size of columns and rows
- Change the font size and style



Favorites & Sharing

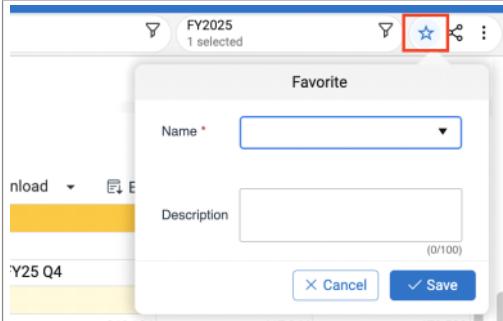
Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Favorites

- Favorites allow you to save a page view with specific filters & layouts
 - If you commonly plan certain intersections, name and save your favorites
 - Favorites are specific to each Page/Tab

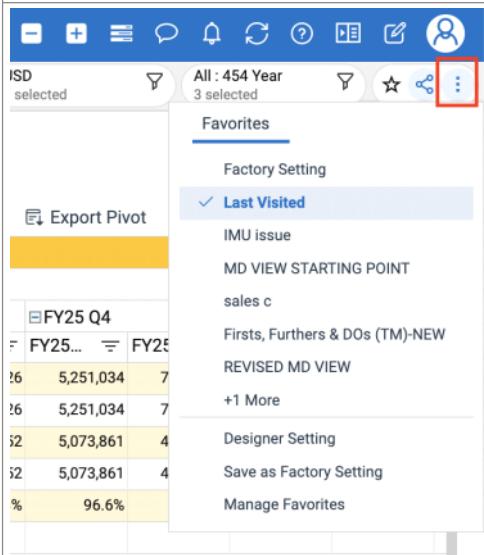
Saving a Favorite

Once you have your view configured and filtered the way you like, click on the STAR, name your favorite, hit save!



Navigating & Managing Favorites

Navigate to the correct page/tab where your favorite is saved, use the 3 vertical dots and chose which favorite to open



Use **Manage Favorites** to get the full list of favorites from the current page - open, edit, share or delete from this window

A screenshot of a Qlik Sense dashboard. At the top, there's a toolbar with various icons. Below it, a search bar shows 'All : 454 Year' and '3 selected'. A context menu is open over a pivot table titled 'FY25 Q4'. The menu has sections for 'Favorites' and 'Last Visited'. Under 'Last Visited', several items are listed: 'IMU issue', 'MD VIEW STARTING POINT', 'sales c', 'Firsts, Further & DOs (TM)-NEW', 'REVISED MD VIEW', '+1 More', 'Designer Setting', 'Save as Factory Setting', and 'Manage Favorites'. The 'Manage Favorites' option is highlighted with a red box.

A screenshot of the 'Manage Favorites' dialog box. It lists eight items in a table format:

Default	Name	Description	Digest
★	Factory Setting	Factory Setting	false
★	Last Visited	System saved last visited state	false
★	IMU issue	Feb IMU 67.33 vs. 67.45 in TXT	false
★	MD VIEW STARTING POINT	MD VIEW STARTING POINT	false
★	sales c	sales c	false
★	Firsts, Further & DOs (TM)-NEW	Firsts, Further & DOs (TM)-NEW	false
★	REVISED MD VIEW	REVISED MD VIEW	false

On the right side of the table, there are four buttons: 'Open', 'Share', 'Edit', and 'Delete'. The 'Edit' button is highlighted with a red box.

To find a list of all your current favorites on all pages/tabs use the My Workspace page - use the refresh button to reload the list before using this view

A screenshot of the 'My Workspace' page. At the top, there's a search bar and a 'Favorites' tab which is highlighted with a red box. Below the tabs, there's a section titled 'MANAGE FAVORITES' with the sub-instruction 'Showing all favorites for current selection.' On the right, there's a 'Show Online Meetings' button with a refresh icon, also highlighted with a red box. The main area displays a table of favorites:

	Name	Description	Workspace	Page	View
<input type="checkbox"/>	Sales Rekey	Sales Rekey	BU Plan	Planning Workflow	Sales & Demand Planning
<input type="checkbox"/>	CP populate view	CP populate view	Validation - IT	Class Plan Validation	Class Plan Validation
<input type="checkbox"/>	Receipt validation qlik	Receipt validation qlik	Validation - IT	Class Plan Validation	Class Plan Validation
<input type="checkbox"/>	Test Sharing	Test Sharing	Validation - IT	Class Plan Validation	Class Plan Validation
<input type="checkbox"/>	OO Qlik Validation	OO Qlik Validation	BU Plan	Planning Workflow	Inventory & Receipts Planning

Sharing a Favorite

Once you have created a favorite, click on the share button and add the users/groups you want to share with

Once you share a favorite with someone:

- If you make updates to the favorite , they will see the changes reflected in their copy
- If they want to save a favorite with different filters they can save with a different name

The screenshot shows a software application window with a toolbar at the top containing various icons. Below the toolbar, a status bar displays "Selected" and "FY2025 1 selected". A red box highlights a share icon in the toolbar. The main area contains a grid with columns labeled "FY25 Q4", "FY25 H2", and "FY2025". A modal dialog box titled "Test Favorite : Share with people and groups" is open in the center. The dialog lists several users who have been shared with, including Bharath Ranganathan, Pradheep Lakshmanaswamy, piyush pradhan, nirjan s, and Nakshatra Gopi. It also shows the last share date and time: "Last shared on 29-05-2024 02:58:41 PM". At the bottom of the dialog are "Cancel" and "Share" buttons.

Collaboration

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Collaboration

There are many tools within o9 to collaborate with your team to avoid the use of excessive emails and provide a more efficient way to communicate:

- Comments/Posts
- Tasks

Comments

Communicate with your team about certain values on particular views

- Right click on cells to provide specific comments and view existing cell comments.
- Notify team members around insights, shaping decisions, etc.
- Attach reference docs.
- Plan intersections will be tagged when you right click on a specific planning cell.

Actions	Class	↑ Data	FY25 FEB	FY25 MAR	FY25 APR	FY25 M
	4160 MASKS (NA)	CP Demand R				
		LY Demand R				
		LLY Demand R		541		
		LLLY Demand R	118,614	11		
		CP Sales R				
		LY Sales R				
		LLY Sales R		433		
		LLLY Sales R		330,076	37	

The screenshot shows the o9 interface with a pivot table. A context menu is open over a cell in the table, with the 'Add Cell Comment' option highlighted. The comment creation dialog is open, showing a text area with 'test comment' typed in. Below the text area, there is a list of tags: '4160 MASKS (NA)', 'FY25 MAR', 'CurrentWorkingView', 'USD', 'REST OF WORLD', 'ANTHRO RETAIL (NA)', 'ANTHRO DIRECT (NA)', and 'CP Demand R'. There are also 'Notify Users...' and 'Attach' buttons, with 'Attach' being highlighted. At the bottom of the dialog are 'Discard' and 'Post' buttons.

Once your comment has been posted, you will see the cell is flagged in the upper right corner which indicates the comment against it. You can click on the tag to open the comment directly.

The flag will be red if the comment is **unread** and black if the comment has been **read**.

You can mark the comment as red/unread by clicking the check box to the left of the comment box and hitting Mark As:

The screenshot shows the o9 interface with a comment post. A red arrow points to the 'Mark As' dropdown menu, specifically the 'Read' option, which is highlighted with a red box. The comment text is 'test comment'. Below the comment are 'Comment (0)' and 'Like (0)' buttons.

Turn on 'Pulse Indicator' in the Actions column of the pivot table to easily identify intersections with comments. The word bubble will be filled in dark for unread comments and filled in white for read comments. Note that this will only display when the table is filtered at the sub class level.

UR Search

Class Plan

IMU & AUR Planning

CurrentWorkingView 1 selected 4160.MASKS (NA) 1 selected REST OF WORLD 1 selected

Enable 'Pulse Indicator' to see intersections with comments. This will only work at subclass level.

Red tag = unread comment
Black tag = read comment

Filled in = unread comment
Not filled in = read comment

Posts

Posts are the same as comments but not tagged to a specific cell - use to communicate information between team members

In the top toolbar, you can choose the icon to create a post (red box below):

- Notify team members around insights, shaping decisions, etc.
- Attach reference docs.

Search

Class Plan

Markdown & Margin Planning

Time: Y S Q M W

Actions Class Channel

4160.DRESSES.. ANTHROPOLOGIE (NA)

Create Post

Topic...

Add Tag...

Tasks

Notify Users...

Notify only on WebUI Attach

Tasks

Create & Assign tasks to particular users to track workload

In the top toolbar, you can choose the icon to create a task (red box below)

Within a task you can:

- Assign a user to complete the task
- Add Followers who need to be informed
- Attach external documents
- Select a priority – High, Medium, Low
- Set a due date

Create New Task...

State: Open Title: * Due Date: * 05/29/2024

Assignees * | Followers Add Assignees... Private Restricted

Description | Attach Priority: H M L

B I U A Description Editor

Tags Add Tags... Cancel Save

		Layout	Local Edit
7/25 H2	7/25 Q3		
5...	FY25...	FY2	
7,466,751	7,799,601		
7,466,752	7,124,493		
2,405,885	6,193,374		
2,405,885	6,193,374		
32.2%	79.4%		
32.2%	86.9%		
1,024,660	4,867,132		
1,024,660	4,867,132		
13.7%	62.4%		
13.7%	68.3%		
1,024,660	3,518,980		
1,024,660	3,518,980		

My Views

To manage all posts/comments & tasks you were tagged or notified in, navigate to the My Views Workspace --> Pulse/Alerts Tab

- My Workspace
- Online Meetings
- My Documents
- My Views**
- Tenants
- Users
- User Management

Pulse/Alerts

Task My Jobs Admin Notifications Alert Subscription Scenario Manager My Action Buttons

All Folders Tasks (1) IT Folder Planner Comments (2)

HelpContent TenantHelpContent Online Meetings

o9 Solutions - Planner Comments 6 days ago o9 Solutions Tag HTML URI APP Followers Task Comment (0) Like (0)

o9 - TenantHelpContent 6 days ago o9 Solutions Tag html app URI Followers Task Comment (0) Like (0)

Does this look ok to you? - Planner Comments 9 days ago I updated the sales - ok? REST OF WORLD CurrentWorkingView FY25 MAY +4 more Tag Comment (0) Like (0)

Use the Task tab to manage open and overdue tasks:

My Views

Pulse/Alerts Task My Jobs Admin Notifications Alert Subscription Scenario Manager My Action Buttons

Create New Task... State Open Title * Due Date * 05/30/2024

Assignees * I Followers Add Assignees... Private Restricted

Description | Attach Priority H M L

B I U A Font Size Font Color Font Style Font Weight Font Family Text Alignment Text Direction Text Transform Text-decoration

Tags Add Tags... x Cancel ✓ Save

Total Tasks 0 Priority High 0 Medium 0 Low 0 Total Open 0 Priority High 0 Medium 0 Low 0 Total In Progress 0 Priority High 0 Medium 0 Low 0 Total Overdue 0 Priority High 0 Medium 0 Low 0 Total Closed 0 Priority High 0 Medium 0 Low 0

Editing & Save / Discard

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Editing, Saving & Discard

Editable cells will be displayed in yellow. Cells displayed in white cannot be edited.

After making edits in the editable cells, **Save** can be used to save any changes that were made.

If you do not wish to save your changes, select the **Discard** button. This will discard all changes since the last Save.

The screenshot shows a software interface titled "Class Plan". At the top, there are navigation buttons for "Search", "Save" (highlighted with a red box), and "Discard". Below the header, there are various filters and dropdown menus. The main area is a data grid with columns for "Actions", "D...", "C...", "Sub...", and "Data". The "Data" column contains numerical values. Some cells in the "Data" column are highlighted in yellow, indicating they are editable. The grid is organized by fiscal years (FY2025, FY25 H1, FY25 Q1, FY25 Q2, FY25 MAY, etc.) and months (FEB, MAR, APR, Q1, Q2, etc.).

Shortcuts

In order to do a quick Sum, Avg, Min, Max within o9, highlight consecutive cells using the shift button and see the calculated values display at the top left of the table

The screenshot shows the same "Class Plan" interface as the previous one. A selection box highlights three cells in the first row of the data grid. A status bar at the bottom left displays the "Selection Count: 3; Sum: 2,720,112; Average: 906,704; Minimum: 729,760; Maximum: 1,047,803". The data grid structure is identical to the first screenshot, showing hierarchical levels like FY2025, FY25 H1, etc.

Local Edit

Open a ticket at support.urbanout.com or email o9support@urbanout.com for help!

Local Edit

Local Edit can be used to edit multiple cells at once before recalculating.

When making edits to many cells or pasting in large sets of values, this feature can be used to cut down on calculation time because you do not have to wait for the model to recalculate after editing each cell.

After making changes, when you submit and close, remember you still need to Save.

The screenshot shows the 'Brand Plan' application interface. At the top, there's a navigation bar with tabs like 'Summary', 'Dashboard', 'Approval Status', 'Brand Planning', and 'Reconciliation Summary'. Below the navigation bar, there's a search bar and some filters. The main area displays a grid of data with various columns and rows. A red box highlights a specific section of the grid, specifically the rows for 'ANTHROPOLO...' and 'BP Sales R'. The 'Local Edit' button is located in the top right corner of the grid area. The data grid has several columns with numerical values and percentage signs, such as '\$256,765,748', '87.82%', and '3.32%'. The entire grid is enclosed in a red border.

Export to Excel

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Export to Excel

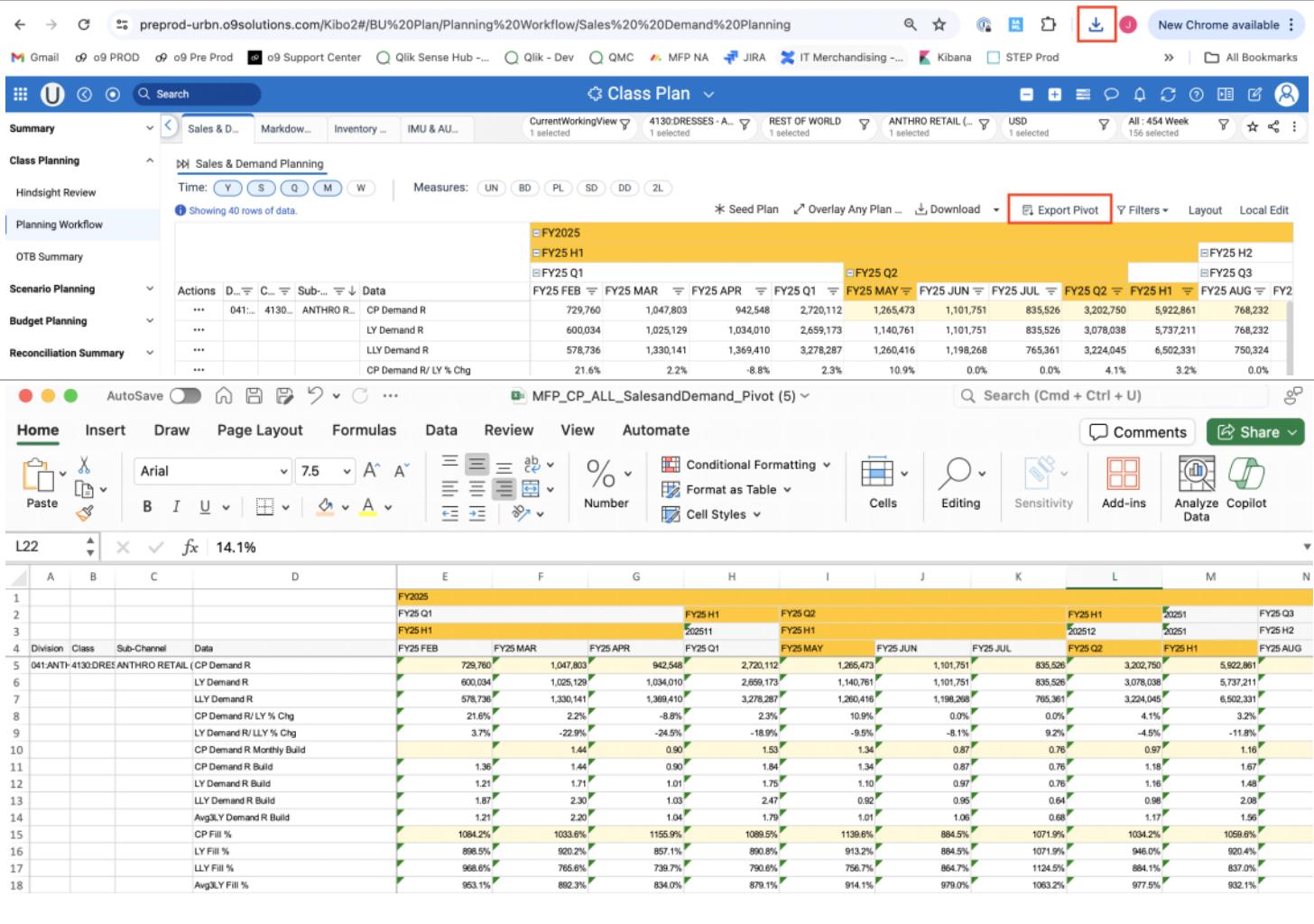
This functionality allows you to export your plan into excel as a read only version for reporting or viewing

Export Pivot

Use the Export Pivot Button to export the Pivot Table Widget/View into excel - formatted to match the screen you are working in. The download will appear in the top of your chrome toolbar and the excel document can be opened from there.

The export will match the layout you have setup on this specific view (columns/rows/metrics)

All values export as text and must be converted to numbers if needed



The screenshot shows a Qlik Sense dashboard with a Pivot Table titled "Sales & Demand Planning". The Pivot Table is organized by Division, Class, Sub-Channel, and Time period (FY2025, FY25 H1, FY25 Q1, FY25 Q2, FY25 H2, FY25 Q3). The data includes various metrics such as CP Demand R, LY Demand R, and CP Demand R/LY % Chg. A red box highlights the "Export Pivot" button in the top right corner of the Pivot Table interface. Below the dashboard, a screenshot of Microsoft Excel shows the same data structure, indicating that the export preserves the pivot table's layout and data.

Download

Export the metrics and data that you are currently viewing - this is not formatted to match the screen but will give all the values that are displayed

The filters in the popup window inherit from your scope filters but can be changed within the window

Save As Download - Similar to Favorites, if you download certain intersections frequently you can name and save your download filters for easy access when needed.

Download Favorites - Download the metrics and data that you are currently viewing using previously saved download filters

Brand Plan

004:ANTHROPOLOGIE REST OF WORLD CurrentWorkingView FY21_CY20 Sep +64

Summary Dashboard Approval Status Brand Planning

Download As * EXCEL

Brand Select All 004:ANTHROPOLOGIE (NA)

Channel Select All ANTHROPOLOGIE (NA)-DIRECT ANTHROPOLOGIE (NA)-OTLT ANTHROPOLOGIE (NA)-RETAIL

Country Group Select All REST OF WORLD UNITED STATES

Version Name * Select All CurrentWorkingView

454 Month Select All FY21_CY20 Sep FY21_CY20 Oct FY21_CY20 Nov FY21_CY20 Dec FY21_CY21 Jan

Save As Download Cancel

Download Favorites

FY25_CY24		FY25_CY24 S2	
FY25_CY24 S1			
CY25_CY24 S1	CY25_CY24 S2	FY25_CY24 S1	FY25_CY24 S2
\$30,130,200	\$325,198,898	\$765,337,178	\$284,571,907
\$30,130,280	\$335,198,898	\$765,337,178	\$283,274,089
10,545,339	\$176,437,234	\$410,982,573	\$157,756,852
48,738,394	\$187,625,137	\$436,363,531	\$164,922,629
4.69%	8.70%	6.41%	7.25%
11.0 m	15.3 m	26.3 m	11.4 m
200.7 m	143.7 m	344.4 m	127.5 m
85.58%	81.42%	83.80%	80.85%
\$4,807,755	(\$48,129,943)	(\$92,937,698)	(\$41,642,619)

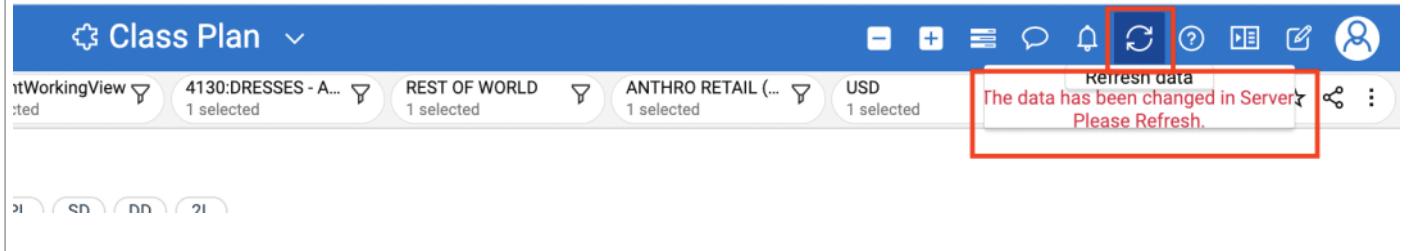
Data Refresh

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

On Screen Data Refresh

If multiple people are working in the same filters or batch jobs were submitted to run, the data on the screen may change while you are working and need to be refreshed.

When you hover over the refresh data in the top toolbar, there will be a notification if data has changed - the refresh data button can be used to display the most up to date data on the screen



Notifications

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Notifications

Notifications can be found under the bell icon in the top toolbar - if you have a new notification there will be a red number on top of this icon displaying how many unread notifications you have!

Notifications are sent when the following happens:

- A batch job completes (Seeding, Overlay, Locking)
- A favorite is shared with you
- A post/comment/task is shared

The screenshot shows the o9 platform interface. At the top, there is a navigation bar with various icons and dropdown menus for 'REST OF WORLD' and 'ANTHRO RETAIL'. Below the navigation bar, there is a search bar and some filters. On the left, there is a sidebar with a yellow header 'FY25 Q2' and a table showing financial data for FY25 Q1, FY25 MAY, and FY25 JUN. The table includes columns for values and percentages. On the right, a red box highlights the 'Notifications' panel. The notifications list shows several items, each with a small icon (blue star, green checkmark), the recipient's name and email, the date updated, and a 'View More' link.

FY25 Q1	FY25 MAY	FY25 JUN
2,720,112	1,265,473	1,101,751
2,659,173	1,140,761	1,101,751
3,278,287	1,260,416	1,198,268
2.3%	10.9%	0.0%
-18.9%	-9.5%	-8.1%

Notifications

- piyush.pradhan@o9solutions.com has shared a view fav... Updated 30-May-2024 10:08:28 AM View More
- kparker@anthropologie.com has shared a view favorite M... Updated 30-May-2024 10:08:28 AM View More
- Seed Budget Class Plan - Execution completed success... Updated 01-May-2024 11:10:55 AM View More
- Seed Budget Class Plan - Execution completed success... Updated 01-May-2024 11:10:59 AM View More
- Seed Budget Class Plan - Execution completed success... Updated 01-May-2024 11:10:27 AM View More
- Seed Budget Class Plan - Request submitted successfu... Updated 01-May-2024 11:09:50 AM View More
- Seed Budget Class Plan - Request submitted successfu... Updated 01-May-2024 11:09:48 AM View More

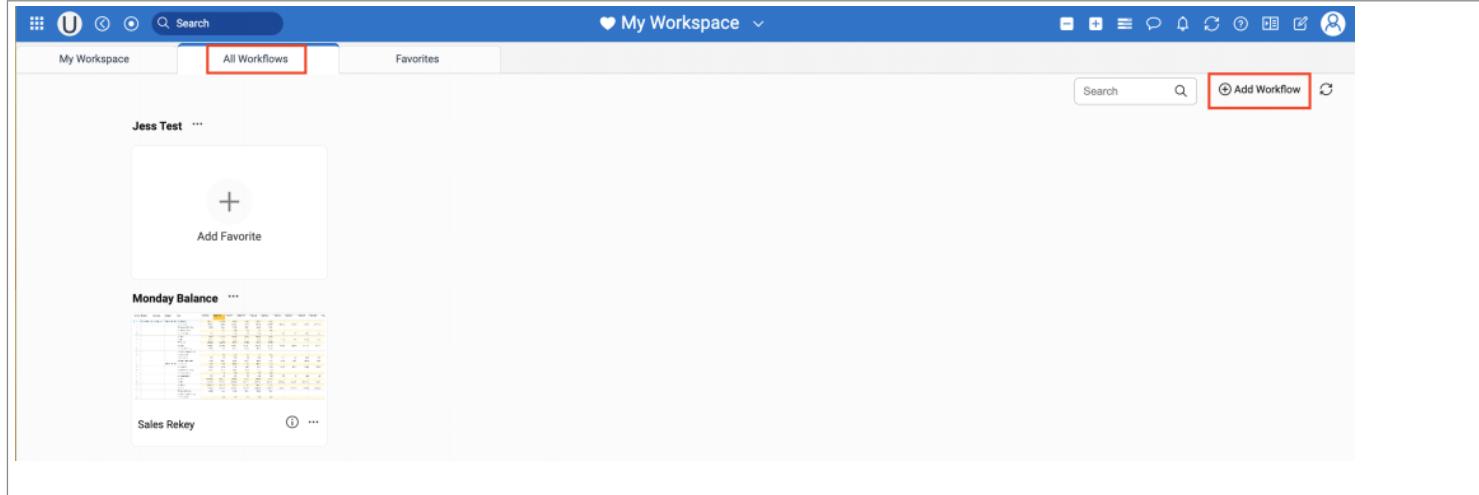
Workflows

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Workflows

Use workflows to navigate quickly between favorites/views for commonly used combinations

Workflows are combinations of saved favorites that allow you to move between different pages/tabs/views to complete a full planning workflow

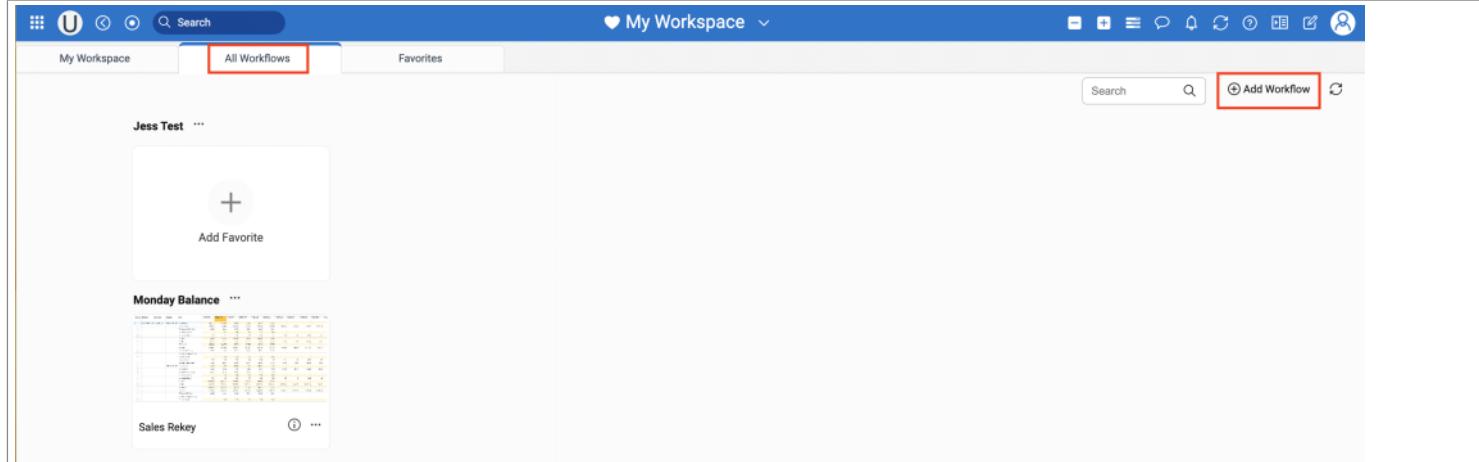


The screenshot shows the Urban Outfitters planning system's 'My Workspace' interface. At the top, there are tabs for 'My Workspace', 'All Workflows' (which is highlighted with a red box), and 'Favorites'. Below the tabs is a search bar and an 'Add Workflow' button (also highlighted with a red box). The main area contains two workflow cards: 'Jess Test' (empty) and 'Monday Balance' (a grid-based view for sales rekeying).

Create New Workflows

Use the **My Workspace** tab to create new workflows with the Add Workflow button or use the **Manage Workflow** button in the top taskbar as a shortcut - use the Add workflow button

Give the workflow a name

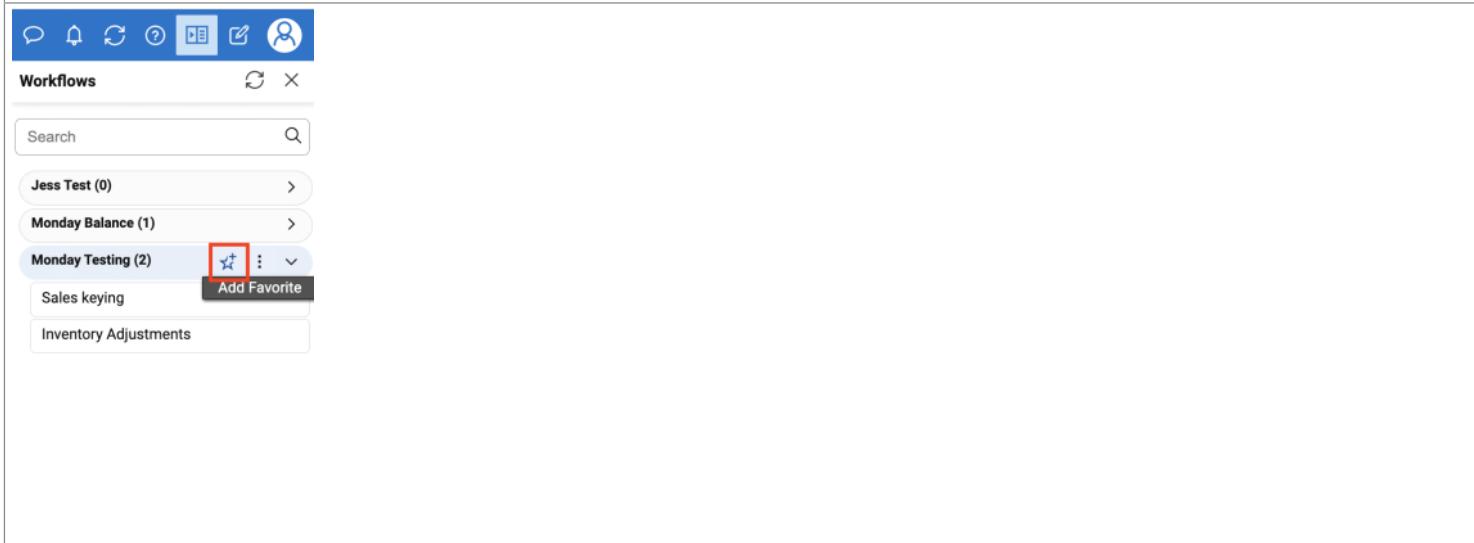


This screenshot is identical to the one above, showing the 'My Workspace' interface with the 'All Workflows' tab selected. A new workflow card titled 'Jess Test' is currently being created, indicated by a large plus sign icon and the 'Add Favorite' text below it.

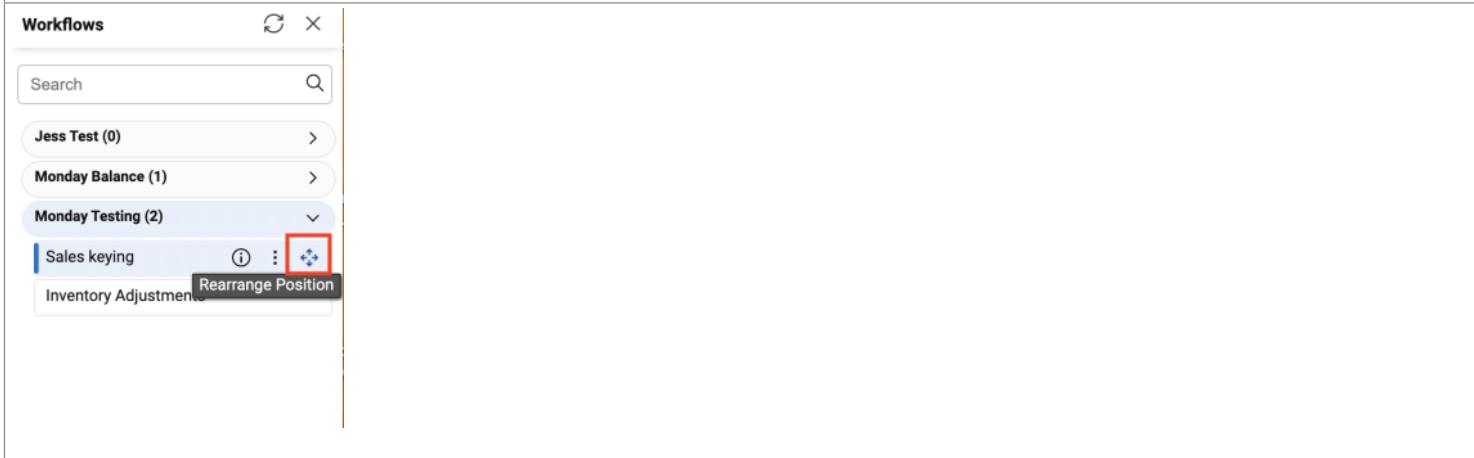


Adding/Managing Favorites

Navigate to the first favorite you want to add to the workflow, once there, bring up the workflow toolbar and use the Add Favorite button



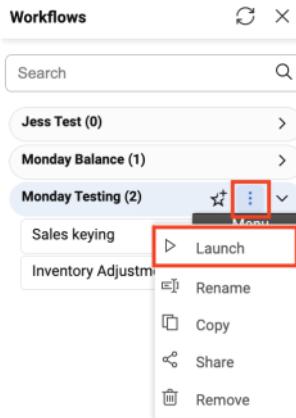
The order can be changed of the favorites by using the arrows to move a favorite up or down



Launch a Workflow

Launching a workflow will allow you to move through the different favorites using a small toolbar at the bottom as a shortcut

Launch the workflow by going to the menu and choosing **Launch**



This will bring up a blue tool bar at the bottom of the screen

Use the Left/Right arrows to move between different favorites or the drop down to go to a specific favorite

A screenshot of the Class Plan interface. At the top, there's a search bar and a title 'Class Plan'. Below the title, there are several filters: 'Sales & ...', 'Markdo...', 'Inventor...', 'IMU & ...', 'CurrentWorkingView' (selected), '4130:DRESSES - A...', 'REST OF WORLD' (selected), and 'ANTHRO RETAIL (... selected). In the middle, there's a grid of data for 'FY2025' and 'FY25 H1'. The bottom of the screen features a blue toolbar with several buttons: 'Monday Testing (2)', 'Sales keying', 'Inventory Adjustments', 'Monday Testing', 'Sales keying', 'EXIT', and a set of left/right/up/down navigation arrows. The 'Monday Testing (2)' button is highlighted with a red box.

Sharing a Workflow

Workflows can be shared to other team members, using the Menu button --> Share, then key in team members to share to

The screenshot shows the Monday.com Workflows interface. In the top navigation bar, there are icons for message, bell, refresh, help, and user profile. Below the bar, the title "Workflows" is displayed, followed by a search bar and a "X" button. A list of workflows is shown: "Jess Test (0)", "Monday Balance (1)", "Monday Testing (2)" (which is selected and has a red box around its three-dot menu), "Sales keying", and "Inventory Adjustment". A context menu is open over "Monday Testing (2)", with options: "Launch", "Rename", "Copy", "Share" (which is highlighted with a red box), and "Remove".

Monday Testing : Share with people and groups

Read ▾

Cancel Share

Cal Ami Carlin
ACarlin@anthropologie.com
Logan Campbell
LCampbell@anthropologie.com
Hisako Carmichael
HCarmichael@urbanoutfitters.com
Kaitlin Concannon
KConcannon@freepeople.com
Angie Caldwell
acaldwell2@urbanoutfitters.com

Freeze/Respread/Lock Cell

- ★ The Freeze Total, Re-spread, and Lock Cell functionalities will allow users to quickly update data selectively based on their requirements. These options are available to use in the pivots by right clicking on a cell.

Function	Description
Freeze Total	<p>Use the Freeze Total function to hold the 'subtotal' value of an editable measure at the higher level. When an edit is made at the lower level, the other values at the sub level will adjust to match the locked total.</p> <ul style="list-style-type: none"> - Only editable measures can be frozen - Measures cannot be frozen at the lowest level (only higher levels can be frozen) - You can also collapse a member attribute and freeze totals, instead of enabling subtotals - This will not work on measures that allow negative values <p>1. Freeze Q1 Total</p> <p>2. Update Feb & Apr Totals</p> <p>3. Q1 Total Holds and Mar rebalances</p> <p>all weeks under month will freeze after updates to month</p> <p>⚠️ Freeze Total cannot be used for metrics that allow negative values (e.g. Sales). The error message below will display when trying to use this function on these metrics.</p> <p>ERR-GC-006 Query Execution Failed with the following Errors: 6: Support for freezing a measure cell is limited to a measure of aggregation type [SUM] only when spreading type is [DistributeToLeaves]. Measure: [BU Ttl Sls Rtg]. Aggregation type: [SUM], spreading type: [DistributeNegative]</p>
Respread	<p>Use the Re-spread function to disaggregate the current aggregated value at a higher level cell to the lower levels based on a selected re-spread measure. This will update the initial spread by redistributing data based on the chosen measures ratio to the total.</p> <p>Note: If you used the 'Respread' button and then later updated a measure at a total level it will override the respread using the original disaggregation. The re-spread is a one-time activity and will not hold until retriggered using the respread button</p> <ul style="list-style-type: none"> • Only editable measures can be respread • The lowest level values cannot be re-spread (only higher levels can respread) • You can also collapse a member attribute and re-spread, instead of enabling subtotals <p><u>Example:</u> I want to respread my CP Demand R based on the shape of my CP Sales R.</p>

Actions		Division	Class	Sub...	Data	FY25 JUL				
						FY25 WK 23	FY25 WK 24	FY25 WK 25	FY25 WK 26	FY25 JUL
...	081:FP APPAR...	8144:FP ENDL...	FREE PEOPLE...		CP Fill %	114.6%	190.9%	109.2%	202.3%	144.4%
...					CP Demand R	5,186	3,909	5,487	2,857	17,439
...					CP Sales R	5,944	7,464	5,990	5,780	
...					CP Sales R Reg	5,329	7,328	5,773	5,279	
...					CP Sales R FP	4,217	4,296	5,190	5,117	
...					CP Sales R Pro...	1,112	3,032	583	162	
...					CP Sales R MD	615	136	217	501	

Actions		Division	Class	Sub...	Data	FY25 JUL				
						FY25 WK 23	FY25 WK 24	FY25 WK 25	FY25 WK 26	FY25 JUL
...	081:FP APPAR...	8144:FP ENDL...	FREE PEOPLE...		CP Fill %	114.6%	190.9%	109.2%	202.3%	156.1%
...					CP Demand R	4,117	5,170	4,149	4,003	17,439
...					CP Sales R	4,719	9,871	4,529	8,099	27,219
...					CP Sales R Reg	4,231	9,692	4,365	7,397	25,684
...					CP Sales R FP	3,348	5,682	3,924	7,170	20,124
...					CP Sales R Pro...	883	4,010	441	227	5,561
...					CP Sales R MD	488	180	164	702	1,534

Lock Cell

Use Lock Cell function on editable cells to prevent any further modifications from being made.

- Only editable measures can be locked
- Locking Cell at an aggregated level will lock all lower levels

Actions		Class	↑ Data	Locked Cell	FY26 Q1			
					FY26 FEB	FY26 MAR	FY26 APR	FY26 Q1
...	0110:CASUAL BLOUSES (NA)		CP Sales R	500	500	500	500	1,500
...			CP Sales R Reg % Sales R	50.0%	100.0%	100.0%	83.3%	
...			CP Sales R MD	250	0	0	250	
...			CP Sales R MD % Sales R	50.0%	0.0%	0.0%	16.7%	
...			CP Sales R Reg	250	500	500	1,250	

Actions		Class	↑ Data	FY26 Q1					
				FY26 FEB	FY26 WK 01	FY26 WK 02	FY26 WK 03	FY26 WK 04	FY26 FEB
...	0110:CASUAL BLOUSES (NA)		CP Sales R	125	125	125	125	125	500
...			CP Sales R Reg % Sales R	50.0%	50.0%	50.0%	50.0%	50.0%	
...			CP Sales R MD	63	63	63	63	250	
...			CP Sales R MD % Sales R	50.0%	50.0%	50.0%	50.0%	50.0%	
...			CP Sales R Reg	63	63	63	63	250	

Actions		Class	↑ Data	FY26 Q1					
				FY26 FEB	FY26 WK 01	FY26 WK 02	FY26 WK 03	FY26 WK 04	FY26 FEB
...	0110:CASUAL BLOUSES (NA)		CP Sales R	125	125	125	125	125	500
...			CP Sales R Reg % Sales R	75.0%	75.0%	75.0%	75.0%	75.0%	
...			CP Sales R MD	31	31	31	31	125	
...			CP Sales R MD % Sales R	25.0%	25.0%	25.0%	25.0%	25.0%	
...			CP Sales R Reg	94	94	94	94	375	

Update Sales R MD % and Sales R Total holds

Time: Y S Q M W

Measures: UN BD PL SD DD 2L

Showing 5 rows of data. Please refresh the pivot for potential impact...

See...

Office Hours Recordings

Friday, February 28, 2025 10:50 AM

- [Collaboration - Comments, Posts, and Tasks - 02/28/2025](#)

Comp Factor

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

WP Comp Factor

- This page allows admins and key stakeholders to maintain and update all WP comp factors for both Sales & Inventory measures
- The comp factors will be maintained separately by each plan type. There will be individual tabs/reports for Brand Plan (BP), Division Plan (DP), and Class Plan (CP).
- The comp factors should be entered as a percentage.

Copy WP Comp Plan

Allows you to copy WP Comp Plan to a Scenario Plan

Copy WP Comp Plan

Copy WP Comp Plan

Source Version * CurrentWorkingView

Brand * Select All 004:ANTHROPOLOGIE (NA)

Country Group * Select All REST OF WORLD

Target Version * R&D Product Planning Scenario-1

Sub-Channel * Select All ANTHRO RETAIL (NA) +2 More

Planning Month * Select All FY25 FEB +47 More

Set Comp Factor Default Value

Allows you to apply the comp factor to your plan

Set Comp Factor

Set Comp Factor Default Value

BD Comp Factor

- This page allows admins and key stakeholders to maintain and update all BD comp factors for both Sales & Inventory measures
- The comp factors will be maintained separately by each plan type. There will be individual tabs/reports for Brand Plan (BP), Division Plan (DP), and Class Plan (CP).
- The comp factors should be entered as a percentage.

Copy BD Comp Plan

Allows you to copy BD Comp Plan to the Working Budget Plan

Copy BD Comp Plan

Copy BD Comp Plan

Source Version *	<input type="text" value="CurrentWorkingView"/>	Target Version *	<input type="text" value="Working Budget Plan"/>
Brand *	<input type="text" value="Select All 004:ANTHROPOLOGIE (NA) X"/>	Sub-Channel *	<input type="text" value="Select All ANTHR0 RETAIL (NA) X +2 More"/>
Country Group *	<input type="text" value="Select All REST OF WORLD X"/>	Planning Month *	<input type="text" value="Select All FY25 FEB X +47 More"/>

Reset
 Close
 Submit

• Set Comp Factor Default Value
 ○ Allows you to apply the Comp Factor to your Plan
 Set Comp Factor
Set Comp Factor Default Value

VAT

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

VAT %

- This page allows admins and key stakeholders to maintain the VAT factor by Subclass, Subchannel, and Region
- This VAT % will be used in all ExVat measure calculations
- The VAT % will need to be entered as a percentage.

- Copy VAT:

 [Copy VAT](#)

- Set VAT Default Value

 [Set VAT Default ...](#)

Pricing Factor

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Pricing Factor

Exchange Rate

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Exchange Rate

- This page is where admins can set-up or update the currency exchange rates.
- There are separate tabs to maintain your exchange rate for the WP and BD.

- There are 4 different currencies maintained in the system:

- USD
- CAD
- GBP
- EUR

- **USD** is the base currency of planning in o9

- You can change your currency in your scope filters. All retail measures will convert in real time with relevant currency symbols.

The screenshot shows the Admin Data Management interface with the 'WP Exchange Rate' tab selected. The top navigation bar includes 'Admin Data Management', 'CurrentWorkingView 1 selected', 'All: Currency 4 selected', and 'All: 454 Year 4 selected'. The main area displays a table of exchange rates. The columns are labeled 'Actions', '454 Year', '454 Month', 'WP Exchange Rate', 'WP Exchange Rate', 'WP Exchange Rate', and 'WP Exchange Rate'. The rows show currency codes (CAN, EUR, GBP, USD) and their corresponding exchange rates over time (FY25 FEB to JUN). A red box highlights the 'All: Currency' dropdown in the top right, and red arrows point from the currency codes in the table to their respective columns.

Actions	454 Year	454 Month	WP Exchange Rate	WP Exchange Rate	WP Exchange Rate	WP Exchange Rate
...	FY2025	FY25 FEB	CAN	1.342	0.917	0.787
...		FY25 MAR		1.350	0.926	0.791
...		FY25 APR		1.356	0.922	0.788
...		FY25 MAY		1.367	0.932	0.799
...		FY25 JUN				1.000

Number of Stores

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Number of Stores

- This page allows users to set the number of **Sales Stores** and **Inventory Stores** at a subclass, subchannel, country group level.
 - Sales Stores =
 - Inventory Stores =
- These parameters will be used in relevant average store metrics calculations across all the different plan types.

The screenshot shows the Admin Data Management interface with the 'Number of Stores' page selected. The top navigation bar includes the Urban Outfitters logo, a search bar, and tabs for 'Admin Data Management'. Below the header, there are filters for 'CurrentWorkingView' (1 selected), '2110.WEDDING DRESSES (NA)' (427 selected), and 'REST OF WORLD' (1 selected). The main content area has a title 'Number of Stores' and a time filter section with buttons for Y, S, Q, M, and W. A note indicates 'Showing 4 rows of data.' The data grid has columns for Actions, Brand, Channel, Sub-Channel, Data, and months from FY25 FEB to FY25 OCT. The grid contains four rows of data:

Actions	Brand	Channel	Sub-Channel	Data	FY25 FEB	FY25 MAR	FY25 APR	FY25 MAY	FY25 JUN	FY25 JUL	FY25 AUG	FY25 SEP	FY25 OCT
...	004:ANTHROP...	ANTHROPOLOGIE (NA)-DIRECT	ANTHRO DIRECT (NA)	No of Sales Stores	1	1	1	1	1	1	1	1	1
...				No of Inventory Stores	1	1	1	1	1	1	1	1	1
...		ANTHROPOLOGIE (NA)-RETAIL	ANTHRO RETAIL (NA)	No of Sales Stores	46	48	48	50	49				
...				No of Inventory Stores	130	131	137	138	142				

Scenario Management

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Scenario Management

- This page will inform users on the Actualization status of each of the plan types.
- Each plan type will have a separate view/report where users can manage which scenarios will be actualizing.
 - BP Scenario Management (Brand Plan)
 - FP Scenario Management (Financial Plan)
 - D Scenario Management (Division Plan)
 - CP Scenario Management (Class Plan)
 - PAP Scenario Management (Product Attribute)
 - LAP Scenario Management (Location Attribute)
- In each view, users can see each of the scenario versions along with the Last Actualized Date and Last Actualized User. This will track information on the last actualized date as well as the user who triggered the scenario actualization.
- The level of granularity will depend on the plan type you are viewing.

Plan Lock - CPPL

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Plan Lock - CPPL

The Lock is scheduled to run nightly as part of the overnight job schedule. It will run daily at approximately 3AM. It will run based on the parameters filled out in the Admin Data Management workspace. If the parameters are blank, the job will run but nothing will copy to PL. The overnight job will run the same procedure as the Ad Hoc Locking Action Button.

Step 1: Before the night of a lock, planners should review their CurrentWorkingView on the pages within the **Class Plan Workspace > Class Planning Page Group** and confirm that those plans have finished being shaped and are ready to lock.

Step 2: Navigate to **Admin Data Management Workspace > Admin – MFP Page Group > Plan Lock CPPL Page > Plan Lock CPPL View**.

Step 3: Select the intersections that you want to lock by clicking the check boxes. This is called the "CPPL Lock" because it is locking the CurrentWorkingView CP values to PL.

The selection can be done at different levels of the hierarchy. Update the Pivot layout to change the level at which you are selecting. Below shows it being done for the Year at Brand level:

Brand	Data	FY2025
004-ANTHROPOLOGIE (NA)	CPPL Last Processed	
	Check for CPPL Lock	<input type="checkbox"/>

Step 4: When you are finished editing, click "Save".

Step 5: The job will run overnight and copy CP to PL for only those intersections selected in the Admin Data Management workspace.

After the process is completed, time will be captured in CPPL Last Processed metric and the checks will be removed from the intersections so that they can be selected again later. Below shows an intersection after the job has run.

Plan Lock - CPPL

Time: Y S Q M W

Showing 12 rows of data.

When the job runs, a timestamp is entered and the checkmark is removed.

CPPLLockSched... Download ▾

Actions	Brand	Division	Class	Data	FY2025		
					FY25 JUN	FY25 JUL	FY25 AUG
...	001:URBAN OUTFITTERS (NA)	001:WOMEN'S DIVISION (NA)	0111:WOVEN BLOUSES (NA)	CPPL Last Processed	2024-04-16	2024-04-16	<input checked="" type="checkbox"/>
...				Check for CPPL Lock	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...			0112:CUT AND SEW KNITS (NA)	CPPL Last Processed	2024-04-16	2024-04-16	<input type="checkbox"/>
...				Check for CPPL Lock	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...			0114:SWEATERS (NA)	CPPL Last Processed	2024-04-16	2024-04-16	<input type="checkbox"/>
...				Check for CPPL Lock	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

KIP Class Level

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

KIP Class Level

In advance, classes need to be identified as style/color level planning classes or size level planning classes.

This difference determines which workspace the key item plans are done for each particular class.

Size level classes should only be on classes that need to be planned down to the size level, where the size of a style is a different item that is planned separately.

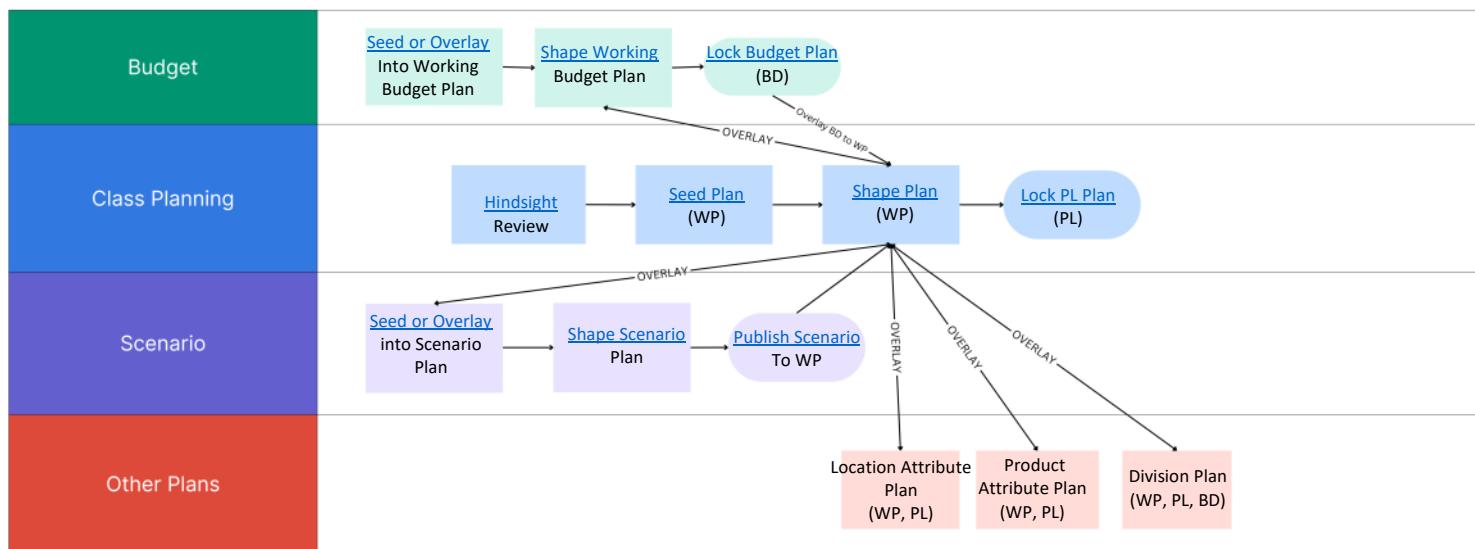
The screenshot shows a software interface titled "Admin Data Management". The main area displays a table titled "KI Class - Style Color Association" with 198 rows of data. The columns are labeled "Class", "KI at StyleColor Level For Class", and "KI at SKU Level For Class". A red callout box points to the top right corner of the table area, containing the text "Filter for the class or classes you need to edit". Another red callout box points to the first two columns of the table, containing the text "Check the box in the first column for Style Level and second column for Size Level". The top navigation bar includes a search bar, various icons, and a user profile icon. The status bar at the bottom shows "CurrentWorkingView 1 selected 0010:W JACKETS/OUTERWE... +111".

Class	KI at StyleColor Level For Class	KI at SKU Level For Class
0001:HOMETAGTEST (NA)	<input type="checkbox"/>	<input type="checkbox"/>
0002:EARRINGSTEST (NA)	<input type="checkbox"/>	<input type="checkbox"/>
0110:CASUAL BLOUSES (NA)	<input type="checkbox"/>	<input type="checkbox"/>
0111:WOVEN BLOUSES (NA)	<input type="checkbox"/>	<input type="checkbox"/>
0112:CUT AND SEW KNITS (NA)	<input type="checkbox"/>	<input type="checkbox"/>
0113:LOUNGE TOPS (NA)	<input type="checkbox"/>	<input type="checkbox"/>
0114:SWEATERS (NA)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
0115:BLAZERS & JACKETS (NA)	<input type="checkbox"/>	<input type="checkbox"/>
0117:HEAVY KNITS (NA)	<input type="checkbox"/>	<input type="checkbox"/>
0118:BASIC LAYERING TOPS (NA)	<input type="checkbox"/>	<input type="checkbox"/>

Class Planning Overview

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Class Planning Process



Navigation

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Class Plan Workspace

The class plan workspace allows you to create, shape and edit your class plan. This plan can be edited at SubClass, SubChannel and week or any of the higher levels above these.

Below is a description of each page group & page that exists in the Class Plan Workspace.

Page Group	Page	Description
Summary		
	Dashboard	This page is intended to be used to review a plan's key metrics. There is a graph to compare demand & sales plans to historical time periods and a pivot table to display high level plan metrics.
	Approval Status	This view shows the approval status and date a plan has been approved, as well as a tab to action the locking of a plan (Locking to PL)
Class Planning		
	Hindsight Review	This page will allow you to look at all historical time periods for key metrics: Sales, Demand, Markdowns, Margin, Inventory & Receipts. This can be used to help determine what time period to seed from.
	Planning Workflow	This page has tabs for each flow of the plan with all relevant metrics on the individual tabs. This workflow should be used for detailed planning and to see specific metrics within an area that don't exist within the summary view.
	OTB Summary	This page allows you to plan most key metrics on a one page view and can be used for editing the plan while visualizing a variety of metrics from different areas.
Scenario Planning		
	Scenario Planning	This page is where you can create a scenario plan and publish a scenario back out to your WP plan version
	Scenario vs WP	This page is used to compare any scenario plan to the current WP plan
Budget Planning		
	Budget Planning	This page is used to edit your working budget plan and to lock it to become the Budget version of the plan.
	Class vs Division Budget	This page allows you to compare the class budget metrics to the division budget metrics in order to reconcile
Reconciliation		
	CP vs BD	This page is a detailed report with all plan metrics to compare between WP and Budget version.
	CP vs PL	This page is a detailed report with all plan metrics to compare between WP and Approved version.
Reporting		
	Reporting	This page can be used as a supplement OTB report

Seeding

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Seeding

The starting point of developing a plan is to seed it with data

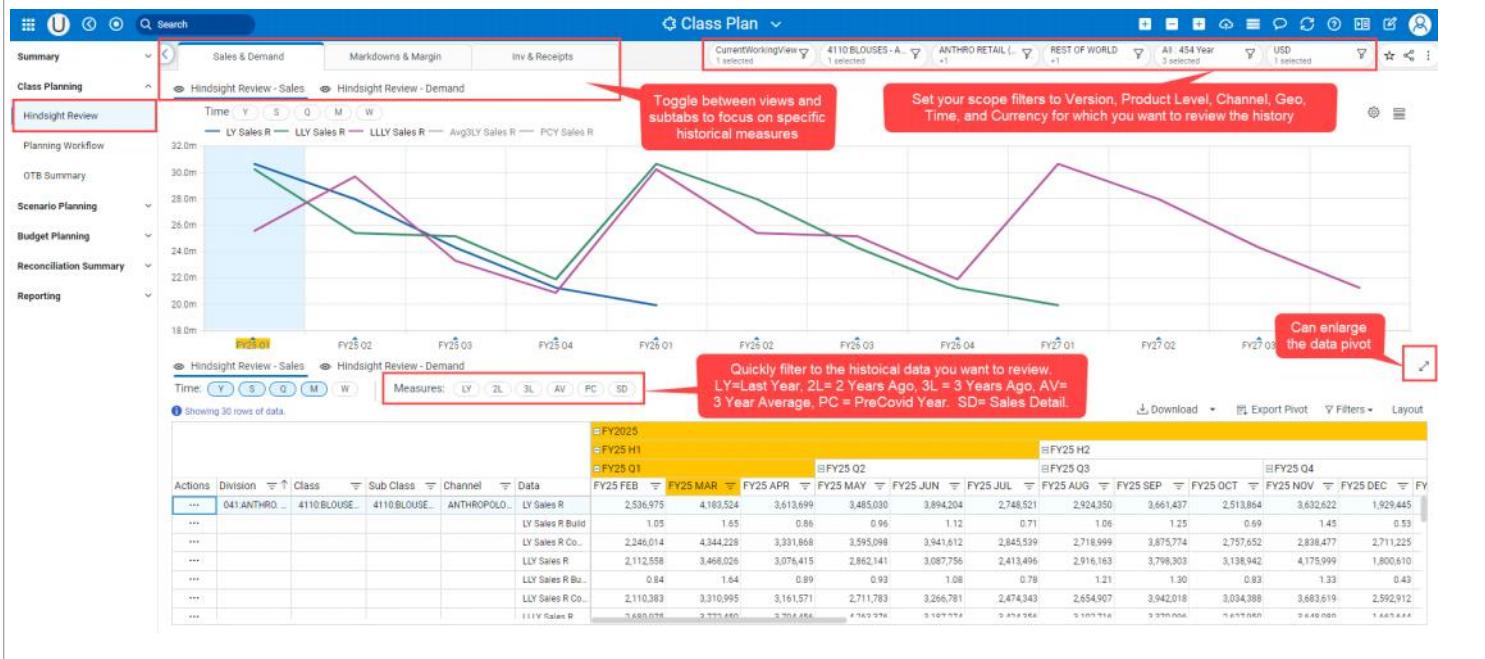
When you are building a new Merchandise Financial Plan, seeding it with data from the past or from a like plan will save time and improve accuracy by inheriting key data instead of building it from scratch. You will inherit seasonality curves, key metrics, and ratios from the selected time frame. It creates the basis used to shape your future plan.

You can choose to seed from History, from a like Product Level, or from the Demand Forecast

Hindsight Workflow

Review historical data by navigating from the **Class Plan Workspace > Class Planning Page Group > Hindsight Review Page**. The "Hindsight Review" page exists for all plan types and all plan types have the same layout. This guide focuses on Class Planning.

Hindsight Review helps planners determine which historical time frame is most appropriate to use as the baseline for their future plan. *Which past year do you think next year will be most like?*



Seeding Workflow

Navigate to **Class Plan Workspace > Class Planning Page Group > Planning Workflow Page > Sales & Demand Planning View** or **Class Plan Workspace > Class Planning Page Group > OTB Summary**

Update your Scope Filters to the time frame you are going to seed with data.

Click on the "Seed Plan" Action Button.

Class Plan

Sales & Demand Planning | Markdown & Margin Planning | Markdown & Margin Planning | Inventory & Receipts Planning | IMU & AUR Planning

Current Working View: 4110 BLOUSES - A... ANTHRO RETAIL... REST OF WORLD FV26 FEB USD 1 selected

Set your scope filters to Version, Product Level, Channel, Geo, Time, and Currency that you want to PLAN.

Seed Plan Action Button

Class Plan for selected (future) time frame is BLANK. It has not been seeded with data.

Action	Division	Class	Company	Channel	Data	Time	Currency
...	041 ANTHRO WOMEN'S DIVISION (NA)	4110 BLOUSES - ANTHRO (NA)	ANTHROPOLOGIE (NA)	ANTHROPOLOGIE (NA)/DIRECT	CP Demand R	FY2026	USD
...					LV Demand R	FV26 H1	
...					CP Demand R/LV % Chg	FV26 Q1	
...					CP Sales R/Build	FV26 FEB	
...					LV Demand R/Build	FY26 MAR	
...					CP Sales R	1.42	
...					LV Sales R	57.6%	
...					CP Sales R/LV % Chg	1.43	
...					CP Sales R/Comp/LV % Chg	57.7%	
...					CP Sales R/Build	2.468.821	
...					LV Sales R/Build	1.44	
...					LV Sales R Reg/Sales R	2.448.379	
...						1.45	
...						88.5%	
...						98.6%	
...						295.445	
...						386.686	
...						1.60	
...						1.24	

Fill out parameters in the "Seed Plan" Action Button Pop Up

Best Practice: Filter in your Scope Filters! Only update the seed source in the Pop-Up window. Let the other parameters populate from your scope filters. This prevents confusion and user error.

Select Seed Source

- PCY
- PCY
- Like Class
- Seed From Like Class

Select Seed Source will default to BLANK. You can choose to seed from 4 historical time frames or you can choose to seed from a like class.

Historical Time Frames:

- LY = Last Year
- LLY = Last Last Year (2 Years Ago)
- LLLY = Last Last Last Year (3 Years Ago)
- Avg3LY = Average of last 3 years

You cannot seed from PCY = PreCovid Year.

If you select "Seed from Like Class" as the Seed Source, Class options will become available to select under "Like Source Class". Select the class you want to COPY DATA FROM.

Department, Class, SubClass, Sub-Channel, CountryGroup, and Planning Month will populate with the data in your Scope Filters. You can update this in the pop-up window by hitting the "+", but this is not recommended.

Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."

Seed Plan

Request submitted successfully. Please wait for the notification.

X Close

Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.



Refresh o9 to see updated data.

Review your updated Class Plan. Now that the plan has been seeded, the CP values will no longer be blank. They will match the data from which you seeded.

Tips & Tricks - FAQ 1

- Do only the measures I have pulled into my view seed?

No! All seeding measures will seed no matter what measures you have pulled into the Pivot Table in *Class Plan Workspace > Class Planning Page Group > Planning Workflow Page > Sales & Demand Planning View*. The only measures that do not seed are RTV & Inv Adj.

It does not matter which measures you have pulled into this pivot table. All measures will seed.

Layout

Can update measures in the pivot in Layout > Data.

Tips & Tricks - FAQ 2

Can I seed all my classes with LY at one time or do I have to do them individually?

Multiple classes may be seeded at one time by selecting multiple classes in your Seed Plan Action Button Parameters.

This is true for parent/child relationships at any level of the hierarchy (e.g., all classes in a department, departments in a division, divisions in a brand, etc.)

Select Seed Source

Department

SubClass

Class

- Select All: 2110.BLOUSES-ANTHRO.(NA) X
- 2110.BLOUSES-ANTHRO.(NA)
- 2110.HAWAIIAN TOPS(NA)
- 2110.CUT AND SEW KNITS(ANTHRO.(NA))
- 2112.RING GAUCHE(ANTHRO.(NA))
- 2114.SWEATERS-(ANTHRO.(NA))
- 2115.JACKETS(ANTHRO.(NA))

Sub-Channel

Reset Close Submit

Tips & Tricks - FAQ 3

Can I seed a plan with the LY of a “Like Class”?

Yes, you can choose to seed from LY/LLY/LLLY/AVG3LY of a Like Class in the Seed Plan action button.

Select Seed Source

- Avg3LY
- Seed From Like Class
- Seed From Like Class LY
- Seed From Like Class LLY
- Seed From Like Class LLLY
- Seed From Like Class Avg3LY

Tips & Tricks - FAQ 4

If I am copying LY data into a plan, and the LY data has not fully actualized yet, what happens?

For LY data that does not have actual values yet, the CurrentWorkingView (WP) plan values for the will be used.

The screenshot shows the SAP Class Plan interface. The top navigation bar includes links for Summary, Sales & Demand Planning, Material & Manufacturing, Inventory & Receipts Planning, M&S S&D Planning, Purchasing & Supplier Finance, and Financials. The main area is titled 'Sales & Demand Planning' and shows a 'LY - partially actualized timeframe' section. This section contains a grid of historical data for different time periods (FY23 MAR to FY25 APR) across various dimensions like Action, Division, and Class. The data is color-coded in yellow and orange boxes. The left sidebar lists other planning modules such as Client Planning, Forecast Review, Planning Overview, CTR Summary, Scenario Planning, Budget Planning, Recognition Summary, and Reporting.

Tips & Tricks - FAQ 5

When I copy LY data into a plan, the EOP's do not match TY to LY. Why is this?

There are two reasons for this:

1. The EOP's for the TY data are calculating using the planned ending EOP of the prior period (the last planned EOP of the prior year or season). If the planned EOP in that period is different from the LY EOP, the plans that were just copied are using a different starting point than the LY values.
2. In the CurrentWorkingView plans, LY values for Transfer/RTV's and Inv Adj's are not included in the copy process. Thus, they affect the LY EOP's but the TY EOP's are calculated based on their values being zero.

Shaping the Plan

PLAN - Sales & Demand

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Sales & Demand Metrics

Summary of **SALES** metrics available:

- Retail (Sales R) – Reg, Full Price, Promo, Markdown
- Retail Comp (Sales R Comp) – Reg, Full Price, Promo, Markdown
- Units (Sales U) – Reg, Full Price, Promo, Markdown
- Average Units Sold (AUS) – Reg, Full Price, Promo, Markdown
- Average Per Store (APS R & APS U) – Reg, Full Price, Promo, Markdown
- Build (Sales R Build)

Summary of **DEMAND** Measures Available:

- Fill %
- Demand (Demand R) – Reg, Full Price, Promo, Markdown

Fill %

Demand and Sales are tied together by Fill %.

Fill % or Fill Rate quantifies the ability to fulfill customer orders. It is the ratio between the total retail ordered by consumers (Demand R) and the total retail successfully fulfilled/shipped (Sales R).

$$CP\ Sales\ R = CP\ Demand\ R * CP\ Fill\ %$$

$$CP\ Demand\ R = CP\ Sales\ R / CP\ Fill\ %$$

CP Fill % always holds! CP Fill % remains constant when CP Sales R and CP Demand R change. The only way for CP Fill % to change is if a user updates it directly. If a user updates CP Fill %, CP Sales R will recalculate and CP Demand R will hold.

Examples of Interactions

Starting Data:

		FY26 APR		
Division	Class	CP Demand R	CP Fill %	CP Sales R
041:ANTHRO. WOMEN'S DIVISION (NA)	4110:BLOUSES - ANTHRO. (NA)	10,000	80.0%	8,000

Example 1 – Action: Update CP Demand R from 10,000 to 14,000. Result: CP Fill % will hold, and CP Sales R will update to 11,200.

		FY26 APR		
Division	Class	CP Demand R	CP Fill %	CP Sales R
041:ANTHRO. WOMEN'S DIVISION (NA)	4110:BLOUSES - ANTHRO. (NA)	14,000	80.0%	11,200

Example 2 – Action: Update CP Sales R from 8,000 to 12,000. Result: CP Fill % will hold, and CP Demand R will update to 15,000.

		FY26 APR		
Division	Class	CP Demand R	CP Fill %	CP Sales R
041:ANTHRO. WOMEN'S DIVISION (NA)	4110:BLOUSES - ANTHRO. (NA)	15,000	80.0%	12,000

Example 3 – Action: Update CP Fill % from 80% to 90%. Result: CP Demand R will hold, and CP Sales R will update to 9,000.

		FY26 APR		
Division	Class	CP Demand R	CP Fill %	CP Sales R
041:ANTHRO. WOMEN'S DIVISION (NA)	4110:BLOUSES - ANTHRO. (NA)	10,000	90.0%	9,000

Sales - Calculation Callouts

1. When Sales R is changed, the total Markdown (MkdTot R) HOLD and the MD % (MkdTot R % Sales R) updates.

Example – update CP Sales R from 10,000 to 20,000. CP MkdTot R holds and CP MkdTot R % Sales R recalculates.

Division	Class	CP Sales R	CP MkdTot R % Sales R	CP MkdTot R
041:ANTHRO. WOMEN'S DIVISION (NA)	4110:BLOUSES - ANTHRO. (NA)	10,000	10.0%	1,000
Division	Class	CP Sales R	CP MkdTot R % Sales R	CP MkdTot R
041:ANTHRO. WOMEN'S DIVISION (NA)	4110:BLOUSES - ANTHRO. (NA)	20,000	5.0%	1,000

2. Sales AUS FP, Sales AUS Promo, and Sales AUS MD are plannable. Sales AUS Reg and Sales AUS are not plannable. Changing AUS (Sales AUS) will recalculate your sales units (Sales U). $CP\ Sales\ U = CP\ Sales\ R / CP\ Sales\ AUS$

Division	Class	Data	FY26 Q1	FY26 APR
041:ANTHRO. WOMEN'S DIVISION (NA)	4110:BLOUSES - ANTHRO. (NA)	CP Sales R	20,000	
		CP Sales R Reg	18,000	
		CP Sales R FP	16,200	
		CP Sales R Promo	1,800	
		CP Sales R MD	2,000	
		CP Sales AUS	77.22	Not Plannable
		CP Sales AUS Reg	82.19	
		CP Sales AUS FP	83.08	
		CP Sales AUS Promo	75.00	Plannable
		CP Sales AUS MD	50.00	
		CP Sales U	259	
		CP Sales U Reg	219	
		CP Sales U FP	195	
		CP Sales U Promo	24	
		CP Sales U MD	40	

Example – update CP Sales AUS FP from 83.08 to 70. CP Sales U Reg will recalculate and CP Sales R FP will hold

Division	Class	CP Sales R FP	CP Sales AUS FP	CP Sales U Reg
041:ANTHRO. WOMEN'S DIVISION (NA)	4110:BLOUSES - ANTHRO. (NA)	16,200	83.08	219
Division	Class	CP Sales R FP	CP Sales AUS FP	CP Sales U Reg
041:ANTHRO. WOMEN'S DIVISION (NA)	4110:BLOUSES - ANTHRO. (NA)	16,200	70.00	255

3. CP Sales R FP % Sales R Reg is plannable & editable; CP Sales R Promo % Sales R Reg is not plannable or editable.
 $CP Sales R Promo \% Sales R Reg = 100\% - CP Sales R FP \% Sales R Reg$

Division	Class	Data	FY26 APR	
041:ANTHRO. WOMEN'S DIVISION (NA)	4110:BLOUSES - ANTHRO. (NA)	CP Sales R Reg	18,000	
		CP Sales R FP	16,200	
		CP Sales R FP % Sales R Reg	90.0%	Plannable
		CP Sales R Promo	1,800	
		CP Sales R Promo % Sales R Reg	10.0%	Not Plannable

4. WOS aggregates by taking the computed CP Avg Inv R metric at the aggregated level and dividing it by the average of Sales R metric at the lower level. It does not divide by the total CP Sales R for the month.

Class	Data	FY26 APR	FY26 WK 10	FY26 WK 11	FY26 WK 12	FY26 WK 13	FY26 APR
4110:BLOUSES - ANTHRO. (NA)	CP Sales R	5,000,000	4,000,000	3,500,000	3,500,000	3,500,000	16,000,000
	CP Avg Inv R	18,578,774	14,078,514	10,928,274	6,828,024	12,578,399	
	CP WOS R	3.7	3.5	3.0	2.0	3.1	

WEEK LEVEL
 $CP WOS R = CP Avg Inv R / CP Sales R$
 $= 18,578,774 / 5,000,000$
 $= 3.7$

MONTH LEVEL
 $CP WOS R = CP Avg Inv R / AVG(CP Sales R for each week)$
 $= 12,578,399 / AVG(5M+4M+3.5M+3.5M)$
 $= 3.1$

5. When planning Sales measures at aggregated Time grains, the adjusted value (could be the planned measure or the affected measure from a ratio metric) is pushed down to the lowest Time grain, where the other measures are recalculated and aggregated back up.

Demand - Calculation Callouts

- Fill % always holds
- CP Demand R Reg % Demand R, CP Demand R FP % Demand R Reg, CP Demand R Promo % Demand R Reg, and CP Demand R MD % Demand R are not editable or plannable. They copy from the related sales measure.
- CP Demand R FP % Demand R Reg and CP Demand R Promo % Demand R Reg (% to REG) are plannable and editable. CP Demand R FP % Demand R and CP Demand R Promo % Demand R (% to TOTAL Demand) are not plannable or editable. They are calculated and visible.
- CP Demand R Reg, CP Demand R FP, CP Demand Promo, and CP Demand R MD are not editable or plannable. Plan these using the % to sales metrics.

Actions	Division	Class	Data	FY26 APR
...	041:ANTHRO. WOMEN'S DIVISION (NA)	4110:BLOUSES - ANTHRO. (NA)	CP Demand R	20,000,000
...			CP Demand R Reg	19,375,000
...			CP Demand R FP	18,812,500
...			CP Demand R Promo	562,500
...			CP Demand R MD	625,000
...			CP Demand R Reg % Demand R	96.9%
...			CP Sales R Reg % Sales R	96.9%
...			CP Demand R FP % Demand R Reg	97.1%
...			CP Sales R FP % Sales R Reg	97.1%
...			CP Demand R Promo % Demand R Reg	2.9%
...			CP Sales R Promo % Sales R Reg	2.9%
...			CP Demand R MD % Demand R	3.1%
...			CP Sales R MD % Sales R	3.1%

PLAN - Build

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!



Development on BUILD measures are not complete in o9. Ultimately, there will be a CP Sales R Build metric and a CP Demand R Build metric that will be editable and accurate at all aggregation levels.

Build Metrics

Build is a measure of growth from one time period to the next.

DEMAND BUILD = Total Demand / Previous Total Demand

SALES BUILD = Total Sales / Previous Total Sales

- CP Demand R Build
- CP Demand R Build Weekly
- CP Demand R Build Monthly
- CP Sales R Build
- CP Sales R Build Weekly
- CP Sales R Build Monthly

CP Demand R Build & CP Sales R Build are not editable and correctly calculated at every level - use monthly & weekly metrics to edit build

Actions	Division	Class	Data	FY2026				
				FY26 H1				
				FY26 Q1				
				FY26 APR				
			FY26 WK 10	FY26 WK 11	FY26 WK 12	FY26 WK 13	FY26 APR	
...	041-ANTHRO. WOMEN'S DIVISION (NA)	4110-BLOUSES - ANTHRO. (NA)	CP Demand R	6,666,667	5,333,333	5,333,333	2,666,667	20,000,000
...			CP Demand R Build	3.68	0.80	1.00	0.50	2.00
...			CP Demand R Weekly Build	3.68	0.80	1.00	0.50	1.04
...			CP Demand R Monthly Build	1.48	2.67	3.05	1.53	2.00
...			CP Sales R	5,333,333	4,266,667	4,266,667	2,133,333	16,000,000
...			CP Sales R Build	1.95	0.80	1.00	0.50	1.11
...			CP Sales R Weekly Build	1.95	0.80	1.00	0.50	0.96
...			CP Sales R Monthly Build	1.88	1.01	1.15	0.58	1.11

Not editable.
Shows "Demand R Weekly Build" at week and "Demand R Monthly Build" at month.
Use the Weekly and Monthly Build measures for editing.

PLAN - Comp

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Comp Metrics

"COMP" refers to comparable store sales. COMP metrics look at sales for stores that have been open for over one year. It allows planners to differentiate between growth from new store openings and growth/decline in existing stores.

- CP Sales R Comp
- CP EOP R Comp
- CP Receipt R Comp
- CP GM Comp

Comp factors can be managed in the Admin Data Management workspace and are used to calculate comp metrics in o9 ([Comp Factor](#))

Example Calculations:

$$\text{SALES R COMP} = \text{SALES} * \text{SALES COMP FACTOR}$$

$$\text{SALES R COMP TY/LY \% CHG} = (\text{SALES R COMP} - \text{SALES R LY}) / \text{SALES R LY}$$

$$\text{SALES R COMP TY/LY COMP \% CHG} = (\text{SALES R COMP} - \text{SALES R COMP LY}) / \text{SALES R COMP LY}$$

Aggregation

Comp factors are entered at MONTH level. The week's will replicate the month comp factor.

The QUARTER Comp Factor will reflect its first MONTH's comp factor. The SEASON Comp Factor will reflect its first QUARTER comp factor. The YEAR Comp Factor will reflect its firsts SEASON comp factor.

Brand	Data	FY2026				FY2025				FY2024				FY2023				FY2022						
		FY26 H1				FY25 H1				FY24 H1				FY23 H1				FY22 H1						
		FY26 Q1		FY26 Q2		FY26 Q3		FY26 Q4		FY25 Q1		FY25 Q2		FY25 Q3		FY25 Q4		FY24 Q1		FY24 Q2		FY24 Q3		
004 ANTHROPOLOGIE (NA)	CP Comp Factor Sales	100.0%		100.0%		125.0%		100.0%		125.0%		125.0%		125.0%		125.0%		125.0%		125.0%		125.0%		125.0%
004 ANTHROPOLOGIE (NA)	CP Comp Factor Inventory	125.0%		100.0%		125.0%		125.0%		100.0%		125.0%		125.0%		125.0%		125.0%		125.0%		125.0%		125.0%

Comp Factor - Sales & Inventory		FY2026																							
004 ANTHROPOLOGIE (NA)		FY26 H1		FY26 Q1		FY26 Q2		FY26 Q3		FY26 Q4		FY25 H1		FY25 Q1		FY25 Q2		FY25 Q3		FY25 Q4		FY24 H1		FY24 Q1	
Brand	Data	FY26 FEB	FY26 MAR	FY26 APR	FY26 Q1	FY26 MAY	FY26 JUN	FY26 JUL	FY26 Q2	FY26 H1	FY26 AUG	FY26 SEP	FY26 OCT	FY26 Q3	FY26 NOV	FY26 DEC	FY26 Q1	FY26 Q2	FY26 Q3	FY26 Q4	FY25 H2	FY25 Q1	FY25 Q2	FY25 Q3	FY25 Q4
004 ANTHROPOLOGIE (NA)	CP Comp Factor Sales	100.0%	100.0%	125.0%	100.0%	125.0%	125.0%	125.0%	125.0%	100.0%	125.0%	125.0%	125.0%	125.0%	125.0%	125.0%	125.0%	125.0%	125.0%	125.0%	125.0%	125.0%	125.0%	125.0%	125.0%
004 ANTHROPOLOGIE (NA)	CP Comp Factor Inventory	100.0%	100.0%	125.0%	100.0%	125.0%	125.0%	125.0%	125.0%	100.0%	125.0%	125.0%	125.0%	125.0%	125.0%	125.0%	125.0%	125.0%	125.0%	125.0%	125.0%	125.0%	125.0%	125.0%	125.0%

PLAN - Markdowns

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Markdown Metrics

Summary of **Markdown** metrics available:

- Total Markdown Retail (MkdTot R)
- POS Markdown Retail (MkdPOS R)
- Permanent Markdown Retail (MkdPerm R)
- Firsts Markdown Retail (MkdFirsts R)
- Furthers Markdown Retail (MkdFurther R)
- Dimeouts Retail, Units, AUI (MkdDO)
- First Markdown Conversion Retail, Units, AUI

Total Markdowns

Total markdown retail is the sum of the POS markdowns and the Permanent markdowns:

$$CP\ MkdTotal\ R = CP\ MkdPOS\ R + CP\ MkdPerm\ R$$

Total Markdowns can be planned as a retail value or as a % to the planned Sales R.

When updating either of these planned metrics (MkdTot R or MkdTot R % Sales R), the MkdPerm R updates and the MkdPOS R holds. If there is no planned MkdPerm R (MkdPerm R = 0), the MkdPOS R will update to reflect the total.

$$CP\ MkdPerm\ R = CP\ MkdTotal\ R - CP\ MkdPOS\ R$$

POS Markdowns

POS Markdowns can be planned as a retail value or as a % to the planned Sales R:

MkdPOS R

MkdPOS R % Sales R

It will only update if planned directly or if MkdTotal R is changed and MkdPerm R is 0.

If POS Markdowns are updated, the total markdowns will update to reflect the changes and the permanent markdowns will remain unchanged.

Permanent Markdowns

Permanent Markdowns are the sum of component markdowns:

$$MkdFirsts\ R + MkdFurther\ R + MkdDO\ R$$

Total permanent markdowns cannot be changed, either the total markdowns are planned, which will impact permanent markdowns or the components of the permanent markdowns are planned (Firsts, Furthers, Dimeouts).

First Markdowns – a markdown that is taken on a SKU the first time. The SKU is going from regular price to markdown. This can be planned as a retail value or as a % to the planned Sales R.

MkdFirsts R

MkdFirsts R % Sales R

To accurately plan regular and markdown inventory, there are two metrics that need to be planned in relation to first markdowns:

MkdFirsts Discount % - this is the average % discount on the first markdowns. Planning this metric will calculate First Mkd Inv R Conversion which is the amount of regular inventory value that is moving from regular inventory to markdown inventory as part of this markdown.

$$\text{First Mkd Inv R Conversion} = \text{MkdFirsts R} / \text{MkdFirsts Discount}$$

First Mkd AUI Conversion – will convert First Mkd Inv R Conversion to First Mkd Inv U Conversion so that unit inventory is accurately planned.

$$\text{First Mkd Inv U Conversion} = \text{First Mkd Inv R Conversion} / \text{First Mkd AUI Conversion}$$

Further Markdowns – a markdown that is taken on a SKU after a previous markdown. The SKU is already marked down and is being marked down again. This can be planned as a retail value or a % to the planned Sales R.

MkdFurther R

MkdFurther R % Sales R

Dimeouts – a markdown intended to sell off the inventory out of the business. The markdown is taken down to \$0.10 and the inventory adjustment is taken at a similar time. This can be planned as a retail value or a % to the planned Sales R.

MkdDO R

MkdDO R % Sales R

Note – when planning MkdDO R, this value is assumed to match the inventory adjustment and will be removed from planned inventory however the actual adjustment will actualize in the Inv Adj R field while only the markdown value will actualize in this field. If the markdown and adjustment happen in different weeks, the markdown will not impact the inventory in the same way the adjustment will.

To accurately plan markdown inventory units, the MkdDO R is also converted to MkdDO U using the MkdDO AUI. The MkdDO AUI is a planned metric which only impacts the MkdDO U.

PLAN - Margin

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

PLAN - Receipts

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Receipt Metrics

Summary of RECEIPT metrics available:

- Retail (Receipt R)
- Retail Comp (Receipt R Comp)
- Units (Receipt U)
- Average Units Receipt (AUR)
- Average Per Store (APS R)

Weekly Rebalancing

There are three options in o9 to rebalance your receipts in season:

- Manual Rebalance
- Rebalance to On Order
- Rebalance to Receipt Plan

Location for rebalancing:

Class Plan Workspace > Class Planning Page Group > Planning Workflow Page > Inventory & Receipts Planning View

Class Plan Workspace > Class Planning Page Group > OTB Summary

Manually update receipts by keying in the CP Receipt R

The screenshot shows the Class Plan workspace with the 'Inventory & Receipts Planning' tab selected. The 'Planning Workflow' section is highlighted with a red box. A red callout box points to the 'CP Receipt R' row in the data grid, which contains the value '625,000'. The text 'Update receipt dollars by keying in the "CP Receipt R" field' is displayed within the callout.

Rebalance to On Order - This action button automatically copies the on order for ANY month selected to the receipt plan

The screenshot shows the Class Plan workspace with the 'Inventory & Receipts Planning' tab selected. The 'Planning Workflow' section is highlighted with a red box. A red box highlights the 'Automatic Weekly...' button in the toolbar. The data grid shows weekly sales figures for various categories like '4110 BLOUSES', 'ANTHROPOLOGIE (NA) RETAIL', etc., across weeks 10 through 13 of FY26.

Automatic Weekly Plan Rebalancing

The screenshot shows the 'Automatic Weekly Plan Rebalancing' dialog box. It includes sections for 'Select Destination', 'Department', 'Class', 'Sub-Class', 'Country Group', and 'Sub-Channel', each with a 'Select All' checkbox. At the bottom are 'Reset', 'Close', and 'Submit' buttons.

Weekly Plan Rebalancing to On Order (Action Button)					
<i>Before Wk 1 Actualized</i>					
	Feb Wk 1	Feb Wk 2	Feb Wk 3	Feb Wk 4	Feb Total
On Order R	1200	550	500	200	2450
IP Receipts (not an o9 measure)	0	0	0	0	0
PL Receipt R	1200	550	500	200	2450
CP Receipt R	1150	600	400	300	2450
<i>After Wk 1 Actualized</i>					
	Feb Wk 1	Feb Wk 2	Feb Wk 3	Feb Wk 4	Feb Total
On Order R	0	750	500	100	1350
IP Receipts (not an o9 measure)	1000	0	0	0	1000
PL Receipt R	1200	550	500	200	2450
CP Receipt R	1000	600	400	300	2350
<i>After Action Button</i>					
	Feb Wk 1	Feb Wk 2	Feb Wk 3	Feb Wk 4	Feb Total
On Order R	0	750	500	100	1350
IP Receipts (not an o9 measure)	1000	0	0	0	1000
PL Receipt R	1200	550	500	200	2450
CP Receipt R	1000	750	500	100	2350

Rebalance to Receipt Plan - This action button automatically rebalances the monthly receipts after weeks begin to actualize in the month. The monthly PL plan is copied back and the remaining weeks receipt plans prorate to hit the monthly receipt plan.

Automatic Weekly Plan Rebalancing

Select Destination *	Department *
<input type="checkbox"/> Rebalance to On Order <input checked="" type="checkbox"/> Rebalance to Receipt Plan	<input checked="" type="checkbox"/> Select All 0413:ANTHRO. WOMEN'S DRESSES (NA) X
Class *	Sub-Class *
<input checked="" type="checkbox"/> Select All 4130:DRESSES - ANTHRO. (NA) X	<input checked="" type="checkbox"/> Select All 4130:DRESSES - ANTHRO. (NA) X
Country Group *	Sub-Channel *
<input type="button" value="Reset"/> <input type="button" value="Close"/> <input checked="" type="button" value="Submit"/>	

Weekly Plan Rebalancing to Receipt Plan (Action Button)					
<i>Use PL Month Total for rebalancing</i>					
<i>Use WP Week Ratio for rebalancing</i>					
<i>Before Wk 1 Actualized</i>					
	Feb Wk 1	Feb Wk 2	Feb Wk 3	Feb Wk 4	Feb Total
On Order R	1200	550	500	200	2450
IP Receipts (not an o9 measure)	0	0	0	0	0
PL Receipt R	1200	550	500	200	2450
CP Receipt R	1150	600	400	300	2450
	CP Ratio	46.15%	30.77%	23.08%	
<i>After Wk 1 Actualized</i>					
	Feb Wk 1	Feb Wk 2	Feb Wk 3	Feb Wk 4	Feb Total
On Order R	0	750	500	200	1450
IP Receipts (not an o9 measure)	1000	0	0	0	1000
PL Receipt R	1200	550	500	200	2450
CP Receipt R	1000	600	400	300	2300
<i>After Action Button</i>					
	Feb Wk 1	Feb Wk 2	Feb Wk 3	Feb Wk 4	Feb Total
On Order R	0	750	500	200	1450
IP Receipts (not an o9 measure)	1000	0	0	0	1000
PL Receipt R	1200	550	500	200	2450
CP Receipt R	1000	669	446	335	2450
	(WK 2 / (WK 2+3+4)) * (PL Month R - Actualized R)				
PL Month Ttl - Actualized R: 1450					
CP Ratio	46.15%	30.77%	23.08%		
New CP Receipt R	669	446	335		

PLAN - Inventory

Thursday, August 29, 2024 12:55 PM

EOP (Inventory) Metrics

Summary of EOP metrics available:

- Retail (EOP R) - Reg, Markdown
- Units (EOP U) - Reg, Markdown
- Average Units Inventory (AUI) - Reg, Markdown

EOP Calculations

EOP is calculated differently for the retail channel and the direct channel.

DIRECT CHANNEL:

CP BOP R	
-	CP Sales R
-	CP MkdTot R
+	CP Receipt R
+	CP Inv Adj R
-	CP RTV R
-	CP Dir Rtn to Rtl Str R
-	CP MPOS R (Calc)
+	CP PPS Adj R
-	CP Trns Dir to Outlet R
-	CP Trns Dir to Rtl Mvmt R
-	CP Trns Dir to Rtl Strs R
-	CP Trns Dir to Whls R
+	CP Trns Rtl Mvmt to Dir R (Calc)
+	CP Trns Rtl Strs to Dir R (Calc)
+	CP Trns General R
-	CP Trns Dir to Franchise R
CP EOP R	

RETAIL CHANNEL:

CP BOP R	
-	CP Sales R
-	CP MkdTot R
+	CP Receipt R
+	CP Inv Adj R
-	CP RTV R
+	CP Dir Rtn to Rtl Str R (Calc)
+	CP MPOS R
-	CP PPS Adj R (Calc)
+	CP Trns Dir to Rtl Strs R (Calc)
-	CP Trns Rtl Strs to Dir R CP
-	CP Trns Rtl to Outlet R
-	CP Trns Rtl to Whls R
+	CP Trns General R
CP EOP R	

MOVEMENT CHANNEL:

CP BOP R	
-	CP Sales R
-	CP MkdTot R
+	CP Receipt R
+	CP Inv Adj R
-	CP RTV R
+	CP Dir Rtn to Rtl Str R (Calc)
+	CP MPOS R
-	CP PPS Adj R (Calc)
+	CP Trns Dir to Rtl Mvmt R (Calc)
-	CP Trns Rtl Mvmt to Dir R
-	CP Trns Rtl to Outlet R
-	CP Trns Rtl to Whls R
+	CP Trns General R
CP EOP R	

Regular EOP Calculations

EOP is calculated differently for the retail channel and the direct channel.

DIRECT CHANNEL:

CP BOP R Reg	
-	CP Sales R Reg
-	CP MkdPOS R
-	CP First Mkd Inv R Conversion
+	CP Receipt R
+	CP Inv Adj R
-	CP RTV R
-	CP Dir Rtn to Rtl Str R Reg
-	CP MPOS R Reg (Calc)
+	CP PPS Adj R Reg
-	CP Trns Dir to Outlet R Reg
-	CP Trns Dir to Rtl Mvmt R Reg
-	CP Trns Dir to Rtl Strs R Reg
-	CP Trns Dir to Whisl R Reg
+	CP Trns Rtl Mvmt to Dir R Reg (Calc)
+	CP Trns Rtl Strs to Dir R Reg (Calc)
+	CP Trns General R
CP EOP R Reg	

RETAIL CHANNEL:

CP BOP R Reg	
-	CP Sales R Reg
-	CP MkdPOS R
-	CP First Mkd Inv R Conversion
+	CP Receipt R
+	CP Inv Adj R
-	CP RTV R
+	CP Dir Rtn to Rtl Str R Reg (Calc)
+	CP MPOS R Reg
-	CP PPS Adj R Reg (Calc)
+	CP Trns Dir to Rtl Strs R Reg (Calc)
-	CP Trns Rtl Strs to Dir R Reg
-	CP Trns Rtl to Outlet R Reg
-	CP Trns Rtl to Whisl R Reg
+	CP Trns General R Reg
CP EOP R Reg	

MOVEMENT CHANNEL:

CP BOP R Reg	
-	CP Sales R Reg
-	CP MkdPOS R
-	CP First Mkd Inv R Conversion
+	CP Receipt R
+	CP Inv Adj R
-	CP RTV R
+	CP Dir Rtn to Rtl Str R Reg (Calc)
+	CP MPOS R Reg
-	CP PPS Adj R Reg (Calc)
+	CP Trns Dir to Rtl Mvmt R Reg (Calc)
-	CP Trns Rtl Mvmt to Dir R Reg
-	CP Trns Rtl to Outlet R Reg
-	CP Trns Rtl to Whisl R Reg
+	CP Trns General R Reg
CP EOP R Reg	

Markdown EOP Calculations

EOP is calculated differently for the retail channel and the direct channel.

DIRECT CHANNEL:

CP BOP R MD	
-	CP Sales R MD
-	CP MkdPerm R
+	CP First Mkd Inv R Conversion
-	CP Dir Rtn to Rtl Str R MD
-	CP MPOS R MD (Calc)
+	CP PPS Adj R MD
-	CP Trns Dir to Outlet R MD
-	CP Trns Dir to Rtl Mvmt R MD
-	CP Trns Dir to Rtl Strs R MD

-	CP Trns Dir to Whls R MD
+	CP Trns Rtl Mvmt to Dir R MD (Calc)
+	CP Trns Rtl Strs to Dir R MD(Calc)
+	CP Trns General R MD
CP EOP R MD	

RETAIL CHANNEL:

CP BOP R MD	
-	CP Sales R MD
-	CP MkdPerm R
+	CP First Mkd Inv R Conversion
+	CP Dir Rtn to Rtl Str R MD (Calc)
+	CP MPOS R MD
-	CP PPS Adj R MD (Calc)
+	CP Trns Dir to Rtl Strs R (Calc)
-	CP Trns Rtl Strs to Dir R MD
-	CP Trns Rtl to Outlet R MD
-	CP Trns Rtl to Whls R MD
+	CP Trns General R MD
CP EOP R MD	

MOVEMENT CHANNEL:

CP BOP R MD	
-	CP Sales R MD
-	CP MkdPerm R
+	CP First Mkd Inv R Conversion
+	CP Dir Rtn to Rtl Str R MD (Calc)
+	CP MPOS R MD
-	CP PPS Adj R MD (Calc)
+	CP Trns Dir to Rtl Mvmt R MD (Calc)
-	CP Trns Rtl Mvmt to Dir R MD
-	CP Trns Rtl to Outlet R MD
-	CP Trns Rtl to Whls R MD
+	CP Trns General R MD
CP EOP R MD	

Cross Channel Metrics

Summary of **Cross Channel** metrics available:

- Mobile Point of Sale Retail (MPOS R) - Reg, Markdown
- Mobile Point of Sales Units (MPOS U) - Reg, Markdown
- Mobile Point of Sales Average Selling Price (MPOS AUS)
- Direct Return to Retail Stores Retail (Dir Rtn to Rtl Str R) - Reg, Markdown
- Direct Return to Retail Stores Units(Dir Rtn to Rtl Str U) - Reg, Markdown
- Direct Return to Retail Stores Average Selling Price
- Pick, Pack & Ship Retail (PPS R) - Reg, Markdown
- Pick, Pack & Ship Units (PPS U) - Reg, Markdown
- Pick, Pack & Ship Retail Average Selling Price

1. All Cross Channel Metrics are planned as a % to the Total Sales R in the following metrics:

- MPOS R % Sales R
- Dir Rtn to Rtl str R % Sales R
- PPS R % Sales R

2. The breakout of regular price value/units and markdown value/units are planned as a % Reg to total R in the following metrics:

- MPOS R Reg % MPOS R
- Dir Rtn to Rtl Str R % MPOS R
- PPS R % MPOS R

3. The editability of these metrics are dictated by the channel you are planning in:

- MPOS is plannable in the **RETAIL** channels
- Dir Rtn to Rtl Str is plannable in the **DIRECT** channels
- PPS is plannable in the **DIRECT** channels

4. When filtered to the other channel where the metric is NOT plannable, the metrics with "(calc)" in their names can be used to see how the values are impacting that channel.

Transfer Metrics

Summary of **Transfer** metrics available:

PLAN - FWOS

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!



Temporary FWOS measures to be used at the different product/channel/time levels.

Metric	Product	Channel	Time	Notes
FWOS Weekly	Brand/Div/Dept/Class	Retail/Direct/Omni	Week	All Product & Channel Levels at the Week
FWOS 1	1 Class	1 Channel	Any Time	Class/Channel/Any Time
FWOS Div	1 Division	1 Channel	Any Time	Division/Channel/Any Time
FWOS Class/Company	1 Class	Total Company	Any Time	Class/All Channel/Any Time
FWOS Division/Company	1 Division	Total Company	Any Time	Division/All Channel/Any Time

Locking to PL

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Locking an Approved Plan to the PL Version

The Approved Plan (PL Version) exists so that planners have a reference of a past plan. They schedule the lock to run automatically on a set cadence, like quarterly or monthly, or they can lock it ad hoc. The PL is a snapshot of their plan; it is updated more frequently than the Budget Plan but not as frequently as the CurrentWorkingView (WP Version). Usually, Plan locking will be coordinated and actioned at once for an entire Division or Brand. This gives the planning team and managers a finalized, approved, and up-to-date snapshot of the plan that they can reference later.

The Approved Plan (PL Version) is created by locking the CurrentWorkingView (WP Version). Values will populate in PL CP after the plan has been locked

Two Methods of Locking - Action Button vs Scheduled Job:

- Use the scheduled job option if one person or a small group of people within the brand are going to be responsible for when and how the plan is locked. Planners would only be responsible for making sure their Class Plan is ready to be locked.
- Use the action button option exclusively if every planner is responsible for locking their own classes as ready.
- The action button can also be used to support the scheduled job strategy by only using it for one-offs and exceptions.

Locking - Action Button

Review your CurrentWorkingView on the pages within the **Class Plan Workspace > Class Planning Page Group** and confirm that this plan has finished being shaped and is ready to lock.

Navigate to **Class Plan Workspace > Summary Page Group > Approval Status Page > Lock Plan Tab**

Set your scope filters to Version, Product Level, Channel, Geo, Time, and Currency that you want to LOCK.

Lock Plan Action Button

Class Plan for selected time frame is populated with planned or actualized data. It has been shaped and it is ready to be locked.

Fill out parameters in the “Lock Plan” Action Button Pop Up.

All parameters (Department, Class, Sub-Class, CountryGroup, Sub-Channel, Planning Month, and Planning Week) will populate with the data in your Scope Filters.

You can update this in the pop-up window by hitting the "+", but this is not recommended.

Planning Month

FY25 APR

FY25 MAY

Click Submit! You will receive a message that says “Request submitted successfully. Please wait for the notification.”

Planning Week ⓘ *

 Select All FY25 WK 10 X +3 More
 Reset X Close ✓ Submit

Lock Plan

Request submitted successfully. Please wait for the notification.

Close

Close window. You will receive a notification on the bell icon when the locking is complete. In the meantime, you can continue to work in o9.

The Notifications panel displays four entries, each with a green checkmark and the message "Lock Plan - Execution completed successfully." The notifications are for "4110 BLOUSES - ANTHRO (NA)", "4111 HEAVYWEIGHT KNITS (NA)", "4112 CUT AND SEW KNITS-ANTHRO (NA)", and "4113 FINE GAUGE-ANTHRO (NA)". Each entry includes a "View More" link.

Refresh o9 to see updated data

The o9 interface shows a message: "The data has been changed in Server. Please Refresh." A refresh button is highlighted with a red box.

Locking - Scheduled Lock

The Lock is scheduled to run nightly as part of the overnight job schedule. It will run daily at approximately 3AM. It will run based on the parameters filled out in the Admin Data Management workspace. If the parameters are blank, the job will run but nothing will copy to PL. The overnight job will run the same procedure as the Ad Hoc Locking Action Button.

Before the night of a lock, planners should review their CurrentWorkingView on the pages within the **Class Plan Workspace > Class Planning Page Group** and confirm that those plans have finished being shaped and are ready to lock.

Navigate to **Admin Data Management Workspace > Admin – MFP Page Group > Plan Lock CPPL Page > Plan Lock CPPL View**.

The Admin Data Management workspace shows the "Plan Lock - CPPL" page. The left sidebar lists various filters: Admin - MFP, WP Comp Factor, BD Comp Factor, VAT, Pricing Factor, Exchange Rate, Number of Stores, Scenario Management, Admin - KIP, and IT Only. The "Plan Lock - CPPL" filter is selected and highlighted with a red box. The main grid displays data for various product categories and departments, with checkboxes for locking specific items. The grid columns include: Actions, Division, Department, Class, Data, FY25 FEB, FY25 MAR, FY25 APR, FY25 MAY, FY25 JUN, FY25 JUL, FY25 AUG, FY25 SEP, FY25 OCT, and FY25 N.

Select the intersections that you want to lock by clicking the check boxes. This is called the "CPPL Lock" because it is locking the CurrentWorkingView CP values to PL.

The screenshot shows the Admin Data Management workspace with the "Plan Lock - CPPL" view selected. The top navigation bar includes "Save" and "Discard" buttons. A red box highlights the "Time" filter buttons (Y, S, Q, M, W) with the text: "Easily toggle between timeframes using these buttons. You can lock at any time level." Another red box highlights the "FY25 JUN" button. The main grid displays data for various products and time periods. A red box highlights a row for "4110:BLOUSES - ANTHRO. (NA)" with the text: "Set your scope filters to the Version, Product Level, Channel, Geo, Time, and Currency that you want to lock." A third red box highlights a checkbox in the "CPPL Last Processed" column for the same row.

The selection can be done at different levels of the hierarchy. Update the Pivot layout to change the level at which you are selecting. Below shows it being done for the Year at Brand level:

Plan Lock - CPPL

Time: Y S Q M W

Showing 2 rows of data.

Brand	Data	FY2025
004:ANTHROPOLOGIE (NA)	CPPL Last Processed	<input type="checkbox"/>
	Check for CPPL Lock	<input type="checkbox"/>

When you are finished editing, click "Save".

Plan Lock - CPPL

Time: Y S Q M W

Showing 2 rows of data.

Click "Save" to commit changes and "Discard" to revert back.

Unsaved changes are underlined orange.

Brand	Data	FY2025
004:ANTHROPOLOGIE (NA)	CPPL Last Processed	<input checked="" type="checkbox"/>
	Check for CPPL Lock	<input type="checkbox"/>

The job will run overnight and copy CP to PL for only those intersections selected in the Admin Data Management workspace.

After the process is completed, time will be captured in CPPL Last Processed metric and the checks will be removed from the intersections so that they can be selected again later. Below shows an intersection after the job has run.

Plan Lock - CPPL

Time: Y S Q M W

Showing 12 rows of data.

When the job runs, a timestamp is entered and the checkmark is removed.

Actions	Brand	Division	Class	Data
...	001:URBAN OUTFITTERS (NA)	001:WOMEN'S DIVISION (NA)	0111:WOVEN BLOUSES (NA)	CPPL Last Processed
...				<input type="checkbox"/>
...			0112:CUT AND SEW KNITS (NA)	CPPL Last Processed
...				<input checked="" type="checkbox"/>
...			0114:SWEATERS (NA)	CPPL Last Processed
...				<input checked="" type="checkbox"/>
				Check for CPPL Lock
				<input type="checkbox"/>
				Check for CPPL Lock
				<input type="checkbox"/>
				Check for CPPL Lock
				<input type="checkbox"/>

FY2025

FY25 JUN FY25 JUL FY25 AUG

2024-04-16 2024-04-16

2024-04-16 2024-04-16

2024-04-16 2024-04-16

2024-04-16 2024-04-16

Reviewing Locked Values

The plan that was locked can be reviewed using the PL CP measures. There are PL CP measures scattered in the various views but for a full reconcile, the CP vs PL page can be used under Reconciliation Summary.

Class Plan

Summary OTB Summary Planning OTB Summary Planning CurrentWorkingView 1 selected 4110 BLOUSES - ANTHRO (NA) ANTHRO RETAIL (NA) REST OF WORLD 1 selected FY25 APR 1 selected USD 1 selected * Seed Plan Overlay Any Plan ... Download Export Pivot Filters Layout Local Edit

Dashboard OTB Summary Planning Time: Y S G M W Showing 154 rows of data.

Approval Status

Class Planning

Hindsight Review

Planning Workflow

OTB Summary

Scenario Planning

Budget Planning

Budget Planning

Class vs Division Budget

Reconciliation Summary

CP vs BD

CP vs PL

Reporting

Actions Division Class Sub-Channel Data

CP Demand R
PL CP Demand R
CP vs PL Demand R %
ED CP Demand R
CP vs BD Demand R
CP vs BD Demand R %
CP Demand R / LY % Chg
LY Demand R
CP Fill %
ED CP Fill %
PL CP Fill %
LY Fill %
CP Demand R Build
LY Demand R Build
CP Sales R
ED CP Sales R

FY25 WK 10 FY25 WK 11 FY25 WK 12 FY25 WK 13

	FY25 WK 10	FY25 WK 11	FY25 WK 12	FY25 WK 13
CP Demand R	1,500,000	1,500,000	1,500,000	1,500,000
PL CP Demand R	1,500,000	1,500,000	1,500,000	1,500,000
CP vs PL Demand R %	0	0	0	0
ED CP Demand R %	0.0%	0.0%	0.0%	0.0%
CP vs BD Demand R %	-0.6%	-0.6%	-0.6%	-0.6%
CP vs BD Demand R %	-0.6%	-0.6%	-0.6%	-0.6%
CP Demand R / LY % Chg	3%	3%	3%	3%
LY Demand R	996	996	996	996
CP Fill %	75.0%	75.0%	75.0%	75.0%
ED CP Fill %	75.0%	75.0%	75.0%	75.0%
PL CP Fill %	75.0%	75.0%	75.0%	75.0%
LY Fill %	50.1%	53.8%	58.9%	54.5%
CP Demand R Build	0.68	0.68	0.68	0.68
LY Demand R Build	1.21	0.95	0.97	1.08
CP Sales R	1,125,000	1,125,000	1,125,000	1,125,000
ED CP Sales R				

CP is CurrentWorkingView (WP)

PL CP is Locked Plan

Immediately after locking, CP and PL CP will match exactly. As time passes and the CurrentWorkingView is updated, they will become out of sync and PL CP will be a reference point of the plan at the time of locking.

Budget Planning

Open a ticket at support.urbn.com or email o9support@urbanoutfitters.com for help!

Budget Planning

This process is used to plan and lock the budget version of the plan (BD Version). The planning is done in the Working Budget Version with CP metrics and once ready, can be locked to copy to the BD CP Metrics.

The Budget Plan (BDVersion) is created by locking the Working Budget Plan.

Here are the actions in Budget Planning:

[Budget Planning - Seeding the plan](#)

[Budget Planning - Overlaying the plan](#)

[Budget Planning - Update LY Data](#)

[Budget Planning - Lock Budget Plan](#)

[Budget Planning - Reconciliation](#)

Budget Planning - Seeding the plan

If you want to plan the budget using historical data, you can use the "Seed Plan" action button to create the plan.

Navigate to the **Class Plan Workspace > Budget Planning Page Group > Budget Planning Page**

Update your Scope Filters to the time frame you are going to seed with data.

Click "Seed Plan" action button

The screenshot shows the Class Plan workspace with the 'Budget Planning' page selected. The left sidebar has sections like Summary, Class Planning, Scenario Planning, and Budget Planning (which is also highlighted with a red box). The main area shows a grid of data with columns for Actions, Division, Class, Channel, and Data. Above the grid, there are various filters and buttons, including 'Working Budget Pl...', '0522:LIGHTING (N...)', 'REST OF WORLD', 'URBAN RETAIL (NA)', 'USD', 'FY2025', and a 'Seed Budget Cl...' button (which is highlighted with a red box and has a red callout pointing to it). Below the grid, there's a table for FY2025 with columns for LY, Q1, Q2, Q3, Q4, and MAR.

Fill out parameters in the "Seed Plan" action button Pop Up

The screenshot shows the 'Seed Budget Class Plan' pop-up window. It has fields for 'Select Seed Source' (with options LY, LLY, LLLY, Avg3LY), 'Target Version' (Working Budget Plan), 'Class' (0522:LIGHTING (NA)), 'Sub-Channel' (URBAN RETAIL (NA)), 'Planning Month' (FY25 FEB), and 'Department' (005:HOUSEWARES). There are also dropdowns for 'Select the SubClass' (0522:LIGHTING (NA)) and 'Country Group' (REST OF WORLD). A purple box on the left says 'Choose to seed from 4 historical time frames: LY - Last Year, LLY - 2 Years Ago, LLLY - 3 Years Ago, Avg3LY - Average of the last 3 years'. A green box on the right lists 'CurrentWorkingView' scenarios: R&D Product Planning Scenario-1, R&D Product Planning Scenario-2, R&D Product Planning Scenario-3, and R&D Product Planning Scenario-4. A red callout at the bottom points to a note: 'Department, Class, SubClass, Subchannel, Country Group and Planning Month will populate with the data in the scope filters. You can update this in the pop-up window by hitting the "+"'

Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."

Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.

Refresh o9 to see updated data.

Budget Planning - Overlaying the plan

If you want to plan the budget using an existing plan, you can use the "Overlay Any Plan to Class Plan" action button

Navigate to the **Class Plan Workspace > Budget Planning Page Group > Budget Planning Page**

Update your Scope Filters to the time frame you are going to overlay the data

Click "Overlay Any Plan to Class Plan" action button

The screenshot shows the SAP S/4HANA Class Plan workspace. The top navigation bar has a red box around the 'Budget Planning' tab. Below it, the scope filters are set to 'Working Budget Plan' (1 selected), '0522:LIGHTING (NA)' (1 selected), 'REST OF WORLD' (1 selected), 'URBAN RETAIL (NA)' (+1 selected), 'USD' (1 selected), and 'FY2025' (1 selected). A red callout bubble points to the 'Set scope filters for the Product, Channel, Time that you want to plan' text. In the center, there's a table with columns for Actions, Division, Class, Company, Channel, Data, and various financial metrics. At the bottom right of the table area, the 'Overlay Action Button' is highlighted with a red box.

Fill out parameters in the "Overlay Any Plan to Class Plan" action button Pop Up

The screenshot shows the 'Overlay Any Plan To Class Plan' pop-up window. It has several sections: 'Source Version' (with a dropdown menu showing 'CurrentWorkingView', 'Working Budget Plan', and other R&D scenarios), 'Target Version' (set to 'Working Budget Plan'), 'Overlay From' (checkboxes for 'Mkt' and 'Cross-Channel'), 'Beginning on Hand' (checkbox), 'Department' (checkboxes for 'Select All 005:HOUSEWARES DIVISION (NA)' and '0522:LIGHTING (NA)'), 'Sub-Class' (checkboxes for 'Select All 0522:LIGHTING (NA)' and '+5 More'), 'Sub-Channel' (checkboxes for 'Select All URBAN RETAIL (NA)' and '+1 More'), 'Planning Month' (checkboxes for 'Select All FY25 FEB' and '+11 More'). On the right, there are checkboxes for 'Sales & Demand', 'Select Cost & Margins', 'Receipts & Inventory', 'Division' (checkbox for 'Select All 005:HOUSEWARES DIVISION (NA)'), 'Class' (checkbox for 'Select All 0522:LIGHTING (NA)'), 'Source Attribute Type', 'Country Group' (checkbox for 'Select All REST OF WORLD'), and 'Department, Class, SubClass, Subchannel, Country Group and Planning Month will populate with the data in the scope filters. You can update this in the pop-up window by hitting the '+''). At the bottom right are 'Reset', 'Close', and 'Submit' buttons. A green box highlights the 'Choose which plan to copy from - Plan Type & Version' section. A pink box highlights the 'Choose what source of plan to copy from:' section. A purple box highlights the 'Working Budget Plan - copy from a different plan version working budget (ex. Division Plan)'. A red box highlights the message about department, class, sub-class, sub-channel, country group, and planning month.

Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."

Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.

Refresh o9 to see updated data.

Budget Planning - Update LY Data

If you would like to reference historical data while planning you can use the "Copy LY to Scenarios" action button.

This action will populate all LY, LLY, LLLY, Avg3LY metrics for the filters selected in the action button.

Navigate to the **Class Plan Workspace > Budget Planning Page Group > Budget Planning Page**

Update your Scope Filters to the time frame you are going to populate historical data for

Click "Copy LY to Scenarios" action button

Class Plan

Working Budget PL... 0522:LIGHTING (N... REST OF WORLD URBAN RETAIL (NA) USD FY2025

Budget Planning

Copy LY to Scenarios Action Button

Action	Division	Class	Company	Channel	Data
...	005:HOUSEWA...	0522:LIGHTIN...	URBAN OUTFI...	URBAN OUTFITTERS (NA)-DI...	CP Demand R
...					LY Demand R
...					CP Fill %
...					LY Fill %
...					CP Demand R Monthly Build
...					LY Demand R Build

Fill out parameters in the “Copy LY to Scenarios” action button Pop Up

Click Submit! You will receive a message that says “Request submitted successfully. Please wait for the notification.”

Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.

Refresh o9 to see updated data.

Budget Planning - Lock Budget Plan

Once the plan is finalized in the Budget Planning space, locking the budget plan will update the BD CP Metrics.

Navigate to the Class Plan Workspace > Budget Planning Page Group > Budget Planning Page

Update your Scope Filters to the time frame you want to lock to BD CP.

Click "Lock Budget" action button

Class Plan

Working Budget PL... 0522:LIGHTING (N... REST OF WORLD URBAN RETAIL (NA) USD FY2025

Lock Budget Action Plan

Action	Division	Class	Company	Channel	Data
...	005:HOUSEWA...	0522:LIGHTIN...	URBAN OUTFI...	URBAN OUTFITTERS (NA)-DI...	CP Demand R
...					LY Demand R
...					CP Fill %
...					LY Fill %

Fill out parameters in the “Lock Budget” action button Pop Up

Click Submit! You will receive a message that says “Request submitted successfully. Please wait for the notification.”

Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.

Refresh o9 to see updated data.

Budget Planning - Reconciliation

There are two reports created to reconcile the Budget Plan:

1. Division Budget Plan vs Class Budget Plan (BD DP vs BD CP)
2. Class Budget Plan vs Class Working Plan (BD CP vs CP)

Navigate to Class Plan Workspace > Budget Planning Page Group > Class vs Division Budget Page

Class Plan

Summary Class vs Division Budget

Dashboard Class vs Division Budget

Approval Status

Class Planning

Hindsight Review

Planning Workflow

OTB Summary

Scenario Planning

Scenario Planning

Scenario vs WP

Budget Planning

Budget Planning

Class vs Division Budget

Reconciliation Summary

Showing 36 rows of data.

Time: Y S Q M W

Class Plan Budget Version

Actions	Division	Company	Channel	Data	FY25	FY25 H1	FY25 Q1	FY25 FEB	FY25 MAR
...	041:ANTHRO...	ANTHROPOLO...	ANTHROPOLO...	BD DP Demand R					
...				BD CP Demand R					
...				DPRD vs CPBD Demand R					
...				BD DP Fill %					
...				BD CP Fill %					
...				BD DP Demand R Build	0.00	0.00	0.00	0.00	0.00
...				BD CP Demand R Build					
...				BD DP Sales R	1,536,434	1,536,434	1,536,434	1,536,434	1,757,681
...				BD CP Sales R					
...				DPRD vs CPBD Sales R					
...				BD DP Sales R Reg % Sales R	100.0%	100.0%	100.0%	100.0%	100.0%
...				BD CP Sales R Reg % Sales R					

Navigate to Class Plan Workspace > Reconciliation Summary Group > CP vs BD

Class Plan

Summary CPBD Compare

Dashboard CP vs CPBD Reconciliation

Approval Status

Class Planning

Hindsight Review

Planning Workflow

OTB Summary

Scenario Planning

Scenario Planning

Scenario vs WP

Budget Planning

Budget Planning

CP vs BD

CP vs PL

Showing 4 rows of data.

Class Plan Working Version

Class Plan Budget Version

Actions	Division	Class	Channel	Data	FY2025	FY25 H1	FY25 Q1	FY25 FEB	FY25 MAR
...	041:ANTHRO...	4130:DRESSES...	ANTHROPOLOGIE (NA)-RETAIL	CP Demand R					
...				BD CP Demand R					
...				CP Demand R					
...				BD CP Demand R					

Scenario Planning

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Scenario Planning

This process is used to plan multiple versions or test out different scenarios and answer "what if" questions without impacting the current WP plan.

There are 4 scenario versions to use:

R&D Product Planning Scenario 1

R&D Product Planning Scenario 2

R&D Product Planning Scenario 3

R&D Product Planning Scenario 4

Scenario versions of the plan do not actualize automatically and historical information is not automatically brought in. Both of these steps can be completed prior to planning if desired.

Here are the actions for Scenario Planning:

[Displaying Historical Information \(LY,LLY,LLLY,3yrAvg\)](#)

[Actualizing the Scenario](#)

[Seeding the plan](#)

[Overlay the Plan](#)

[Publish the Plan](#)

Displaying Historical Information (LY,LLY,LLLY,3yrAvg)

If you would like to use historical information to inform your scenario plan you can do so by using an action button, [Copy LY to Scenario](#)

Navigate to the **Class Plan Workspace > Scenario Planning Page Group > Scenario Planning Page**

Update your Scope Filters to the time frame you are going to seed with data.

Click [Copy LY to Scenario](#) action button

The screenshot shows the Class Plan workspace with the Scenario Planning page selected. The top navigation bar includes a search bar and various filter options. A red box highlights the 'Set Scope Filters for the PLAN' button. In the center, there's a grid of historical data for different quarters. A red box highlights the 'Copy LY Action Button' located above the grid. The grid columns include Time (Y, S, Q, M, W), Department (4130:DRESSES - ANTHRO. (NA)), Sub-Channel (ANTHRO RETAIL (NA)), and Data (CP Demand R, CP Fill %, LY Fill %, LLY Fill %, CP Sales R). The data shows values for FY25 FEB through FY25 JUN, with a total of 454 Month.

Fill out parameters in the [Copy LY to Scenario](#) Action Button Pop Up - will automatically inherit from scope filters

The pop-up window for 'Copy LY to Scenario' has several input fields. At the top, it shows 'Target Version' as 'R&D Product Planning Scenario-1'. Below that are sections for 'Department' (with a checkbox for 'Select All 0413:ANthro. WOMEN'S DRESSES (NA)'), 'Class' (with a checkbox for 'Select All 4130:DRESSES - ANTHRO. (NA)'), 'Sub-Channel' (with a checkbox for 'Select All ANTHRO RETAIL (NA)'), and 'Planning Year' (with a checkbox for 'Select All FY2025'). At the bottom, there are two checkboxes: 'Copy LLY' and 'Copy Avg3LY'. A purple callout box points to a text field labeled 'Choose which years of data to copy that you will need for planning'.

Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."

The screenshot shows a modal window titled 'Seed Plan'. Inside, a message says 'Request submitted successfully. Please wait for the notification.' There is a small info icon next to the message. In the bottom right corner, there is a red-bordered 'Close' button.

Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.



Refresh o9 to see updated data.

Review your updated Scenario Plan. The historical value you chose should no longer be blank.

Actualizing the Scenario

The scenario versions of the plan do not actualize automatically in the event that a scenario plan is used to compare against actuals. These instructions can be used to actualize a scenario plan if desired.

Navigate to the **Class Plan Workspace > Scenario Planning Page Group > Scenario Planning Page**

Update your Scope Filters to the time frame you are going to seed with data.

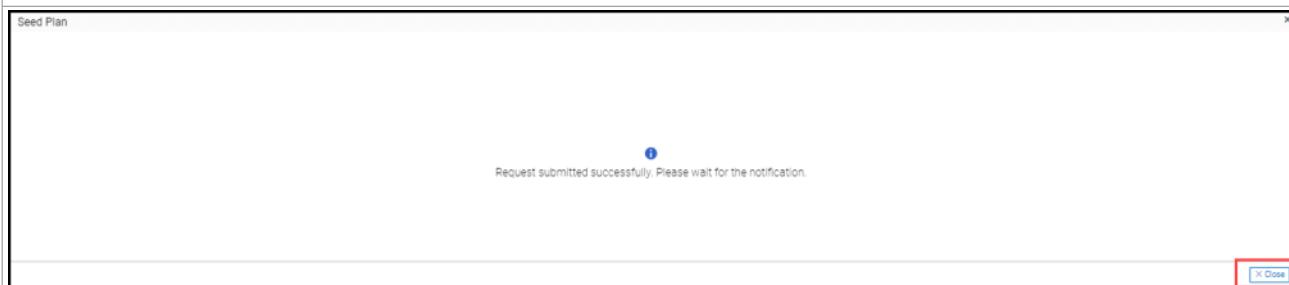
Click **Actualize Scenario** action button

The screenshot shows the Class Plan workspace with the Scenario Planning page selected. The top navigation bar includes filters for REST OF WORLD, FY26 FEB, USD, and All : 454 Week. The main area displays a grid of data with columns for Actions, Department, Class, Sub-Class, and Data. A red box highlights the 'Set Scope Filters for the PLAN' button in the top right. Another red box highlights the 'Actualize Scenario Action Button' in the middle right of the page.

Fill out parameters in the **Actualize Scenario** Action Button Pop Up - will automatically inherit from scope filters

The screenshot shows the 'Actualize Scenario' action button pop-up window. It contains fields for To Scenario (R&D Product Planning Scenario-1), Department (0413:ANTHRO. WOMEN'S DRESSES (NA)), Sub-Class (4130:DRESSES - ANTHRO. (NA)), Division (Select All 041:ANTHRO. WOMEN'S DIVISION (NA)), Class (Select All 4130:DRESSES - ANTHRO. (NA)), and a 'Submit' button. A red box highlights the 'Submit' button.

Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."



Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.



Refresh o9 to see updated data.

Review your updated Scenario Plan. Now that the plan has been seeded, the CP values will no longer be blank. They will match the data from which you seeded.

Seeding the plan

If you want to plan a scenario from scratch using historical data, you can use the "Seed Plan" action button to create the plan.

Navigate to the **Class Plan Workspace > Scenario Planning Page Group > Scenario Planning Page**

Update your Scope Filters to the time frame you are going to seed with data.

Click **Seed Scenario Class Plan** action button

Class Plan

Summary Scenario Planning Set Scope Filters for the PLAN R&D Product Plann... 4130:DRESSES - A... REST OF WORLD ANTHRO RETAIL (...) USD All : 454 Week 1 selected 1 selected 1 selected 1 selected 156 selected

Class Planning Scenario Planning Time: Y S Q M W Showing 24 rows of data. Seed Scenario Cl... Overlay Any Plan ... Publish Scenario Actualize Scenario Download Export Pivot Filters Layout Local Edit

Hindsight Review Planning Workflow OTB Summary Scenario Planning Actions Depart... Class Sub... Data 0413:ANTHRO... 4130:DRESSES... ANTHRO RETAIL... CP Demand R FY25 FEB 29,528 FY25 MAR FY25 APR FY25 JUN FY25 JUL FY25 AUG FY25 SEP FY25 OCP Fill % 593.0% LY Fill % LLY Fill % CP Sales R 175,102 FY25 H1 FY25 Q1 FY25 Q2 FY25 H2 FY25 03 FY25 04

Scenario vs WP Budget Planning

Fill out parameters in the **Seed Scenario Class Plan** Action Button Pop Up - will automatically inherit from scope filters

Use CurrentWorkingView to get the accurate historical Data

CurrentWorkingView Working Budget Plan R&D Product Planning Scenario-1 R&D Product Planning Scenario-2 R&D Product Planning Scenario-3 R&D Product Planning Scenario-4

Choose to seed from 4 historical time frames

LY - Last Year
LLY - 2 Years Ago
LLLY - 3 Years Ago
Avg3LY - Average of the last 3 years

Seed Scenario Class Plan

Select Seed Source * +
Target Version * R&D Product Planning Scenario-1
Class * Select All 4130:DRESSES - ANTHRO. (NA) X
Sub-Channel * Select All ANTHRO RETAIL (NA) X
Planning Month * Select All FY25 FEB X +35 More

Source * +
Department * Select All 0413:ANTHRO. WOMEN'S DRESSES (NA) X
Select the SubClass * Select All 4130:DRESSES - ANTHRO. (NA) X
Country Group * Select All REST OF WORLD X

Reset Close Submit

Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."

Seed Plan

Request submitted successfully. Please wait for the notification.

X Close

Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.

REST OF WORLD FY26 FEB USD 1 selected

Refresh o9 to see updated data.

Review your updated Scenario Plan. Now that the plan has been seeded, the CP values will no longer be blank. They will match the data from which you seeded.

Overlay the Plan

Use the Overlay action button to copy an existing plan into your scenario version. The plans that can be copied in are:

1. Class Plan - WP, BD, PL
2. Division Plan - WP, BD, PL
3. Product Attribute Plan - WP, PL
4. Location Attribute Plan - WP, PL
5. Any other Scenario Plan from Class, Division, Product Attribute or Location Attribute

Navigate to the **Class Plan Workspace > Scenario Planning Page Group > Scenario Planning Page**

Update your Scope Filters to the time frame you are going to seed with data.

Click **Overlay Any Plan** action button

Class Plan

Summary

Class Planning

Hindsight Review

Planning Workflow

OTB Summary

Scenario Planning

Scenario Planning

Scenario vs WP

R&D Product Plann... 1 selected

4130:DRESSES - A... 1 selected

REST OF WORLD 1 selected

ANTHRO RETAIL (-) 1 selected

USD 1 selected

All : 454 Week 156 selected

Time: Y S Q M W

Showing 24 rows of data.

Copy LY to Scenario... Seed Scenario Cl... Overlay Any Plan Publish Scenario Actualize Scenario... Download Export Pivot Filters Layout Local Edit

FY2025

Overlay Plan Action Button

FY25 Q2 FY25 H2 FY25 Q3

FY25 JUN FY25 JUL FY25 AUG FY25 SEP FY25 O

Actions	Depart...	Class	Sub...	Data	FY25 FEB	FY25 MAR	FY25 APR	FY25 MAY	FY25 JUN	FY25 JUL	FY25 AUG	FY25 SEP	FY25 O	
...	0413:ANTHRO...	4130:DRESSES...	ANTHRO RETA...	CP Demand R	29,528									
...				CP Fill %	593.0%									
...				LY Fill %										
...				LLY Fill %										

Fill out parameters in the **Overlay Any Plan** Action Button Pop Up - will automatically inherit from scope filters

Choose what source of plan to copy from:

CurrentWorkingView - Used for any published WP, PL, BD Versions

Working Budget Plan - copy from a different plan version working budget (ex. Division Plan)

Scenarios - Copy from plan data existing in a scenario plan

Overlay Any Plan To Class Plan

Source Version ⓘ *

Target Version ⓘ *

Sales & Demand ⓘ

Select Cost & Margins ⓘ

Receipts & Inventory ⓘ

Mkt ⓘ

Cross-Channel ⓘ

Beginning on Hand ⓘ

Use the metric checkboxes to copy only certain groups of metrics into your working budget plan

Department ⓘ *

Select All 005:HOUSEWARES DIVISION (NA) ×

Sub-Class *

Select All 0522:LIGHTING (NA) × +5 More

Sub-Channel *

Select All URBAN RETAIL (NA) × +1 More

Planning Month *

Select All FY25 FEB × +11 More

Class ⓘ *

Select All 0522:LIGHTING (NA) × +5 More

Source Attribute Type ⓘ

Country Group ⓘ *

Select All REST OF WORLD ×

Department, Class, SubClass, Subchannel, Country Group and Planning Month will populate with the data in the scope filters. You can update this in the pop-up window by hitting the "≡"

Reset Close Submit

Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."

Seed Plan

Request submitted successfully. Please wait for the notification.

Close

Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.

REST OF WORLD +1

FY26 FEB +1

USD 1 selected

Refresh o9 to see updated data.

Review your updated Scenario Plan. Now that the plan has been overlayed the values should match the source plan.

Publish the Plan

If there is a desire to replace the current working plan with the newly created scenario plan, you can use the **Publish Scenario** action button to accomplish this

Navigate to the **Class Plan Workspace > Scenario Planning Page Group > Scenario Planning Page**

Update your Scope Filters to the time frame you are going to seed with data.

Click **Publish Scenario** action button

Class Plan

Set Scope Filters for the PLAN

R&D Product Planning... 4130:DRESSES - A... REST OF WORLD ANTHRO RETAIL (... USD All: 454 Week 156 selected

Scenario Planning

Time: Y S Q M W Showing 24 rows of data. Copy LY to Scenario... Seed Scenario Cl... Overlay Any Plan... Publish Scenario Actualize Scenario Download Export Pivot Filters Layout Local Edit

	FY2025	FY25 H1	FY25 Q1	FY25 Q2	FY25 H2
	FY25 FEB	FY25 MAR	FY25 APR	FY25 MAY	FY25 JUN
Actions	CP Demand R	29,528	593.0%	454 Month	
0413:ANTHRO...	4130:DRESSES...	ANTHRO RETA...			
...	CP Fill %				
...	LY Fill %				
...	LYV Fill %				
...					

Fill out parameters in the **Publish Scenario** Action Button Pop Up - will automatically inherit from scope filters

Choose the scenario you want to publish to WP (1-4)

Publish Scenario

Source to Publish: R&D Product Planning Scenario-1

Department: Select All 0413:ANTHRO. WOMEN'S DRESSES (NA) +

Sub-Class: Select All 4130:DRESSES - ANTHRO (NA) +

Country Group: Select All REST OF WORLD +

Demand: Cost & Margins: Receipts:

Sales & Demand: Markdowns: Cross-Channel:

Use the metric checkboxes to copy only certain groups of metrics into your working budget plan.

Reset Close Submit

Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."

Seed Plan

Request submitted successfully. Please wait for the notification.

X Close

Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.

REST OF WORLD FY25 FEB USD

Refresh o9 to see updated data.

Reconcile the Plan

If there is a desire to replace the current working plan with the newly created scenario plan, you can use the **Publish Scenario** action button to accomplish this

Navigate to the **Class Plan Workspace > Scenario Planning Page Group > Scenario Planning Page**

The filter on the version needs to include both the CurrentWorkingView (WP) and the scenario you want to compare to

Class Plan

Scenario to WP Compare

CurrentWorkingView 0112:CUT AND SE... REST OF WORLD URBAN RETAIL (NA) USD FY2025

Time: Y S Q M W Showing 48 rows of data.

Working Plan Scenario Plan

Actions	Division	Class	Sub-Channel	Data	CurrentWorking View	R&D Product Planning...	CurrentWorking R&D Product View	R&D Product Planning...	CurrentWorking R&D Product View	R&D Product Planning...	CurrentWorking R&D Product View	R&D Product Planning...	
...	001:WOMEN'S ...	0112:CUT AND...	URBAN DIREC...	CP Demand R	592,398	20,670	727,503		497,708		499,582		584,500
...				CP Fill %	80.6%	113.8%	80.6%		76.0%		78.8%		76.9%
...				CP Demand R ...	0.66		1.21		0.68		1.00		1.17
...				CP Sales R	477,539	23,518	586,637		378,472		393,709		449,651
...				CP Sales R Re...	82.6%	82.8%	83.1%		77.9%		68.0%		91.0%

Scenario Planning

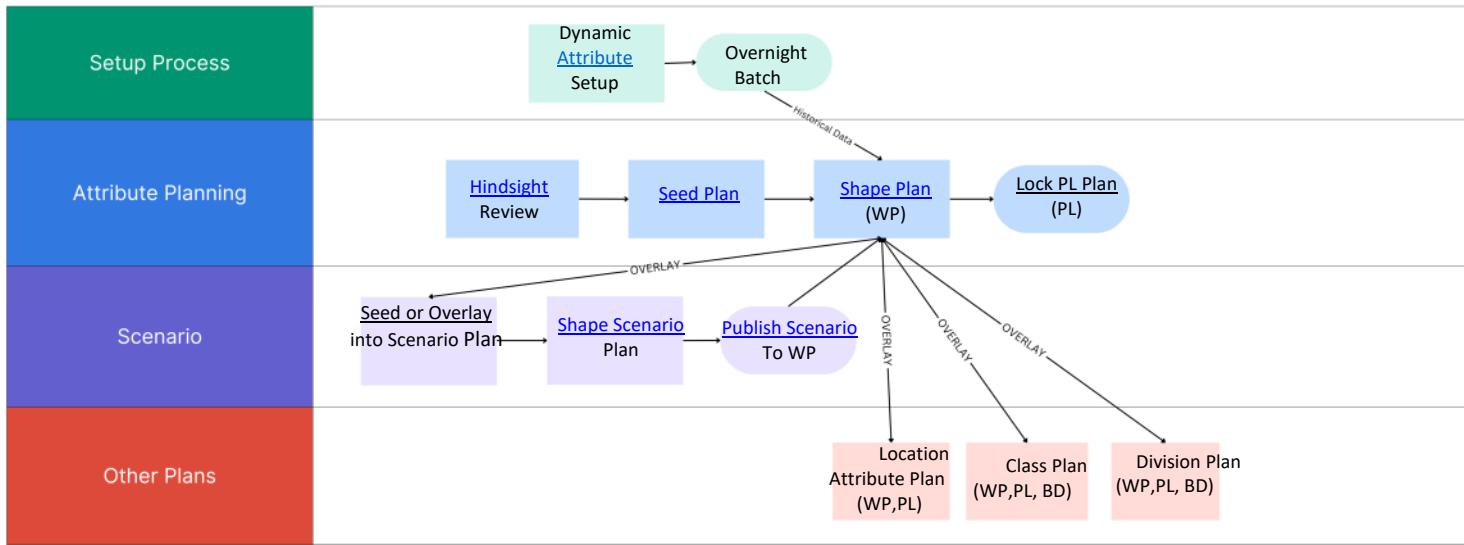
Scenario vs WP

Baseline Planning

Attribute Planning Overview

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Attribute Planning Process



Overview Recording

Tuesday, July 2, 2024 4:00 PM

Navigation

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Attribute Plan Workspace

The Attribute plan workspace allows you to create, shape and edit your attribute plan. This plan can be edited at Attribute Value, SubChannel and week or any of the higher levels above these.

Below is a description of each page group & page that exists in the Attribute Plan Workspace.

Page Group	Page	Description
Attribute Setup		
	Attribute Setup	This page is used to setup dynamic attribute plans by class. This is in addition to the two default attributes (32 & 39).
Summary		
	Dashboard	This page is intended to be used to review a plan's key metrics. There is a graph to compare demand & sales plans to historical time periods and a pivot table to display high level plan metrics.
Class Planning		
	Hindsight Review	This page will allow you to look at all historical time periods for key metrics: Sales, Demand, Markdowns, Margin, Inventory & Receipts. This can be used to help determine what time period to seed from.
	Planning Workflow	This page has tabs for each flow of the plan with all relevant metrics on the individual tabs. This workflow should be used for detailed planning and to see specific metrics within an area that don't exist within the summary view.
	OTB Summary	This page allows you to plan most key metrics on a one page view and can be used for editing the plan while visualizing a variety of metrics from different areas.
Scenario Planning		
	Scenario Planning	This page is where you can create a scenario plan and publish a scenario back out to your WP plan version
	Scenario vs WP	This page is used to compare any scenario plan to the current WP plan
Reconciliation		
	PA vs PA PL	This page is a detailed report with all plan metrics to compare between PA WP and PA Locked version.
	PA vs DP	This page is a detailed report with all plan metrics to compare between PA WP and Division WP version.
	PA vs CP	This page is a detailed report with all plan metrics to compare between PA WP and Class WP version.
Reporting		
	Reporting	This page can be used as a supplement OTB report

Attribute Setup

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Attribute Plan Setup

All classes will automatically have Attribute 32 - Season and Attribute 39 - Market/OB setup in the system and can start planning at any time.

There are 4 dynamic attributes in addition to the two above that can be setup for each class. Once setup is complete, the process runs overnight to generate the history and create the plan.

The 4 dynamic attribute plans will remain intact until a new attribute is selected. This will remove the existing plan and create a new plan for the new attribute.

★ Please Note - If you are **UO EU** you also need to have Country Group in the layout below.

You can select your attribute in the first row, and then copy and paste all the way down!

Dynamic Attribute Setup

Setup additional attributes to plan by navigating to **Attribute Plan Workspace > Attribute Setup Page Group > Attribute Setup Page**.

Update scope filters for the class or classes you want to plan.

Choose the attribute number to plan in the field Dynamic Attribute 1. If you want to plan additional attributes, use fields Dynamic Attribute 2-4.

The screenshot shows the Attribute Plan workspace with the Dynamic Attribute Setup page selected. The left sidebar includes sections for Summary, Attribute Planning, Hindsight Review, Planning Workflow, Plan Summary, Scenario Planning, Reconciliation Summary, and Forecast Review. The main area features four dropdown menus labeled 'Dynamic Attribute 1', 'Dynamic Attribute 2', 'Dynamic Attribute 3', and 'Dynamic Attribute 4'. The 'Dynamic Attribute 1' dropdown is open, showing a list of attributes: Attribute_1, Attribute_2, Attribute_3, Attribute_4, Attribute_5, Attribute_6, Attribute_7, and Attribute_8. The 'Attribute_1' option is highlighted with a red box. A larger red box encloses the entire list of attributes in the 'Dynamic Attribute 1' dropdown. The top right of the screen shows various workspace navigation and filter options.

Once the attributes are chosen, an overnight batch will run to populate the history in the plan and create the association. Once this batch runs, you will be able to filter on this combination to plan.

Seeding

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Seeding

The starting point of developing a plan is to seed it with data

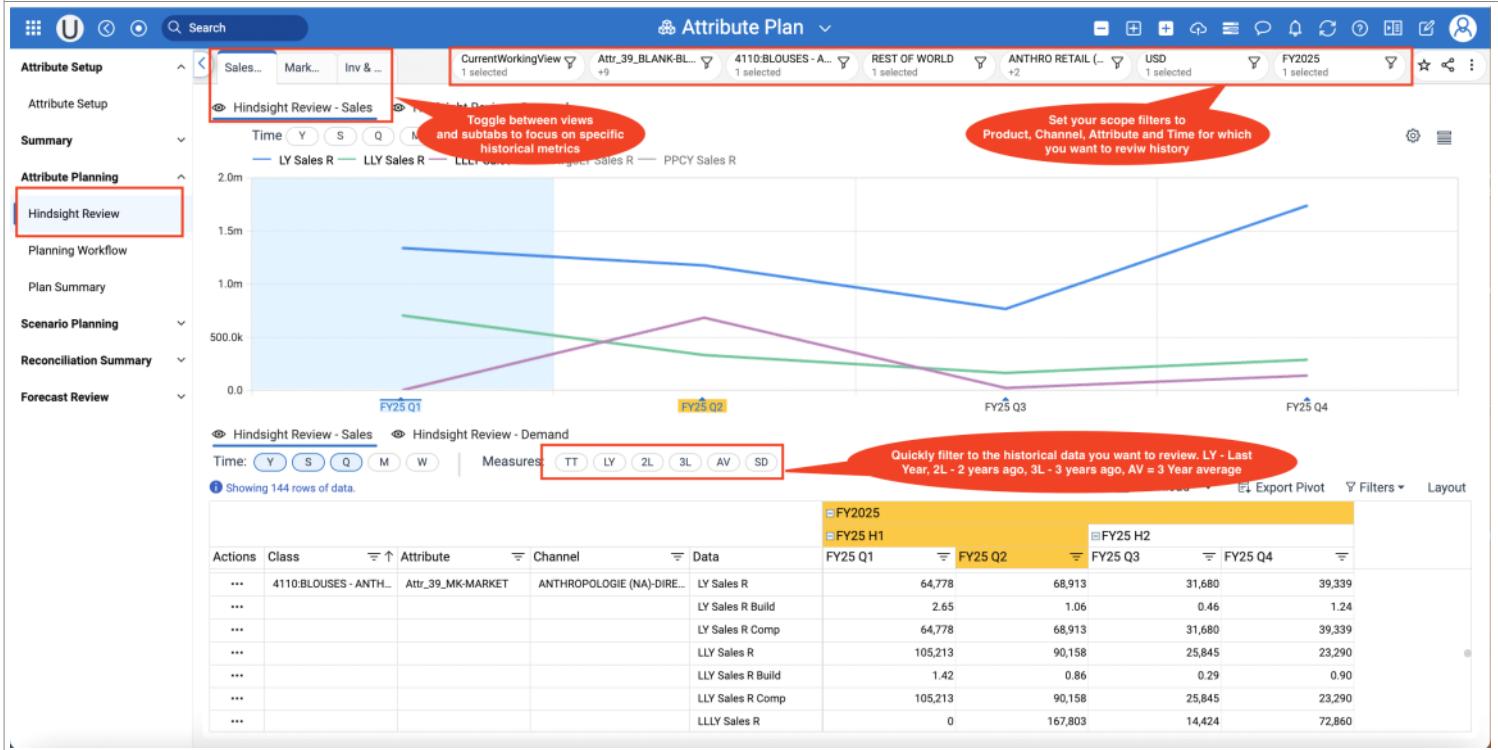
When you are building a new Merchandise Financial Plan, seeding it with data from the past or from a like plan will save time and improve accuracy by inheriting key data instead of building it from scratch. You will inherit seasonality curves, key metrics, and ratios from the selected time frame. It creates the basis used to shape your future plan.

You can choose to seed from any level of history (LY, LLY, LLLY, Avg3LY), a like class, or a like attribute.

Hindsight Workflow

Review historical data by navigating from the **Attribute Plan Workspace > Attribute Planning Page Group > Hindsight Review Page**. The “Hindsight Review” page exists for all plan types and all plan types have the same layout. This guide focuses on Attribute Planning.

Hindsight Review helps planners determine which historical time frame is most appropriate to use as the baseline for their future plan. *Which past year do you think next year will be most like?*



Seeding Workflow

Navigate to **Attribute Plan Workspace > Attribute Planning Page Group > Planning Workflow Page > Sales & Demand Planning View** or **Attribute Plan Workspace > Attribute Planning Page Group > PlanSummary**

Update your Scope Filters to the time frame you are going to seed with data.

Click on the “Seed Plan” Action Button.

Attribute Plan

Summary Planning

Set scope filters for Product, Channel Attribute and time you want to plan

FY2025

FY25 H1

FY25 Q1

FY25 FEB

FY25 MAR

FY25 WK... **FY25 WK...**

Actions **Class** **Attribute...** **Attribute** **Data**

Plan Summary

Scenario Planning

Reconciliation Summary

Forecast Review

Seed Plan

Select Seed Source

Division

Department

SubClass

Like Source Class

Submit

Fill out parameters in the "Seed Plan" Action Button Pop Up

Select Seed Source will default to BLANK. You can choose to seed from 4 historical time frames or you can choose to seed from a like class.

Historical Time Frames:

- LY = Last Year
- LLY = Last Last Year (2 Years Ago)
- LLLY = Last Last Last Year (3 Years Ago)
- Avg3LY = Average of last 3 years

You cannot seed from PCY = PreCovid Year.

If you select "Seed from Like Class" as the Seed Source, Class options will become available to select under "Like Source Class". Select the class you want to COPY DATA FROM.

Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."

Seed Plan

Request submitted successfully. Please wait for the notification.

X Close

Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.



Refresh o9 to see updated data.

Review your updated Class Plan. Now that the plan has been seeded, the CP values will no longer be blank. They will match the data from which you seeded.

Tips & Tricks - FAQ 1

1. Do only the measures I have pulled into my view seed?

No! All seeding measures will seed no matter what measures you have pulled into the Pivot Table in *Class Plan Workspace > Class Planning Page Group > Planning Workflow*

Page > Sales & Demand Planning View. The only measures that do not seed are RTV & Inv Adj.

It does not matter which measures you have pulled into this pivot table. All measures will seed.

Can update measures in the pivot in Layout > Data.

Tips & Tricks - FAQ 2

Can I seed all my classes with LY at one time or do I have to do them individually?

Multiple classes may be seeded at one time by selecting multiple classes in your Seed Plan Action Button Parameters.

This is true for parent/child relationships at any level of the hierarchy (e.g., all classes in a department, departments in a division, divisions in a brand, etc.)

Select Seed Source

Like Source Class

Select All 4110.BLOUSES-ANTHRO.(NA) X

4110.BLOUSES-ANTHRO.(NA)
4111.HAWAIIAN.GHT.KNTA.(NA)
4112.OUT AND BEW KNITS-ANTHRO.(NA)
4112.RING GAUGE-ANTHRO.(NA)
4116.SWEATERS-ANTHRO.(NA)
4118.JACKETS-ANTHRO.(NA)

Reset Close Submit

Tips & Tricks - FAQ 3

Can I seed a plan with the LY of a “Like Class”?

No. When seeding from a like class, it is seeding from the plan time frame (WP). For example, if you seed class 4110 FY26 MAR from 4112, it will copy the data from 4112 FY26 MAR. It is copying the “WP” or “CurrentWorkingView”.

The correct workflow is to seed the Like Class from its own history before using it to seed a class without its own history.

Select Seed Source *

Cannot multi-select

LY
LLV
LLL
AvgLY
AvgBLY
Seed From Like Class

Tips & Tricks - FAQ 4

If I am copying LY data into a plan, and the LY data has not fully actualized yet, what happens?

For LY data that does not have actual values yet, the CurrentWorkingView (WP) plan values for the will be used.

The screenshot shows a software interface for financial planning, specifically the Class Plan module. The top navigation bar includes tabs like Summary, Sales & Demand Planning, Merchandise Planning, Merchandise & Merchandise Planning, Inventory & Receipts Planning, Sales & Purchase Planning, General Planning, and Forecasting. The main area displays a grid of data for LY (partially actualized timeframe). A red border highlights the LY column headers and the first few rows of data. The data grid has columns for Actions, Division, and Class, followed by various LY and TY EOP columns.

Tips & Tricks - FAQ 5

When I copy LY data into a plan, the EOP's do not match TY to LY. Why is this?

There are two reasons for this:

1. The EOP's for the TY data are calculating using the planned ending EOP of the prior period (the last planned EOP of the prior year or season). If the planned EOP in that period is different from the LY EOP, the plans that were just copied are using a different starting point than the LY values.
2. In the CurrentWorkingView plans, LY values for Transfer/RTV's and Inv Adj's are not included in the copy process. Thus, they affect the LY EOP's but the TY EOP's are calculated based on their values being zero.

% to Total Class Metrics

Open a ticket at support.urbn.com or email o9support@urbanoutfitters.com for help!

Compare Attribute Plan to Total Class Plan

In Attribute Plan > Attribute Planning > OTB Summary view, you can plan your attribute metrics against the total class plan metrics. Your class plan values will be displayed in the PA CP metrics, and can be compared to your Product Attribute (PA) metrics.

Below are all class plan metrics available in Attribute Plan:

- PA CP Demand R
- PA CP EOP R
- PA CP FWOS R 1
- PA CP Receipt R
- PA CP Sales R
- PA CP Sales R Build
- PA CP MkdTot R % Sales R
- PA CP MkdTot R
- PA CP WOS R
- PA CP IMU % OO

The PA CP metrics will update in our nightly batch. This will copy CP data to the PA CP measures.

	Actions	Class	Attribute	Data	FY25 DEC	FY25 JAN	FY25 Q4	FY25 H2	FY2025	FY26 FEB	FY26 MAR	FY26 APR	FY26 Q1	FY26 MAY	FY26 JUN	FY26 JUL	FY26 Q3
WSSI	...	4123 PANTS (...	ANTHRO RETA...	Attr_32_NS...	PA Demand R	338,015	164,904	1,020,505	2,380,265	4,562,439	362,495	656,781	606,319	1,625,594	615,881	515,372	339,557
Currency Planning	PA Sales R	5,267,764	3,232,383	13,567,063	29,184,552	55,196,784	4,800,000	8,402,676	7,000,000	20,202,676	6,989,994	6,800,000	5,248,196	
Scenario Planning	PA Receipt R	8,605,489	7,810,252	22,722,735	46,567,253	79,737,906	9,300,000	9,500,000	10,000,000	28,800,000	4,500,000	9,000,000	8,000,000	
Reconciliation Summary	PA EOP R	17,503,961	21,253,325	21,253,325	21,253,325	21,253,325	24,851,451	24,042,384	26,737,777	23,536,184	24,604,598	26,019,474		
Forecast Review	PA CP Demand R	439,310	240,172	1,287,074	2,975,679	6,328,453	508,886	785,978	700,683	1,995,547	723,154	605,732	452,742	
Reporting	PA CP EOP R	20,678,761	25,538,236	25,538,236	25,538,236	25,538,236	30,043,995	27,655,111	28,392,368	28,392,368	25,978,573	27,766,213	24,941,937	
	PA CP Receipt R	9,476,191	11,363,636	29,367,937	60,047,235	118,296,734	13,140,187	11,302,165	9,316,770	33,759,122	8,356,771	11,454,545	7,090,909	
	PA CP Sales R	7,315,983	46,17,690	18,159,387	38,602,788	79,986,234	7,037,337	10,309,492	8,124,304	25,471,134	8,027,845	8,063,824	7,110,973	
	PA Demand R / CP Demand R %	76.94%	68.66%	79.29%	79.99%	72.09%	71.23%	83.56%	86.53%	81.46%	85.17%	85.06%	75.00%	
	PA EOP R / CP EOP R %	84.65%	83.22%	83.22%	83.22%	83.22%	82.72%	86.94%	94.17%	94.17%	87.24%	88.55%	104.32%	
	PA Receipt R / CP Receipt R %	90.81%	68.73%	77.37%	77.55%	67.40%	70.76%	84.05%	107.33%	85.31%	53.85%	78.57%	112.82%	
	PA Sales R / CP Sales R %	72.00%	70.00%	74.71%	75.60%	69.01%	68.21%	81.50%	86.16%	79.32%	87.07%	84.33%	73.80%	

There is an action button called 'SpreadCPValues' which can be ran ad hoc during the day. It will copy CP planned values to the PA CP metrics. This would be useful if changes were made to CP and you wanted these updates to show PA CP metrics the same day. Otherwise, these changes will update overnight. This action button is located in the Planning Workflow view.

	Actions	Divi ↑	Attribute	Data	FY25 FEB	FY25 MAR	FY25 APR	FY25 MAY	FY25 JUN	FY25 JUL	FY25 AUG	FY25 SEP	FY25 OCT	FY25 NOV	FY25 DEC	FY25 JAN	FY26 FEB	FY26 MAR
WSSI	PA Sales R	3,816,989	5,738,931	4,138,012	4,387,291	4,235,896	3,694,614	4,354,903	6,105,445	5,157,141	5,066,916	5,267,764	3,232,383	4,800,000	8,402,676	
Currency Planning	PA CP Sales R	5,775,851	9,059,412	7,084,755	7,086,282	7,143,729	5,233,417	6,009,309	7,991,367	6,445,726	6,225,713	7,315,983	4,617,690	7,037,337	10,309,492	
Scenario Planning	LY Sales R	4,859,008	5,963,692	4,824,716	3,064,960	4,295,487	4,076,991	4,712,408	5,745,156	3,549,868	3,879,721	4,078,013	3,055,218	3,816,989	5,738,6	
Reconciliation Summary	LLY Sales R	3,014,931	3,993,428	2,285,978	3,288,984	3,690,836	3,199,970	3,669,496	4,491,260	3,530,592	3,432,544	4,292,459	3,550,006	4,859,008	5,963,	
Forecast Review	PA Sales R / CP Sales R %	66.09%	63.35%	58.41%	61.92%	59.30%	70.60%	72.51%	76.40%	80.01%	81.39%	72.00%	70.00%	68.21%	81.5	
Reporting	PA LLY Sales R / CP LLY Sales R %	66.14%	60.64%	58.36%	47.27%	54.35%	64.46%	66.63%	72.07%	68.13%	68.68%	73.99%	75.19%	66.09%	63.3	
	PA LLY Sales R / CP LLY Sales R %	61.22%	58.78%	42.44%	46.91%	48.98%	51.64%	56.86%	59.66%	63.58%	56.75%	60.02%	65.40%	66.14%	60.6	
	PA LLLY Sales R / CP LLLY Sales R %	47.29%	39.05%	32.46%	27.87%	25.89%	39.68%	42.10%	43.28%	26.73%	23.52%	28.08%	55.88%	61.22%	58.7	
	PA Avg3LY Sales R / CP Avg3LY Sales R %	62.07%	56.18%	48.22%	42.48%	44.76%	52.94%	57.37%	60.74%	55.67%	52.81%	57.40%	66.41%	64.78%	61.1	

% to Total Class - Penetration Metrics

There are 4 penetration metrics:

- PA Demand R/CP Demand R %
- PA Sales R/CP Sales R %
- PA Receipt R/CP Receipt R %
- PA EOP R/CP EOP R %

PA Demand, Sales, and Receipts penetration metrics are editable and can be entered to calculate the PA metrics. The EOP % to CP metric is not editable.

You can compare your historical product attribute plan penetration metrics to your historical class plan metrics for LY, LLY, LLLY, & AVG3LY

- PA LY Demand R/ CP LY Demand R %
- PA LLY Demand R/ CP LLY Demand R %
- PA LLLY Demand R/ CP LLLY Demand R %
- PA AVG3LY Demand R/ CP AVG3LY Demand R %

- PA LY Sales R / CP LY Sales R %
- PA LLY Sales R / CP LLY Sales R %
- PA LLLY Sales R / CP LLLY Sales R %
- PA Avg3LY Sales R / CP Avg3LY Sales R %
- PA LY Receipt R / CP LY Receipt R %
- PA LLY Receipt R / CP LLY Receipt R %
- PA LLLY Receipt R / CP LLLY Receipt R %
- PA Avg3LY Receipt R / CP Avg3LY Receipt R %
- PA LY EOP R / CP LY EOP R %
- PA LLY EOP R / CP LLY EOP R %
- PA LLLY EOP R / CP LLLY EOP R %
- PA Avg3LY EOP R / CP Avg3LY EOP R %

Attribute Plan

Attribute Setup: Sales & De..., Markdown..., Inventory &..., IMU & AUR... CurrentWorkingView 4123.PANTS (NA) REST OF WORLD ANTHRO RETAIL... USD Attr_32_NS-NO SE... All: 454 Year Attr_32_NS-NO SE... All: 454 Year

Summary: Sales & Demand Planning Measures: UN PL SD DD 2L

Attribute Planning: Time: Y S Q M W Like Attribute SpreadCPValues Seed Plan Seed PAP Forecast Overlay Any Plan Download Export Pivot Filters Layout Local Edit

Hindsight Review: Showing 10 rows of data.

Planning Workflow: FY2025 FY2026 FY2026 H1 FY26 H1 FY26 Q1

Actions	Division	Attribute	Data														
			FY25 FEB	FY25 MAR	FY25 APR	FY25 MAY	FY25 JUN	FY25 JUL	FY25 AUG	FY25 SEP	FY25 OCT	FY25 NOV	FY25 DEC	FY25 JAN	FY26 FEB	FY26 MAR	
...	041:...	Attr_32_NS...	PA Sales R	3,816,989	5,738,931	4,138,012	4,387,791	4,235,896	3,694,614	4,354,903	6,105,445	5,157,141	5,066,916	5,267,764	3,232,383	4,800,000	8,402,6
...		PA CP Sales R		5,775,851	9,059,412	7,084,755	7,086,282	7,143,729	5,233,417	6,006,309	7,991,367	6,445,726	6,225,713	7,315,983	4,617,690	7,037,337	10,309,4
...		LY Sales R		4,859,008	5,963,692	4,824,716	3,064,960	4,295,457	4,076,991	4,712,608	5,745,156	3,549,866	3,879,721	4,878,013	3,055,218	3,816,989	5,738,5
...		LLY Sales R		3,014,931	3,993,428	2,285,978	3,288,984	3,690,836	3,159,978	3,669,496	4,491,260	3,530,592	3,432,544	4,292,459	3,550,006	4,859,008	5,963,6
...		LLL Sales R		817,716	1,402,545	1,085,840	1,186,056	1,477,859	1,942,894	1,715,353	2,039,325	1,005,344	911,377	1,226,407	1,607,345	3,014,931	3,993,4
...		PA Sales R / CP Sales R %		66.09%	63.35%	58.41%	61.92%	59.30%	70.60%	72.51%	76.40%	80.01%	81.39%	72.00%	70.00%	68.21%	81.5
...		PA LY Sales R / CP LY Sales R %		66.14%	60.64%	58.36%	47.27%	54.35%	64.46%	66.63%	72.07%	68.13%	68.68%	73.99%	75.19%	66.09%	63.3
...		PA LLY Sales R / CP LLY Sales R %		61.22%	58.78%	42.44%	46.91%	48.98%	51.64%	56.86%	59.66%	63.58%	56.75%	60.02%	65.40%	66.14%	60.6
...		PA LLL Sales R / CP LLL Sales R %		47.25%	39.05%	32.46%	27.87%	25.89%	39.68%	42.10%	43.28%	26.73%	23.52%	28.08%	55.88%	61.22%	58.7
...		PA Avg3LY Sales R / CP Avg3LY Sales R %		62.07%	56.18%	48.22%	42.48%	44.76%	52.94%	57.37%	60.74%	55.67%	52.81%	57.40%	66.41%	64.78%	61.1

Compare historical PA metrics to historical CP metrics

Class Plan

Sales & Demand Planning: CurrentWorkingView 4123.PANTS (NA) REST OF WORLD ANTHRO RETAIL... USD FY2025 FY2025

Inventory & Receipts Planning: FY2025

IMU & Cost Planning: FY2025

Measures: UN BD SD DD 2L

Attribute Planning: FY25 Q2 FY25 Q3 FY25 Q4

Hindsight Review: Showing 5 rows of data.

Planning Workflow: FY25 MAR FY25 APR FY25 MAY FY25 JUN FY25 JUL FY25 AUG FY25 SEP FY25 OCT FY25 NOV FY25 DEC FY25 JAN FY25 FEB FY25 MAR

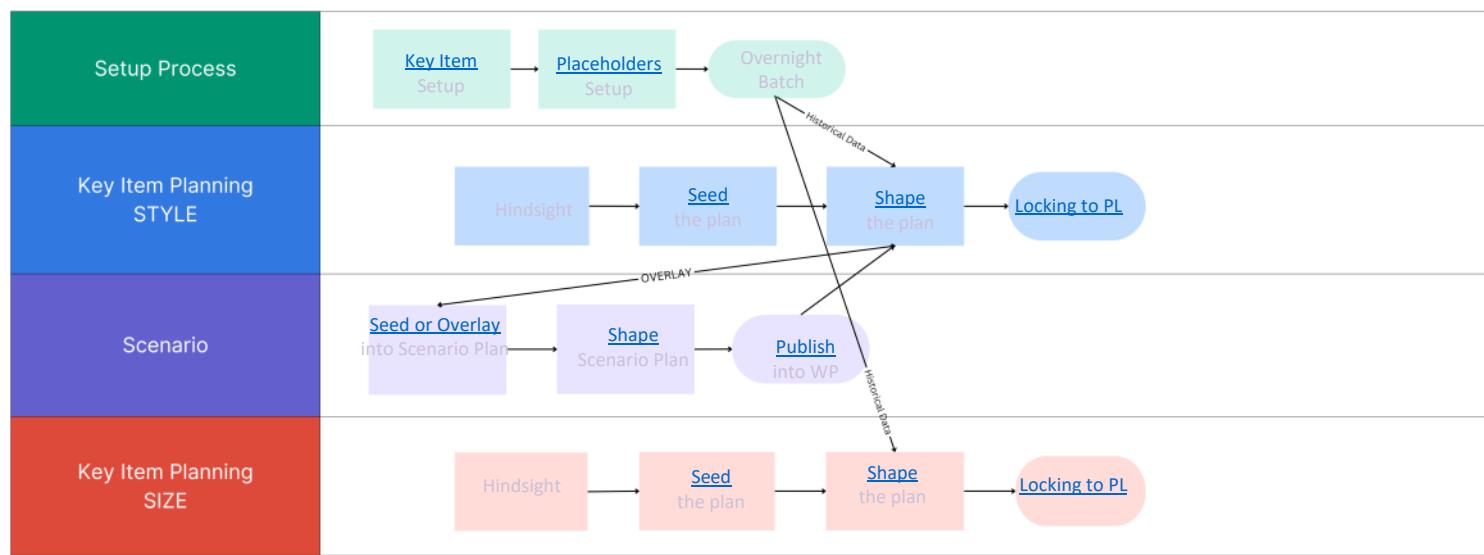
Actions	Division	Class	Data												
			FY25 MAR	FY25 APR	FY25 MAY	FY25 JUN	FY25 JUL	FY25 AUG	FY25 SEP	FY25 OCT	FY25 NOV	FY25 DEC	FY25 JAN	FY25 FEB	FY25 MAR
...	041:ANTHRO. WOMEN'S DIVISI...	4123.PANTS (NA)	CP Sales R	13,262,169	10,325,567	10,470,187	10,699,928	7,978,839	8,874,368	13,287,018	9,933,460	12,253,356	10,673,709	6,621,241	123,410,57
...			LY Sales R	14,089,267	11,957,597	9,530,989	11,608,044	9,072,123	10,318,009	12,156,131	8,389,706	10,403,283	9,148,124	5,901,655	123,081,582
...			LLY Sales R	9,838,910	7,837,697	9,414,877	10,591,822	8,850,905	9,403,737	10,603,527	9,008,735	10,225,818	9,288,470	7,448,475	109,234,334
...			LLL Sales R	5,558,926	4,885,336	6,269,542	7,265,800	6,788,765	5,997,210	6,359,327	5,487,680	6,147,667	5,816,083	4,020,330	67,471,836
...			Avg3LY Sales R	9,829,035	8,226,876	8,405,136	9,821,889	8,237,265	8,572,985	9,706,328	7,628,774	8,925,589	8,084,226	5,790,153	99,929,251

Uses historical data from Class Plan

Key Item Planning Overview

Tuesday, July 23, 2024 12:50 PM

Key Item Planning Process



Key Item Style

Tuesday, July 23, 2024 12:54 PM

Navigation

Tuesday, July 23, 2024 12:54 PM

Key Item Plan - Style Workspace

The Key Item Plan Style workspace allows you to create, shape and edit your key item plan at the style color level. This plan can be edited at Style Color, SubChannel and week or any of the higher levels above these.

Below is a description of each page group & page that exists in the Key Item Plan Style Workspace.

Page Group	Page	Description
KIP - Setup		
	Key Item Planning Setup	This page is used to identify which styles and style colors should be plannable as Key Items in this Key Item Style Level Workspace.
KIP - Style Color		
	Hindsight Review	This page will allow you to look at all historical time periods for key metrics: Sales, Demand, Markdowns, Margin, Inventory & Receipts. This can be used to help determine what time period to seed from.
	Planning Workflow	This page has tabs for each flow of the plan with all relevant metrics on the individual tabs. This workflow should be used for detailed planning and to see specific metrics within an area that don't exist within the summary view.
	Summary	This page allows you to plan most key metrics on a one page view and can be used for editing the plan while visualizing a variety of metrics from different areas.
Scenario Planning		
	Scenario Planning	This page is where you can create a scenario plan and publish a scenario back out to your WP plan version
	Scenario vs WP	This page is used to compare any scenario plan to the current WP plan
Reconciliation		
	KI vs KI PL	This page is a detailed report with all plan metrics to compare between WP and Approved version.
KIP Forecast Review		
	KIP Forecast Review	This page is used to review high level demand forecast vs history and plan.
	Insights	This page is used to review more detailed forecasting metrics

Key Item Setup

Tuesday, July 23, 2024 12:55 PM

Key Item Plan Setup

This page is used to determine which style/colors within a class should be setup on key item planning. If a style should be planned, it can be checked and if you want to remove a style from key item planning it should be unchecked.

Prior to this step, the class should be setup as a style or size class. If you do not see the class you are looking for in the filter, check this step first: [KIP Class Level](#)

Once items are selected in this page, the history will populate in an overnight batch. Note that changes will need to be made prior to 4pm in order to update the next day. Updates made after 4pm will not update until the next batch completes the following afternoon around 6pm.

Key Item Plan Setup Steps

Choose which styles and colors should be planned by navigating to **Key Item Plan - Style Workspace > KIP - Setup Page Group > Key Item Planning Setup Page**.

Update your Scope Filters to the class you are looking to plan.

Update the check box for styles or colors you want to include in key item planning. If you remove the Style Color Field from the pivot and make changes at the Style Level, all colors under the Style will be impacted.

NOTE: If you select an item to be a Key Item after 4:00PM Eastern Time it will not be available as a key item until the day after the next.

The screenshot shows a table with columns: Actions, Division, Class, Style, Style Color, and Plan Key Item Style Level. The 'Actions' column has a checkbox for each row. The 'Style Color' column lists various style colors. The 'Plan Key Item Style Level' column contains a minus sign for most rows. A red callout box highlights the 'Actions' column with the text 'Populate the checkbox for items that should be planned as key items'. Another red callout box highlights the top right corner of the screen with the text 'Set scope filters to choose the class to plan items in'.

Once you have selected the Style/Colors you want to plan click the "Create Association" Action Button. It will automatically select the style colors from the checkbox:

The screenshot shows the same table as before, but with a modal window titled 'CreateAssociation' overlaid. The modal contains a 'Version' section with a dropdown menu, a 'StyleColor' section with a list of style colors and a 'Select All' checkbox, and a 'Submit' button at the bottom. A red callout box highlights the 'Create Association Action Button' on the main screen.

Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."

Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.

Once complete, the style colors will be available to plan, **but will require an overnight batch to create historical data.**

Removing a Key Item from Plan

In order to keep the system clean and improve performance, key items should be removed if they will no longer be planned.

Navigate to **Key Item Plan - Style Workspace > KIP - Setup Page Group > Key Item Planning Setup Page**.

Update your Scope Filters to the class you are looking to plan.

Update the check box for styles or colors you want to remove from key item planning. If you remove the Style Color Field from the pivot and make changes at the Style Level, all colors under the Style will be impacted.

Key Item Plan - Style

Actions	Division	Class	Style	Style Color	Plan Key Item Style Level
...	041:ANTHRO. WOMEN'S DIVISION (NA)	4110:BLOUSES - ANTHRO. (NA)	4110-000001-0000001: CHRISRTEN (NA)	4110-000001-0000001-0000 (NA)	—
...			4110-000001-0000003: NEW TEST ITEM ES ...	4110-000001-0000003-0000 (NA)	—
...				4110-000001-0000003-0001 (NA)	—
...				4110-000001-0000003-0002 (NA)	—
...				4110-000001-0000003-0004 (NA)	—
...				4110-000001-0000003-0005 (NA)	—
...				4110-000001-0000003-0006 (NA)	—
...				4110-000001-0000003-0008 (NA)	—

Once you have selected the Style/Colors you want to remove click the "Delete Association" Action Button. It will automatically select the style colors from the checkbox:

Key Item Plan - Style

Actions	Division	Class	Style	Style Color	Plan Key Item Style Level
...	041:ANTHRO. WOMEN'S DIVISION (NA)	4110:BLOUSES - ANTHRO. (NA)	4110-000001-0000001: CHRISRTEN (NA)	4110-000001-0000001-0000 (NA)	—
...			4110-000001-0000003: NEW TEST ITEM ES ...	4110-000001-0000003-0000 (NA)	—
...				4110-000001-0000003-0001 (NA)	—
...				4110-000001-0000003-0002 (NA)	—
...				4110-000001-0000003-0004 (NA)	—
...				4110-000001-0000003-0005 (NA)	—
...				4110-000001-0000003-0006 (NA)	—
...				4110-000001-0000003-0008 (NA)	—

DeleteAssociation

Version ① *

CurrentWorkingView

StyleColor ① *

Select All 4110-000001-0000001-0000 (NA) X

Reset Close Submit

Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."

Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.

Once complete, the style colors will be removed from the plan.

Tips & Tricks - FAQ 1

Can I copy & paste a list of style colors into the Key Item Setup?

Yes. If you have a list of styles in Excel, or in a Text file you can highlight the list of style colors you wish to filter by and copy & paste them into o9.

Excel

A	B
1	Style Colors
2	4130-034238-0001112-0081
3	4130-034869-0002133-0010
4	4130-034869-0002830-0009
5	4130-039264-0006455-0049
6	4130-021040-0008941-0008
7	4130-001903-0003218-0049
8	4130-039264-0009811-0041
9	4130-0088993-0001358-0009
10	4130-060683-0003262-0099
11	4130-046403-0000002-0031
12	4130-009951-0000005-0089
13	4130-034869-0003594-0001
14	4130-037067-0000001-0011
15	4130-021162-0000051-0040
16	4130-038029-0005274-0049
17	4130-020459-0000028-0010
18	4130-063828-0000027-0079
19	4130-034869-0005681-0038
20	4130-044323-0000002-0066
21	4130-063828-0000033-0001
22	4130-005968-0000045-0049

A	B	C
1 Style Colors	Aptos N: 11 A\$ \$ %	
2 4130-034238-0001112-0081	Cut	
3 4130-034869-0002133-00	Copy	
4 4130-034869-0002830-00	Paste Options:	
5 4130-039264-0006455-00		
6 4130-021040-0008941-00	Paste Special...	
7 4130-001903-0003218-00	Smart Lookup	
8 4130-039264-0009811-00		
9 4130-008993-0001358-00		
10 4130-060683-0003262-00		
11 4130-046403-0000002-00		
12 4130-009951-0000005-00		
13 4130-034869-0003594-00		
14 4130-007277-0000007-00		
15 4130-005968-0000045-00		
16 4130-005968-0000045-00		
17 4130-005968-0000045-00		
18 4130-005968-0000045-00		
19 4130-005968-0000045-00		
20 4130-005968-0000045-00		
21 4130-005968-0000045-00		
22 4130-005968-0000045-00		

Right click on the selected section, and then left click on "Copy"

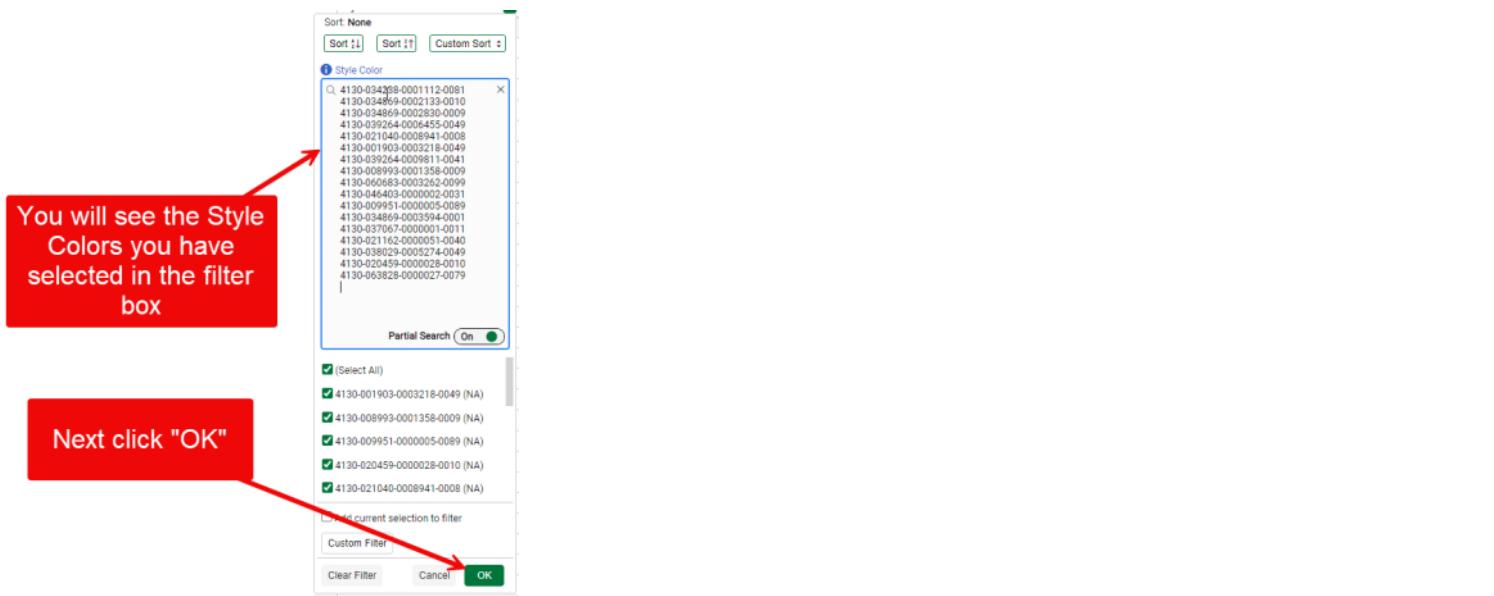
Key Item Plan - Style								
Actions	Brand	Division	Department	Class	Sub Class	Style	Style Color	Plan Key Item Style Level
<input type="checkbox"/>	004 ANTHROPOLOGIE (NA)	041 ANTHRO. WOMEN'S DIVISION (N...	0413 ANTHRO. WOMEN'S DRESSES (...	4130 DRESSES - ANTHRO. (NA)	4130 DRESSES - ANTHRO. (NA)	4130-001081-0000001: AMANDA U...	4130-001081-0000001:0005 (NA)	
<input type="checkbox"/>	...					4130-001133-0000001: WC DITSY FL...	4130-001133-0000001:0009 (NA)	
<input type="checkbox"/>	...					4130-001133-0000002: BR ASYM HE...	4130-001133-0000002:0040 (NA)	
<input type="checkbox"/>	...					-00000004-0009 (NA)	-00000004-0009 (NA)	
<input type="checkbox"/>	...					-00000005-0005 (NA)	-00000005-0005 (NA)	
<input type="checkbox"/>	...					-00000006-0066 (NA)	-00000006-0066 (NA)	
<input type="checkbox"/>	...					-00000006-0041 (NA)	-00000006-0041 (NA)	
<input type="checkbox"/>	...					-0000012-0001 (NA)	-0000012-0001 (NA)	
<input type="checkbox"/>	...					-0000016-0001 (NA)	-0000016-0001 (NA)	

In o9 click the tornado icon in the Style Color column

Key Item Plan - Style								
Actions	Brand	Division	Department	Class	Sub Class	Style	Style Color	Plan Key Item Style Level
<input type="checkbox"/>	004 ANTHROPOLOGIE (NA)	041 ANTHRO. WOMEN'S DIVISION (N...	0413 ANTHRO. WOMEN'S DRESSES (...	4130 DRESSES - ANTHRO. (NA)	4130 DRESSES - ANTHRO. (NA)	4130-001081-0000001: AMANDA U...	4130-001081-0000001:0005 (NA)	
<input type="checkbox"/>	...					4130-001133-0000001: WC DITSY FL...	4130-001133-0000001:0009 (NA)	
<input type="checkbox"/>	...					4130-001133-0000002: BR ASYM HE...	4130-001133-0000002:0040 (NA)	
<input type="checkbox"/>	...					-00000004-0009 (NA)	-00000004-0009 (NA)	
<input type="checkbox"/>	...					-00000005-0005 (NA)	-00000005-0005 (NA)	
<input type="checkbox"/>	...					-00000006-0066 (NA)	-00000006-0066 (NA)	
<input type="checkbox"/>	...					-00000006-0041 (NA)	-00000006-0041 (NA)	
<input type="checkbox"/>	...					-0000012-0001 (NA)	-0000012-0001 (NA)	
<input type="checkbox"/>	...					-0000016-0001 (NA)	-0000016-0001 (NA)	

Right click in the search bar

Next click paste

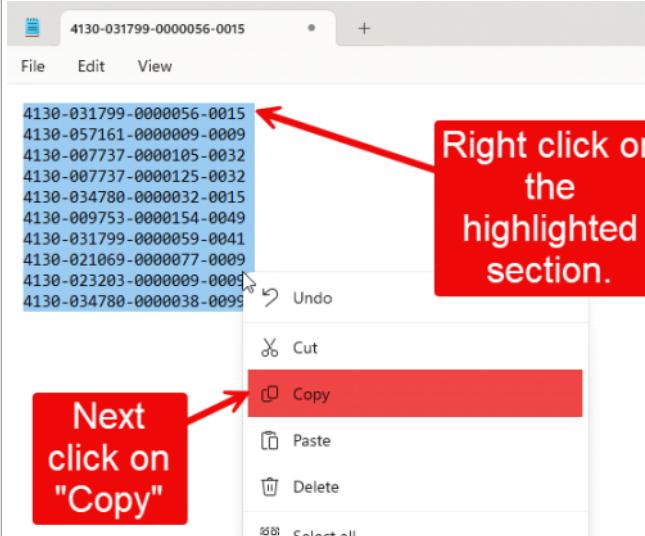


Key Item Plan - Style

Showing 17 rows of data.

Actions	Brand	Division	Department	Class	Sub Class	Style	Style Color	Plan Key Item Style Level
<input type="checkbox"/>	004 ANTHROPOLOGIE (NA)	041 ANTHRO. WOMEN'S DIVISION (N...	0413 ANTHRO. WOMEN'S DRESSES (...	4130 DRESSES - ANTHRO. (NA)	4130 DRESSES - ANTHRO. (NA)	4130-001903-0003218: FLTR LS WRA...	4130-001903-0003218-0049 (NA)	-
<input type="checkbox"/>	...					4130-008993-0001358: SHIRRED SLV...	4130-008993-0001358-0009 (NA)	-
<input type="checkbox"/>	...					4130-009951-0000005-0089	4130-009951-0000005-0089 (NA)	-
<input type="checkbox"/>	...					4130-020459-0000028-0010	4130-020459-0000028-0010 (NA)	-
<input type="checkbox"/>	...					4130-021040-0008941-0008 (NA)	4130-021040-0008941-0008 (NA)	-
<input type="checkbox"/>	...					4130-021162-0000051: SLS TIE BAC...	4130-021162-0000051-0040 (NA)	-
<input type="checkbox"/>	...					4130-034238-0001112: SLS PRINTED...	4130-034238-0001112-0081 (NA)	-
<input type="checkbox"/>	...					4130-034869-0002133: SLS FRINGE...	4130-034869-0002133-0010 (NA)	-
<input type="checkbox"/>	...					4130-034869-0002830: BAR PRINT J...	4130-034869-0002830-0009 (NA)	-
<input type="checkbox"/>	...					4130-034869-0003594: SHEER MESH...	4130-034869-0003594-0001 (NA)	-
<input type="checkbox"/>	...					4130-037067-0000001: CALLAHAN S...	4130-037067-0000001-0011 (NA)	-
<input type="checkbox"/>	...					4130-038029-0005274: SLS PLT SHR...	4130-038029-0005274-0049 (NA)	-
<input type="checkbox"/>	...					4130-039264-0006455: COTTON GAL...	4130-039264-0006455-0049 (NA)	-
<input type="checkbox"/>	...					4130-046403-0000002: CAP SLV GIN...	4130-046403-0000002-0031 (NA)	-
<input type="checkbox"/>	...					4130-060583-0003262: LS SHEER FE...	4130-060583-0003262-0099 (NA)	-
<input type="checkbox"/>	...					4130-063828-0000027: LS PRINT AB...	4130-063828-0000027-0079 (NA)	-

Notepad



Key Item Plan - Style

Showing 17,019 rows of data.

Actions	Brand	Division	Department	Class	Sub Class	Style	Style Color	Plan Key Item Style Level
<input type="checkbox"/>	004 ANTHROPOLOGIE (NA)	041 ANTHRO. WOMEN'S DIVISION (N...	0413 ANTHRO. WOMEN'S DRESSES (...	4130 DRESSES - ANTHRO. (NA)	4130 DRESSES - ANTHRO. (NA)	4130-001903-0003218: FLTR LS WRA...	4130-001903-0003218-0049 (NA)	-
<input type="checkbox"/>	...					4130-008993-0001358: SHIRRED SLV...	4130-008993-0001358-0009 (NA)	-
<input type="checkbox"/>	...					4130-009951-0000005-0089	4130-009951-0000005-0089 (NA)	-
<input type="checkbox"/>	...					4130-020459-0000028-0010	4130-020459-0000028-0010 (NA)	-
<input type="checkbox"/>	...					4130-021040-0008941-0008 (NA)	4130-021040-0008941-0008 (NA)	-
<input type="checkbox"/>	...					4130-021162-0000051: SLS TIE BAC...	4130-021162-0000051-0040 (NA)	-
<input type="checkbox"/>	...					4130-034238-0001112: SLS PRINTED...	4130-034238-0001112-0081 (NA)	-
<input type="checkbox"/>	...					4130-034869-0002133: SLS FRINGE...	4130-034869-0002133-0010 (NA)	-
<input type="checkbox"/>	...					4130-034869-0002830: BAR PRINT J...	4130-034869-0002830-0009 (NA)	-
<input type="checkbox"/>	...					4130-034869-0003594: SHEER MESH...	4130-034869-0003594-0001 (NA)	-
<input type="checkbox"/>	...					4130-037067-0000001: CALLAHAN S...	4130-037067-0000001-0011 (NA)	-
<input type="checkbox"/>	...					4130-038029-0005274: SLS PLT SHR...	4130-038029-0005274-0049 (NA)	-
<input type="checkbox"/>	...					4130-039264-0006455: COTTON GAL...	4130-039264-0006455-0049 (NA)	-
<input type="checkbox"/>	...					4130-046403-0000002: CAP SLV GIN...	4130-046403-0000002-0031 (NA)	-
<input type="checkbox"/>	...					4130-060583-0003262: LS SHEER FE...	4130-060583-0003262-0099 (NA)	-
<input type="checkbox"/>	...					4130-063828-0000027: LS PRINT AB...	4130-063828-0000027-0079 (NA)	-

In step 9 click the tornado icon in the Style Color column

Right click in the search bar

Next click paste

You will see the Style Colors you have selected in the filter box

Next click "OK"

Key Item Plan - Style

Showing 10 rows of data.

Actions	Brand	Division	Department	Class	Sub Class	Style	Style Color	Plan Key Item Style Level
<input type="checkbox"/>	004:ANTHROPOLOGIE (NA)	041:ANTHRO. WOMEN'S DIVISION (N...	0413:ANTHRO. WOMEN'S DRESSES (...	4130:DRESSES - ANTHRO. (NA)	4130:DRESSES - ANTHRO. (NA)	4130-007737-0000105: BARE LACE D...	4130-007737-0000105-0032 (NA)	—
<input type="checkbox"/>	...					4130-007737-0000125: YK LS TIREE...	4130-007737-0000125-0032 (NA)	—
<input type="checkbox"/>	...					4130-009753-0000154: SHOSHANNA...	4130-009753-0000154-0049 (NA)	—
<input type="checkbox"/>	...					4130-021069-0000077: EVA FRANCO...	4130-021069-0000077-0009 (NA)	—
<input type="checkbox"/>	...					4130-023203-0000009: RO DE LS PL...	4130-023203-0000009-0009 (NA)	—
<input type="checkbox"/>	...					4130-031799-0000056: OB SS SD T S...	4130-031799-0000056-0015 (NA)	—
<input type="checkbox"/>	...					4130-031799-0000059: OB LS DEC E...	4130-031799-0000059-0041 (NA)	—
<input type="checkbox"/>	...					4130-034780-0000032: UK AVIMANY...	4130-034780-0000032-0015 (NA)	—
<input type="checkbox"/>	...					4130-034780-0000038: BL NK SS PR...	4130-034780-0000038-0099 (NA)	—
<input type="checkbox"/>	...					4130-057161-0000009: BANJANAN ...	4130-057161-0000009-0009 (NA)	—

You will now see only the Style Colors you have filtered for.

Placeholders in Setup

Thursday, August 08, 2024 2:47 PM

Creating Placeholders in Key Item Planning Setup

This process is used to placeholders in key item planning.

You can create a placeholder style or style color.

Creating a Placeholder Style

If you would like to create a Placeholder Style in Key Item Plan - Color

Navigate to Key Item Plan – Color > KIP – Setup > Key Item Planning Setup

Click the "+ Create PH Style" action button at the top of the pivot view.

A screenshot of the SAP Fiori interface for 'Key Item Plan - Color'. The title bar says 'Key Item Plan - Color'. The left sidebar shows navigation paths: KIP - Setup, Key Item Planning Setup, KIP - Style Color, Hindsight Review, Planning Workflow, Summary, Scenario Planning, Reconciliation Summary, KIP Forecast Review, and Reporting. The main area is titled 'Key Item Setup - Style Color' and shows a table with columns: Actions, Division, Class, Style, and Style Color. At the top of the table, there are two buttons: '+ Create PH Style' and 'Create PH Style...'. A red box highlights the first button. A callout bubble points to it with the text: 'You can either create a new Placeholder Style with colors associated with it, or create Placeholder colors associated with an existing style.' To the right of the table is a grid of 'Key Item' and 'Non Key Item' rows, each with a small preview icon and a delete icon.

Select the Sub-Class, Number of Style-Colors, and Sizes per Style Color, and enter a Placeholder Style name then click "Submit"

A screenshot of the 'Create PH Style' dialog box. It has four input fields: 'Sub-Class' (dropdown menu showing '8152 FP HATS (NA)'), 'Number of Style Colors' (dropdown menu showing '1'), 'Placeholder Style' (text input field showing 'TEST'), and 'Number Of Style Color Size per Style Color' (dropdown menu showing '1'). Below these fields are 'Reset' and 'Close' buttons, followed by a large 'Submit' button with a checkmark icon. Red boxes highlight the 'Sub-Class' dropdown, the 'Placeholder Style' input field, and the 'Number Of Style Color Size per Style Color' dropdown.

You will be notified when the Style has been created.

A screenshot of the 'Notifications' screen. It displays three notifications with green checkmarks: 'Create PH Style - Execution completed successfully.' (Updated 08-Aug-2024 02:57:46 PM), 'Create PH Style - Execution completed successfully.' (Updated 08-Aug-2024 02:57:46 PM), and 'CreateAssociation - Execution completed successfully.' (Updated 08-Aug-2024 02:02:30 PM). Each notification has a 'View More' link below it. The top of the screen shows a toolbar with various icons.

Next navigate to Key Item Plan – Color > KIP – Setup > Key Item Planning Setup

From here we will create the association between the placeholder you created, and setting it to active for key item planning.

A screenshot of the 'Key Item Plan - Color' pivot view. The left sidebar shows 'Key Item Setup - Style Color'. The main area shows a table with columns: Actions, Division, Class, Style, and Style Color. A red box highlights the 'Style Color' filter icon in the top right corner of the table area. A callout bubble points to it with the text: 'Filter to the Placeholder you created'. A modal dialog box titled 'Style Color' is open over the table, showing a list of style colors. One entry, 'CL TEST', is highlighted with a red box and checked. Other entries include 'TEST', '8152-096887-000', '8152-096883-000', '8152-096744-000', '8152-096739-000', 'Custom Filter', 'Clear Filter', and 'OK'. The background table shows several rows of data, and the right side of the screen shows a grid of 'Key Item' and 'Non Key Item' rows.

Select the check box for the placeholder

And click the "+ CreateAssociation" action button

Now navigate back to Key Item Plan – Color > KIP – Style Color > Planning Workflow

You can now add this placeholder to your filtered pivot table.

Your placeholder has been created & activated for key item planning.

Creating a Placeholder Style Color

If you would like to create a Placeholder Style Color

Navigate to Key Item Plan – Color > KIP – Style Color > Planning Workflow

Click the "+ Create PH Style Color" action button at the top of the pivot view.

Select the Sub-Class, Number of Style Colors, Number of Style Color Size per Style Color, and the Style to associate the placeholder color with

Create PH Style Color

Sub-Class *	8152.FP HATS (NA)
Number of Style Colors *	1
Style *	8152-096887-0000001: CLEMENTINE STRAW VISOR (NA)
Number Of Style Color Size per Style Color *	1

You will be notified when the action has completed.

Notifications

Create PH Style Color - Execution completed successfully...
Updated 08-Aug-2024 01:59:00 PM View More

Next navigate to **Key Item Plan – Color > KIP – Setup > Key Item Planning Setup**

From here we will create the association between the placeholder you created, and setting it to active for key item planning. Click the check box for the placeholder and select the "+ CreateAssociation" action button. You will be notified when the process has completed.

Key Item Planning Setup

+ CreateAssociation

Division	Class	Style	Style Color
<input checked="" type="checkbox"/> 083 FREE P WOMEN'S ACCESS (NA)	8152:FP HATS(NA)	8152-096887-000001: CLEMENTINE STRAW VISOR (NA)	1008152096887000001-3
<input type="checkbox"/>			8152-096887-000001-0030: CLEMENTINE STRAW VISOR (NA)-GRN/VERT (NA)
<input type="checkbox"/>			8152-096887-000001-0060: CLEMENTINE STRAW VISOR (NA)-RED/ROUGE (NA)

Notifications

CreateAssociation - Execution completed successfully...
Updated 08-Aug-2024 04:08:34 PM View More

Now navigate back to **Key Item Plan – Color > KIP – Style Color > Planning Workflow**

You can now add this placeholder to your filtered pivot table.

Planning Workflow

Style Color	Key Item	Data
8152-096887-000001-0030: CLEMENTINE STRAW VISOR (NA)-GRN/VERT (NA)	KI Demand R Reg	FY25 AUG FY25 SEP FY25 OCT
8152-096887-000001-0060: CLEMENTINE STRAW VISOR (NA)-RED/ROUGE (NA)	KI Demand R Reg	

Planning Workflow

Style Color

Your placeholder has been created & activated for key item planning.

Deleting Placeholders

Thursday, August 08, 2024 2:47 PM

Deleting Placeholders

This process is used to delete placeholders in key item planning.

You can delete a placeholder style, style color, or style color size.

Creating a Placeholder Style

If you would like to create a Placeholder Style in Key Item Plan - Color

Navigate to Key Item Plan – Color > KIP – Setup > Key Item Planning Setup > Key Item Delete PH

The screenshot shows the 'Key Item Plan - Color' application window. On the left, there's a navigation sidebar with various tabs like 'KIP - Setup', 'Key Item Planning Setup', 'KIP - Style Color', etc. The 'Key Item Delete PH' tab is highlighted with a red box and an arrow pointing to it from the text above. The main area is a grid table titled 'Showing 91 rows of data'. The columns include Actions, Brand, Division, Department, Class, Sub Class, and Style. The first few rows show data for '001:URBAN OUTFITTERS...' and '001:WOMEN'S DIVISION...'. A red box highlights the 'Actions' column header.

Here you can delete a placeholder Style, Style Color, or Style Color Size.

Deleting Placeholder Style

- If you want to delete an entire placeholder style you will only select the Style tic box at the far right.
- Please DO NOT click the Style & Style Color & Style Color Size.

Deleting Placeholder Style Color

- If you want to delete specific color(s) within a placeholder you will select the StyleColor tic box associated with the style color(s) you wish to delete.

Deleting Placeholder Style Color Size

- For this you will need to navigate to the same screen in Key Item Plan - Size and select the specific size(s) you wish to delete from the column on the right side of the screen.

In the example below I have selected to delete a placeholder Style & a single color for another placeholder Style. Click Save when you have made your selections

The screenshot shows the 'Key Item Plan - Color' application window with the 'Key Item Delete PH' tab selected. A red box highlights the 'Save' button at the top. A callout box with a red border contains the text: 'In this example I will delete All of Style 0522-TEST_BULB1 & just 0522-TEST_ITEM color 3. Make selections then click Save'. The main area is a grid table titled 'Showing 91 rows of data'. The columns include Actions, Class, Sub Class, Style, Style Color, Style Color Size, StyleColor, and Style. The 'StyleColor' column has several checkboxes. One checkbox in the 'StyleColor' column for the row '0522-TEST_ITEM' is checked and highlighted with a red box. Another checkbox in the 'StyleColor' column for the row '0522-TEST_BULB1' is also highlighted with a red box.

Please note once you have saved your selections these placeholders will be deleted in the nightly batch. If you wish to undo the selection deselect the tic box and click save again prior to the end of day.

Grouping Style Colors

Wednesday, August 21, 2024 1:56 PM

Grouping Style Colors

This process will allow you to group selected style colors to get a total by group.

Using KI (Key Item) & NKI (Non Key Item) to form groups

Navigate to Key Item Plan – Color > KIP – Setup > Key Item Planning Setup

In the example shown We have used a placeholder style with 5 colors associated with it. Style Color 1, 2, and 3 will represent fashion colors, while Style Color 4 & 5 represent basic colors.

Actions	Division	Class	Style	Style Color	Plan Key Item Style Level
...	005-HOUSEWARES DIVISION (NA)	0522.LIGHTING (NA)	0522-TEST_ITEM	0522-TEST_ITEM-1	-
...				0522-TEST_ITEM-2	-
...				0522-TEST_ITEM-3	-
...				0522-TEST_ITEM-4	-
...				0522-TEST_ITEM-5	-

First we will select the tic boxes for the three fashion colors, and then select the "+ CreateAssociation" action button.

Actions	Division	Class	Style	Style Color	Plan Key Item Style Level
<input checked="" type="checkbox"/>	...	005-HOUSEWARES DIVISION (NA)	0522.LIGHTING (NA)	0522-TEST_ITEM	0522-TEST_ITEM-1
<input checked="" type="checkbox"/>	...				0522-TEST_ITEM-2
<input checked="" type="checkbox"/>	...				0522-TEST_ITEM-3
<input type="checkbox"/>	...				0522-TEST_ITEM-4
<input type="checkbox"/>	...				0522-TEST_ITEM-5

Second select "KI" from the Is Key Item drop down, then click "Submit"

CreateAssociation

Version ⓘ *

CurrentWorkingView

StyleColor ⓘ *

Select All 0522-TEST_ITEM-1 X +2 More

Is Key Item? ⓘ *

KI

NKI

Submit

Next deselect Style Color 1, 2, and 3. Then select Style Color 4 & 5 and click "+ CreateAssociation"

Actions	Division	Class	Style	Style Color	Plan Key Item Style Level
...	005-HOUSEWARES DIVISION (NA)	0522.LIGHTING (NA)	0522-TEST_ITEM	0522-TEST_ITEM-1	-
...				0522-TEST_ITEM-2	-
...				0522-TEST_ITEM-3	-
<input checked="" type="checkbox"/>	...			0522-TEST_ITEM-4	-
<input checked="" type="checkbox"/>	...			0522-TEST_ITEM-5	-

With Style Color 4 & 5 select "NKi" from the "Is Key Item" drop down, and press "Submit"

CreateAssociation

Version ① *

CurrentWorkingView +

StyleColor ① *

Select All 0522-TEST_ITEM-4 X +1 More

Is Key Item? ① *

NKI
KI
NKI

Reset Close Submit

You will be notified when the associations have been created



Navigate to Key Item Plan – Color > KIP - Style Color > Planning Workflow

Now in your filters select both "Key Item" & "Non Key Item"

Key Item Plan - Color

Planning Workflow Planning Workflow - D... CurrentWorkingView 1 selected Key Item 1 selected 0522-TEST_ITEM-1 REST OF WORLD 1 selected URBAN RETAIL (NA) 1 selected USD 1 selected FY25 JUL +3

Sales & Demand Cross-Channel Inv & Receipts Time: Y S Q M W

Showing 18 rows of data.

Key Item Plan - Color

Planning Workflow Planning Workflow - D...

Version Key Item Item Location Company Currency Time

▲ Version Name ● Key Item ▲ Style Color ▲ Country Group ▲ Sub-Channel ▲ Currency 454 Week

Key Item Non Key Item

2 selected out of 2 related members. To view all available members click Show All

Select All

Key Item Non Key Item

Select both "Key Item" and "Non Key Item"

Next in Layout Add in Key Item & it's Subtotal

Key Item Plan - Color

Planning Workflow Planning Workflow - D... CurrentWorkingView 1 selected Key Item 1 selected 0522-TEST_ITEM-1 REST OF WORLD 1 selected URBAN RETAIL (NA) 1 selected USD 1 selected FY25 JUL +3

Sales & Demand Cross-Channel Inv & Receipts Time: Y S Q M W

Showing 18 rows of data.

Actions Class ↑ Style ↓ Style Color Data FY25 JUL FY25 AUG FY25 SEP FY25 OCT

Select Layout Layout

Pivot Layout

Layout Data Options Display

Rows Columns

Attributes Only All

Style	Subtotal ↕ +
Style Color	Subtotal ↕ +
Company	Subtotal ↕ +
Channel	Subtotal ↕ +
Sub-Channel	Subtotal ↕ +
Country Group	Subtotal ↕ +
Key Item	Subtotal ↕ +
	Subtotal ↕ +

Select "Key Item" & Subtotal

Reset Cancel Save

Key Item Plan - Color

Sales & Demand Cross-Channel Inv & Receipts

Showing 7 rows of data. Please refresh the pivot for potential impacts.

Actions	Class	Style	Key Item	Style Color	Data	FY25 SEP	FY25 OCT
...	0522 LIGHTING (NA)	0522-TEST_IT...	0522-TEST_ITEM-1	(All)	KI Sales U Reg	47,500	62,100
...			0522-TEST_ITEM-2		KI Sales U Reg	25,000	32,500
...			0522-TEST_ITEM-3		KI Sales U Reg	12,500	17,850
...			Non Key Item	(All)	KI Sales U Reg	10,000	11,750
...				0522-TEST_ITEM-4	KI Sales U Reg	75,000	83.5k
...				0522-TEST_ITEM-5	KI Sales U Reg	37,500	
						37,500	

You can now plan individual colors, and all other

Placeholders in Workflow

Thursday, August 08, 2024 2:47 PM

Creating Placeholders

This process is used to placeholders in key item planning.

You can create a placeholder style or style color.

Creating a Placeholder Style

If you would like to create a Placeholder Style in Key Item Plan - Color

Navigate to Key Item Plan – Color > KIP – Style Color > Planning Workflow

Click the "+ Create PH Style" action button at the top of the pivot view.

The screenshot shows the 'Key Item Plan - Color' interface. In the top navigation bar, there is a 'Create PH Style' button with a red border and a '+' icon. Below the navigation bar is a search bar and a toolbar with various icons. The main area is a pivot table showing data for 'Planning Workflow Test'. The left sidebar contains several sections: KIP - Setup, Key Item Planning Setup, KIP - Style Color, Hindsight Review, Planning Workflow, Summary, Scenario Planning, Reconciliation Summary, and KIP Forecast Review. The 'KIP - Style Color' section is currently selected.

Select the Sub-Class, Number of Style-Colors, and Sizes per Style Color, and enter a Placeholder Style name then click "Submit"

The screenshot shows the 'Create PH Style' dialog box. It has three main sections: 'Sub-Class' (containing '8152 FP HATS (NA)'), 'Placeholder Style' (containing 'TEST'), and 'Number Of Style Color Size per Style Color' (containing '1'). At the bottom right of the dialog box is a 'Submit' button with a checkmark, which is highlighted with a red arrow.

You will be notified when the Style has been created.

The screenshot shows the 'Notifications' screen. It displays three green success messages: 'Create PH Style - Execution completed successfully.' (Updated 08-Aug-2024 02:57:46 PM), 'Create PH Style - Execution completed successfully.' (Updated 08-Aug-2024 02:57:46 PM), and 'CreateAssociation - Execution completed successfully.' (Updated 08-Aug-2024 02:02:30 PM). Each message has a 'View More' link next to it.

Next navigate to Key Item Plan – Color > KIP – Setup > Key Item Planning Setup

From here we will create the association between the placeholder you created, and setting it to active for key item planning.

The screenshot shows the 'Key Item Plan - Color' interface under 'Key Item Planning Setup'. A red box highlights the 'Style Color' filter icon in the top right corner of the pivot table. Another red box highlights the 'TEST' placeholder style in the dropdown menu. A third red box highlights the 'Select the check box for the placeholder' checkbox in the bottom left corner of the interface. A fourth red box highlights the '+ CreateAssociation' action button in the top right corner of the interface.

Notifications

CreateAssociation - Execution completed successfully.
Updated 08-Aug-2024 03:19:18 PM [View More](#)

Now navigate back to Key Item Plan – Color > KIP – Style Color > Planning Workflow
You can now add this placeholder to your filtered pivot table.

The screenshot shows the Key Item Plan - Color interface. The left sidebar has sections like KIP - Setup, Key Item Planning Setup, KIP - Style Color, Hindsight Review, Planning Workflow (which is selected), Summary, Scenario Planning, Reconciliation Summary, and KIP Forecast Review. The main area is titled 'Key Item Plan - Color' and shows a pivot table for 'Planning Workflow'. The toolbar includes buttons for Seed Plan, Seed Demand Fo..., Overlay Any Plan, Create PH Style..., Lock Plan, Download, Export Pivot, and Filters. A red box highlights the 'CreateAssociation - Execution completed successfully.' notification at the top. A red arrow points from this notification to the 'Create PH Style...' button in the toolbar.

Creating a Placeholder Style Color

If you would like to create a Placeholder Style Color

Navigate to Key Item Plan – Color > KIP – Style Color > Planning Workflow

Click the "+ Create PH Style Color" action button at the top of the pivot view.

Select the Sub-Class, Number of Style Colors, Number of Style Color Size per Style Color, and the Style to associate the placeholder color with

Create PH Style Color

Sub-Class *
8152:FP HATS (NA)

Number of Style Colors *
1

Style *
B152-096887-0000001: CLEMENTINE STRAW VISOR (NA)

Number Of Style Color Size per Style Color *
1

You will be notified when the action has completed.

Notifications

Create PH Style Color - Execution completed successfully...
Updated 08-Aug-2024 01:59:00 PM View More

Next navigate to **Key Item Plan – Color > KIP – Setup > Key Item Planning Setup**

From here we will create the association between the placeholder you created, and setting it to active for key item planning. Click the check box for the placeholder and select the "+ CreateAssociation" action button. You will be notified when the process has completed.

Key Item Planning Setup

Actions	Division	Class	Style	Style Color	Plan Item Style Level
<input checked="" type="checkbox"/>	... 083 FREE P WOMEN'S ACCESS (NA)	8152:FP HATS(NA)	8152-096887-000001: CLEMENTINE STRAW VISOR (NA)	1008152096887000001-3	
	... 083 FREE P WOMEN'S ACCESS (NA)	8152:FP HATS(NA)	8152-096887-000001-0030: CLEMENTINE STRAW VISOR (NA)-GRN/VERT (NA)	8152-096887-000001-0030: CLEMENTINE STRAW VISOR (NA)-GRN/VERT (NA)	
	... 083 FREE P WOMEN'S ACCESS (NA)	8152:FP HATS(NA)	8152-096887-000001-0060: CLEMENTINE STRAW VISOR (NA)-RED/ROUGE (NA)	8152-096887-000001-0060: CLEMENTINE STRAW VISOR (NA)-RED/ROUGE (NA)	

Notifications

CreateAssociation - Execution completed successfully...
Updated 08-Aug-2024 04:08:34 PM View More

Now navigate back to **Key Item Plan – Color > KIP – Style Color > Planning Workflow**

You can now add this placeholder to your filtered pivot table.

Planning Workflow

Action	Style	Style Color	Key Item	Data
...	B152-096887-000001: CLEMENTINE STRAW VISOR (NA)	B152-096887-000001-0030: CLEMENTINE STRAW VISOR (NA)-GRN/VERT (NA)	Key Item	KI Demand R Reg
...		B152-096887-000001-0060: CLEMENTINE STRAW VISOR (NA)-RED/ROUGE (NA)	Key Item	KI Demand R Reg

Planning Workflow

Planning Workflow Test

Filter By: Key Item (Y) Country Group (Y) Sub-Channel (Y) Show All

Style Color

Your placeholder has been created & activated for key item planning.

Seeding/Overlaying

Tuesday, July 23, 2024 12:56 PM

Seeding

The starting point of developing a plan is to seed it with data

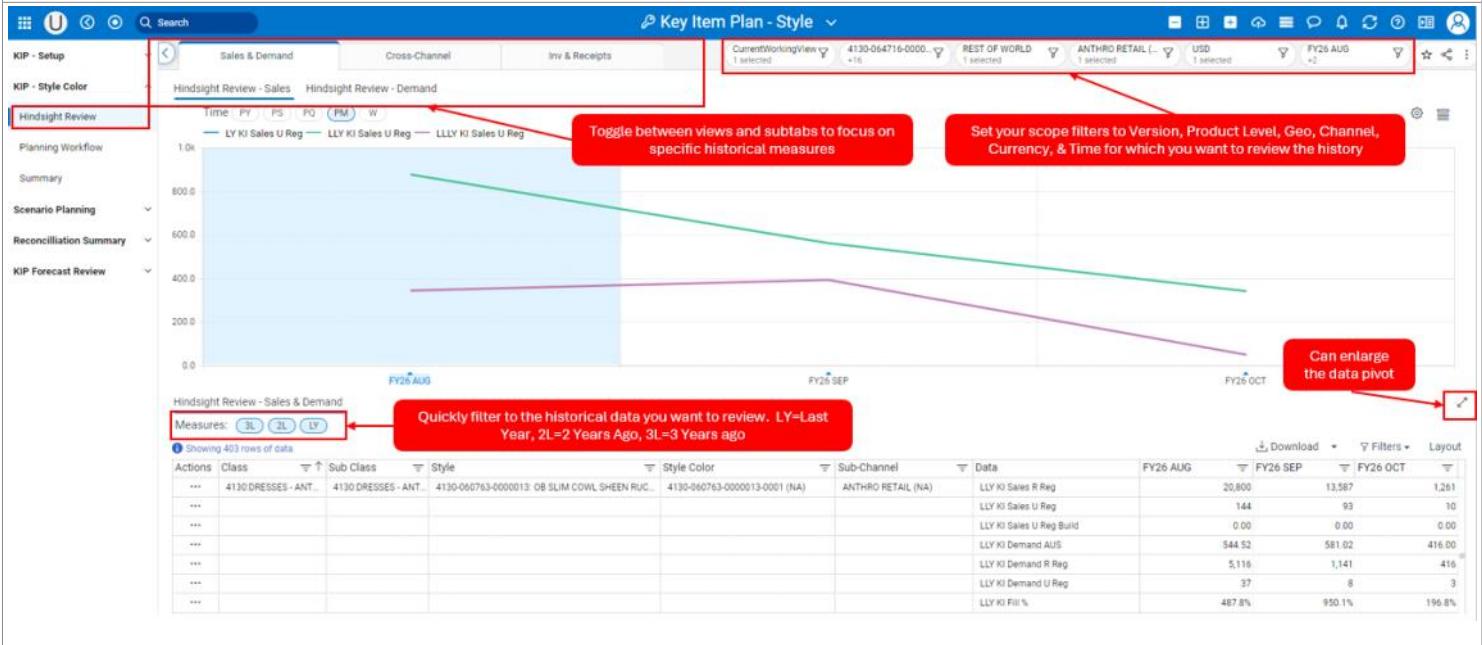
When you are building a new Key Item Plan, seeding it with data from the past or from a like plan will save time and improve accuracy by inheriting key data instead of building it from scratch. You will inherit seasonality curves, key metrics, and ratios from the selected time frame. It creates the basis used to shape your future plan.

You can choose to seed from last year or like style color.

Hindsight Workflow

Review historical data by navigating from the **Key Item Plan - Item Workspace > KIP - Style > Hindsight Review**. The “Hindsight Review” page exists for all plan types and all plan types have the same layout. This guide focuses on Key Item Planning - Style.

Hindsight Review helps planners determine which historical time frame is most appropriate to use as the baseline for their future plan. *Which past year do you think next year will be most like?*

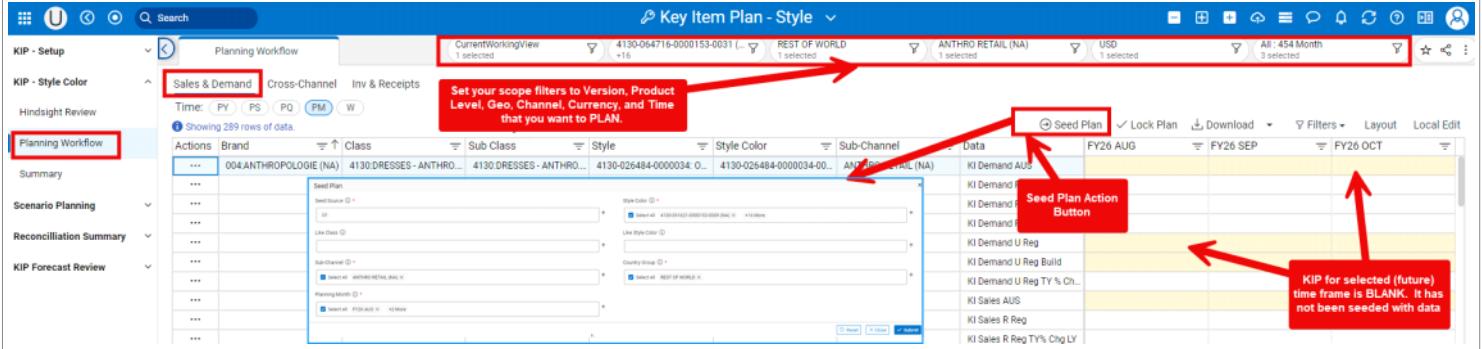


Seeding Workflow

Navigate to **Key Item Plan - Item Workspace > Planning Workflow > Sales & Demand**.

Update your Scope Filters to the time frame you are going to seed with data.

Click on the “Seed Plan” Action Button.



Fill out parameters in the “Seed Plan” Action Button Pop Up

Best Practice: Filter in your Scope Filters! Only update the seed source in the Pop-Up window. Let the other parameters populate from your scope filters. This prevents confusion and user error.

Choose your Seed Source.

You can seed from the LY of KI Style Color, Like Style Color - WP, or Like Style Color - LY.

Seed Source ⓘ *

- LY
- Like Style Color - WP
- Like Style Color - LY

If you choose to seed from 'Like Style Color - WP' or 'Like Style Color - LY', then you should select the **Like Class** to further filter down the list of available key item **Like Style Colors**.

Seed Plan

Seed Source ⓘ *

Like Class ⓘ

Style Color ⓘ *

 Select All 4110-091621-0000190-0010: OB LL PILCRO KEIRA BLOUSE (NA)-WHT/BLANC (NA) X +6 More

Like Style Color ⓘ

Sub-Channel ⓘ *

Country Group ⓘ *

Reset Close Submit

Sub-Channel, Country Group, Planning Month, and Style Color selections will default from your scope filters. You have the option to update these selections by using the "+" in the action button, but this is not recommended.

Seed Plan

Seed Source ⓘ *

Like Class ⓘ

Style Color ⓘ *

 Select All 4110-091621-0000190-0010: OB LL PILCRO KEIRA BLOUSE (NA)-WHT/BLANC (NA) X +6 More

Like Style Color ⓘ

Sub-Channel ⓘ *

Country Group ⓘ *

Select All ANTHRO DIRECT (NA) X +2 More Select All REST OF WORLD X

Planning Month ⓘ *

Select All FY26 FEB X +11 More

Reset Close Submit

Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."

Seed Plan

Request submitted successfully. Please wait for the notification.

Close

Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.



Refresh o9 to see updated data.

Review your updated Key Item Plan. Now that the plan has been seeded, the KI values will no longer be blank. They will match the data from which you seeded.

Tip: Add the **KI Seed Source** metric to your view to see the seed source that was last ran for your intersection! This metric will automatically populate after running the Seed

Plan action button.

In the example below, the key item was seeded from LY

Actions	Class	↑ Style Color	Data	FY26 MAR									
				FY26 WK 04	FY26 FEB	FY26 WK 05	FY26 WK 06	FY26 WK 07	FY26 WK 08	FY26 WK 09	FY26 MAR		
...	4110:BLOUSE...	4110-091621-0000171-0048: OB LL MAEVE BENN...	KI Sales R Reg	20,272	20,272	21,521	25,073	18,442	16,026	10,553	91,615		
...			KI Sales U Reg	216	216	234	271	196	175	112	988		
...			LY Sales R Reg	20,272	92,737	21,521	25,073	18,442	16,026	10,553	91,615		
...			LY Sales U Reg	216	995	234	271	196	175	112	988		
...			KI Seed Source	LY Seed	LY Seed	LY Seed	LY Seed	LY Seed	LY Seed	LY Seed	LY Seed		

Overlay to KI Plan

Use the 'Overlay Any Plan to KI Plan' action button to copy an existing plan into your Key Item Plan.

... Overlay Any Plan ...

Overlay Any Plan to KI Plan

This action will copy the Fill % and the Sales R Reg build from your source plan to your target plan. In order for this process to work, Sales U Reg and Demand U Reg must be entered for the previous week in your KI Plan.

Below is an example for Overlaying from Class Plan - WP

- CP Fill % copies to KI Fill %
- CP Sales R Reg Build copies to KI Sales U Reg Build. KI Sales U Reg will calculate from build
- KI Demand U Reg will calculate based on Fill %
- KI Demand U Reg Build will be computed based on Demand U Reg

Overlay Any Plan to KI Plan Workflow

Navigate to Key Item Plan - Item Workspace > Planning Workflow > Sales & Demand.

Update your Scope Filters to the time frame you are going to overlay with data.

Click on the "Overlay Any Plan to KI Plan" Action Button.

Choose your Overlay From source. You will have the option to overlay from the following plans: Class Plan - WP, Class Plan - LY, Product Attribute Plan - WP, or Product Attribute Plan - LY.

The overlay action will copy build data from the chosen plan into your Key Item Plan.

Overlay From ⓘ *

Class Plan - WP

Class Plan - LY

Product Attribute Plan - WP

Product Attribute Plan - LY

If you chose to Overlay from 'Class Plan - WP' or 'Class Plan - LY'

You will need to select the Like Class:

Like Class ⓘ *

2110:WEDDING DRESSES (NA)

2111:MAIDS DRESSES (NA)

2112:RECEPTION DRESSES (NA)

2113:OCCASION (NA)

2114:FLOWER GIRLS (NA)

2115:BRIDAL SEPARATES (NA)

If you chose to Overlay from 'Product Attribute Plan - WP' or 'Product Attribute Plan - LY'

You will need to select the Like Class and Like Attribute:

Overlay Any Plan to KI Plan

Overlay From ⓘ *

Product Attribute Plan - WP

Style Color ⓘ *

Select All 4110-091621-0000190-0010: OB LL PILCRO KEIRA BLOUSE (NA)-WHT/BLANC (NA) × +6 More

Like Class ⓘ *

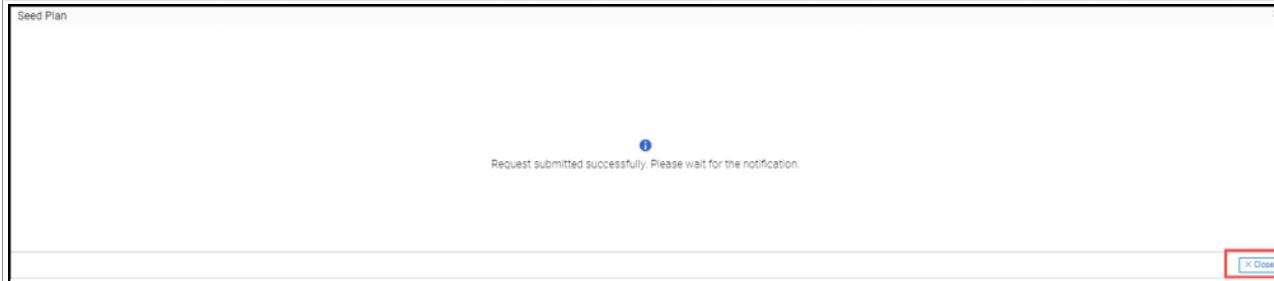
2110:WEDDING DRESSES (NA)

Attribute Type ⓘ

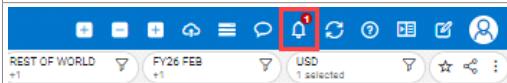
Attribute_1
Attribute_10
Attribute_11
Attribute_12
Attribute_13
Attribute_14

Sub-Channel, Country Group, Planning Month, and Style Color will selections will default from your scope filters. You have the option to update these selections by using the "+" in the action button, but this is not recommended.

Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."



Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.



Refresh o9 to see updated data.

Review your updated Key Item Plan. Now that the plan has been overlayed, the KI build values will no longer be blank. They will match the build data from the plan that was overlayed.

Tips & Tricks - FAQ 1

1. Do only the measures I have pulled into my view seed?

No! All seeding measures will seed no matter what measures you have pulled into the Pivot Table in Key Item Plan - Item Workspace > KIP - Style > Planning Workflow > Sales & Demand View. The only measures that do not seed are RTV & Inv Adj.

Planning Workflow

Actions Brand Class Sub Class Style Style Color Sub-Channel

							Data
							KI Demand AUS
							KI Demand R Reg
							KI Demand R Reg Build
							KI Demand R Reg TY% Ch...
							KI Demand U Reg
							KI Demand U Reg Build
							KI Demand U Reg TY% Ch...
							KI Sales AUS
							KI Sales R Reg
							KI Sales R Reg TY% Chg LY
							KI Sales U Reg
							KI Sales U Reg Avg Store
							KI Sales U Reg Build
							KI Sales U Reg TY % Chg LY
							KI Fill %
							KI No of Stores with Sales U
							PL KI Demand AUS

Tips & Tricks - FAQ 2

Can I seed all my style colors with LY at one time or do I have to do them individually?

Multiple style colors may be seeded at one time by selecting multiple style colors in your Seed Plan Action Button Parameters.

This is true for parent/child relationships at any level of the hierarchy (e.g., all classes in a department, departments in a division, divisions in a brand, etc.)

Seed Plan

Seed Source ① *

Style Color ① *

Select All 4130-091621-0000153-0009 (NA) X +16 More
 4130-091621-0000153-0009 (NA)
 4130-057254-0000020-0001 (NA)
 4130-064716-0000152-0010 (NA)
 4130-064642-0000009-0011 (NA)
 4130-064716-0000153-0031 (NA)
 4130-026484-0000034-0001 (NA)

Like Class ①

Sub-Channel ① *

Like Style Color ①

Country Group ① *

Reset Close Submit

Tips & Tricks - FAQ 3

Can I seed a plan with the LY of a “Like Style Color”?

Yes. You have the option to seed from a Like Style Color's LY or WP.

Seed Plan

Seed Source ① *

Like Style Color Size - WP
 Like Style Color Size - LY

Style Color Size ① *

Select All 4110-091621-0000171-0010-04000: OB LL MAEVE BENNET BLOUSE (NA) X +5 More

Like Class ①

Like Style Color Size ①

Sub-Channel ① *

Select All ANTHRO DIRECT (NA) X +1 More

Country Group ① *

Select All REST OF WORLD X

Reset Close Submit

Tips & Tricks - FAQ 4

When I copy LY data into a plan, the EOP's do not match TY to LY. Why is this?

There are two reasons for this:

1. The EOP's for the TY data are calculating using the planned ending EOP of the prior period (the last planned EOP of the prior year or season). If the planned EOP in that period is different from the LY EOP, the plans that were just copied are using a different starting point than the LY values.
2. In the CurrentWorkingView plans, LY values for Transfer/RTV's and Inv Adj's are not included in the copy process. Thus, they affect the LY EOP's but the TY EOP's are calculated based on their values being zero.

Shaping the Plan

Wednesday, July 24, 2024 8:51 AM

Sales & Demand

Wednesday, July 24, 2024 8:52 AM

Sales & Demand Metrics

Summary of **SALES** metrics available:

- Retail Dollars (Sales R) – Reg
- Units (Sales U) – Reg
- Average Units Sold (AUS) – Reg
- Average Per Store (APS U) – Reg
- Build (Sales R Build) - Reg

Summary of **DEMAND** Measures Available:

- Fill % - Reg
- Demand Dollars (Demand R) – Reg
- Demand Units (Demand U) - Reg
- Average Units Sold (AUS) - Reg
- Build (Demand R Build) - Reg

Fill %

Demand and Sales are tied together by Fill %.

Fill % or Fill Rate quantifies the ability to fulfill customer orders. It is the ratio between the total units ordered by consumers (Demand U) and the total units successfully fulfilled/shipped (Sales U).

$$KI\ Sales\ U\ Reg = KI\ Demand\ U\ Reg * KI\ Fill\ %$$

$$KI\ Demand\ U\ Reg = KI\ Sales\ U\ Reg / KI\ Fill\ %$$

KI Fill % always holds! KIFill % remains constant when KI Sales U Reg and KI Demand U Reg change. The only way for KIFill % to change is if a user updates it directly. If a user updates KI Fill %, KI Sales U Reg will recalculate and KI Demand U Reg will hold.

Sales - Calculation Callouts

1. The only way to populate KI Sales R Reg is by planning the KI Sales AUS. The KI Sales AUS always holds what was entered and KI Sales R Reg calculates whenever KI Sales U Reg changes

Demand - Calculation Callouts

1. Fill % always holds

2. The only way to populate KI Demand R Reg is by planning the KI Demand AUS. The KI Demand AUS always holds what was entered and KI Demand R Reg calculated whenever KI Demand U Reg changes.

Sales U Avg Store

1. If you plan KI Sales U Reg Avg Store, the KI Sales U Reg will be recalculated holding the KI No of Store with Sales U:
$$KI\ Sales\ U\ Reg = KI\ Sales\ U\ Reg\ Avg\ Store * KI\ No\ of\ Stores\ with\ Sales\ U$$

2. If you plan KI Sales U Reg, the KI Sales U Reg Avg Store will be recalculated holding the KI No of Store with Sales U:
$$KI\ Sales\ U\ Reg\ Avg\ Store = KI\ Sales\ U\ Reg / KI\ No\ of\ Stores\ with\ Sales\ U$$

Build

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!



Development on BUILD measures are not complete in o9. Ultimately, there will be a CP Sales R Build metric and a CP Demand R Build metric that will be editable and accurate at all aggregation levels.

Build Metrics

Build is a measure of growth from one time period to the next.

DEMAND BUILD = Total Demand / Previous Total Demand

SALES BUILD = Total Sales / Previous Total Sales

- KI Demand R Reg Build
- KI Demand U Reg Build
- KI Demand U Reg Build Weekly
- KI Demand U Reg Build Monthly
- KI Sales R Reg Build
- KI Sales U Reg Build
- KI Sales U Reg Build Weekly
- KI Sales U Reg Build MOnthly

The build metrics without "Weekly" at the end are not editable and correctly calculated at every level - use the weekly metrics to edit build

Actions	Division	Class	Data	FY2026				FY26 H1				FY26 Q1				FY26 APR			
				FY26 WK 10	FY26 WK 11	FY26 WK 12	FY26 WK 13	FY26 WK 10	FY26 WK 11	FY26 WK 12	FY26 WK 13	FY26 WK 10	FY26 WK 11	FY26 WK 12	FY26 WK 13	FY26 WK 10	FY26 WK 11	FY26 WK 12	FY26 WK 13
...	041-ANTHRO. WOMEN'S DIVISION (NA)	4110 BLOUSES - ANTHRO. (NA)	CP Demand R	6,666.667	5,333.333	5,333.333	2,666.667	20,000.000											
...			CP Demand R Build	3.68	0.80	1.00	0.50	2.00											
...			CP Demand R Weekly Build	3.68	0.80	1.00	0.50	1.04											
...			CP Demand R Monthly Build	1.48	2.67	3.05	1.53	2.00											
...			CP Sales R	5,333.333	4,266.667	4,266.667	2,133.333	16,000.000											
...			CP Sales R Build	1.95	0.80	1.00	0.50	1.11											
...			CP Sales R Weekly Build	1.95	0.80	1.00	0.50	0.96											
...			CP Sales R Monthly Build	1.88	1.01	1.15	0.58	1.11											

NEW PIC

Inventory & Receipts

Wednesday, July 24, 2024 8:52 AM

Receipt Metrics

KI Receipt U is the plannable receipt metric with KI Receipt R calculating based on a planned AUR.

Receipts can also be recommended based on a minimum presentation qty and a target forward weeks of supply.

Recommended Receipt Units

The system can recommend a receipt unit plan by week based on an input of a target forward weeks of supply and a minimum presentation level

For minimum presentation:

[Plan the KI Min Presentation U Per Store](#)

[Plan the KI No of Stores with EOP U](#)

KI Total Presentation **calculates as** [KI Min Presentation U Per Store](#)*[KI No of Stores with EOP](#)

Enter in a KI TGT FWOS for a particular week you are trying to plan. If entered at a month level, the TGT FWOS will copy to every week within that month.

The system will calculate what the KI TGT EOP U should be for that week based on the TGT FWOS and the KI Total Presentation added together:

KI TGT EOP U = KI Sales U Reg for the TGT FOWS + **KI Total Presentation**

The system will compare the KI TGT EOP U to the KI EOP U Reg and add in the already planned receipts in KI Receipt U to get the KI Recommended Receipt U

KI Recommended Receipt U = (KI TGT EOP U – KI EOP U Reg)+ KI Receipt U

	Week 1	Week 2	Week 3	Week 4	Month 1	Week 5	Week 6	Week 7	Week 8
KI BOP U Reg	1000	950	1100	1050	1000	1000	980	945	945
KI Receipt U		200			200				
KI Sales U Reg	50	50	50	50	200	20	35	60	100
KI Total Presentation	1000	1000	1000	1000	1000	1000			
KI EOP U Reg	950	1100	1050	1000	1000	980	945	885	845
KI TGT FWOS U		6							
KI TGT EOP U		1415							
KI Recommended Receipt U		515							

Inventory Metrics

KI Receipt U is the plannable receipt metric with KI Receipt R calculating based on a planned AUR.

Reference Metrics

Key Item Reference Metrics

Backorders U	Backorder Units
Backorders R	Backorder Dollars
Return U	Return Units
Return R	Return Dollars
Cancel R	Cancel Dollars
Cancel U	Cancel Units
Min Presentation U/Store	Minimum Presentation Units per Store
In Stock %	In Stock Percentage
In Transit U	In transit Units
Min Order Qty U	Minimum Order Quantity Units
PDP Views	Product Display Page Views
CVR %	Conversion Rate Percentage

Build Re-projection

Monday, October 14, 2024 3:02 PM



Overview

When Key Items are planned and start to actualize, there are three ways to re-project the sales/demand.

- 1- Hold the future builds and recalculate the future KI Sales U Reg (Retail) / KI Demand U Reg (Direct).
- 2- Calculate a variance between plan and actual for the trailing 4 weeks and apply an average of the variance to the go forward plan
- 3- Calculate a variance between TY & LY for the trailing 4 weeks and apply an average of the variance to the go forward plan

Metrics

- KP Projection Demand U Reg (Comp to Plan)
- KP Projection Demand U Reg (Comp to LY)
- KP Projection Sales U Reg (Comp to Plan)
- KP Projection Sales U Reg (Comp to LY)
- KI Actual Demand Build
- KI Actual Sales Build

Setup for Hold Build

Navigate to Admin Data Management > KIP Forecast Management

The screenshot shows a sidebar navigation menu with the following items:

- Key Item Planner
- Forecast Review
- Data Science Workspace
- Validation - IT
- Admin Data Management** (This item is highlighted with a red box.)
- Brand Financial Plan
- Brand Plan
- Demand Analyst
- Division Plan

Searched for: Search

Admin - LAP

- Initiative by Brand
- Promotion Calendar
- Admin - MFP**
- WP Comp Factor
- BD Comp Factor
- VAT
- Pricing Factor
- Number of Stores
- Exchange Rate
- Scenario Management
- Plan Lock - CPPL
- TXT Data Conversion

Admin - KIP

- KIP Forecast Management**
- KIP Class Level

IT Only

KIP Forecast Managem...

MFP_Adm_KIP_Forecast_Management

Showing 165 rows of data.

<input type="checkbox"/>	Actions	Brand	Sub Class	Hold Build	Last Updated
<input type="checkbox"/>	...	004 ANTHROPOLOGIE (NA)	2110:WEDDING DRESSES (NA)	<input type="checkbox"/>	
<input type="checkbox"/>	...		2111:MAIDS DRESSES (NA)	<input type="checkbox"/>	
<input type="checkbox"/>	...		2112:RECEPTION DRESSES (NA)	<input type="checkbox"/>	
<input type="checkbox"/>	...		2113:OCCASION (NA)	<input type="checkbox"/>	
<input type="checkbox"/>	...		2114:FLOWER GIRLS (NA)	<input type="checkbox"/>	
<input type="checkbox"/>	...		2115:BRIDAL SEPARATES (NA)	<input type="checkbox"/>	
<input type="checkbox"/>	...		2120:BRIDAL WRAPS (NA)	<input type="checkbox"/>	

Use filters to select the Sub Class(es) you want to hold the build for

KIP Forecast Managem...

MFP_Adm_KIP_Forecast_Management

Showing 1 row of data.

<input type="checkbox"/>	Actions	Brand	Sub Class	Hold Build	Last Updated
<input type="checkbox"/>	...	004 ANTHROPOLOGIE (NA)	4110:BLOUSES - ANTHRO (NA)	<input type="checkbox"/>	Apply Avg % Go Forward Vs LY , 10/4/2024 1:42:44 PM

KIP Forecast Managem...

Admin Data Management

CurrentWorkingView 1 selected

4110:BLOUSES - ANTHRO (NA) 1 selected

<input type="checkbox"/>	Version	Item
<input type="checkbox"/>	Version Name	<input checked="" type="radio"/> Sub Class

Brand: 4110:BLOUSES - ANTHRO (NA), 4111:HEAVYWEIGHT KNITS (NA), 4112:CUT AND SEW KNITS-ANTHRO (NA), 4113:FINE GAUGE-ANTHRO (NA), 4114:SWEATERS - ANTHRO. (NA), 4148:LAYERING (NA)

Division: 5 selected out of all 6 available members.

Department: Select All

Class: 4110:BLOUSES - ANTHRO. (NA), 4111:HEAVYWEIGHT KNITS (NA), 4112:CUT AND SEW KNITS-ANTHRO (NA), 4113:FINE GAUGE-ANTHRO (NA), 4114:SWEATERS - ANTHRO. (NA), 4148:LAYERING (NA)

Sub Class:

Once you have ticked the hold build boxes, click save.

Now tick the far left boxes and click "Approve Forecast" action button

Approve Forecast Process

Sub-Class *

Select All 4111:HEAVYWEIGHT KNITS (NA) X 4113:FINE GAUGE-ANTHRO (NA) X

Approved User *

Brandon Byrkit

Approved Date *

2024/11/10

Check that your selections are correct and click Submit

Now you will see the last updated field has been updated

Removing Hold Build

To undo the hold build, click the tic boxes of the subclasses you wish to remove from hold build.

Click save

Admin Data Management

KIP Forecast Management

MFP_Adm_KIP_Forecast_Management

2 rows selected.

Actions	Brand	Sub Class	Hold Build	Last Updated
<input checked="" type="checkbox"/>	004 ANTHROPOLOGIE (NA)	4110 BLOUSES - ANTHRO (NA) 4111 HEAVYWEIGHT KNITS (NA) 4112 CUT AND SEW KNITS-ANTHRO (NA) 4113 FINE GAUGE-ANTHRO (NA) 4114 SWEATERS - ANTHRO. (NA) 4148 LAYERING (NA)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Hold Build, 11/5/2024 2:54:05 PM Hold Build, 11/5/2024 2:54:05 PM

Approve Forecast...

Click the tic boxes on the far left to select the subclasses, then click the action button for Approve Forecast

Approve Forecast Process

Sub-Class ① *

Select All 4111:HEAVYWEIGHT KNITS (NA) X 4113:FINE GAUGE-ANTHRO (NA) X

Approved User ①

Brandon Byrkit

Approved Date ①

2024/11/05

Verify that the subclasses you selected are in the filter and click submit

Reset Close Submit

CurrentWorkingView 1 selected

The data has been changed in Server. Please Refresh.

Admin Data Management

KIP Forecast Management

You can see that the last updated is now blank, and the tic boxes have been removed.

Actions	Brand	Sub Class	Hold Build	Last Updated
<input type="checkbox"/>	004 ANTHROPOLOGIE (NA)	4110 BLOUSES - ANTHRO (NA) 4111 HEAVYWEIGHT KNITS (NA) 4112 CUT AND SEW KNITS-ANTHRO (NA) 4113 FINE GAUGE-ANTHRO (NA) 4114 SWEATERS - ANTHRO. (NA) 4148 LAYERING (NA)	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	

Re-Projecting

Navigate to

- KIP - Setup
- Key Item Planning Setup
- KIP - Style Color
- Hindsight Review
- Planning Workflow
- Summary
- Scenario Planning
- Reconciliation Summary
- KIP Forecast Review
- Reporting

Key Item Plan - Color

Planning Workflow Planning Workflow - Dynam... CurrentWorkingView Key Item 0522-061376-0000068-0010: REST OF WORLD URBAN RETAIL (NA) USD FY25 OCT +3

Sales & Demand Cross-Channel Inv & Receipts Time: M W Y S Q Showing 20 rows of data.

Seed Plan Seed Forecast Pr... Seed Demand Fo... Overlay Any Plan ... Create PH Style ... + Create PH Style ... Lock Plan Download Export Pivot Filters Layout Lc

Data

Actions	Class	Sub...	Style Color	FY25 OCT								FY25 NOV									
				FY25 WK...	FY25 WK...	FY25 WK...	FY25 WK...	FY25 WK...	FY25 WK...	FY25 WK...	FY25 WK...	FY25 WK...	FY25 WK...	FY25 WK...	FY25 WK...	FY25 WK...	FY25 WK...	FY25 WK...			
...	0522 LIGHTIN...	URBAN DIREC...	0522-061376-0000068-0010: T-LAMP: LITTLE GLA...	KI Demand U Reg	17	46	24	17	20	42	255	253	KI Sales U Reg	22	41	22	11	24	31	72	325
...				KP Projection Demand U Reg (Comp to Plan)	203	564	294	203	248	519	3,116	3,093	KP Projection Sales U Reg (Comp to Plan)								
...				KI Demand U Reg Plan	17	46	24	17	20	42	255	253	KI Sales U Reg Plan	22	41	22	11	24	31	72	325
...				KP Projection Demand U Reg (Comp to LY)	44	122	64	44	54	113	675	670	KP Projection Sales U Reg (Comp to LY)								
...				KI Actual Demand Build	0.69	2.78	0.52	0.69	1.22	2.09	6.00	0.99	KI Actual Sales Build								
...																					

Seed Projection

Forecast Process Original Build |

Sub-Channel Select All ANTHRO RETAIL (NA) X

Planning Month Select All FY26 FEB X +11 More

Style Color Select All 4810-095211-0000004-0036: *UK 71 DRY SUN OIL SPF30 (NA)-KHAKI (NA) X

Country Group Select All REST OF WORLD X

Forecast Process Original Build |

Original Build

APPLY AVG % GO FORWARD Vs PLAN

APPLY AVG % GO FORWARD vs LY

Reset Close Submit

Seed Forecast Projection

Forecast Process APPLY AVG % GO FORWARD Vs PLAN |

Sub-Channel Select All URBAN DIRECT (NA) X +1 More

Planning Month Select All FY25 OCT X +3 More

Style Color Select All 0522-061376-0000068-0010: T-LAMP: LITTLE GLASS RIBB (NA)-WHT/BLANC (NA) X

Country Group Select All REST OF WORLD X

Reset Close Submit

Request submitted successfully. Please wait for the notification.

Notifications

Seed Forecast Projection - Execution completed successfully. Updated 14-Oct-2024 04:28:35 PM View More

The data has been changed in Server. Please Refresh.

The Sales & Demand have updated

The KI Actual Build remained constant

Actions		Class	Sub...	Style Color	Data	FY25 OCT	FY25 NOV							
		0522:LIGHTIN...	URBAN DIREC...	0522-061376-0000068-0010: T-LAMP: LITTLE GLA...	KI Demand U Reg	203	564	294	203	248	519	3,116	3,093	
						KI Sales U Reg	271	497	271	135	294	384	881	3,974
						KP Projection Demand U Reg (Comp to Plan)	203	564	294	203	248	519	3,116	3,093
						KI Demand U Reg Plan	203	564	294	203	248	519	3,116	3,093
						KI Sales U Reg Plan	271	497	271	135	294	384	881	3,974
						KP Projection Demand U Reg (Comp to LY)	44	122	64	44	54	113	675	670
						KP Projection Sales U Reg (Comp to LY)								
						KI Actual Demand Build	0.69	2.78	0.52	0.69	1.22	2.09	6.00	0.99
						KI Actual Sales Build								

This will allow you to toggle between re-projection methods if needed

Actions		Class	Sub...	Style Color	Data	FY25 OCT	FY25 NOV							
		0522:LIGHTIN...	URBAN DIREC...	0522-061376-0000068-0010: T-LAMP: LITTLE GLA...	KI Demand U Reg	17	46	24	17	20	42	255	253	
						KI Sales U Reg	22	41	22	11	24	31	72	325
						KP Projection Demand U Reg (Comp to Plan)	203	564	294	203	248	519	3,116	3,093
						KI Demand U Reg Plan	17	46	24	17	20	42	255	253
						KI Sales U Reg Plan	22	41	22	11	24	31	72	325
						KP Projection Demand U Reg (Comp to LY)	44	122	64	44	54	113	675	670
						KP Projection Sales U Reg (Comp to LY)								
						KI Actual Demand Build	0.69	2.78	0.52	0.69	1.22	2.09	6.00	0.99
						KI Actual Sales Build								

Appendix

Hold Build Example: Hold the future builds and recalculate the future KI Sales U Reg (Retail) / KI Demand U Reg (Direct).

This method occurs automatically if the tic box was selected for the class in the KIP Forecast Management Screen.

NEW PROCESS 1 - HOLD BUILDS

	SKU 1	WK1	WK2	WK3	WK4	WK5(Current)	WK6	WK7	WK8
	KI Sales U Reg	280	200	260	160	240	240	360	720
	KI Sales U Reg Build		0.71	1.3	0.62	1.5	1	1.5	2
	KI Sales U Reg Plan (BEFORE ACTUAL)	200	240	192	96	144	144	216	432
	KI Sales U Reg Build (BEFORE ACTUAL)		1.2	0.8	0.37	1.5	1	1.5	2
	Actual Sales(TY)	280	200	260	160				

NEW PROCESS 2 - APPLY AVG % GO FORWARD Vs PLAN

	SKU 1	WK1	WK2	WK3	WK4	WK5(Current)	WK6	WK7	WK8
	KI Sales U Reg	280	200	260	160	144	144	216	432
	KI Sales U Reg Build		0.71	1.3	0.62	0.9	1	1.5	2
	KI Sales U Reg Plan (BEFORE ACTUAL)	200	240	192	96	144	144	216	432
	KI Sales U Reg Build (BEFORE ACTUAL)		1.2	0.8	0.37	1.5	1	1.5	2
	Actual Sales(TY)	280	200	260	160				
	Plan Vs Actual Var %	40.0%	-16.7%	35.4%	66.7%				
	KP Projection Sales U Reg (Comp to Plan)					178	178	267	534

Calculation Explanation examples

- KP Projection Sales U Reg (Comp to Plan)

B	C	D	E	F	G	H	I	J	K
Style Color	Channel	Data	FY25 WK 37	FY25 WK 38	FY25 WK 39	FY25 WK 40	FY25 WK 41	FY25 WK 42	FY25 WK 43
4156-023047-0000033-0014	ANTHROPOLOGIE (NA)-RETAIL	KI Sales U Reg	208	171	148	159	159	245	256
		KI Sales U Reg Build Weekly	104	0.82	0.87	1.07	1	154	104
		PL KI Sales U Reg	208	152	147	163	190	208	324
		PL KI Sales U Reg Build	0.92	0.99	1.21	1.16	1.02	1.57	0.75
		LY Sales U Reg	113	112	143	142	192	453	271
		KI Sales U Reg Plan	210	206	232	173	159	245	256
		KP Projection Sales U Reg (Comp to Plan)	428	270	213	143	133	205	214
		KP Projection Sales U Reg (Comp to LY)	251	270	319	247	213	330	344
		KI Actual Sales Build	0.92	0.99	1.36	1.17	1.08	154	104
		Step 1: Sum KI Sales U Reg for Prior 4 weeks	=sum(E2:H2)						

B	C	D	E	F	G	H	I	J	K
Style Color	Channel	Data	FY25 WK 37	FY25 WK 38	FY25 WK 39	FY25 WK 40	FY25 WK 41	FY25 WK 42	FY25 WK 43
4156-023047-0000033-0014	ANTHROPOLOGIE (NA)-RETAIL	KI Sales U Reg	208	171	148	159	159	245	256
		KI Sales U Reg Build Weekly	104	0.82	0.87	1.07	1	154	104
		PL KI Sales U Reg	208	152	147	163	190	208	324
		PL KI Sales U Reg Build	0.92	0.99	1.21	1.16	1.02	1.57	0.75
		LY Sales U Reg	113	112	143	142	192	453	271
		KI Sales U Reg Plan	210	206	232	173	159	245	256
		KP Projection Sales U Reg (Comp to Plan)	428	270	213	143	133	205	214
		KP Projection Sales U Reg (Comp to LY)	251	270	319	247	213	330	344
		KI Actual Sales Build	0.92	0.99	1.36	1.17	1.08	154	104
		Step 1: Sum KI Sales U Reg for Prior 4 weeks	=sum(E7:H7)						
		Step 2: Sum KI Sales U Reg Plan for Prior 4 Weeks	=sum(E7:H7)						

B	C	D	E	F	G	H	I	J	K
Style Color	Channel	Data	FY25 WK 37	FY25 WK 38	FY25 WK 39	FY25 WK 40	FY25 WK 41	FY25 WK 42	FY25 WK 43
4156-023047-0000033-0014	ANTHROPOLOGIE (NA)-RETAIL	KI Sales U Reg	208	171	148	159	159	245	256
		KI Sales U Reg Build Weekly	104	0.82	0.87	1.07	1	154	104
		PL KI Sales U Reg	208	152	147	163	190	208	324
		PL KI Sales U Reg Build	0.92	0.99	1.21	1.16	1.02	1.57	0.75
		LY Sales U Reg	113	112	143	142	192	453	271
		KI Sales U Reg Plan	210	206	232	173	159	245	256
		KP Projection Sales U Reg (Comp to Plan)	428	270	213	143	133	205	214
		KP Projection Sales U Reg (Comp to LY)	251	270	319	247	213	330	344
		KI Actual Sales Build	0.92	0.99	1.36	1.17	1.08	154	104
		Step 1: Sum KI Sales U Reg for Prior 4 weeks	=sum(E14:H14)						
		Step 2: Sum KI Sales U Reg Plan for Prior 4 Weeks	=sum(E14:H14)						
		Step 3: Calculate the Variance	=I14-E14						

B	C	D	E	F	G	H	I	J	K
Style Color	Channel	Data	FY25 WK 37	FY25 WK 38	FY25 WK 39	FY25 WK 40	FY25 WK 41	FY25 WK 42	FY25 WK 43
4156-023047-0000033-0014	ANTHROPOLOGIE (NA)-RETAIL	KI Sales U Reg	208	171	148	159	159	245	256
		KI Sales U Reg Build Weekly	104	0.82	0.87	1.07	1	154	104
		PL KI Sales U Reg	208	152	147	163	190	208	324
		PL KI Sales U Reg Build	0.92	0.99	1.21	1.16	1.02	1.57	0.75
		LY Sales U Reg	113	112	143	142	192	453	271
		KI Sales U Reg Plan	210	206	232	173	159	245	256
		KP Projection Sales U Reg (Comp to Plan)	428	270	213	143	133	205	214
		KP Projection Sales U Reg (Comp to LY)	251	270	319	247	213	330	344
		KI Actual Sales Build	0.92	0.99	1.36	1.17	1.08	154	104
		Step 1: Sum KI Sales U Reg for Prior 4 weeks	=sum(E14:H14)						
		Step 2: Sum KI Sales U Reg Plan for Prior 4 Weeks	=sum(E14:H14)						
		Step 3: Calculate the Variance	=I14-E14						
		Step 4: Apply the Variance to Current KI Sales U Reg	=I2*E16+I2						

B	C	D	E	F	G	H	I	J	K
Style Color	Channel	Data	FY25 WK 37	FY25 WK 38	FY25 WK 39	FY25 WK 40	FY25 WK 41	FY25 WK 42	FY25 WK 43
4156-023047-0000033-0014	ANTHROPOLOGIE (NA)-RETAIL	KI Sales U Reg	208	171	148	159	159	245	256
		KI Sales U Reg Build Weekly	104	0.82	0.87	1.07	1	154	104
		PL KI Sales U Reg	208	152	147	163	190	208	324
		PL KI Sales U Reg Build	0.92	0.99	1.21	1.16	1.02	1.57	0.75
		LY Sales U Reg	113	112	143	142	192	453	271
		KI Sales U Reg Plan	210	206	232	173	159	245	256
		KP Projection Sales U Reg (Comp to Plan)	428	270	213	143	133	205	214
		KP Projection Sales U Reg (Comp to LY)	251	270	319	247	213	330	344
		KI Actual Sales Build	0.92	0.99	1.36	1.17	1.08	154	104
		Step 1: Sum KI Sales U Reg for Prior 4 weeks	=sum(E14:H14)						
		Step 2: Sum KI Sales U Reg Plan for Prior 4 Weeks	=sum(E14:H14)						
		Step 3: Calculate the Variance	=I14-E14						
		Step 4: Apply the Variance to Current KI Sales U Reg	=I2*E16+I2						

- For the LY calculation replace KI Sales U Reg Plan with LY Sales U Reg Plan.

- KP Projection Demand U Reg (Comp to LY)

	B	C	D	E	F	G	H	I	J	K
1	Style Color	Channel	Data	FY25 WK 37	FY25 WK 38	FY25 WK 39	FY25 WK 40	FY25 WK 41	FY25 WK 42	FY25 WK 43
2	4156-023047-0000033-0014: ANTHROPOLOGIE (NA)-DIRECT	KI Demand U Reg		27	23	22	36	33	51	181
3		KI Demand U Reg Build Weekly		123	0.85	0.96	164	0.92	155	3.54
4		PL KI Demand U Reg		27	31	25	60	55	85	301
5		PL KI Demand U Reg Build		121	1.15	0.81	2.4	0.92	155	3.54
6		LY Demand U Reg		27	23	32	30	38	269	182
7		KI Demand U Reg Plan		27	31	19	53	33	51	181
8		KP Projection Demand U Reg (Comp to Plan)		39	32	15	44	28	43	151
9		KP Projection Demand U Reg (Comp to LY)		27	28	18	47	32	49	174
11		Step 1: Sum KI Demand U Reg for Prior 4 weeks	=SUM(E2:H2)							

	B	C	D	E	F	G	H	I	J	K
1	Style Color	Channel	Data	FY25 WK 37	FY25 WK 38	FY25 WK 39	FY25 WK 40	FY25 WK 41	FY25 WK 42	FY25 WK 43
2	4156-023047-0000033-0014: ANTHROPOLOGIE (NA)-DIRECT	KI Demand U Reg		27	23	22	36	33	51	181
3		KI Demand U Reg Build Weekly		123	0.85	0.96	164	0.92	155	3.54
4		PL KI Demand U Reg		27	31	25	60	55	85	301
5		PL KI Demand U Reg Build		121	1.15	0.81	2.4	0.92	155	3.54
6		LY Demand U Reg		27	23	32	30	38	269	182
7		KI Demand U Reg Plan		27	31	19	53	33	51	181
8		KP Projection Demand U Reg (Comp to Plan)		39	32	15	44	28	43	151
9		KP Projection Demand U Reg (Comp to LY)		27	28	18	47	32	49	174
11		Step 1: Sum KI Demand U Reg for Prior 4 weeks	=SUM(E2:H6)							
12		Step 2: Sum KI Demand U Reg Plan for Prior 4 Weeks	=SUM(E6:H6)							

	B	C	D	E	F	G	H	I	J	K
1	Style Color	Channel	Data	FY25 WK 37	FY25 WK 38	FY25 WK 39	FY25 WK 40	FY25 WK 41	FY25 WK 42	FY25 WK 43
2	4156-023047-0000033-0014: ANTHROPOLOGIE (NA)-DIRECT	KI Demand U Reg		27	23	22	36	33	51	181
3		KI Demand U Reg Build Weekly		123	0.85	0.96	164	0.92	155	3.54
4		PL KI Demand U Reg		27	31	25	60	55	85	301
5		PL KI Demand U Reg Build		121	1.15	0.81	2.4	0.92	155	3.54
6		LY Demand U Reg		27	23	32	30	38	269	182
7		KI Demand U Reg Plan		27	31	19	53	33	51	181
8		KP Projection Demand U Reg (Comp to Plan)		39	32	15	44	28	43	151
9		KP Projection Demand U Reg (Comp to LY)		27	28	18	47	32	49	174
11		Step 1: Sum KI Demand U Reg for Prior 4 weeks	=SUM(E2:H11)							
12		Step 2: Sum KI Demand U Reg Plan for Prior 4 Weeks	=SUM(E11:H11)							
13		Step 3: Calculate the Variance	=E11-E12							
14		Step 4: Calculate the Variance to Current KI Demand U Reg	=I12*I13+I12							

	B	C	D	E	F	G	H	I	J	K
1	Style Color	Channel	Data	FY25 WK 37	FY25 WK 38	FY25 WK 39	FY25 WK 40	FY25 WK 41	FY25 WK 42	FY25 WK 43
2	4156-023047-0000033-0014: ANTHROPOLOGIE (NA)-DIRECT	KI Demand U Reg		27	23	22	36	33	51	181
3		KI Demand U Reg Build Weekly		123	0.85	0.96	164	0.92	155	3.54
4		PL KI Demand U Reg		27	31	25	60	55	85	301
5		PL KI Demand U Reg Build		121	1.15	0.81	2.4	0.92	155	3.54
6		LY Demand U Reg		27	23	32	30	38	269	182
7		KI Demand U Reg Plan		27	31	19	53	33	51	181
8		KP Projection Demand U Reg (Comp to Plan)		39	32	15	44	28	43	151
9		KP Projection Demand U Reg (Comp to LY)		27	28	18	47	32	49	174
11		Step 1: Sum KI Demand U Reg for Prior 4 weeks	=SUM(E2:H11)							
12		Step 2: Sum KI Demand U Reg Plan for Prior 4 Weeks	=SUM(E11:H11)							
13		Step 3: Calculate the Variance	=E11-E12							
14		Step 4: Calculate the Variance to Current KI Demand U Reg	=I12*I13+I12							

	B	C	D	E	F	G	H	I	J	K
1	Style Color	Channel	Data	FY25 WK 37	FY25 WK 38	FY25 WK 39	FY25 WK 40	FY25 WK 41	FY25 WK 42	FY25 WK 43
2	4156-023047-0000033-0014: ANTHROPOLOGIE (NA)-DIRECT	KI Demand U Reg		27	23	22	36	33	51	181
3		KI Demand U Reg Build Weekly		123	0.85	0.96	164	0.92	155	3.54
4		PL KI Demand U Reg		27	31	25	60	55	85	301
5		PL KI Demand U Reg Build		121	1.15	0.81	2.4	0.92	155	3.54
6		LY Demand U Reg		27	23	32	30	38	269	182
7		KI Demand U Reg Plan		27	31	19	53	33	51	181
8		KP Projection Demand U Reg (Comp to Plan)		39	32	15	44	28	43	151
9		KP Projection Demand U Reg (Comp to LY)		27	28	18	47	32	49	174
11		Step 1: Sum KI Demand U Reg for Prior 4 weeks	=SUM(E2:H11)							
12		Step 2: Sum KI Demand U Reg Plan for Prior 4 Weeks	=SUM(E11:H11)							
13		Step 3: Calculate the Variance	=E11-E12							
14		Step 4: Calculate the Variance to Current KI Demand U Reg	=I12*I13+I12							

- For the Plan calculation replace KI Demand U Reg LY with KI Demand U Reg Plan.

Locking to PL

Wednesday, July 24, 2024 8:51 AM

Locking an Approved Plan to the PL Version

The Approved Plan (KI PL Version) exists so that planners have a reference of a past plan. They schedule the lock to run automatically on a set cadence, like quarterly or monthly, or they can lock it ad hoc. The KI PL is a snapshot of their plan; it is updated more frequently than the Budget Plan but not as frequently as the CurrentWorkingView (KI Version). Usually, Plan locking will be coordinated and actioned at once for an entire Division or Brand. This gives the planning team and managers a finalized, approved, and up-to-date snapshot of the plan that they can reference later.

The Approved Plan (KI PL Version) is created by locking the CurrentWorkingView (KI Version). Values will populate in KI PL after the plan has been locked

Two Methods of Locking - Action Button vs Scheduled Job:

- Use the scheduled job option if one person or a small group of people within the brand are going to be responsible for when and how the plan is locked. Planners would only be responsible for making sure their Class Plan is ready to be locked.
- Use the action button option exclusively if every planner is responsible for locking their own classes as ready.
- The action button can also be used to support the scheduled job strategy by only using it for one-offs and exceptions.

Locking - Action Button

Review your CurrentWorkingView on the pages within the **Key Item Plan - Style > KIP - Style Color Group** and confirm that this plan has finished being shaped and is ready to lock.

Navigate to Key Item Plan - KIP - Style Color > Planning Workflow

Set your scope filters to Version, Product Level, Geo, Channel, Currency, and Time that you want to LOCK

Lock Plan Action Button

KI Plan for selected time frame is populated with planned or actualized data. It has been shaped and it is ready to be locked

Fill out parameters in the “Lock Plan” Action Button Pop Up.

All parameters (Style Color, Country Group, Sub-Channel, Planning Month) will populate with the data in your Scope Filters. You can update this in the pop-up window by hitting the '+', but this is not recommended.

Submit

Click Submit! You will receive a message that says “Request submitted successfully. Please wait for the notification.”



Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.

Notifications

- Lock Plan - Execution completed successfully.** View More
- Seed Plan - Execution completed successfully.** Updated 14-Jul-2024 12:49:49 PM View More
- Seed Plan - Execution completed successfully.** Updated 14-Jul-2024 14:23 PM View More
- Seed Plan - Execution completed successfully.** Updated 14-Jul-2024 17:38:39 AM View More
- MFPCCPPLockSchedule - Execution completed successfully.** Updated 15-Jul-2024 04:56:27 PM View More
- MFPCCPPLockSchedule - Execution completed successfully.** Updated 15-Jul-2024 04:58:50 PM View More
- MFPCCPPLockSchedule - Execution completed successfully.** Updated 15-Jul-2024 04:59:38 PM View More

Refresh o9 to see updated data

Reviewing Locked Values

The plan that was locked can be reviewed using the PL KI measures. There are PL KI measures scattered in the various views but for a full reconcile, the KI vs PL KI page can be used under Reconciliation Summary.

Actions	Brand	Class	Sub Class	Style	Style	Sub-Channel	Data
...	004 ANTHROP...	4130 DRESSE...	4130 DRESSES - ANTHRO. (NA)	4130-026484-0000034-0001 (A)	KI Demand AUS	(All)	FY25 JUN
...					PL KI Demand AUS		171.08
...					KI Demand AUS		171.08
...					PL KI Demand AUS		167.41
...					KI Demand AUS		167.41
...					PL KI Demand AUS		167.41
...					KI Demand AUS		157.19
...					PL KI Demand AUS		157.19
...					KI Demand AUS		163.58
...					PL KI Demand AUS		163.58

Scenario Planning

Wednesday, July 24, 2024 8:51 AM

Scenario Planning

This process is used to plan multiple versions or test out different scenarios and answer "what if" questions without impacting the current WP plan.

There is 1 scenario version to use:

R&D Product Planning Scenario 1

Scenario versions of the plan do not actualize automatically and historical information is not automatically brought in. Both of these steps can be completed prior to planning if desired.

Here are the actions for Scenario Planning:

[Displaying Historical Information \(LY,LLY,LLLY,3yrAvg\)](#)

[Actualizing the Scenario](#)

[Seeding the plan](#)

[Overlay the Plan](#)

[Publish the Plan](#)

Displaying Historical Information (LY)

If you would like to use historical information to inform your scenario plan you can do so by using an action button, [Seed Scenario KSC Plan](#)

Navigate to the Key Item Plan - Style > Scenario Planning > Scenario Planning

Update your Scope Filters to the time frame you are going to seed with data.

Click [Seed Scenario KSC Plan](#) action button

The screenshot shows the 'Key Item Plan - Style' application window. In the top right corner, there is a toolbar with various icons. Below the toolbar, a red box highlights the 'Seed Scenario KSC Plan' button, which is part of a larger pop-up menu. This menu also includes options like 'Overlay Any Plan ...' and 'Set Scope Filters for the PLAN'. The main workspace displays a grid of data with columns for 'Data' and 'FY25...'. The left sidebar contains several sections: 'KIP - Setup', 'KIP - Style Color', 'Hindsight Review', 'Planning Workflow', 'Summary', 'Scenario Planning' (which is currently selected and has a red border), 'Scenario vs WP', 'Reconciliation Summary', and 'KIP Forecast Review'. The 'Scenario Planning' section is expanded, showing a list of items.

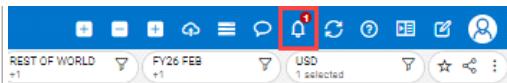
Fill out parameters in the [Seed Scenario KSC Plan](#) Action Button Pop Up - will automatically inherit from scope filters

The screenshot shows the 'Seed Scenario KSC Plan' dialog box. It contains several input fields and dropdown menus. On the left, there are sections for 'Source' (set to 'CurrentWorkingView'), 'Seed Source' (set to 'LY'), 'Sub-Channel' (set to 'Select All ANTHRO DIRECT (NA)'), and 'Planning Month' (set to 'Select All FY25 FEB'). On the right, there are sections for 'Target Version' (set to 'R&D KI Planning Scenario-1'), 'Style Color' (set to 'Select All 4312-065612-0000026-0001 (NA)'), and 'Country Group' (set to 'Select All REST OF WORLD'). At the bottom right of the dialog are three buttons: 'Reset', 'Close', and 'Submit' (which is highlighted with a red box).

Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."

The screenshot shows a confirmation dialog box titled 'Seed Plan'. It contains a message: 'Request submitted successfully. Please wait for the notification.' At the bottom right of the dialog is a red-bordered 'Close' button.

Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.



Refresh o9 to see updated data.

Review your updated Scenario Plan. The historical value you chose should no longer be blank.

Actualizing the Scenario

The scenario versions of the plan do not actualize automatically in the event that a scenario plan is used to compare against actuals. These instructions can be used to actualize a scenario plan if desired.

Navigate to the Class Plan Workspace > Scenario Planning Page Group > Scenario Planning Page

Update your Scope Filters to the time frame you are going to seed with data.

Click **Actualize Scenario** action button

The screenshot shows the 'Scenario Planning' page within the 'Class Plan' workspace. The top navigation bar includes filters for 'R&D Product Plann...', '4130:DRESSES - A...', 'REST OF WORLD', 'ANTHRO RETAIL...', 'USD', and 'All : 454 Week'. A red circle highlights the 'Set Scope Filters for the PLAN' button. In the main grid, time filters are set from 'FY2025' to 'FY25 Q3'. A red circle highlights the 'Actualize Scenario Action Button' located in the grid area.

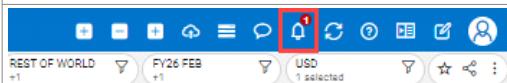
Fill out parameters in the **Actualize Scenario** Action Button Pop Up - will automatically inherit from scope filters

The 'Actualize Scenario' dialog box contains fields for 'To Scenario', 'Department', 'Sub-Class', and 'Division'. Each field has a 'Select All' option checked. At the bottom are 'Reset', 'Close', and 'Submit' buttons. A red circle highlights the 'Submit' button.

Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."

The 'Seed Plan' window displays a message: 'Request submitted successfully. Please wait for the notification.' A red circle highlights the 'X Close' button in the bottom right corner.

Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.



Refresh o9 to see updated data.

Review your updated Scenario Plan. Now that the plan has been seeded, the CP values will no longer be blank. They will match the data from which you seeded.

Seeding the plan

If you want to plan a scenario from scratch using historical data, you can use the "Seed Scenario KSC Plan Action Button" action button to create the plan.

Navigate to the Key Item Plan - Style > Scenario Planning > Scenario Planning Page

Update your Scope Filters to the time frame you are going to seed with data.

Click **Seed Scenario KSC Plan** action button

Key Item Plan - Style

R&D KI Planning Scenario-1 4312-065612-0000026-0001 (-) REST OF WORLD ANTHRO RETAIL (NA) USD FY2023

Set Scope Filters for the PLAN

Action	Brand	Class	Sub Class	Style	Style Color	Sub...	Version	Data	FY25...	FY25...	FY25...	FY25...	FY25...	FY25...
...	004ANTHROP...	4312.FLATS...	4312.FLATS...	4312-065612...	4312-065612...	ANTHRO DIRE...	R&D KI Plann...	KI Demand A...	123.04	125.67	120...	123.04	125.67	120...
...								KI Demand R...	4.163	3.016	1.928	2.755	2.34	1.928
...								KI Demand R...	0.54	0.72	0.64	1.48	0.08	0.64
...								KI Demand U...	34	24	16	23	2	16
...								KI Demand U...	0.55	0.71	0.67	1.44	0.09	0.67
...								KI Sales AUS...	125.58	125.45	125.27	114.65	104.00	125.45
...								KI Sales R Re...	628	1,004	1,378	1,376	104	1,378
...								KI Sales U Re...	5	8	11	12	1	11
...								KI Sales U Rei...	5	8	11	12	1	12

Fill out parameters in the **Seed Scenario Class Plan** Action Button Pop Up - will automatically inherit from scope filters

CurrentWorkingView
R&D KI Planning Scenario-1

Seed Scenario KSC Plan

Source *

Seed Source *

Sub-Channel * Select All ANTHRO DIRECT (NA) + 2 More

Planning Month * Select All FY25 FEB + 11 More

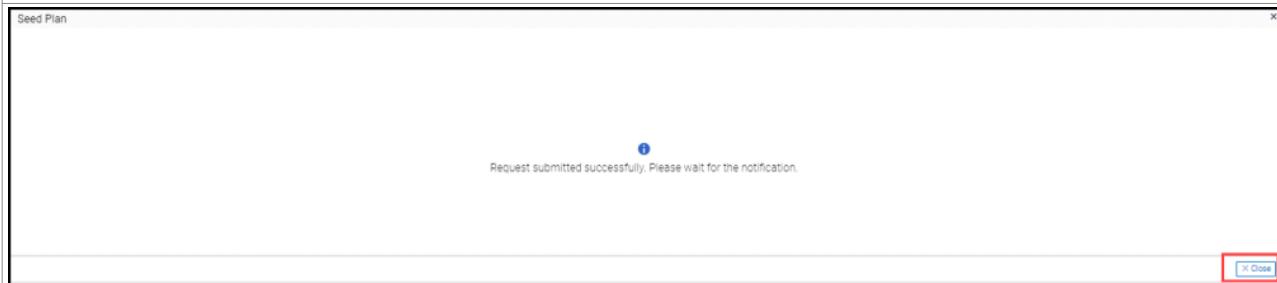
Target Version * R&D KI Planning Scenario-1

Style Color * Select All 4110-025983-0004822-0040 (NA) + 31 More

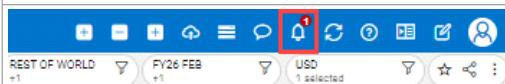
Country Group * Select All REST OF WORLD +

Reset Close Submit

Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."



Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.



Refresh o9 to see updated data.

Review your updated Scenario Plan. Now that the plan has been seeded, the CP values will no longer be blank. They will match the data from which you seeded.

Overlay the Plan

Use the Overlay action button to copy an existing plan into your scenario version. The plans that can be copied in are:

1. Key Item Plan - WP, PL

Navigate to the **Key Item Plan - Style > Scenario Planning > Scenario Planning Page**

Update your Scope Filters to the time frame you are going to seed with data.

Click **Overlay Any Plan** action button

Key Item Plan - Style

R&D KI Planning Scenario-1
1 selected

REST OF WORLD
1 selected

ANTHRO RETAIL (NA)
1 selected

USD
1 selected

FY2025
1 selected

Set Scope Filters for the PLAN

Overlay Plan Action Button

Fill out parameters in the **Overlay Any Plan** Action Button Pop Up - will automatically inherit from scope filters

Overlay Any Plan To KSC Plan

Choose what source plan to copy from.

Source Version * R&D KI Planning Scenario-1

Target Version * R&D KI Planning Scenario-1

Overlay From * Sales & Demand U (checked) Cross-Channel (checked) BOP (checked)

Sales & Demand R (checked) **Inventory** (checked)

Style Color * Select All 4110-025983-0004822-0040 (NA) +31 More

Country Group * Select All REST OF WORLD +

KSC Plan - WP **KSC Plan - PL**

Select which plan to copy from

Submit

Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."

Seed Plan

Request submitted successfully. Please wait for the notification.

X Close

Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.



Refresh o9 to see updated data.

Review your updated Scenario Plan. Now that the plan has been overlayed the values should match the source plan.

Publish the Plan

If there is a desire to replace the current working plan with the newly created scenario plan, you can use the **Publish Scenario** action button to accomplish this

Navigate to the **Key Item Plan - Style > Scenario Planning > Scenario Planning Page**

Update your Scope Filters to the time frame you are going to seed with data.

Click **Publish Scenario** action button

Key Item Plan - Style

1 selected R&D KI Planning Scenario-1 4312-065612-000026-0001 (1 selected) REST OF WORLD 1 selected ANTHRO RETAIL (NA) 1 selected USD 1 selected FY2025 1 selected

Set Scope Filters for the PLAN

Publish Scenario Action Button

Fill out parameters in the **Publish Scenario** Action Button Pop Up - will automatically inherit from scope filters

Publish Scenario

Source * R&D KI Planning Scenario-1 | +

Sub-Channel * Select All ANTHRO DIRECT (NA) X +2 More | +

Planning Month * Select All FY25 FEB X +11 More | +

Demand * Receipts *

Sales **Cross-Channel**

Use the metric check boxes to copy only certain groups of metrics into your working plan.

Reset **Close** **Submit**

Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."

Seed Plan

Request submitted successfully. Please wait for the notification.

X Close

Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.

Refresh o9 to see updated data.

Scenario VS WP

If there is a desire to replace the current working plan with the newly created scenario plan, you can use the **Publish Scenario** action button to accomplish this

Navigate to the **Key Item Plan - Style > Scenario Planning > Scenario vs WP Page**

The filter on the version needs to include both the CurrentWorkingView (WP) and the scenario you want to compare to

Class Plan

1 selected CurrentWorkingView 0112-CUT AND SE... 1 selected REST OF WORLD 1 selected URBAN RETAIL (NA) 1 selected USD 1 selected FY2025 1 selected

Working Plan **Scenario Plan**

Publish Scenario **Download** **Export Pivot** **Filters** **Layout**

Scenario to WP Compare

Scenario vs WP

Working Plan **Scenario Plan**

FY2025 **FY25 H1** **FY25 Q1** **FY25 APR** **FY25 Q2** **FY25 MAY** **FY25 JUN**

FY25 FEB **FY25 MARCH** **FY25 APRIL**

Reconcile the Plan KI vs KIPL

If there is a desire to replace the current working plan with the newly created scenario plan, you can use the **Publish Scenario** action button to accomplish this

Navigate to the **Key Item Plan - Style > Reconciliation Summary > KI vs KIPL**

The filter on the version needs to include both the CurrentWorkingView (WP) and the scenario you want to compare to

Actions	Division	Class	Sub-Channel	Data	FY2025	FY25 H1	FY25 Q1	FY25 FEB	FY25 APR	FY25 MAY	FY25 JUN
...	001:WOMEN'S...	0112:CUT AND...	URBAN DIREC...	CP Demand R...	592,398	20,670	727,503		497,708	499,582	584,500
...				CP Fill %	80.6%	113.8%	80.6%		76.0%	78.8%	76.9%
...				CP Demand R...	0.66		1.21		0.68	1.00	1.17
...				CP Sales R...	477,539	23,518	586,637		378,472	393,709	449,651
...				CP Sales R Re...		82.6%	82.8%	83.1%	77.9%	68.0%	91.0%

KI Rebalance

KI Rebalance from OO U to Receipt U

There is an action button available in the Key Item Plan workspace that will allow you to copy your Total OO U into your KI Receipt U

KI Rebalance

Location for rebalancing:

- Key Item Plan - Color Workspace > KIP - Style Color > Planning Workflow Page > Inventory & Receipts Planning View
- Key Item Plan - Color Workspace > KIP - Style Color > Summary

KI Rebalance will automatically copy the Total OO U to the KI Receipt U. It will copy all weeks in the filter selection and if the OO is 0 for a week, it will copy the 0.

KI Rebalance On Order to Receipts Example:

	FY26 WK 01	FY26 WK 02	FY26 WK 03	FY26 WK 04	FY26 FEB
Total OO U	1,452	604	177	2,233	3,400
KI Receipt U					3,400

	FY26 WK 01	FY26 WK 02	FY26 WK 03	FY26 WK 04	FY26 FEB
Total OO U	3	1,657	1,661	1,660	5,456
KI Receipt U					3,400

Sizing

Tuesday, July 23, 2024 12:57 PM

Navigation

Tuesday, July 23, 2024 1:10 PM

Key Item Plan – Item Workspace

The Key Item Plan Item workspace allows you to create, shape and edit your key item plan at the SKU level. This plan can be edited at SKU, SubChannel and week or any of the higher levels above these.

Below is a description of each page group & page that exists in the Key Item Plan Item Workspace.

Page Group	Page	Description
KIP - Setup		
	Key Item Planning Setup	This page is used to identify which style color size(s) should be plannable as Key Items in this Key Item Size Level Workspace.
KIP - Item		
	Hindsight Review	This page will allow you to look at all historical time periods for key metrics: Sales, Demand, Markdowns, Margin, Inventory & Receipts. This can be used to help determine what time period to seed from.
	Planning Workflow	This page has tabs for each flow of the plan with all relevant metrics on the individual tabs. This workflow should be used for detailed planning and to see specific metrics within an area that don't exist within the summary view.
	Summary	This page allows you to plan most key metrics on a one page view and can be used for editing the plan while visualizing a variety of metrics from different areas.
Scenario Planning		
	Scenario Planning	This page is where you can create a scenario plan and publish a scenario back out to your WP plan version
	Scenario vs WP	This page is used to compare any scenario plan to the current WP plan
Reconciliation		
	KIP vs KIPL	This page is a detailed report with all plan metrics to compare between WP and Approved version.
KIP Forecast Review		
	KIP Forecast Review	This page is used to review high level demand forecast vs history and plan.
Insights		
	Insights	This page is used to review more detailed forecasting metrics

Key Item Setup

Tuesday, July 23, 2024 1:15 PM

Key Item Plan Setup

This page is used to determine which SKUs within a class should be setup on key item planning. If a SKU should be planned, it can be checked and if you want to remove a SKU from key item planning it should be unchecked.

Prior to this step, the class should be setup as a style or size class. If you do not see the class you are looking for in the filter, check this step first: [KIP Class Level](#)

Once items are selected in this page, the history will populate in an overnight batch.

Key Item Plan Setup Steps

Chose which SKUs should be planned by navigating to **Key Item Plan - Item Workspace > KIP - Setup Page Group > Key Item Planning Setup Page**.

Update your Scope Filters to the class you are looking to plan.

Update the check box for SKUs you want to include in key item planning. If you remove the Style Color Size Field from the pivot and make changes at the Style Color Level, all colors under the Style will be impacted.

Once you have selected the SKUs you want to plan click the '+ CreateAssociation' action button from the top.

Once these have been selected they will be available to plan, **but will require an overnight batch to create historical data**.

Style Color Size	Plan Key Item Size Level
<input type="checkbox"/> 4313-001282-0000011-0007-00750: HL WOOD PLATFORM CONTRAST (NA)	<input type="checkbox"/>
<input type="checkbox"/> 4313-001282-0000012-0061-00750: HL ANKL STRAP BURGUNDY PA (NA)	<input type="checkbox"/>
<input checked="" type="checkbox"/> 4313-001282-0000012-0061-00800: HL ANKL STRAP BURGUNDY PA (NA)	<input type="checkbox"/>
<input checked="" type="checkbox"/> 4313-001282-0000016-0030-00950: HL CLOG EMBELLISHED EMERA (NA)	<input type="checkbox"/>
<input type="checkbox"/> 4313-001282-0000018-0070-00600: HL EMBELLISHED GOLD COPPA (NA)	<input type="checkbox"/>
<input type="checkbox"/> 4313-001282-0000018-0070-00850: HL EMBELLISHED GOLD COPPA (NA)	<input type="checkbox"/>
<input type="checkbox"/> 4313-001282-0000019-0090-00600: HL CLOSED TOE KITTEN LEOP (NA)	<input type="checkbox"/>
<input type="checkbox"/> 4313-001282-0000021-0007-08715: RACHEL COMEY MARS MULE (NA)	<input type="checkbox"/>
<input type="checkbox"/> 4313-001282-100044052215-3720: RACHEL COMEY MARS MULE (NA)	<input type="checkbox"/>
4313-001282-100044052215-3720: RACHEL COMEY MARS MULE (NA)	<input type="checkbox"/>

Seeding

Tuesday, July 23, 2024 1:34 PM

Seeding

The starting point of developing a plan is to seed it with data

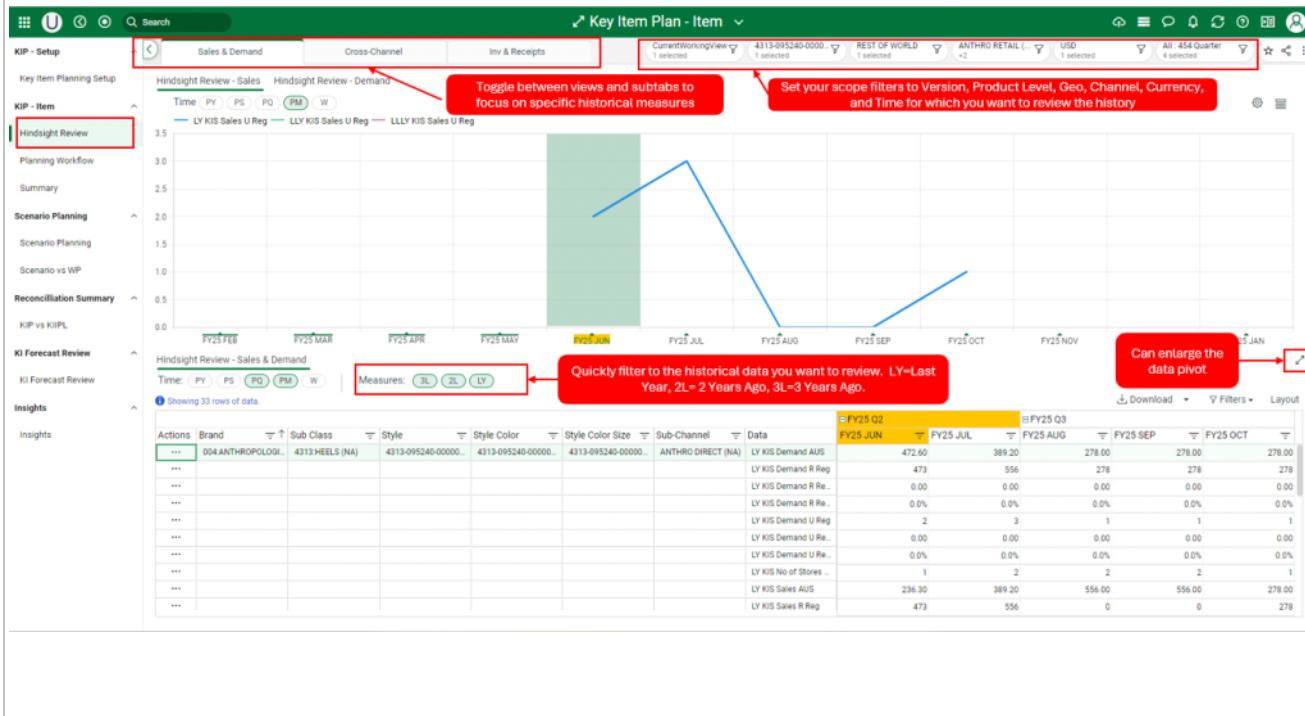
When you are building a new Key Item Plan, seeding it with data from the past or from a like plan will save time and improve accuracy by inheriting key data instead of building it from scratch. You will inherit seasonality curves, key metrics, and ratios from the selected time frame. It creates the basis used to shape your future plan.

You can choose to seed from last year or like style color size.

Hindsight Workflow

Review historical data by navigating from the **Key Item Plan - Item Workspace > KIP - Item > Hindsight Review**. The "Hindsight Review" page exists for all plan types and all plan types have the same layout. This guide focuses on Key Item Planning - Item.

Hindsight Review helps planners determine which historical time frame is most appropriate to use as the baseline for their future plan. *Which past year do you think next year will be most like?*

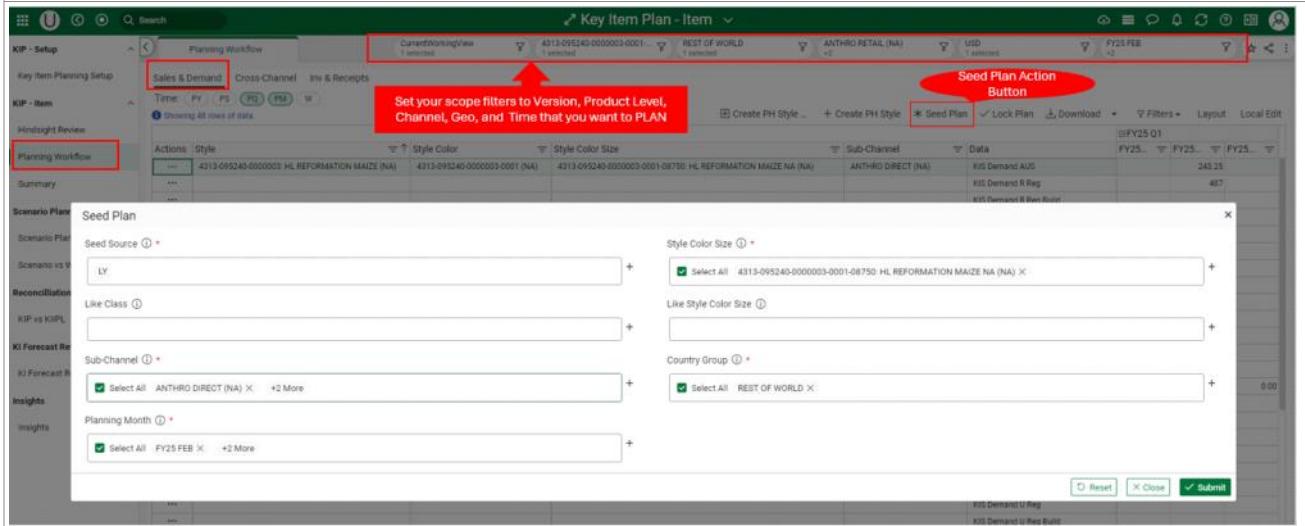


Seeding Workflow

Navigate to **Key Item Plan - Item Workspace > KIP - Item > Planning Workflow > Sales & Demand**.

Update your Scope Filters to the time frame you are going to seed with data.

Click on the "Seed Plan" Action Button.



Fill out parameters in the “Seed Plan” Action Button Pop Up

Best Practice: Filter in your Scope Filters! Only update the seed source in the Pop-Up window. Let the other parameters populate from your scope filters. This prevents confusion and user error.

Select Seed Source. You can choose to seed from LY or a Like SKU (By selecting like class)

Sub-Channel, Country Group, Planning Month will populate with the data in your Scope Filters. You can update this in the pop-up window by hitting the "+", but this is not recommended.

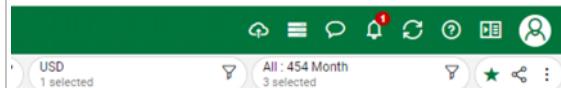
If you select "Seed from Like Class" as the seed source, you will select a class to filter the available Style Color Size prompt list.

Click Submit! You will receive a message that says “Request submitted successfully. Please wait for the notification.”

Request submitted successfully. Please wait for the notification.

X Close

Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.



Refresh o9 to see updated data.

Review your updated Class Plan. Now that the plan has been seeded, the CP values will no longer be blank. They will match the data from which you seeded.

Tips & Tricks - FAQ 1

1. Do only the measures I have pulled into my view seed?

No! All seeding measures will seed no matter what measures you have pulled into the Pivot Table in Key Item Plan - Item Workspace > KIP - Item > Planning Workflow > Sales & Demand View. The only measures that do not seed are RTV & Inv Adj.

It does not matter which measures you have pulled into this pivot table. All measures will seed.

Can update measures in the pivot in Layout > Data

Tips & Tricks - FAQ 2

Can I seed all my SKU's with LY at one time or do I have to do them individually?

Multiple SKU's may be seeded at one time by selecting multiple SKU's in your Seed Plan Action Button Parameters.

This is true for parent/child relationships at any level of the hierarchy (e.g., all classes in a department, departments in a division, divisions in a brand, etc.)

Select All 4110-025983-0004822-0040-07000: CS LL 1PKT SS SHIRT (NA) +11 More

4110-025983-0004822-0040-07000: CS LL 1PKT SS SHIRT (NA)
4110-025983-0004822-0040-08000: OB LL MAEVE BENNET BLOUSE (NA)
4110-091621-0000171-0010-04000: OB LL MAEVE BENNET BLOUSE (NA)
4110-025983-0004822-0040-06000: CS LL 1PKT SS SHIRT (NA)
4110-091621-0000171-0010-03700: OB LL MAEVE BENNET BLOUSE (NA)
4110-091621-0000171-0010-06000: OB LL MAEVE BENNET BLOUSE (NA)

Tips & Tricks - FAQ 3

Can I seed a plan with the LY of a "Like SKU"?

No. When seeding from a like SKU, it is seeding from the plan time frame (WP). For example, if you seed a style/color/size it will copy the WP data from the selected style color size.

The correct workflow is to seed the Like SKU from its own history before using it to seed a SKU without its own history.

Like Style Color Size |
LY Cannot multi-select
Like Class
Like Style Color Size

Tips & Tricks - FAQ 4

If I am copying LY data into a plan, and the LY data has not fully actualized yet, what happens?

For LY data that does not have actual values yet, the CurrentWorkingView (WP) plan values for the will be used.

LY - partially actualized timeframe

Week	Actual	LY
Wk 1	0.00	0.00%
Wk 2	0.00	0.00%
Wk 3	0.00	0.00%
Wk 4	0.00	0.00%
Wk 5	0.00	0.00%
Wk 6	0.00	0.00%
Wk 7	0.00	0.00%
Wk 8	0.00	0.00%
Wk 9	0.00	0.00%
Wk 10	0.00	0.00%
Wk 11	0.00	0.00%
Wk 12	0.00	0.00%
Wk 13	0.00	0.00%
Wk 14	0.00	0.00%
Wk 15	0.00	0.00%
Wk 16	0.00	0.00%
Wk 17	0.00	0.00%
Wk 18	0.00	0.00%
Wk 19	0.00	0.00%
Wk 20	0.00	0.00%
Wk 21	0.00	0.00%
Wk 22	0.00	0.00%
Wk 23	0.00	0.00%
Wk 24	0.00	0.00%
Wk 25	0.00	0.00%
Wk 26	0.00	0.00%
Wk 27	0.00	0.00%
Wk 28	0.00	0.00%
Wk 29	0.00	0.00%
Wk 30	0.00	0.00%
Wk 31	0.00	0.00%
Wk 32	0.00	0.00%
Wk 33	0.00	0.00%
Wk 34	0.00	0.00%
Wk 35	0.00	0.00%
Wk 36	0.00	0.00%
Wk 37	0.00	0.00%
Wk 38	0.00	0.00%
Wk 39	0.00	0.00%
Wk 40	0.00	0.00%
Wk 41	0.00	0.00%
Wk 42	0.00	0.00%
Wk 43	0.00	0.00%
Wk 44	0.00	0.00%
Wk 45	0.00	0.00%
Wk 46	0.00	0.00%
Wk 47	0.00	0.00%
Wk 48	0.00	0.00%
Wk 49	0.00	0.00%
Wk 50	0.00	0.00%
Wk 51	0.00	0.00%
Wk 52	0.00	0.00%

Tips & Tricks - FAQ 5

When I copy LY data into a plan, the EOP's do not match TY to LY. Why is this?

There are two reasons for this:

1. The EOP's for the TY data are calculating using the planned ending EOP of the prior period (the last planned EOP of the prior year or season). If the planned EOP in that period is different from the LY EOP, the plans that were just copied are using a different starting point than the LY values.
2. In the CurrentWorkingView plans, LY values for Transfer/RTV's and Inv Adj's are not included in the copy process. Thus, they affect the LY EOP's but the TY EOP's are calculated based on their values being zero.

Placeholders

Thursday, August 08, 2024 2:47 PM

Creating Placeholders

This process is used to placeholders in key item planning.

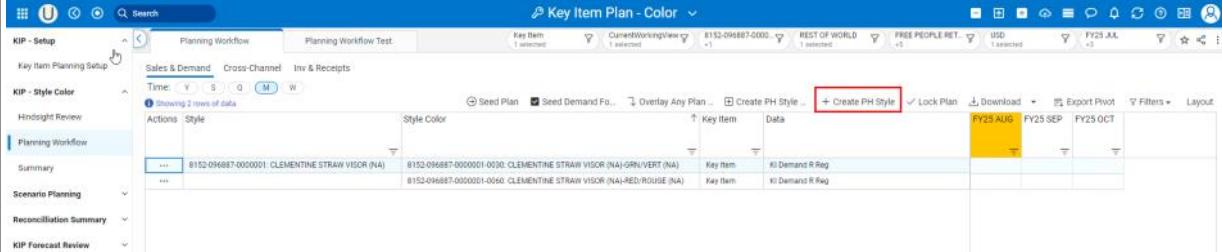
You can create a placeholder style or style color.

Creating a Placeholder Style

If you would like to create a Placeholder Style in Key Item Plan - Color

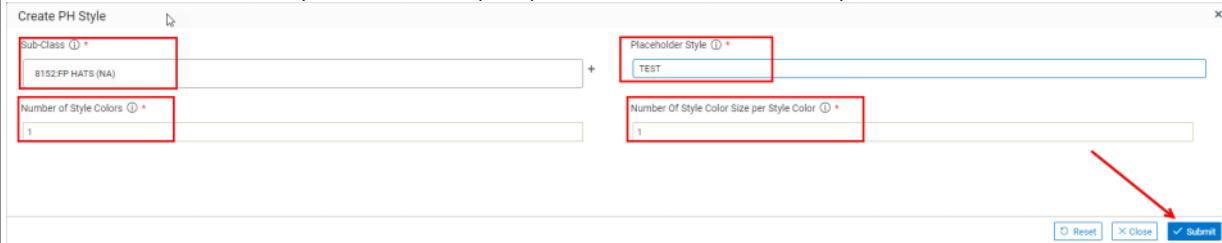
Navigate to Key Item Plan – Color > KIP – Style Color > Planning Workflow

Click the "+ Create PH Style" action button at the top of the pivot view.



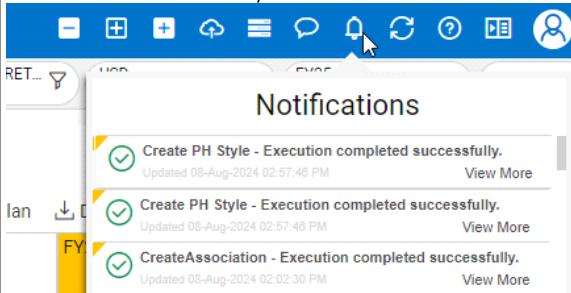
The screenshot shows the 'Key Item Plan - Color' interface. In the top navigation bar, there is a 'Create PH Style' button with a red border and a '+' icon. Below the navigation bar is a search bar and a toolbar with various icons. The main area is a pivot table showing data for 'Planning Workflow Test'. The left sidebar contains several sections: KIP - Setup, Key Item Planning Setup, KIP - Style Color, Hindsight Review, Planning Workflow, Summary, Scenario Planning, Reconciliation Summary, and KIP Forecast Review. The 'KIP - Style Color' section is currently selected.

Select the Sub-Class, Number of Style-Colors, and Sizes per Style Color, and enter a Placeholder Style name then click "Submit"



The screenshot shows the 'Create PH Style' dialog box. It has three main sections: 'Sub-Class' (containing '8152 FP HATS (NA)'), 'Placeholder Style' (containing 'TEST'), and 'Number Of Style Color Size per Style Color' (containing '1'). A red arrow points from the 'Placeholder Style' field towards the 'Submit' button. At the bottom right of the dialog box are 'Reset', 'Close', and 'Submit' buttons, with 'Submit' being highlighted.

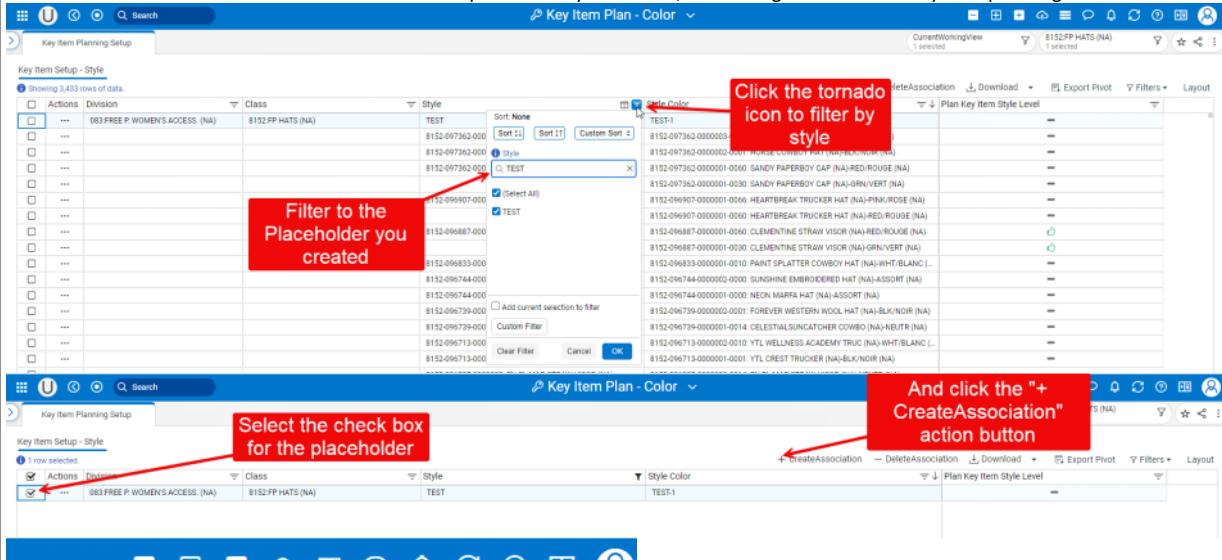
You will be notified when the Style has been created.



The screenshot shows the 'Notifications' screen. It displays three green success messages: 'Create PH Style - Execution completed successfully.' (Updated 08-Aug-2024 02:57:46 PM), 'Create PH Style - Execution completed successfully.' (Updated 08-Aug-2024 02:57:46 PM), and 'CreateAssociation - Execution completed successfully.' (Updated 08-Aug-2024 02:02:30 PM). Each message has a 'View More' link next to it. The notifications are displayed in a grid with columns for status, message, and date.

Next navigate to Key Item Plan – Color > KIP – Setup > Key Item Planning Setup

From here we will create the association between the placeholder you created, and setting it to active for key item planning.



The screenshot shows the 'Key Item Planning Setup' interface. There are two main sections: 'Key Item Setup - Style' and 'Key Item Setup - Datasource'. The 'Key Item Setup - Style' section is active. It shows a table with columns: Actions, Division, Class, Style, and Style Color. A red box highlights the 'Style Color' column header. A red arrow points to the 'TEST' entry in the 'Style Color' column. Another red box highlights the 'TEST' entry. A third red box highlights the 'Select the check box for the placeholder' checkbox in the 'Actions' column. A fourth red box highlights the '+ CreateAssociation' action button in the top right of the table area. The 'Key Item Setup - Datasource' section is also visible below.

Now navigate back to **Key Item Plan – Color > KIP – Style Color > Planning Workflow**
You can now add this placeholder to your filtered pivot table.

The screenshot shows two views of the 'Planning Workflow' section. The top view highlights the 'Create Association - Execution completed successfully.' message. The bottom view shows the 'Planning Workflow' filter selected, with a red box around the 'TEST' placeholder entry in the 'Style Color' dropdown. A red callout box states: 'Your placeholder has been created & activated for key item planning.'

Creating a Placeholder Style Color

If you would like to create a Placeholder Style Color

Navigate to **Key Item Plan – Color > KIP – Style Color > Planning Workflow**

Click the "+ Create PH Style Color" action button at the top of the pivot view.

Select the Sub-Class, Number of Style Colors, Number of Style Color Size per Style Color, and the Style to associate the placeholder color with

Create PH Style Color

Sub-Class *
8152:FP HATS (NA)

Number of Style Colors *
1

Style *
8152-096887-000001: CLEMENTINE STRAW VISOR (NA)

Number Of Style Color Size per Style Color *
1

Submit

You will be notified when the action has completed.

Notifications

Create PH Style Color - Execution completed successfully...
Updated 08-Aug-2024 01:59:00 PM

Next navigate to **Key Item Plan – Color > KIP – Setup > Key Item Planning Setup**

From here we will create the association between the placeholder you created, and setting it to active for key item planning. Click the check box for the placeholder and select

the "+ CreateAssociation" action button. You will be notified when the process has completed.

The screenshot shows the 'Key Item Plan - Color' interface. A red arrow points to the '+ CreateAssociation' button located at the top right of the main grid area. The grid displays items like '083 FREE P. WOMEN'S ACCESS. (NA)' and '8152 FP HATS (NA)'. The top navigation bar includes 'Search', 'Key Item Planning Setup', 'CurrentWorkingView', 'Plan Key Item Style Level', 'Export Pivot', 'Filters', and 'Layout'.

A modal window titled 'Notifications' is open, displaying a message: 'CreateAssociation - Execution completed successfully.' with a timestamp 'Updated 08-Aug-2024 04:08:34 PM'. A red box highlights this message, and a red arrow points from the previous screenshot to this one.

Now navigate back to **Key Item Plan – Color > KIP – Style Color > Planning Workflow**

You can now add this placeholder to your filtered pivot table.

The screenshot shows the 'Key Item Plan - Color' interface with the 'Planning Workflow' placeholder added to the grid. A red box highlights the 'Planning Workflow' section in the left sidebar, and a red arrow points to the placeholder entry in the grid.

The screenshot shows the 'Key Item Plan - Color' interface with the 'Planning Workflow' placeholder activated. A red box highlights the 'Planning Workflow' section in the left sidebar, and a red arrow points to the placeholder entry in the grid. A red callout box says 'Your placeholder has been created & activated for key item planning.'

Creating a Placeholder Style Color Size

If you would like to create a Placeholder Style Color

Navigate to **Key Item Plan – Size > KIP – Item > Planning Workflow**

Click the "+ Create PH Style Color Size" action button at the top of the pivot view.

The screenshot shows the 'Key Item Plan - Size' interface. A red box highlights the '+ Create PH Style Color Size' button at the top center of the grid. The grid displays various KIS Demand entries across different months and years.

Select the Sub-Class, Style, Style Color, and number of Style Color Sizes to create.

Create PH Style Color Size

Sub-Class ① *	4110.BLOUSES - ANTHRO. (NA)	Number Of Style Color Size per Style Color ① *	1
Style ① *	4110-025983-0004822: C5 LL 1PKT SS SHIRT (NA)	Style Color ① *	4110-025983-0004822-0040: C5 LL 1PKT SS SHIRT (NA)-BLUE/BLEU (NA)

You will be notified when the action has completed.

Notifications

Create PH Style Color Size - Execution completed successfully.
Updated 09-Aug-2024 08:23:03 AM

[View More](#)

Next navigate to Key Item Plan – Size > KIP – Setup > Key Item Planning Setup

From here we will create the association between the placeholder you created, and setting it to active for key item planning. Click the check box for the placeholder and select the "+ CreateAssociation" action button. You will be notified when the process has completed.

+ CreateAssociation

Notifications

CreateAssociation - Execution completed successfully.
Updated 08-Aug-2024 04:08:34 PM

Now navigate back to Key Item Plan – Size > KIP – Item > Planning Workflow

You can now add this placeholder to your filtered pivot table.

+ CreateAssociation

Planning Workflow Planning Workflow Test

Version	Key Item	Item	Location	Company	Currency	Time
Version Name	Key Item	Style Color Size	Country Group	Sub-Channel	Currency	454 Week

Brand 4110-111111-111111-1-1

Division i 1 selected out of 2 related members. To view all available members click [Show All](#)

Department Select All

Class 4110-111111-111111-1-1

Sub Class 4110-111111-111111-1-2

Style

Style Color

Style Color Size

New Placeholder size has been created



Deleting Placeholders

Thursday, August 08, 2024 2:47 PM

Deleting Placeholders

This process is used to delete placeholders in key item planning.

You can delete a placeholder style, style color, or style color size.

Creating a Placeholder Style

If you would like to create a Placeholder Style in Key Item Plan - Size

Navigate to Key Item Plan – Size > KIP – Setup > Key Item Planning Setup > Key Item Delete PH

KIP - Setup Key Item Planning Setup Key Item Delete PH

Key Item Planning Setup

Showing 92 rows of data.

Actions	Class	Sub Class	Style	Style Color	Style Color Size
...	0112:CUT AND SEW KNITS (NA)	0112:CUT AND SEW KNITS (NA)	0112-KI-NKI-Copy-Testing	0112-KI-NKI-Copy-Testing-1	0112-KI-NKI-Copy-Testing-1-1
...			0112-Naksh-Test-123	0112-Naksh-Test-123-1	0112-Naksh-Test-123-1-1
...			0112-Testing_123	0112-Testing_123-1	0112-Testing_123-1-1
...					0112-Testing_123-1-2
...	0522:LIGHTING (NA)	0522:LIGHTING (NA)	0522-061376-0000014:T-LAMP: L...	10005220613760000014-20	10005220613760000014-20-1
...			0522-TEST_BULB1	0522-TEST_BULB1-1	0522-TEST_BULB1-1-1
...			0522-TEST_ITEM	0522-TEST_ITEM-1	0522-TEST_ITEM-1-1
...				0522-TEST_ITEM-2	0522-TEST_ITEM-2-1
...				0522-TEST_ITEM-3	0522-TEST_ITEM-3-1
...				0522-TEST_ITEM-4	0522-TEST_ITEM-4-1
...				0522-TEST_ITEM-5	0522-TEST_ITEM-5-1

Here you can delete a placeholder Style, Style Color, or Style Color Size.

Deleting Placeholder Style

- If you want to delete an entire placeholder style you will only select the Style tic box at the far right.
- Please DO NOT click the Style & Style Color & Style Color Size.

Deleting Placeholder Style Color

- If you want to delete specific color(s) within a placeholder you will select the StyleColor tic box associated with the style color(s) you wish to delete.

Deleting Placeholder Style Color Size

- If you want to delete specific size(s) within a placeholder style color you will select the StyleColorSize tic box associated with the size(s) you wish to delete.

In the example below I have selected to delete a placeholder Style Color Size. Click Save when you have made your selections

Key Item Planning Setup Key Item Delete PH

Save Discard

In the example shown only size level 0112-Testing_123-1-2 will be deleted. Once selected click "Save"

Actions	Class	Sub Class	Style	Style Color	Style Color Size	StyleColorSize	StyleColor	Style
...	0112:CUT AND SEW KNITS (NA)	0112:CUT AND SEW KNITS (NA)	0112-KI-NKI-Copy-Testing	0112-KI-NKI-Copy-Testing-1	0112-KI-NKI-Copy-Testing-1-1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...			0112-Naksh-Test-123	0112-Naksh-Test-123-1	0112-Naksh-Test-123-1-1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...			0112-Testing_123	0112-Testing_123-1	0112-Testing_123-1-1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
...				0112-Testing_123-1-2	0112-Testing_123-1-2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please note once you have saved your selections these placeholders will be deleted in the nightly batch. If you wish to undo the selection deselect the tic box and click save again prior to the end of day.

KI EOP Validation

DIRECT CHANNELS:			
KI BOP U Reg			DIRECT
-	KI Sales U Reg		KI EOP U Reg = KI BOP U Reg - KI Sales U Reg + KI Receipt U - KI MPOS Sales U (Calc) - KI Dir Rtn to Rtl Str U + KI PPS Adj U + KI Inv Adj U + KI Trn Retail Stores to Direct U (Calc) - KI Trn Direct To Outlet U - KI Trn Direct to Wholesale U - KI Trn Direct to Retail Movement Stores U+ KI Trn Retail Movement Stores to Direct U (calc) + KI Transfer U
+	KI Receipt U		
+	KI Inv Adj U	could be a negative	
-	KI Dir Rtn to Rtl Str U		
-	KI MPOS Sales U (Calc)		
+	KI PPS Adj U		
-	KI Trns Dir to Outlet U		
-	KI Trns Dir to Rtl Mvmt U		
-	KI Trns Dir to Rtl Strs U		
-	KI Trns Dir to Whls U		
+	KI Trns Rtl Mvmt to Dir U (Calc)		
+	KI Trns Rtl Strs to Dir U (Calc)		
+	KI Transfer U	could be a negative	
KI EOP U Reg			
RETAIL CHANNELS:			
KI BOP U Reg			RETAIL
-	KI Sales U Reg		KI EOP U Reg = KI BOP U Reg - KI Sales U Reg + KI Receipt U + KI MPOS Sales U + KI Dir Rtn to Rtl Str U (Calc)- KI PPS Adj U (Calc) + KI Inv Adj U - KI Trn Retail Stores to Direct U + KI Trn Direct to Retail Stores U (Calc)- KI Trn Retail To Outlet U - KI Trn Retail to Wholesale U + KI Transfer U
+	KI Receipt U		
+	KI Inv Adj U	could be a negative	
+	KI Dir Rtn to Rtl Str U (Calc)		
+	KI MPOS Sales U		
-	KI PPS Adj U (Calc)		
+	KI Trns Dir to Rtl Strs U (Calc)		
-	KI Trns Rtl Strs to Dir U		
-	KI Trns Rtl to Outlet U		
-	KI Trns Rtl to Whls U		
+	KI Transfer U	could be a negative	
KI EOP U Reg			
MOVEMENT CHANNEL:			
KI BOP U Reg			MOVEMENT
-	KI Sales U Reg		KI EOP U Reg = KI BOP U Reg - KI Sales U Reg + KI Receipt U + KI MPOS Sales U + KI Dir Rtn to Rtl Str U (Calc)- KI PPS Adj U (Calc) + KI Inv Adj U - KI Trn Retail To Outlet U - KI Trn Retail to Wholesale U + KI Trn Direct to Retail Movement Stores U (Calc)- KI Trn Retail Movement Stores to Direct U + KI Transfer U
+	KI Receipt U		
+	KI Inv Adj U		
+	KI Dir Rtn to Rtl Str U (Calc)		
+	KI MPOS U		
-	KI PPS Adj U (Calc)		
+	KI Trns Dir to Rtl Mvmt U (Calc)		
-	KI Trns Rtl Mvmt to Dir U		
-	KI Trns Rtl to Outlet U		
-	KI Trns Rtl to Whls U		
+	KI Transfer U		
KI EOP U Reg			

Overview Recording

Thursday, June 27, 2024 9:26 AM

[DemandPlanning.mp4](#)

Location Attribute Plan Overview

Navigation

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Location Attribute Plan Workspace

The Location Attribute plan workspace allows you to create, shape and edit your location attribute plan. This plan can be edited at Location Attribute Value, SubChannel and week or any of the higher levels above these.

Below is a description of each page group & page that exists in the Location Attribute Plan Workspace.

Page Group	Page	Description
Location Attribute Setup		
	Location Attribute Value Setup	This page is used to setup location attribute plans by class.
Summary		
	Dashboard	This page is intended to be used to review a plan's key metrics. There is a graph to compare demand & sales plans to historical time periods and a pivot table to display high level plan metrics.
Location Planning		
	Hindsight Review	This page will allow you to look at all historical time periods for key metrics: Sales, Demand, Markdowns, Margin, Inventory & Receipts. This can be used to help determine what time period to seed from.
	Planning Workflow	This page has tabs for each flow of the plan with all relevant metrics on the individual tabs. This workflow should be used for detailed planning and to see specific metrics within an area that don't exist within the summary view.
	Plan Summary	This page allows you to plan most key metrics on a one page view and can be used for editing the plan while visualizing a variety of metrics from different areas.
Scenario Planning		
	Scenario Planning	This page is where you can create a scenario plan and publish a scenario back out to your WP plan version
	Scenario vs WP	This page is used to compare any scenario plan to the current WP plan
Reconciliation		
	LA vs PL	This page is a detailed report with all plan metrics to compare between LA WP and LA Locked version.

Location Attribute Setup

Initial Location Attribute Setup

Location Attribute Setup Steps for Brand Users

First, users will need to email o9support a list of the location attribute groups. This step will need to happen before these groups are available to plan in the system. Please provide the information below and we will upload these into the Location Attribute Workspace:

- Location Attribute Type - (ex: Climate)
- Location Attribute Values - (ex: Hot Stores, Cold Stores)
- Store Numbers
- Store Names

The remaining steps below will be completed by the o9Support team. We will notify you once these Location Attribute Groups are loaded into production!

Location Attribute File Upload Steps for IT Team

Key Notes:

- Item.[L2] is class number with 100 for North America or 200 for EU
 - Example: Class 4130 in North America would be noted as 1004130
- Sales Domain.[Sales Planning Channel] is the territory (3 digits) with 100 for North America or 200 for EU
 - Example: Anthropology for North America would be noted as

Channel Information

Below are the numerical values for the Sales Domain.[Sales Planning Channel] column of the setup sheet

100001 = URBAN RETAIL (NA)
100004 = ANTHRO RETAIL (NA)
100007 = ANTHRO HOME OUTLET (NA)
100008 = FREE PEOPLE RETAIL (NA)
100011 = FP MOVEMENT (NA)

Fact.FactSCLocAttrValueAssoc File

The first file you will need to fill out

	This will always be CurrentWorking View	100 + 4 Digit Class #	See section on Channel Information	This is where you define the Attribute Group Name	8 Digit Store # (1000 + Store #)	
	A	B	C	D	E	F
1	Version.[Version Name]	Item.[L2]	Sales Domain.[Sales Planning Channel]	Location Attribute.[Location Attribute Value]	Location.[Location]	Global RD Class Chnl Loc Val Assoc
2	CurrentWorkingView	1003112		100004 Terrain	10003001.US	TRUE
3	CurrentWorkingView	1003112		100004 Terrain	10003002.US	TRUE
4	CurrentWorkingView	1003112		100004 Terrain	10003003.US	TRUE
5	CurrentWorkingView	1003112		100004 Terrain	10003004.US	TRUE
6	CurrentWorkingView	1003112		100004 Terrain	10003005.US	TRUE

Dimension.DimLocationAttribute File

The second file you will need to fill out

	See section on Channel Information	Last 3 digits of the Channel #: Channel Name	Name of the Attribute Type you want to create	Display name of the Attribute Type you want to create	Attribute Value you want to create	Display name of the Attribute Value you want to create
	A	B	C	D	E	F
1	Location Attribute.[Location Brand]	Location Attribute.[Location Brand\$DisplayName]	Location Attribute.[Location Attribute Type]	Location Attribute.[Location Attribute Type\$DisplayName]	Location Attribute.[Location Attribute Value]	Location Attribute.[Location Attribute Value\$DisplayName]
2		100004 004:ANTHROPOLOGIE (NA)	Terrain	Terrain	Terrain	Terrain
3		100004 004:ANTHROPOLOGIE (NA)	Terrain	Terrain	LF Terrain	LF Terrain

Attribute File Upload

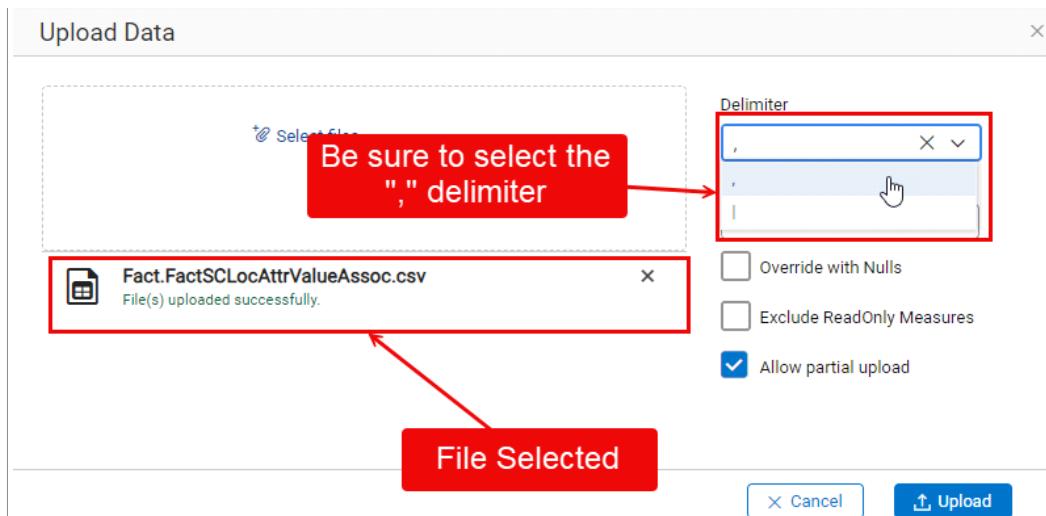
You will need to upload two files to create Location Attribute Groups & Associate Stores with them

First upload Dimension.DimLocationAttribute.csv this will establish the Attribute Groups you want to create.

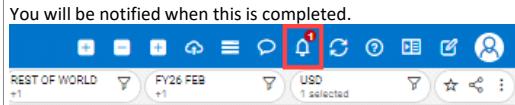
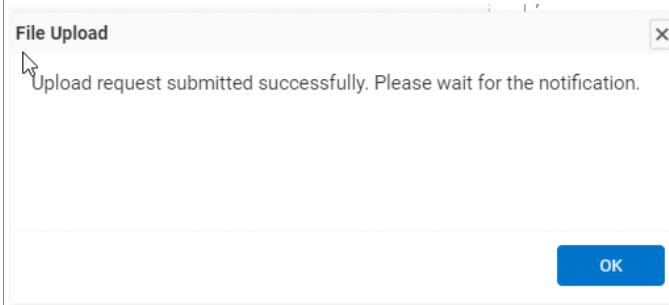
Upload Data

Once you have clicked "Upload" you will receive the message box shown below.

Next upload Fact.FactSCLocAttrValueAssoc.csv this will assign store locations to the attribute groups you have created



Once you have clicked "Upload" you will receive the message box shown below.



Attribute File Upload (Overnight Note)

Once you have these uploaded it does require an overnight batch run before you are able to see them in the Tenant.

Attribute Location Updates

Location Attribute Location Updates

Key Notes:

- To update the locations associated with an Attribute Group there are a few easy steps

To update locations associated with an Attribute

Below in Location Attribute Setup click on your Filters

The screenshot shows the Location Attribute Plan interface. On the left, the navigation bar includes 'Location Attribute Setup' (highlighted with a red box). The main area displays a grid of 'Location Attribute Value' and 'Sub Location' pairs. A red box highlights the filter bar at the top, which contains dropdowns for 'CurrentWorkingView' (1 selected), '4130 DRESSES - ANTHRO. (NA)' (1 selected), 'REST OF WORLD' (1 selected), 'ANTHRO RETAIL (NA)' (1 selected), and 'All : Location Attribute Value' (2 selected). Another red box highlights the message 'The filters have the sub-class, channel, location attribute value, & sub locations selected.' A third red box highlights the message 'Location 414 is currently associated with Cold Store Test & 417 is associated with Hot Store Test.'

In your Location Filter Click on "Location Store"

The screenshot shows the Location Attribute Plan interface. The navigation bar includes 'Location Attribute Setup' (highlighted with a red box). The main area has a search bar and a filter section with tabs for 'Version', 'Item', 'Location', 'Company', 'Location Attribute', 'Sub Class', 'Location Store' (highlighted with a red box), 'Country Group', 'Sub-Channel', and 'Location Attribute Value'. A red box highlights the 'Location Store' tab. Below it, a table lists 'Location Store' entries: 00414: 414 BOSTON, MA NEWBURY (NA), 00415: 415 CHESTNUT HILL, MA (NA), and 00417: 417 ATLANTA, GA-LENOX SQU (NA). A red box highlights this table. At the bottom, a 'Sub Location' section shows two entries: 10000414.US and 10000417.US.

You can search by store number to add locations to your view

The screenshot shows the Location Attribute Plan interface. The navigation bar includes 'Location Attribute Setup' (highlighted with a red box). The main area has a search bar and a filter section with tabs for 'Version', 'Item', 'Location', 'Company', 'Location Attribute', 'Sub Class', 'Sub Location' (highlighted with a red box), 'Country Group', 'Sub-Channel', and 'Location Attribute Value'. A red box highlights the 'Sub Location' tab. Below it, a table lists 'Location Store' entries: 00415: 415 CHESTNUT HILL, MA (NA). A red box highlights this table. To the right, a search bar contains 'Q. 415' and a button labeled 'Add to current selection' with a checkmark. A red box highlights this area. A callout text says 'Search for the location you wish to add, and click "Add to current selection"'.

Filtering out sub-locations

You will want to filter out sub locations to only those applicable for your plan.

Sub Locations contain the Store # with a suffix denoting a country ex. .US for US Locations

The screenshot shows the Location Attribute Plan interface. The navigation bar includes 'Location Attribute Setup' (highlighted with a red box). The main area has a search bar and a filter section with tabs for 'Version', 'Item', 'Location', 'Company', 'Location Attribute', 'Sub Class', 'Sub Location' (highlighted with a red box), 'Country Group', 'Sub-Channel', and 'Location Attribute Value'. A red box highlights the 'Sub Location' tab. Below it, a table lists 'Sub Location' entries: 10000414.AU, 10000414.CA, 10000414.MD, 10000414.SA, 10000414.US, 10000415.AT, 10000415.CA, 10000415.DE, 10000415.GB, 10000415.IE, 10000415.JP, and 10000415.US. A red box highlights this table. A callout text says 'Click "Sub Location" to limit the sub locations to only those that are applicable'.

Location Attribute Plan

Location Attribute Setup

Location Store

Sub Location

14 selected out of all 14 available members. To view related members click Show Related

Select All

Search

Location Attribute Plan

Location Attribute Setup

Location Store

Sub Location

Showing search results: 3 of 3 members selected. To view related members click Show Related

Q .US

Add to current selection (3/3)

Select All

10000414.US 10000415.US 10000417.US

Once you have the desired sub locations selected click "Apply"

Cancel Apply

Updating the Location Attribute's for Locations

You will want to filter out sub locations to only those applicable for your plan.

Sub Locations contain the Store # with a suffix denoting a country ex. .US for US Locations

Location Attribute Plan

Location Attribute Value Setup

Global RD Class Chnl Loc Val Assoc

Actions	Sub Class	Sub-Channel	Location Attribute Value	Sub Location	Global RD Class Chnl Loc Val Assoc
...	4130 DRESSES - ANTHRO. (NA)	ANTHRO RETAIL (NA)	Cold Store Test	10000414.US	<input checked="" type="checkbox"/>
...				10000415.US	<input type="checkbox"/>
...				10000417.US	<input type="checkbox"/>
...			Hot Store Test	10000414.US	<input type="checkbox"/>
...				10000415.US	<input type="checkbox"/>
...				10000417.US	<input checked="" type="checkbox"/>

Click the tic box to associate a location with a particular Location Attribute Value

Attribute Class Updates

Location Attribute Product Updates

Key Notes:

- To update the products associated with an Attribute Group there are a few easy steps

To update products associated with an Attribute

Below in Location Attribute Setup click on your Filters

The screenshot shows the Location Attribute Plan interface. On the left, the Location Attribute Setup sidebar is open, with 'Location Attribute Value' selected. A red box highlights the 'Sub Class' dropdown, which is set to '4130:DRESSES - ANTHRO. (NA)'. Another red box highlights the 'CurrentWorkingView' filter, which is set to '4130:DRESSES - ANTHRO. (NA)'. A third red box highlights the 'All Location Attribute Value' filter, which is set to '2 selected'. In the center, a table lists 'Location Attribute Value' (e.g., 'Cold Store Test') and 'Sub Location' (e.g., '10000414.US'). A red box highlights the entry 'Sub Class 4130 is currently associated with The Location Attribute Values for Cold Store Test & Hot Store Test'. On the right, a grid shows 'Global RD Class Chnl Loc Val Assoc' with several rows, some of which have checkboxes checked.

In your Location Filter Click on "Sub Class"

The screenshot shows the Location Attribute Plan interface. The sidebar is open to 'Location Attribute Value'. The 'Sub Class' dropdown is highlighted with a red box and set to '4130:DRESSES - ANTHRO. (NA)'. Below it, a list of product levels is shown: Brand (004:ANTHROPOLOGIE (NA)), Division (041:ANTHRO. WOMEN'S DIVISION (NA)), Department (0411:ANTHRO. WOMEN'S TOPS (NA), 0412:ANTHRO. WOMEN'S BOTTOMS (NA), 0413:ANTHRO. WOMEN'S DRESSES (NA), 0416:JACKETS (NA), 0417:ANTHRO WOMEN'S TREND (NA), 0418:SETS (NA)), Class (4130:DRESSES - ANTHRO. (NA)), and Sub Class (4130:DRESSES - ANTHRO. (NA)). A red box highlights the 'Department' row. A red callout box points to the 'Department' row with the text 'You can click any of the product levels to make changes'.

You can search by store number to add locations to your view

The screenshot shows the Location Attribute Plan interface. The sidebar is open to 'Location Attribute Value'. The 'Department' dropdown is highlighted with a red box and set to '0411:ANTHRO. WOMEN'S TOPS (NA)'. A red box highlights the '0411:ANTHRO. WOMEN'S TOPS (NA)' entry. A red callout box points to the entry with the text 'As an example I have selected Department 411'.

Location Attribute Plan

Location Attribute Value Setup

Version Item Location Company Location Attribute

Currency Planning Sub Class Sub Location Country Group Sub-Channel Location Attribute Value

Summary Brand 4110:BLOUSES - ANTHRO. (NA) 4111:HEAVYWEIGHT KNITS (NA) 4112:CUT AND SEW KNITS-ANTHRO (NA) 4113:FINE GAUGE-ANTHRO (NA) 4114:SWEATERS - ANTHRO. (NA) + 1 more

Location Planning Division 6 selected out of all 6 available members.

Hindsight Review Department Select All

Planning Workflow Class 4110:BLOUSES - ANTHRO. (NA) 4111:HEAVYWEIGHT KNITS (NA) 4112:CUT AND SEW KNITS-ANTHRO (NA) 4113:FINE GAUGE-ANTHRO (NA) 4114:SWEATERS - ANTHRO. (NA) 4148:LAYERING (NA)

Plan Summary Sub Class

Scenario Planning Scenario Planning Scenario vs WP Reconciliation Summary

All classes are selected

Location Attribute Plan

Location Attribute Value Setup

Showing 36 rows of data.

Actions	Sub Class	Sub-Channel	Location Attribute Value
...	4110:BLOUSES - ANTHRO. (NA)	ANTHRO RETAIL (NA)	Cold Store Test
...
...	Hot Store Test
...
...	4111:HEAVYWEIGHT KNITS (NA)	ANTHRO RETAIL (NA)	Cold Store Test
...
...	Hot Store Test
...
...	4112:CUT AND SEW KNITS-ANTHRO (NA)	ANTHRO RETAIL (NA)	10000417 US Store Test
...

To quickly add all sub classes to a location attribute value click "Layout"

Download Filters Layout Local Edit Global RD Class Chnl Loc Val Assoc

Pivot Layout

Layout Data Options Display

Rows

Attributes Only All

Sub Class Subtotal ↕ + Sub-Channel Subtotal ↕ + Location Attribute Value Subtotal ↕ + Sub Location Subtotal ↕ + Version Name Subtotal ↕ + Country Group Subtotal ↕ +

Deselect "Sub Class"

Reset Cancel Save

Location Attribute Plan

Save **Discard**

Location Attribute Value Setup

Location Attribute Value Setup

Actions Sub-Channel

ANTHRO RETAIL (NA)

Hot Store Test

Location Attribute Value

1 selected

All Class 6 selected

REST OF WORLD 1 selected

ANTHRO RETAIL (NA) 1 selected

All Location Attribute Value 2 selected

Download Filters Layout Local Edit

Now I can select which locations for all of the selected sub-classes at once

Global RD Class Chnl Loc Val Assoc

10000415.US 10000417.US

Location Attribute Plan

Save **Discard**

Location Attribute Value Setup

Location Attribute Value Setup

Actions Sub Class

4110 BLouses - ANTHRO (NA) ANTHRO RETAIL (NA) Cold Store Test

Sub-Channel

ANTHRO RETAIL (NA) Cold Store Test

Location Attribute Value

1 selected

All Class 6 selected

REST OF WORLD 1 selected

ANTHRO RETAIL (NA) 1 selected

All Location Attribute Value 2 selected

Download Filters Layout Local Edit

Go back to your Layout to add "Sub Class" back in.

Pivot Layout

Layout **Data** **Options** **Display**

Rows

Attributes Only All

Sub Class Subtotal ↔ +
Sub-Channel Subtotal ↔ +
Location Attribute Value Subtotal ↔ +
Sub Location Subtotal ↔ +
Version Name Subtotal ↔ +
Country Group Subtotal ↔ +

Add "Sub Class" back to your layout

Reset Cancel Save

Location Attribute Plan

Location Attribute Value Setup

Showing 36 rows of data

Actions	Sub Class	Sub-Channel	Location Attribute Value	Sub Location	Global RD Class Chnl Loc Val Assoc
...	4110 BLOUSES - ANTHRO (NA)	ANTHRO RETAIL (NA)	Cold Store Test	10000414.US 10000415.US 10000417.US	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>
...	4111 HEAVYWEIGHT KNITS (NA)	ANTHRO RETAIL (NA)	Cold Store Test	10000414.US 10000415.US	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
...	4112 CUT AND SEW KNITS-ANTHRO (NA)	ANTHRO RETAIL (NA)	Cold Store Test	10000417.US 10000414.US 10000415.US	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
...	Hot Store Test	10000414.US 10000415.US	<input type="checkbox"/> <input type="checkbox"/>
...	Hot Store Test	10000417.US	<input type="checkbox"/>
...	Hot Store Test	10000414.US	<input type="checkbox"/>
...	Hot Store Test	10000415.US	<input type="checkbox"/>

Now you can see that all Sub Classes have been added to the Location Attribute Values you selected

Seeding

Seeding

The starting point of developing a plan is to seed it with data

When you are building a new Merchandise Financial Plan, seeding it with data from the past or from a like plan will save time and improve accuracy by inheriting key data instead of building it from scratch. You will inherit seasonality curves, key metrics, and ratios from the selected time frame. It creates the basis used to shape your future plan.

You can choose to seed from any level of history (LY, LLY, LLLY, Avg3LY), an actual store, a like store, or a placeholder store.

Hindsight Workflow

Review historical data by navigating from the **Location Attribute Plan Workspace > Location Planning Page Group > Hindsight Review Page**. The "Hindsight Review" page exists for all plan types and all plan types have the same layout. This guide focuses on Location Attribute Planning.

Hindsight Review helps planners determine which historical time frame is most appropriate to use as the baseline for their future plan. *Which past year do you think next year will be most like?*

The screenshot shows the Hindsight Review page within the Location Attribute Plan workspace. The left sidebar lists various planning categories: Location Attribute Setup, Currency Planning, Summary, Location Planning, Hindsight Review (which is highlighted with a red box), Planning Workflow, Plan Summary, Scenario Planning, and Reconciliation Summary. The main content area is titled "Hindsight Review - Sales". It features a toolbar with filter dropdowns for CurrentWorkingView, Product (081 FP APPAREL...), Location Store (00801: 801 PARA...), Free People (NA), USD, AN Climate, and FY2025. Below the toolbar is a message: "No data available for the filtered members." A red box highlights the "Sales" tab in the toolbar. A callout box points to the toolbar with the text: "Toggle between views and subtabs to focus on specific historical metrics". Another callout box points to the filters with the text: "Set your scope filters to Product, Channel, Attribute, Time for which you want to review history". The bottom section contains a table header with columns: Actions, Class, Channel, Location Attribute Type, Location Attribute Value, Sub Location, Location Store, Data, and Values. A warning message at the top of the table says: "Your current filter selections resulted in no valid data. Please modify your filter selections and try again."

Seeding Workflow

Navigate to **Location Attribute Plan Workspace > Attribute Planning Page Group > Planning Workflow Page > Sales & Demand Planning View or Attribute Plan Workspace > Attribute Planning Page Group > PlanSummary**

Update your Scope Filters to the time frame you are going to seed with data.

Click on the "Seed Plan" Action Button.

The screenshot shows the "Seed Plan" action button pop-up window. The window has several input fields and dropdowns. On the left, under "Planning Workflow", there is a "Seed From" field containing "Actual Store" and a "Target Store" field with a checkbox for "Select All 10000801 US". Below these are "Sub-Class", "Planning Month", and "Attribute Type" fields. On the right, there are "Seed Source" (set to "WP"), "Source Store" (empty), "Sub-Channel" (empty), and "Attribute Type" (set to "AN Climate"). At the bottom right of the window is a "Submit" button. A red box highlights the "Planning Workflow" section. A green box highlights the "Seed Source" field. A blue box highlights the "Attribute Type" field. A yellow box highlights the "Submit" button. A callout box points to the "Seed From" field with the text: "Set scope filters for Product, Attribute, and time you want to plan".

Fill out parameters in the "Seed Plan" Action Button Pop Up

The diagram illustrates the process of selecting a seed source and applying it to a seed plan.

Seed From: A dropdown menu with options: Like Store, Actual Store, Like Store, and PH Store. A red box highlights "Like Store". Below it, a green box contains the text: "You can select Actual Store, Like Store, or PH Store".

Seed Source: A dropdown menu with options: WP, LY, LLY, LLLY, and Avg3LY. A green box on the right says "Select what you want to seed with".

Seed Plan: A form with sections: Seed From (Like Store), Target Store (Select All 10000801.US), Sub-Class (Select All 8130:FP W DRESSES (NA)), Planning Month (Select All FY25 FEB), Source Store (10000001.US), and Attribute Type (AN Climate). A blue arrow points from the "Like Store" selection in the Seed From step to the "Source Store" section in the Seed Plan step. A yellow arrow points from the "AN Climate" selection in the Seed Source step to the "Attribute Type" section in the Seed Plan step.

Source Store: A dropdown menu with options: 10000001.US and 10000001.US. A blue box contains the text: "If you select 'like store' or 'PH store' you will need to select a source store".

Attribute Type: A dropdown menu with options: AN Climate and AN Climate. A green box on the right says "Select the Attribute Type you wish to seed".

** Note: if you choose to seed from Like Store, there is a metric 'LAP Like Store' that will tell you the store # you selected to seed for the particular intersection**

Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."

Seed Plan

Request submitted successfully. Please wait for the notification.

Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.



Refresh o9 to see updated data.

Review your updated Class Plan. Now that the plan has been seeded, the CP values will no longer be blank. They will match the data from which you seeded.

Tips & Tricks - FAQ 1

1. Do only the measures I have pulled into my view seed?

No! All seeding measures will seed no matter what measures you have pulled into the Pivot Table in *Class Plan Workspace > Class Planning Page Group > Planning Workflow Page > Sales & Demand Planning View*. The only measures that do not seed are RTV & Inv Adj.

Tips & Tricks - FAQ 2

Can I seed all my classes with LY at one time or do I have to do them individually?

Multiple classes may be seeded at one time by selecting multiple classes in your Seed Plan Action Button Parameters.

This is true for parent/child relationships at any level of the hierarchy (e.g., all classes in a department, departments in a division, divisions in a brand, etc.)

Tips & Tricks - FAQ 3

Can I seed a plan with the LY of a "Like Class"?

No. When seeding from a like class, it is seeding from the plan time frame (WP). For example, if you seed class 4110 FY26 MAR from 4112, it will copy the data from 4112 FY26 MAR. It is copying the "WP" or "CurrentWorkingView".

The correct workflow is to seed the Like Class from its own history before using it to seed a class without its own history.

Tips & Tricks - FAQ 4

If I am copying LY data into a plan, and the LY data has not fully actualized yet, what happens?

For LY data that does not have actual values yet, the CurrentWorkingView (WP) plan values for the will be used.

Tips & Tricks - FAQ 5

When I copy LY data into a plan, the EOP's do not match TY to LY. Why is this?

There are two reasons for this:

1. The EOP's for the TY data are calculating using the planned ending EOP of the prior period (the last planned EOP of the prior year or season). If the planned EOP in that period is different from the LY EOP, the plans that were just copied are using a different starting point than the LY values.
2. In the CurrentWorkingView plans, LY values for Transfer/RTV's and Inv Adj's are not included in the copy process. Thus, they affect the LY EOP's but the TY EOP's are calculated based on their values being zero.

Shaping

Sales

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Sales Metrics

Summary of **SALES** metrics available:

- Retail Dollars (Sales R) – Total, Reg, Full Price, Promo, Markdown
- Units (Sales U) – Total, Reg, Full Price, Promo, Markdown
- Average Units Sold (AUS) – Total, Reg, Full Price, Promo, Markdown
- Build (Sales R Build) - Total
- Sales R Reg % Sales R - Percent of Total Sales that are Reg Price
- Sales R MD % Sales R - Percent of Total Sales that are MD Price
- Sales R FP % Sales R Reg - Percent of Reg Price Sales that are Full Price

Sales - Calculation Callouts

LAP Sales R Reg % Sales R & LAP Sales R MD % Sales R

Data	FY25 WK 32
LAP Sales R	5,335
LA vs PL Sales R	0
LAP Sales R/LY % Chg	0.0%
LAP Sales R Build	1.42
LAP Sales R Reg	5,274
LAP Sales R Reg % Sales R	98.9%
LAP Sales R MD	61
LAP Sales R MD % Sales R	1.1%

LAP Sales R Reg % Sales R calculates the % of total sales that are reg price

You can enter either the % of Reg Price or the % of MD Price and the other will calculate.

LAP Sales R FP % Sales R Reg

Data	FY25 WK 32
LAP Sales R	5,335
LA vs PL Sales R	0
LAP Sales R/LY % Chg	0.0%
LAP Sales R Build	1.42
LAP Sales R Reg	5,274
LAP Sales R Reg % Sales R	98.9%
LAP Sales R MD	61
LAP Sales R MD % Sales R	1.1%
LAP Sales R FP	4,436
LAP Sales R FP % Sales R	83.2%
LAP Sales R FP % Sales R Reg	84.1%
LAP Sales R Promo	838
LAP Sales R Promo % Sales R	15.7%
LAP Sales R Promo % Sales R Reg	15.9%

Sales R FP % Sales R Reg calculates the percent of Reg Price sales that are at Full Price

This will also calculate the percent of Total Sales that are Promo as seen in LAP Sales R Promo % Sales R, and the percent of Reg Price Sales that are Promo as seen in LAP Sales R Promo % Sales R Reg

Sales AUS - Calculation Callouts

Sales AUS FP (Sales Average Unit Sale Full Price)

LAP Sales U	429
LAP Sales U FP	338
LAP Sales U MD	5
LAP Sales U Promo	86
LAP Sales U Reg	424
LAP Sales AUS	12.44
LAP Sales AUS FP	13.12
LAP Sales AUS MD	12.16
LAP Sales AUS Promo	9.74
LAP Sales AUS Reg	12.44

Changing the LAP Sales AUS FP will adjust Sales Units for FP, Reg, & Total while holding the Sales Retail

LAP Sales U	414
LAP Sales U FP	323
LAP Sales U MD	5
LAP Sales U Promo	86
LAP Sales U Reg	409
LAP Sales AUS	12.90
LAP Sales AUS FP	13.75
LAP Sales AUS MD	12.16
LAP Sales AUS Promo	9.74
LAP Sales AUS Reg	12.91

Sales AUS Promo (Sales Average Unit Sales Promotional)

LAP Sales U	429
LAP Sales U FP	338
LAP Sales U MD	5
LAP Sales U Promo	86
LAP Sales U Reg	424
LAP Sales AUS	12.44
LAP Sales AUS FP	13.12
LAP Sales AUS MD	12.16
LAP Sales AUS Promo	9.74
LAP Sales AUS Reg	12.44

Changing the LAP Sales AUS Promo will adjust Sales Units for FP, Reg, Promo, Total, & adjust the Total Sales AUS while holding the Sales Retail

LAP Sales U	434
LAP Sales U FP	338
LAP Sales U MD	5
LAP Sales U Promo	91
LAP Sales U Reg	429
LAP Sales AUS	12.30
LAP Sales AUS FP	13.12
LAP Sales AUS MD	12.16
LAP Sales AUS Promo	9.25
LAP Sales AUS Reg	12.31

Index to Average

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Index to Average

Index to Average is used to look at an individual store and see how it compares to the average of all stores.

To calculate Index to Average, we have APS metrics that measure the average across all stores. Note that the Index to Average calculation will use the APS for the entire Location Attribute Type, not just the Sub Locations that is filtered in your view.

APS Sales R = Sales R / Store Count

APS Inv R = Inv R / Store Count

APS WOS R = WOS R / Store Count

APS FWOS R = FWOS R / Store Count

Summary of Index to Average metrics for Sales, Inventory, WOS, and FWOS:

- LAP Sales R Idx to Avg
- LAP Sales R MD Idx to Avg
- LAP Sales R Reg Idx to Avg
- LAP Sales U Idx to Avg
- LAP Sales U MD Idx to Avg
- LAP Sales U Reg Idx to Avg

- LAP Inv R Idx to Avg
- LAP Inv R MD Idx to Avg
- LAP Inv R Reg Idx to Avg
- LAP Inv U Idx to Avg
- LAP Inv U MD Idx to Avg
- LAP Inv U Reg Idx to Avg

- LAP WOS R Idx to Avg
- LAP WOS R MD Idx to Avg
- LAP WOS R Reg Idx to Avg
- LAP WOS U Idx to Avg
- LAP WOS U MD Idx to Avg
- LAP WOS U Reg Idx to Avg

- LAP FWOS R Idx to Avg
- LAP FWOS U Idx to Avg

Index to Average Calculation Example:

Location	Data	Week 1	Week 2	Week 3	Week 4
Store 1	LAP EOP R	10	20	30	40
Store 2	LAP EOP R	20	40	60	80
Store 3	LAP EOP R	30	60	90	100
Store 1/2/3	LAP Inv Store Count	3	3	3	3
Store 1/2/3	LAP APS EOP R	20	40	60	73.33
Store 1	LAP Inv R Idx to Avg	0.50	0.50	0.50	0.55
Store 2	LAP Inv R Idx to Avg	1.00	1.00	1.00	1.09
Store 3	LAP Inv R Idx to Avg	1.50	1.50	1.50	1.36

Build

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Build Metrics

Build is a measure of growth from one time period to the next. LAP Sales R Build

SALES BUILD = Total Sales / Previous Total Sales

- LAP Sales R Build

LAP Sales R Build

Location Store	Data	FY25 WK 31	FY25 WK 32	FY25 WK 33	FY25 WK 34
03001: TERRAIN AT STYERS (NA)	LAP Sales R	3,750	5,335	4,377	9,387
	LA vs PL Sales R	-409	0	0	0
	LAP Sales R/LY % Chg	0.0%	0.0%	0.0%	0.0%
	LAP Sales R Build	0.98	1.42	0.82	2.14
	LAP Sales R Reg	3,528	5,274	4,329	9,403

Keying in the LAP Sales R Build will adjust the LAP Sales R. Or keying in LAP Sales R will adjust the LAP Sales R build

Markdowns

Markdown Metrics

Summary of **Markdown** metrics available:

- MkdTot R
- MkdPOS R
- MkdPerm R
- MkdPOS R % Sales R
- MkdPOS R % Sales R = MkdPOS R / Sales R

Markdowns

Data	FY25 WK 33	FY25 WK 34
LAP Sales U Idx to Avg	1.07	1.75
LAP Sales U MD Idx to Avg	0.63	1.78
LAP Sales U Reg Idx to Avg	1.07	1.75
LAP Sales Store Count	1	1
LAP MkdTot R	507	10,240
LAP MkdPOS R	507	1,740
LAP MkdPOS R % Sales R	11.6%	18.5%
LAP MkdPerm R	0	8,500

Changing your LAP
MkdTot R will hold the
LAP MkdPOS R and
adjust the LAP MkdPerm
R

Data	FY25 WK 33	FY25 WK 34
LAP Sales U Idx to Avg	1.07	1.75
LAP Sales U MD Idx to Avg	0.63	1.78
LAP Sales U Reg Idx to Avg	1.07	1.75
LAP Sales Store Count	1	1
LAP MkdTot R	507	12,000
LAP MkdPOS R	507	1,740
LAP MkdPOS R % Sales R	11.6%	18.5%
LAP MkdPerm R	0	10,260

Inventory

Inventory Metrics

Summary of **Inventory** metrics available:

The measures below are used to plan inventory broken out by price group. These are editable measures.

- EOP R Reg % EOP R = % of total EOP that are Reg price
- EOP R MD % EOP R = % of total EOP that are MD price

APS stands for Average Per Store. The APS EOP metrics are used to measure the average amount of inventory held at the end of the period across all stores. These reference metrics are not editable.

LAP Inv Store Count = # of Stores with Inventory (store is counted if inventory is entered for specific intersection)

- LAP APS EOP R = EOP R / LAP Inv Store Count
- LAP APS EOP U = EOP U / LAP Inv Store Count
- LAP APS EOP R Reg = EOP R Reg / LAP Inv Store Count
- LAP APS EOP U Reg = EOP U Reg / LAP Inv Store Count
- LAP APS EOP R MD = EOP R MD / LAP Inv Store Count
- LAP APS EOP U MD = EOP U MD / LAP Inv Store Count

Index to Average is used to look at an individual store and see how it compares to the average of all stores. Note that the Index to Average calculation will use the APS for the entire Location Attribute Type, not just the Sub Locations that is filtered in your view.

- Inventory R Index to Average (LAP Inv R Idx to Avg) = Store Inv R / APS EOP R
- Inventory U Index to Average (LAP Inv U Idx to Avg) = Store Inv U / APS EOP U
- Reg Inventory R Index to Average (LAP Inv R Reg Idx to Avg) = Store Inv R Reg / APS EOP R Reg
- Reg Inventory U Index to Average (LAP Inv U Reg Idx to Avg) = Store Inv U Reg / APS EOP U Reg
- MD Inventory R Index to Average (LAP Inv R MD Idx to Avg) = Store Inv R MD / APS EOP R MD
- MD Inventory U Index to Average (LAP Inv U MD Idx to Avg) = Store Inv U MD / APS EOP U MD

Index to Average Calculation Example:

Location	Data	Week 1	Week 2	Week 3	Week 4
Store 1	LAP EOP R	10	20	30	40
Store 2	LAP EOP R	20	40	60	80
Store 3	LAP EOP R	30	60	90	100
Store 1/2/3	LAP Inv Store Count	3	3	3	3
Store 1/2/3	LAP APS EOP R	20	40	60	73.33
Store 1	LAP Inv R Idx to Avg	0.50	0.50	0.50	0.55
Store 2	LAP Inv R Idx to Avg	1.00	1.00	1.00	1.09
Store 3	LAP Inv R Idx to Avg	1.50	1.50	1.50	1.36

Receipts

Receipt Metrics

Summary of **Receipt** metrics available:

- LAP Receipt R - Receipt Dollar \$
- LAP Receipt R/LY % Chg - Percentage of TY Receipt Dollar compared to LY Receipt Dollar
- LAP Receipt U - Receipt Units
- LAP AUR - Average Receipt Price

Locking to LAPL

Locking an Approved Plan to the LAPL Version

The Approved Plan (LAPL Version) exists so that planners have a reference of a past plan. They schedule the lock to run automatically on a set cadence, like quarterly or monthly, or they can lock it ad hoc. The LAPL is a snapshot of their plan; it is updated more frequently than the Budget Plan but not as frequently as the CurrentWorkingView (LAP Version). Usually, Plan locking will be coordinated and actioned at once for an entire Division or Brand. This gives the planning team and managers a finalized, approved, and up-to-date snapshot of the plan that they can reference later.

The Approved Plan (LAPL Version) is created by locking the CurrentWorkingView (LAP Version). Values will populate in LAPL after the plan has been locked

One Method of Locking - Action Button:

- Use the action button option to lock your Location Attribute Plan

Locking Plan Walkthrough

When you are ready to lock your plan click the "Lock Plan" action button.

Data	FY25 WK 33	FY25 WK 34	FY25 WK 35	FY25 WK 36
LAP Sales R	4,377	12,500	6,302	2,879
LAPL Sales R	4,377	10,000	6,302	2,879

The filters you have selected in your view will populate in the Lock Plan popup, and will automatically be included in the lock.
You can make adjustments in the filters prior to selecting Lock Plan, or in the pop-up box.

* Lock Plan

SubClass ⓘ *

Select All 3111:ANNUAL (NA) X

Store ⓘ *

Select All 10003001.US X

SubChannel ⓘ *

Select All ANTHRO RETAIL (NA) X

Planning Month ⓘ *

Select All FY25 SEP X +1 More

Attribute Type ⓘ *

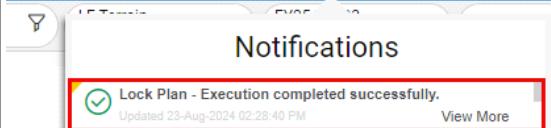
Terrain

Submit

After you have clicked "Submit" in the pop-up you will be notified when the action is completed.



Now you can refresh your data and see the results



Data	FY25 WK 33	FY25 WK 34	FY25 WK 35	FY25 WK 36
LAP Sales R	4,377	12,500	6,302	2,879
LAPL Sales R	4,377	10,000	6,302	2,879

Before lock
shown above,
after lock below

Data	FY25 WK 33	FY25 WK 34	FY25 WK 35	FY25 WK 36
LAP Sales R	4,377	12,500	6,302	2,879
LAPL Sales R	4,377	12,500	6,302	2,879

Scenario Planning

Scenario Planning

This process is used to plan multiple versions or test out different scenarios and answer "what if" questions without impacting the current WP plan.

There are 4 scenario versions to use:
R&D Product Planning Scenario 1
R&D Product Planning Scenario 2
R&D Product Planning Scenario 3
R&D Product Planning Scenario 4

Scenario versions of the plan do not actualize automatically and historical information is not automatically brought in. Both of these steps can be completed prior to planning if desired.

Here are the actions for Scenario Planning:

[Displaying Historical Information \(LY,LLY,LLLY,3yrAvg\)](#)

[Actualizing the Scenario](#)

[Seed the plan](#)

[Overlay the Plan](#)

[Publish the Plan](#)

Scenario Planning - Set Up

In the Location Attribute Setup screen, you will be able to filter on each of the 4 scenario versions. The scenarios will default from the same Location Attributes that were set up in the CWV.

Use the 'Copy Association Setup to Scenarios' action button to copy the store associations set up in the CWV to your Scenario versions. You can make changes to the individuals stores in the Location Attribute Group as needed.

The screenshot shows the Location Attribute Plan interface. On the right side, there are four columns representing different scenario versions: R&D Product Planning Scenario-1, R&D Product Planning Scenario-2, R&D Product Planning Scenario-3, and R&D Product Planning Scenario-4. A red box highlights the 'Copy Assoc to S...' button located at the top right of the scenario columns. Below the table, there are buttons for 'Delete Plan' and 'Download'.

Displaying Historical Information (LY,LLY,LLLY,3yrAvg)

If you would like to use historical information to inform your scenario plan you can do so by using an action button, [Copy LY to Scenario](#)

Navigate to the Class Plan Workspace > Scenario Planning Page Group > Scenario Planning Page

Update your Scope Filters to the time frame you are going to seed with data.

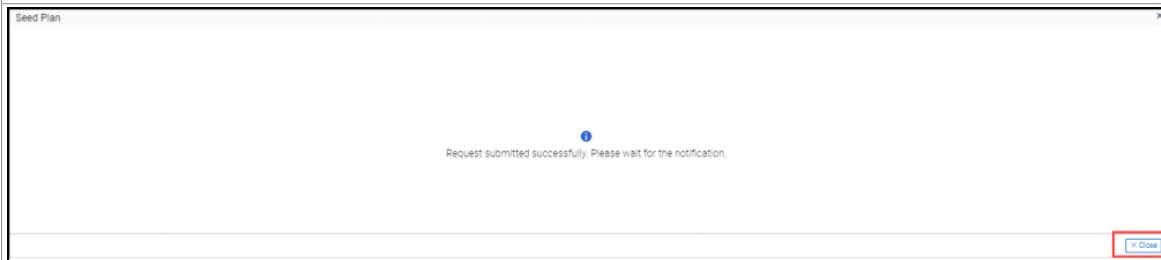
Click [Copy LY to Scenario](#) action button

The screenshot shows the Location Attribute Plan interface with scope filters applied. A red box highlights the 'Set Scope Filters for the PLAN' button. Another red box highlights the 'Copy LY Action Button'. The interface includes various filters like 'R&D Product Planning Scenario...', 'CurrentWorkingView', 'REST OF WORLD', 'ANthro Retail (NA)', 'USD', 'Wedding', and 'FY25 FEB'.

Fill out parameters in the [Copy LY to Scenario](#) Action Button Pop Up - will automatically inherit from scope filters

The screenshot shows the 'Copy LY to Scenarios' dialog box. It contains fields for Department, SubClass, Location, Attribute Type, and Planning Year. At the bottom, there are two checkboxes: 'CopyLY' and 'CopyAvg3LY'. A blue box highlights these checkboxes, and a blue arrow points to a note: 'Chose which years of historical data to copy'. Buttons for 'Reset', 'Close', and 'Submit' are at the bottom right.

Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."



Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.



Refresh o9 to see updated data.

Review your updated Scenario Plan. The historical value you chose should no longer be blank.

Actualizing the Scenario

The scenario versions of the plan do not actualize automatically in the event that a scenario plan is used to compare against actuals. These instructions can be used to actualize a scenario plan if desired.

Navigate to the Location Attribute Plan Workspace > Scenario Planning Page Group > Scenario Planning Page

Update your Scope Filters to the time frame you are going to seed with data.

Click **Actualize Scenario** action button

Action	Division	Location Attribute Type	Location Attribute Value	Sub Location	Date	FY25 FEB	FY25 MAR	FY25 APR	FY25 MAY	FY25 JUN	FY25 JUL	FY25 AUG	FY25 SEP	FY25 OCT	FY25 NOV	FY25 DEC
...	021:WEDDINGS (NA)	Wedding	Anthro Capsule	10000411.US	LAP Sales R	-314	-110	1146	460	481	-336	196	166	-747	201	
...					LY Sales R	2,045	8,663	3,112	2,398	774	-645	324	620	148	-1,239	116
...					LLY Sales R	-154	169	302	173	133	-300	-334	620	148	-1,239	116
...					LLY L Sales AUS				115.28	135.75	207.45	58.75	184.00	210.99	154.00	
...					AugSLY L Sales AUS	252.38	249.56	312.69	221.13	99.48	139.59	-17.02	363.75	481.35	250.00	72.26

Fill out parameters in the **Actualize Scenario Action Button Pop Up** - will automatically inherit from scope filters

To Scenario *****
R&D Product Planning Scenario-1

Division *****
 Select All 041-ANTHRO. WOMEN'S DIVISION (NA) X

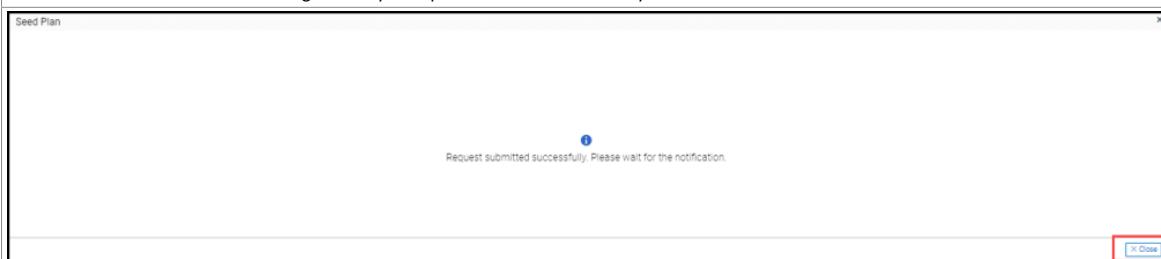
Department *****
 Select All 0413:ANTHO. WOMEN'S DRESSES (NA) X

Class *****
 Select All 4130:DRESSES - ANTHRO. (NA) X

Sub-Class *****
 Select All 4130:DRESSES - ANTHRO. (NA) X

Reset Close Submit

Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."



Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.



Refresh o9 to see updated data.

Review your updated Scenario Plan. Now that the plan has been seeded, the CP values will no longer be blank. They will match the data from which you seeded.

Seeding the plan

If you want to plan a scenario from scratch using historical data, you can use the "Seed Plan" action button to create the plan.

Navigate to the Location Attribute Plan Workspace > Scenario Planning Page Group > Scenario Planning Page

Update your Scope Filters to the time frame you are going to seed with data.

Click **Seed Plan** action button

The screenshot shows a grid of historical sales data for 'WEDDING DRESSES (NA)' across various locations and time periods. The 'Seed Plan' button is highlighted with a red box. Another red box highlights the 'Set Scope Filters for the PLAN' button, which is located in the top navigation bar under 'Scenario Planning'.

Fill out parameters in the **Seed Plan** Action Button Pop Up - will automatically inherit from scope filters

The dialog box contains fields for selecting a seed source (R&D Product Planning Scenario-1), target version (R&D Product Planning Scenario-1), department (Select All 0413:ANTHRO. WOMEN'S DRESSES (NA)), class (Select All 4130:DRESSES - ANTHRO. (NA)), subclass (Select the SubClass), sub-channel (Select All ANTHRO RETAIL (NA)), country group (Select All REST OF WORLD), and planning month (Select All FY25 FEB). A green box highlights the 'Use CurrentWorkingView to get the accurate historical Data' message. A purple box highlights the historical time frames: LY - Last Year, LLY - 2 Years Ago, LLLY - 3 Years Ago, and Avg3LY - Average of the last 3 years.

Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."

The dialog box displays a message: "Request submitted successfully. Please wait for the notification." A red box highlights the "Close" button at the bottom right.

Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.

The toolbar includes various icons for navigation and operations. The bell icon is highlighted with a red box.

Refresh o9 to see updated data.

Review your updated Scenario Plan. Now that the plan has been seeded, the CP values will no longer be blank. They will match the data from which you seeded.

Overlay the Plan

Use the Overlay action button to copy an existing plan into your scenario version. The plans that can be copied in are:

1. Class Plan - WP, BD, PL
2. Division Plan - WP,BD,PL
3. Product Attribute Plan - WP, PL
4. Location Attribute Plan - WP, PL
5. Any other Scenario Plan from Class, Division, Product Attribute or Location Attribute

Navigate to the Location Attribute Plan Workspace > Scenario Planning Page Group > Scenario Planning Page

Update your Scope Filters to the time frame you are going to seed with data.

Click **Overlay Any Plan** action button

Location Attribute Plan

Set Scope Filters for the PLAN

R&D Product Planning Scenario-1 selected 2110 WEDDING DRESSES (NA) +28 REST OF WORLD 1 selected ANTHRO RETAIL (NA) 1 selected USD 1 selected Wedding 1 selected FY2025 1 selected

Actions Division Location Attribute Type Location Attribute Value Sub Location Data FY25 FEB FY25 MAR FY25 APR FY25 MAY FY25 JUN FY25 JUL FY25 AUG FY25 SEP FY25 OCT FY25 NOV FY25 DEC

... 021 WEDDINGS (NA) Wedding Anthro Capsule 10000411.US LAP Sales R -914 -1,110 1,146 460 481 132 -396 -46 3,076 4,186 0 LY Sales R 2,045 8,663 3,112 2,388 774 133 -645 136 -737 168 -747 201 LLY Sales R -154 169 302 173 133 -300 -334 620 148 -1,239 116 LLY L Sales AUS 115.28 195.75 207.45 58.75 184.00 210.99 154.00 AugSLY L Sales AUS 252.38 249.56 912.69 221.19 99.48 139.59 -17.02 369.75 481.35 250.00 72.26

Fill out parameters in the Overlay Any Plan Action Button Pop Up - will automatically inherit from scope filters

Choose Source Version to Copy From:

- CurrentWorkingView - Used for any published WP, PL, BD Versions
- WorkingBudgetPlan - copy from a different plan version working budget (ex: DP)
- Scenarios - Copy from plan data existing in a scenario plan

Choose Plan Type and Version of Plan to Copy From:

Overlay Any Plan To Location Plan

Source Version ⓘ

CurrentWorkingView
R&D Product Planning Scenario-1
R&D Product Planning Scenario-2
R&D Product Planning Scenario-3
R&D Product Planning Scenario-4
Working Budget Plan

Sub-Class ⓘ

Select All 2110:WEDDING DRESSES (NA) X +28 More

Target Store ⓘ

Select All 10000411.US X +48 More

Planning Month ⓘ

Select All FY26 FEB X +11 More

Attribute Type ⓘ

Wedding

Mkd ⓘ

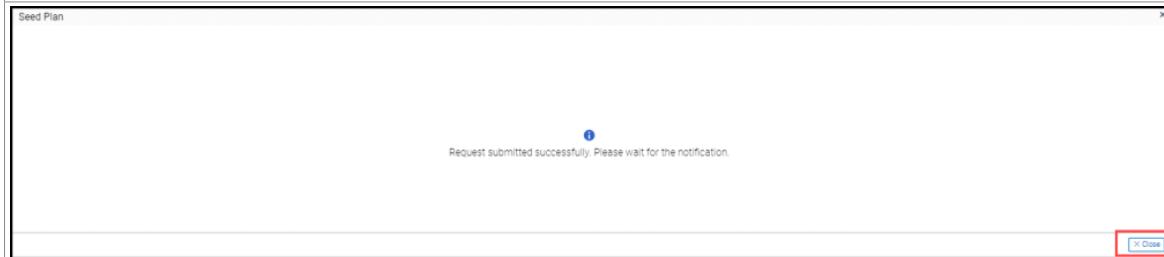
Receipts & Inventory ⓘ

Use metric checkboxes to copy only certain metric groups

Sub-Class, Target Store, Planning Month, Attribute Type, and Sub-Channel will default to the data selected in Scope Filters. This can be updated in the pop-up by hitting the + sign. It is recommended to update in scope before running action buttons.

Reset Close Submit

Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."



Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.



Refresh o9 to see updated data.

Review your updated Scenario Plan. Now that the plan has been overlaid the values should match the source plan.

Publish the Plan

If there is a desire to replace the current working plan with the newly created scenario plan, you can use the **Publish Scenario** action button to accomplish this

Navigate to the **Location Attribute Plan Workspace > Scenario Planning Page Group > Scenario Planning Page**

Update your Scope Filters to the time frame you are going to seed with data.

Click **Publish Scenario** action button

Location Attribute Plan

Set Scope Filters for the PLAN

R&D Product Planning Scenario-1 selected 2110 WEDDING DRESSES (NA) +28 REST OF WORLD 1 selected ANTHRO RETAIL (NA) 1 selected USD 1 selected Wedding 1 selected FY2025 1 selected

Actions Division Location Attribute Type Location Attribute Value Sub Location Data FY25 FEB FY25 MAR FY25 APR FY25 MAY FY25 JUN FY25 JUL FY25 AUG FY25 SEP FY25 OCT FY25 NOV FY25 DEC

... 021 WEDDINGS (NA) Wedding Anthro Capsule 10000411.US LAP Sales R -914 -1,110 1,146 460 481 132 -396 -46 3,076 4,186 0 LY Sales R 2,045 8,663 3,112 2,388 774 133 -645 136 -737 168 -747 201 LLY Sales R -154 169 302 173 133 -300 -334 620 148 -1,239 116 LLY L Sales AUS 115.28 195.75 207.45 58.75 184.00 210.99 154.00 AugSLY L Sales AUS 252.38 249.56 912.69 221.19 99.48 139.59 -17.02 369.75 481.35 250.00 72.26

Publish Scenario

Fill out parameters in the **Publish Scenario** Action Button Pop Up - will automatically inherit from scope filters

Chose the scenario you want to publish to WP (1-4)

Publish Scenario

Source to Publish: R&D Product Planning Scenario-1

Demand: Cost & Margins

Sales & Demand: Cross Channel

Use this metric checkboxes to copy only certain groups of metrics into your working budget plan

Reset Close Submit

Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."

Seed Plan

Request submitted successfully. Please wait for the notification.

X Close

Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.

REST OF WORLD FY26 FEB USD 1 selected

Refresh o9 to see updated data.

Reconcile the Plan

If there is a desire to replace the current working plan with the newly created scenario plan, you can use the **Publish Scenario** action button to accomplish this

Navigate to the **Location Attribute Plan Workspace > Scenario Planning Page Group > Scenario Planning Page**

The filter on the version needs to include both the CurrentWorkingView (WP) and the scenario you want to compare to

Actions	Division	Location Attribute Type	Location Attribute Value	Data	CurrentWorkingView					R&D Product Planning Scenario-1					
					FY25 AUG	FY25 SEP	FY25 OCT	FY25 NOV	FY25 DEC	FY25 JAN	FY25 AUG	FY25 SEP	FY25 OCT	FY25 NOV	FY25 DEC
...	021 WEDDINGS (NA)	Wedding	Anthro Capsule	LAP Sales R	84,338	125,475	99,896	110,176	22,102	31,245	70,302	62,352	17,573	17,719	30,806
...				LAP Sales Store Count	23	23	23	23	23	17	21	22	22	19	21
...				LAP Sales R	2,047,613	2,181,963	1,595,885	1,641,584	417,958	74,973	88,843	57,614	13,651	1,368,164	1,897,569
...				LAP Sales Store Count	26	26	26	26	26	26	25	26	9	22	26

Placeholders

Creating Placeholders

Creating Placeholders

This process is used to create placeholder store in Location Attribute Planning

Creating a Placeholder Store

If you would like to create a Placeholder Store

Navigate to **Location Attribute Plan > Location Planning > Planning Workflow**

Click the "+ Create PH Store" action button at the top of the pivot view.

The screenshot shows the SAP Fiori interface for Location Attribute Planning. The left sidebar has sections like Workspace, Location Attribute Setup, Currency Planning, Summary, Location Planning, Hindsight Review, Planning Workflow (which is highlighted with a red box), Plan Summary, Scenario Planning, and Reconciliation Summary. The main area is titled "Location Attribute Plan" and shows a pivot table with columns for Actions, Division, Channel, Location Attribute Type, Location Attribute Value, Location Store, Sub Location, and various financial metrics. At the top of the pivot table, there are buttons for "Seed Plan", "Create PH Store" (which is highlighted with a red box), "Delete PH Store", "Lock Plan", "Overlay Any Plan", "Download", "Filters", "Layout", and "Local Edit".

Create PH Store

The "Create PH Store" dialog box contains several input fields and instructions:

- Sub-Channel:** ANTHRO RETAIL (NA) (with a red box around it)
- Country Group:** REST OF WORLD
- Location Store:** 00417: 417 ATLANTA, GA-LENOX SQU (NA) (with a red box around it)
- Location Store is PH:** A checkbox that must be checked (with a red box around it).
- Select a district and Location Store:** A callout pointing to the District and Location Store fields.
- District:** SOUTHEAST (NA)
- Placeholder Store Number:** PH 865
- Name your Placeholder Store:** A callout pointing to the Placeholder Store Number field.
- Buttons:** Reset, Close, Submit

Once you have created your new placeholder you will need to associate it to the products you want to plan.

Navigate to Admin Data Management > Admin - LAP > Location Attribute Association

The Admin Data Management interface shows two screens related to Location Attribute Association:

- Top Screen:** Shows a list of associations with filters for CurrentWorkingView (1 selected), Sub-Class (4110 BLOUSES - ANTHRO (NA)), Sub-Channel (ANTHRO RETAIL (NA)), and Location Store (PH 865). A callout points to the filters with the text "Open the filters to select the sub class(es) & new placeholder".
- Bottom Screen:** Shows a search interface for Sub Location. It includes a search bar with "PH 865", a "Select All" checkbox, and a "Click to select" callout pointing to the search bar. Below the search bar, there's a "Filter By" section with "Sub Class (*)" and "Sub-Channel (*)" checkboxes, and a "Show All" link. A callout points to the search bar with the text "You can search for the place holder you created".

Admin Data Management

Actions	Sub Class	Sub-Channel	Sub Location
<input checked="" type="checkbox"/>	4110 BLOUSES - ANTHRO. (NA)	ANTHRO RETAIL (NA)	PH 865

+ Add Association

Click the box to associate the placeholder to the subclass(es) you have selected. And click "+ Add Association"

Location Attribute Plan

Actions	Sub Class	Location Attribute Value	Sub Location	Global RD Class Ch...
<input checked="" type="checkbox"/>	4110 BLOUSES - ANTHRO. (NA)	A_PLUS	10000403.AU	<input type="checkbox"/>
<input checked="" type="checkbox"/>			10000403.CA	<input type="checkbox"/>
<input checked="" type="checkbox"/>			10000403.GB	<input type="checkbox"/>
<input checked="" type="checkbox"/>			10000403.N/A	<input type="checkbox"/>
<input checked="" type="checkbox"/>			10000403.US	<input type="checkbox"/>
<input checked="" type="checkbox"/>			PH 704	<input type="checkbox"/>
<input checked="" type="checkbox"/>			PH 865	<input type="checkbox"/>
<input checked="" type="checkbox"/>			PH Camm	<input type="checkbox"/>

+ Download Filters Local Edit

You can now associate the placeholder with a location attribute

Deleting Placeholders

Deleting Placeholders

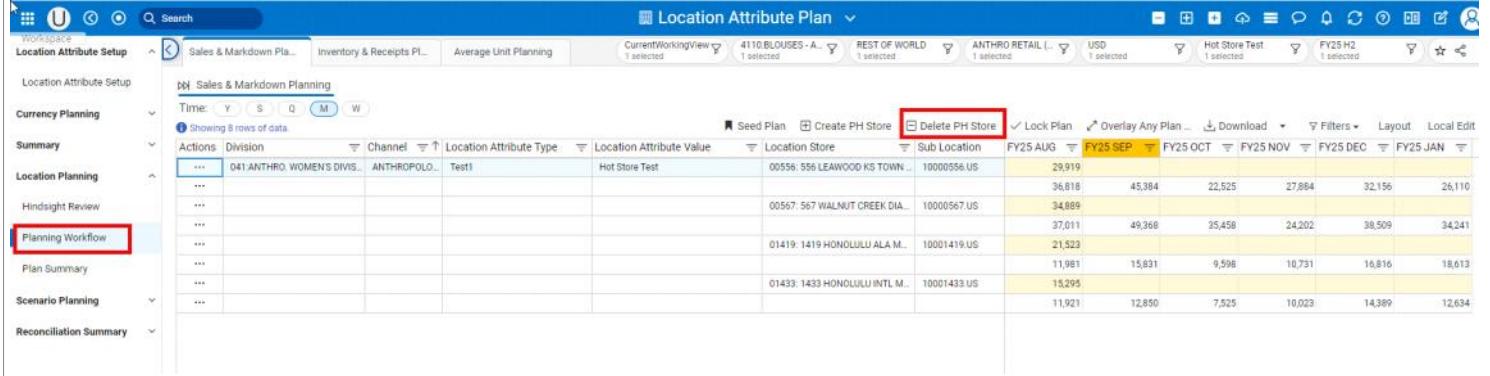
This process is used to delete placeholder store in Location Attribute Planning

Deleting a Placeholder Store

If you would like to delete a Placeholder Store

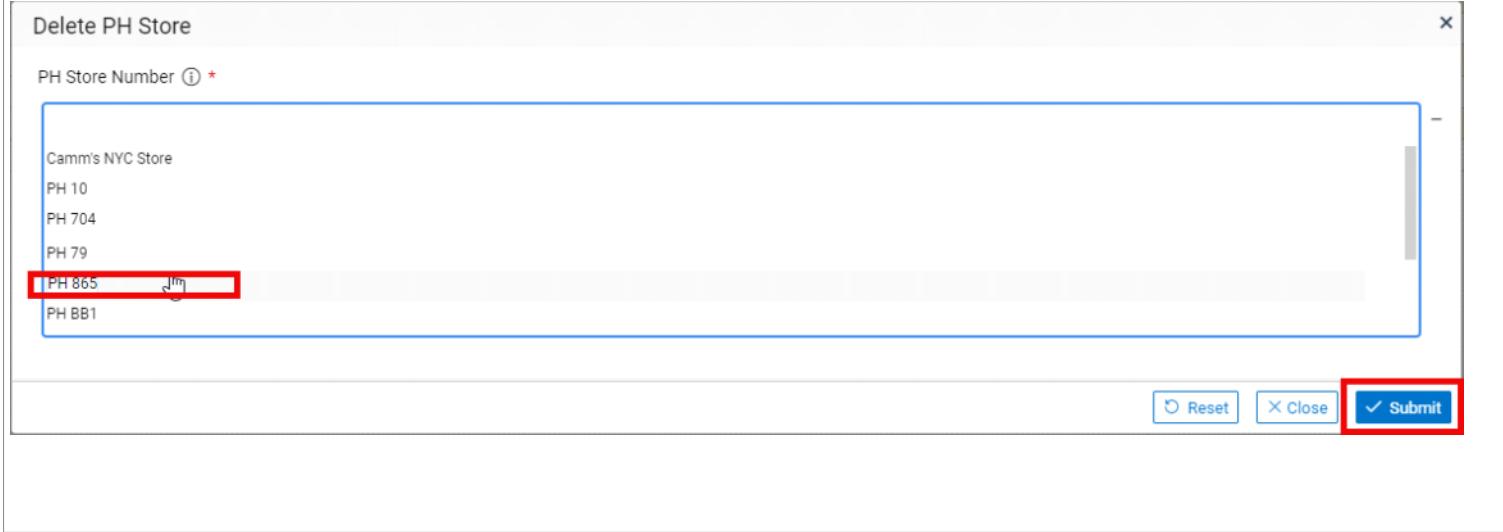
Navigate to **Location Attribute Plan > Location Planning > Planning Workflow**

Click the "+ Delete PH Store" action button at the top of the pivot view.



The screenshot shows the SAP Fiori interface for Location Attribute Planning. The left sidebar has sections like Workspace, Location Attribute Setup, Currency Planning, Summary, Location Planning, Hindsight Review, Planning Workflow (which is highlighted with a red box), Plan Summary, Scenario Planning, and Reconciliation Summary. The main area is titled "Sales & Markdown Planning" and shows a pivot table with columns for Actions, Division, Channel, Location Attribute Type, Location Attribute Value, Location Store, Sub Location, and various financial metrics for FY25 AUG through FY25 JAN. A toolbar at the top includes buttons for Seed Plan, Create PH Store, Delete PH Store (which is highlighted with a red box), Lock Plan, Overlay Any Plan, Download, Filters, Layout, and Local Edit. The "Delete PH Store" button is located in the top right corner of the toolbar.

Select the Place Holder you want to delete and click "Submit"



The screenshot shows a modal dialog titled "Delete PH Store". It has a field labeled "PH Store Number" with a red asterisk, which contains the value "PH 865". Below this is a list of placeholder store names: "Camm's NYC Store", "PH 10", "PH 704", "PH 79", "PH 865", and "PH BB1". At the bottom of the dialog are three buttons: "Reset", "Close", and "Submit" (which is highlighted with a red box).

Weekly Budget Process

Tuesday, June 11, 2024 12:01 PM

EU Process

Monday 23 September 2024 13:26

AN EU Timing

Monday 23 September 2024 13:29

Maybe you want to add guidance here about how often we will lock down WP into PL, or how often we will overlay channel plans from the direct/retail division view?

Language Settings

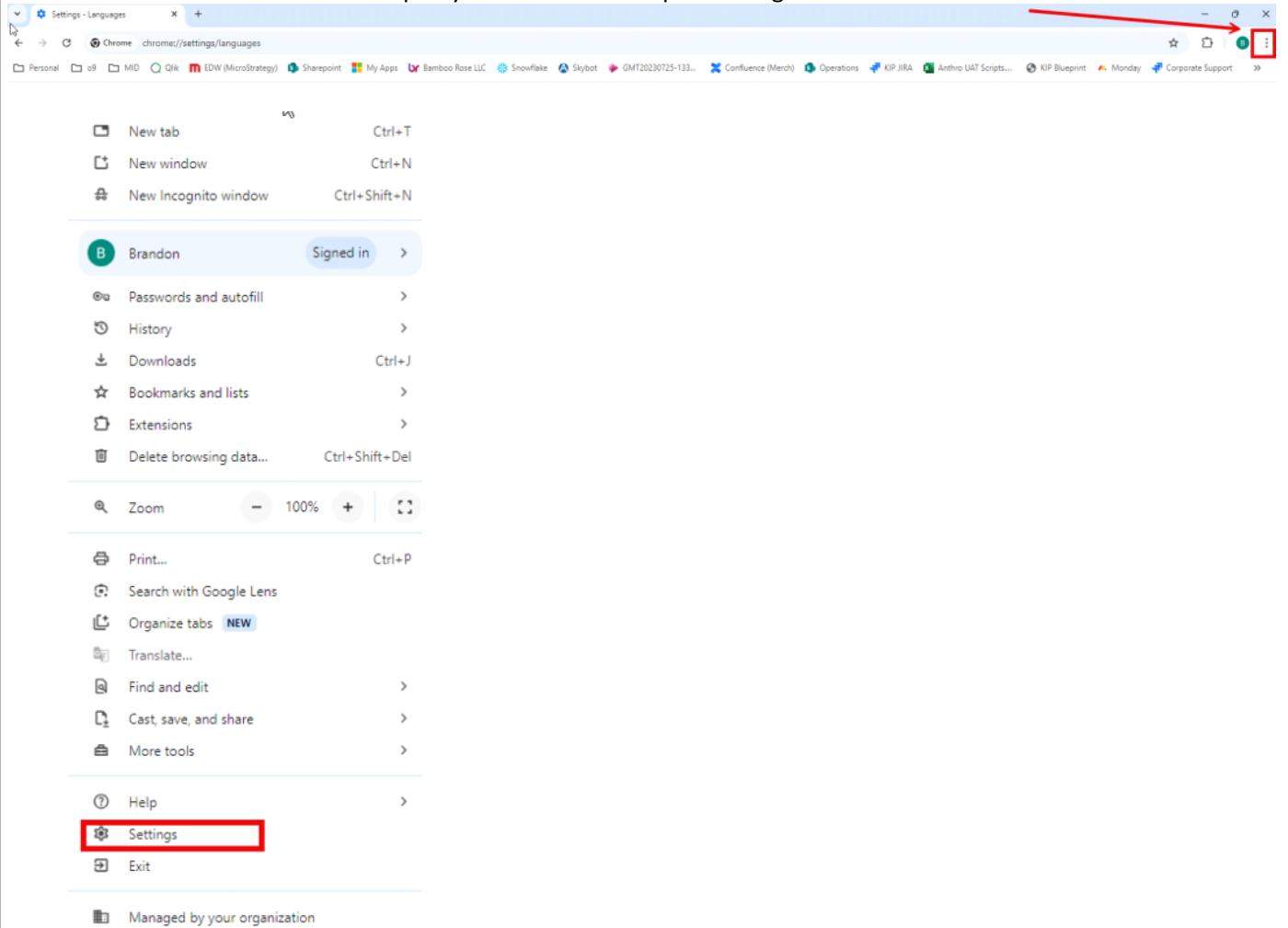
Monday, October 21, 2024 8:08 AM

Browser Language Settings

Purpose and Overview:

If you are seeing "BU" plan instead of "Class Plan" follow these steps

Click the three vertical dots at the top of your browser and open settings.



Click "Languages"



Settings

- You and Google
- Autofill and passwords
- Privacy and security
- Performance
- Experimental AI
- Appearance
- Search engine
- Default browser
- On startup



Languages

- Downloads
- Accessibility
- System
- Reset settings



Extensions



About Chrome

If not added then click "Add languages" and add English (United States)

 Websites in your languages

Let websites know the languages you speak. They'll show content in those languages, when possible.

[Add languages](#)

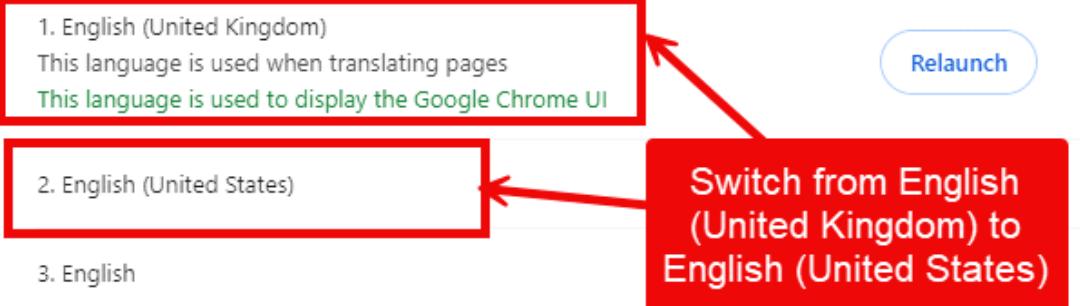
1. English (United Kingdom)
This language is used when translating pages
This language is used to display the Google Chrome UI

2. English (United States)

3. English

Switch from English (United Kingdom) to English (United States)

[Relaunch](#) 



Click the three vertical dots next to English (United States)

Websites in your languages

Let websites know the languages you speak. They'll show content in those languages, when possible.

[Add languages](#)

1. English (United Kingdom)
This language is used when translating pages
This language is used to display the Google Chrome UI

2. English (United States)

3. English





Tic the "Display Google Chrome in this language" box and then Relaunch Google Chrome

Preferred languages

Websites in your languages

Let websites know the languages you speak. They'll show content in those languages, when possible.

[Add languages](#)

1. English (United Kingdom)

This language is used when translating pages

This language is used to display the Google Chrome UI

[Relaunch](#)

2. English (United States)

3. English

[Spell check](#)

- Display Google Chrome in this language
- [Move to the top](#)
- [Move down](#)
- [Remove](#)



EU Process

Monday 23 September 2024 13:26

Use this

UO EU Timing

Monday 23 September 2024 13:28

Maybe you want to add guidance here about how often we will lock down WP into PL, or how often we will overlay channel plans from the direct/retail division view?

Language Settings

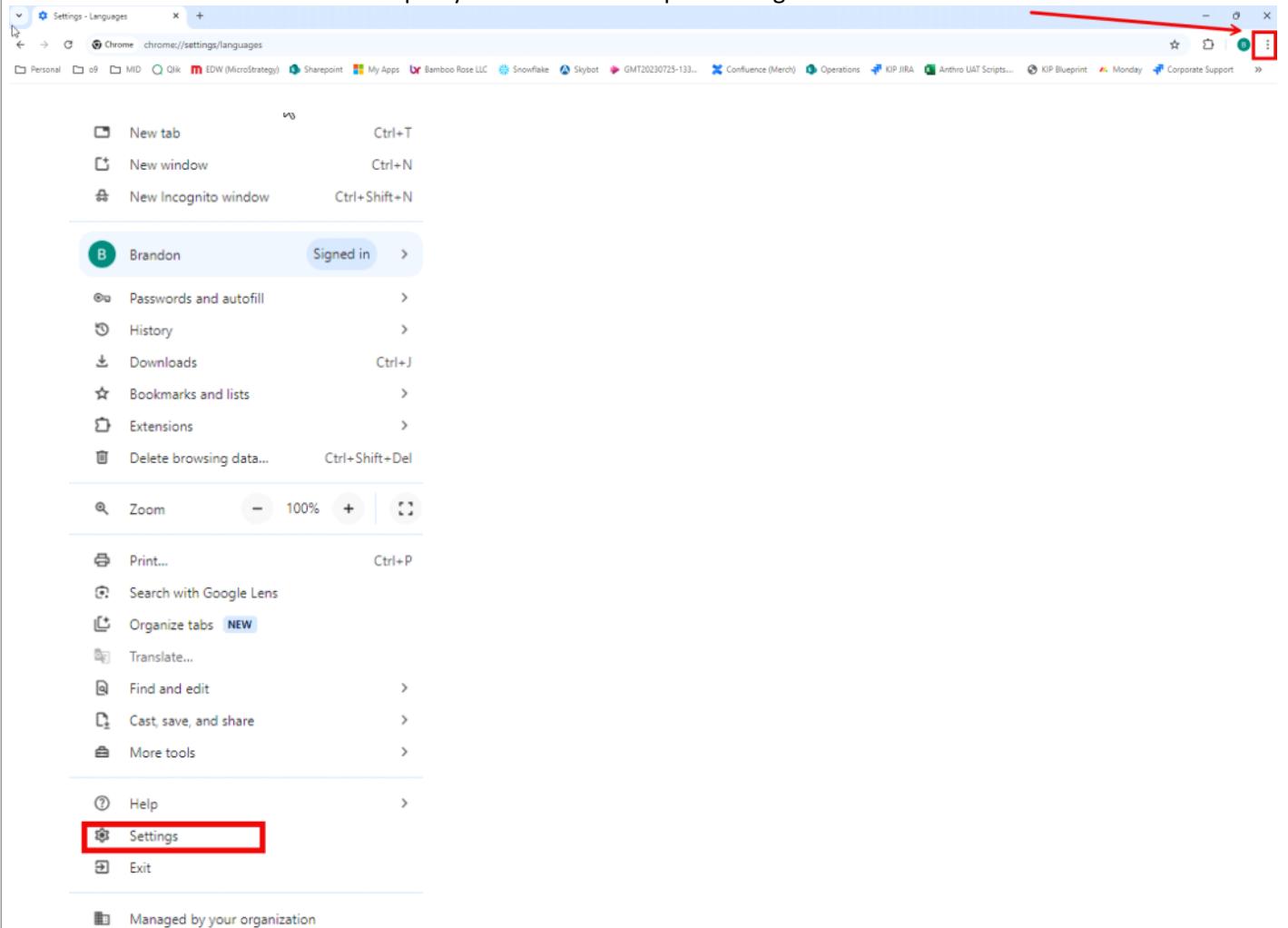
Monday, October 21, 2024 8:08 AM

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Click "Languages"



Settings

- You and Google
- Autofill and passwords
- Privacy and security
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Languages

- Downloads
- Accessibility
- System
- Reset settings



Extensions



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[Add languages](#)

Relaunch 

1. English (United Kingdom)
This language is used when translating pages
This language is used to display the Google Chrome UI

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3. English 

Switch from English (United Kingdom) to English (United States) 

Click the three vertical dots next to English (United States)

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[Add languages](#)

Relaunch 

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3. English 

Tic the "Display Google Chrome in this language" box and then Relaunch Google Chrome

Preferred languages

Websites in your languages

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[Add languages](#)

1. English (United Kingdom)

This language is used when translating pages

This language is used to display the Google Chrome UI

[Relaunch](#)

⋮

2. English (United States)

3. English

Spell check

- Display Google Chrome in this language
- [Move to the top](#)
- [Move down](#)
- [Remove](#)



Key Item Set Up Steps

Thursday 20 February 2025 10:22

1. Admin Data management - number of stores, class, country group, month level, ticky box on the class
2. Key item set up - select the key item and non-key items you want to plan the day before so all the actuals come over

Daily Planning

Thursday, October 10, 2024 9:40 AM

Daily Planning

Summary of Documentation:

Daily Planning Overview

- Definition
- Measures

Seeding Workflow

- Workflow Overview - Quick Steps
- Review Class Plans
- Seed Daily Division Plan from History
- Update % by day in Daily Division Plan
- Overlay Daily Division Plan to Daily Class Plan

FAQs

- Frequently Asked Questions

Daily Planning Overview:

We can plan sales and demand by day at the Division level. This can then be spread down to Class level. The % by Day by sub-channel at the Daily Division Level will exactly match the % by day by sub-channel at the Daily Class Level.

Day plans are created using the CurrentWorkingView Plan (WP) in Class Plan.

The Day Plan is seeded at Division Level using Division history by day.

Measures that seed (Division only):

- Reg Demand R
- MD Demand R
- Reg Sales R
- MD Sales R

Plannable Measures (Division only):

- DDP Reg Demand R Mix pct
- DDP MD Demand R Mix pct
- DDP Reg Sales R Mix pct
- DDP MD Sales R Mix pct

 **Best Practice:** Always seed your plan! Do not develop a plan with empty or null values. The system's calculation logic assumes plans will be seeded.

Seeding Workflow:

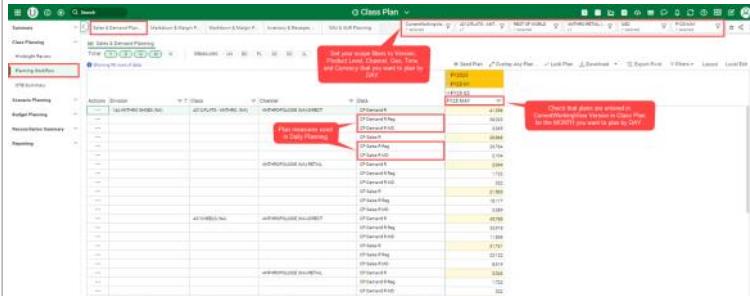
QUICK STEPS:

1. Seed Daily Division Plan from History
2. Overlay Daily Division Plan from Class Plan
3. Update % by day in Daily Division Plan if needed
4. Overlay Daily Class Plan

Class Plan Review:

Step 1: Review Class Plan data by navigating from the **Class Plan Workspace > Class Planning Page Group > Planning Workflow Page > Sales & Demand Planning View**. Confirm that plans are entered for the division and month you are going to plan by day.

A plan must first exist for the month before it can be broken down by day.



Seeding:

Step 2: Navigate to **Daily Division Plan Workspace > Daily Division Planning Page Group > Planning Workflow Page > Daily Division Plan View**.

Step 3: Update your Scope Filters to the time frame you are planning. This year Daily Division Plan (DDP) measures will be blank because you have not yet seeded this time frame with data. In the time parameter in scope filters, you can only select from current month, next month, or next next month.

Step 4: Click on the "Seed Plan" Action Button.

Step 5: Fill out parameters in the "Seed Plan" Action Button Pop Up.

Step 6: Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."

Step 7: Close window. You will receive a notification on the bell icon when the seeding is complete. In the meantime, you can continue to work in o9.

Step 8: Refresh o9 to see updated data.

Step 9: Review your updated Daily Division Plan. Now that the plan has been seeded, the DDP values will no longer be blank. They will match the data from which you seeded. The "Mix pct" measures will now be populated.

Overlay DDP from CP

Step 10: Click on the "Overlay from Class Plan" Action Button.

This button will copy the Class Plan Division Total to the Daily Division Plan. The ratio by day will hold from seeding, but the value will update to match the plan.

Step 11: Fill out parameters in the "Overlay from Class Plan" Action Button Pop Up.

Step 12: Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."

Reset Close

Step 13: You will receive a message asking if you want to continue with the overlay. Select "Yes".

Step 14: Close window. You will receive a notification on the bell icon when the overlay is complete. In the meantime, you can continue to work in o9.

Step 15: Refresh o9 to see the updated data.

Step 16: Review your updated Daily Division Plan. Now that the overlay is complete, the DDP values will no longer match the selected time frame (LY in this example). They will match the data from the class Plan. The % by day holds from seeding.

When looking at the month-level data in Daily Division Planning, you can see the DDP measures exactly match the CP measures from the CurrentWorkingView (WP).

Update % by day

Step 17: Review the Mix pct in the Daily Division Plan. If needed, the user can update the Mix pct values in Daily Division Planning. The user can update the Mix pct by keying over the percent generated. The yellow rows are editable.

Reasons the user may want to update the % by day: outlier correction, eliminate negative plans, correct or shift an event.

Step 18: When you are finished editing, click "Save". The Mix Pct values will adjust to still total 100% for the month. The DDP values will recalculate based on the updated Mix Pct values.

Overlay Daily Class Plan

Step 19: Navigate to Daily Division Plan Workspace > Daily Division Planning Page Group > Planning Workflow Page > Daily Class Plan View. You do not need to change your scope filters, as they should match the Daily Division Plan scope filters.

The Daily Class Plan (DCP) measures will be blank initially.

Step 20: Click on the "Overlay from Class Plan" Action Button.

This button will copy the CurrentWorkingView Class Plan to the Daily Class Plan.

The ratio by day will replicate down from the Daily Division Plan (DDP).

Step 21: Fill out parameters in the "Overlay from Class Plan" Action Button Pop Up.

✓ **Best Practice:** Filter in your Scope Filters! Let the parameters populate from your scope filters instead of adjusting them in the pop-up. This prevents confusion and user error.

Step 22: Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."

Step 23: Close window. You will receive a notification on the bell icon when the overlay is complete. In the meantime, you can continue to work in o9.

The screenshot shows the Overlay from Class Plan interface. At the top, a message says "Request submitted successfully. Please wait for the notification." Below it, there's a toolbar with various icons. A red box highlights the Notifications icon. Underneath, a list of notifications is shown, with one entry for "Overlay Daily Class Plan - Execution completed successfully" highlighted by a red box.

Step 24: Refresh o9 to see updated data.

The screenshot shows the IRO RETAIL interface. A red box highlights the refresh button in the toolbar. Below the toolbar, a message box says "The data has been changed in Server" with a star icon and "Please Refresh." A red box highlights the "Please Refresh." message.

Step 25: Review your updated Daily Class Plan. Now that the overlay is complete, the DCP values will no longer be blank. The total for the month will match the total from the Class Plan. The % by Day replicates down from DDP. Though Mix Pct is not visible in DCP, if calculated, the Mix Pct in DCP would exactly match the Mix Pct in Daily Division Plan.

The screenshot shows the Daily Division Plan interface. A large grid table displays data for various divisions and days. The "DCP" column contains numerical values, indicating that the Daily Class Plan overlay has been successfully applied, filling in previously blank fields.

When looking at the month-level data in Daily Class Planning, you can see the DCP measures exactly match the CP measures from the CurrentWorkingView (WP).

The screenshot shows the Daily Class Planning interface. It displays two side-by-side tables. The left table is titled "CurrentWorkingView" and the right table is titled "Dcp Plan". Both tables show identical data for various divisions and months, demonstrating that the DCP measures match the CP measures from the CurrentWorkingView.

Daily Plans are now complete!

FAQs:

FAQ #1

Q: The Mix Pct values are blank in Daily Division Planning. I completed seeding and the Division has historical values. Why are the %s blank?

The screenshot shows the Daily Division Planning interface. A large grid table displays data for various divisions and months. In the "Mix Pct" column, many cells are blank, indicating that the Mix Pct values are not being populated correctly.

A: "Subtotal" must be selected for 454 Month in the Pivot Layout.

The screenshot shows the Pivot Layout interface. It displays a grid of items with checkboxes. One item, "454 Month", has a red box around its checkbox, which is checked, indicating that the "Subtotal" option is selected for this category.

FAQ #2

Q: Can I update the Mix % for Sales R or Demand R?

A: No. It rolls up from the Reg and MD buckets.

FAQ #3

Q: Why do the measures in Daily Planning sometimes have negatives?

A: If the Division or Class had more returns than sales, you will see a negative for that day after seeding. You can choose to leave this or update the negative Mix Pct value to a positive Mix Pct value.

FAQ #4

Q: Can you edit the Daily Class Plans (DCP)?

A: No.

FAQ #5

Q: Can I see the Daily Class Plan Mix Pct?

A: No. They exactly match the Mix Pct in the Daily Division Plan.

FAQ #6

Q: Will the Daily Class Plan ever have a different Mix Pct than the Division?

A: No. The only exception is if the Class has no plans in Class Plan, in which case everything will be blank for that class in DCP.

FAQ #7

Q: What if I don't want to seed?

A: You can skip the seeding step and every day will have the same weight.

FAQ #8

Q: Why can I only select from 3 months?

A: You can only select current month or upcoming two months. Day planning is data heavy, so we have limited the selections to just the time frames needed for performance reasons.

FAQ #9

Q: What if I need to change the Mix Pct after I finished? What if the Class Plans change and I want to update my Daily Plans to match? What if I want to seed from a different time frame than I originally selected?

A: You can redo this process as many times as you like! You do not have to start from the beginning. You can pick up from whichever step has changed data.

FAQ #10

Q: Can I change the Daily Plans on a partially elapsed month?

A: Yes, but you can not update the days that have actualized. Actualized data is locked and cannot be edited.

MFP Outbound Schedule

NA Outbound Times -->

- Monday through Saturday

12:00 AM EST

11:00 AM EST

02:00 PM EST

07:00 PM EST

EU Outbound Times -->

- Monday through Saturday

10:30 AM GMT (05:30 AM EST)

01:30 PM GMT (08:30 AM EST)

06:30 PM GMT (01:30 PM EST)

- Tuesday through Saturday

10:00 PM GMT (05:00 PM EST)

MFP

Monday, July 1, 2024 2:41 PM

7.1

1. CP EOP R Comp/LY % Chg metric created and added to OTB Summary and Inv/Receipts Planning
2. When you edit any of the Transfers R metrics, it will automatically put 100 % in Reg unless you manually override. This keeps the EOP R, EOP R Reg and EOP R MD in sync.
3. Actualize Scenario workflow added to the page in class plan
4. PL Locking overnight batch has been added to the schedule
5. FWOS metrics have been added in class plan for Class/Company and Division/Company
6. The LY FWOS for non-actualized time periods has been fixed
7. OTB metric on the FP report is corrected
8. OTB R metric not correct in current month is fixed
9. UI updates:
 1. Add PL Receipt R & LLY AUR to Class Plan > IMU & AUR Planning > Average Unit Planning tab - Requested by Kate O'Connor
 2. Add BD IMU to Class Plan > IMU & AUR Planning > IMU Planning tab - Requested by Kate O'Connor
 3. Add AUS & AUI (Reg, MD, & Total) to Class Plan > Inventory & Receipts Planning > EOP Validation - Requested by Kate O'Connor
 4. Add BU FWOS R ClsCom and BU FWOS R DivCom to Class Plan > OTB Summary
 5. Add measures below to Division Plan > OTB Summary
 1. a. DP EOP R Comp/LY Comp % Chg
 2. b. DP EOP R Comp/LY % Chg
 3. c. DP Sales R Comp/LY Comp % Chg
 4. d. DP Sales R Comp/LY % Chg.

7.5

1. LY Trans Total R Measure blank is fixed
2. UI Updates:
 - Add all metrics in Class Plan > OTB Summary as metric under Reporting > OTB Summary Report - Requested by Linda George
 - Add LLLY AUS measures below to Class Plan > Planning Workflow > IMU & AUR Planning > Average Unit Planning
 - *LLLY Sales AUS*
 - *LLLY Sales AUS FP*
 - *LLLY Sales AUS MD*
 - *LLLY Sales AUS Promo*
 - *LLLY Sales AUS Reg*
 - Add to Attribute Plan > Plan Summary view
 - CP Sales R/LY % Chg
 - PAPL MkdTot R
 - LY MkdTot R
 - TY Receipt R Daily
 - PA IMU % OO
 - CP OTB R
 - CP Receipt R /LY % Chg
 - CP EOP R /LY %Chg
 - CP WOS R
 - PL CP WOS R
 - Avg3LY WOS R

- LY WOS R
- LLY WOS R
- LLLWOS R
- LLY FWOS R 1
- LLLFWOS R 1
 - Reg history to LLLY for sales/demand/inventory
 - TY/LY Transfer Metrics

07/20/2024

Monday, July 22, 2024

10:02 AM

Issue key	Issue Type	Priority	Summary	Business Description
O9-722	Improvement	Major	FREE PEOPLE DIRECT UK EU (NA) editability & seeding	This change removes the ability for planners to change the Transfers metrics for the FP Direct UK subchannel, with the exception of Transfers General.
O9-727	Improvement	Major	Class Plan - Markdown Disaggregation Change	<p>This change fixes the disaggregation of MkdTot, MkdPerm, and MkdPOS when MkdPerm is 0 at a lower level. MkdPerm will now hold at 0 and MkdPOS will update to reflect the updated MkdTot value based on the disaggregation of MkdTot.</p> <p>This change also corrects an issue when planning MkdTot to be less than the currently planned MkdPOS and MkdPerm is 0. Previously, MkdPerm would become a negative value and MkdPOS would hold to reflect the change in MkdTot. Now, MkdPerm will remain at 0 and MkdPOS will update to reflect the reduced MkdTot.</p>
O9-729	Improvement	Medium	CC Metrics Spreading negative	This change corrects an issue where if planning or seeding Cross Channel metrics in planning periods where the Sales R value in any of the Subchannels is negative, the spread of the seeded or planned values across the Subchannels was producing a negative value. Value of the Cross Channel metric in the Subchannels will now correctly display a value of 0 if Sales R is negative in the Subchannel.
O9-739	Improvement	Major	Change the split for CC Metrics in FP EU Company	This change removes the split of the FP Retail UK EU subchannel to the FP Direct UK subchannel. All Cross Channel metrics for FP EU will now correctly be copied over entirely between FP Retail UK EU and FP Direct UK EU subchannels.
O9-824	Improvement	Medium	UI Updates in Staging - Week of 7/8/24	<p>Added the following metrics:</p> <ul style="list-style-type: none"> * Attribute Plan ** Planning Workflow > Sales & Demand Planning view: *Weekly Sales Build* * Class Plan ** Forecast Review: *LY Demand R Build, LY Sales R Build, LLY Sales R Reg, LLLY Sales R Reg, LY Demand R Reg, LLY Demand R Reg, LLLY Demand R Reg*
O9-845	Bug	Major	Markdowns not locked / showing blank in PL	When using the automated plan locking feature, the CP MkdTot R value was not moving into PL CP MkdTot R after the batch ran.

08/03/2024

Tuesday, August 27, 2024 12:31 PM

Jira	Summary	Details
O9-816	LLLY Promo and Markdown	<p>Added the following metrics to Attribute Plan - OTB and Attribute Plan - Planning Workflow - Sales & Demand</p> <ul style="list-style-type: none">• LLLY Demand R Promo• LLLY Demand R Promo % Demand R• LLLY Demand R Promo % Demand R Reg• LLLY Sales R Promo• LLLY Sales R Promo % Sales R• LLLY Sales R Promo % Sales R Reg <p>Added the following metrics to Attribute Plan - OTB and Attribute Plan - Planning Workflow - Markdown & Margin</p> <ul style="list-style-type: none">• LLY MkdPOS R % Sales R• LLY MkdPerm R % Sales R• LLLY MkdPOS R % Sales R• LLLY MkdPerm R % Sales R
O9-836	UI Updates in PROD - Week of 7/8/24	<p>Added the CP EOP R Reg Comp/LY % Chg metric to the Class Plan > Planning Workflow > Inventory & Receipts > Reg & MD workspace.</p> <p>Added the following list of metrics to the Class Plan > Scenario Planning workspace:</p> <p>LY Sales U LY Sales AUS LY Sales U Reg LY Sales AUS Reg LY Sales U FP LY Sales AUS FP LY Receipt U LY EOP U LY AUI LY EOP R Reg LY AUI Reg LY EOP R MD LY AUI MD LY Sales AUS Promo LY Sales AUS MD CP MkdFirst R CP MkdFirst R % Sales R CP MkdFirst Discount% CP MkdFurther R CP MkdFurther R % Sales R CP MkdDO R CP MkdDO R % Sales R CP MkdDO U CP MkdDO AUI CP First Mkd AUI Conversion CP First Mkd Inv R Conversion CP First Mkd Inv U Conversion CP Receipt U</p>

		CP EOP U CP AUI CP EOP R Reg CP EOP U Reg CP AUI Reg CP EOP R MD CP EOP U MD CP AUI MD CP EOP R Comp/LY Comp % Chg CP EOP R MD Comp/LY % Chg CP Sales R MD Comp/LY % Chg CP Sales R Reg Comp/LY % Chg CP EOP R Reg Comp/LY % Chg
<u>O9-843</u>	Lock Plan - Restrict Access for Approval Status Page	Removed the URBN_UI_NA_UO_Planner role from the Class Plan > Summary > Approval Status and Admin Data Management > Admin - MFP > Plan Lock - CPPL workspace pages.
<u>O9-854</u>	Add comparison metrics for CP PL to TY & LY	<p>Created two new comparison metrics: PL CP EOP R Comp/LY % Chg & PL CP Sales R Comp/LY % Chg</p> <p>Updated the display name for the following metrics: PL CP Sales R Comp/LY Comp % Chg & PL CP EOP R Comp/LY Comp % Chg</p>
<u>O9-855</u>	Add comparison metrics for CP BD to TY & LY	<p>Created two new comparison metrics: BD CP EOP R Comp/LY % Chg & BD CP Sales R Comp/LY % Chg</p> <p>Updated the display name for the following metrics: BD CP Sales R Comp/LY Comp % Chg & BD CP EOP R Comp/LY Comp % Chg</p>
<u>O9-860</u>	UI Updates - Week of 7/22/2024	<p>Added the following metrics to Division Plan Reconciliation:</p> <ul style="list-style-type: none"> • LY EOP U Reg • DP vs PL EOP Reg • DP vs PL EOP MD <p>The following updates were made to the UI:</p> <ul style="list-style-type: none"> • Changed the order of page groups in Attribute Planning so that Attribute Setup is the first group • Removed Approval page in Summary Group • Removed Insights page group from Class Plan • Moved the Insights page under Forecast Review in Class Plan • Changed the format of the variance measures in the Forecast Review pivot

- Key Item Planning and Key Item Forecasting are now **LIVE** in Production.
 - Please reach out to o9support@urbanout.com with any questions.

Type	Summary	Business Description
Change Request	Class Plan - Weekly Plan Rebalance Action Button for Markdown & Sales Metrics	Updated the Weekly Rebalance action button to include a rebalance option for both Sales R and Markdown R in Class Plan. The button still remains in the Inventory & Receipts Planning tab under the Planning Workflow page. The rebalancing for Sales R and Markdown R occurs the same as Receipts R rebalancing.
Improvement	Division Plan - Sales/Demand Monthly Build	Updated the translation name for the current DP Sales/Demand R Build metrics to be DP Demand/Sales R Build Monthly. Created two new metrics that are non-editable called DP Sales/Demand R Build that properly calculates at each Time level.
Improvement	Class Plan - Create CP Sales/Demand R Reg Build	Created a CP Sales R Reg Build and CP Demand R Reg Build metric that is viewable in the Class Plan > Planning Workflow > Sales & Demand and the Class Plan > OTB Summary pivots. These metrics are non-editable and calculate correctly at all aggregated levels.
Improvement	UI Updates in Prod - 8/31/24 release	<p>Changed the translation name for the Product Attribute measures Sales R Comp/LY % Chg and EOP R Comp/LY % Chg to accurately reflect the calculation being performed. They now correctly reflect the comparison as PA Sales R Comp/LY Comp % Chg and PA EOP R Comp/LY Comp % Chg. Both measures exist in the Product Attribute plan OTB Summary pivot.</p> <p>Added the following Class Plan measures to the Class Plan Scenario Planning and Scenario vs WP pivot views:</p> <ul style="list-style-type: none"> • CP Sales R Comp/LY % Chg • CP Sales R Comp/LY Comp % Chg • CP EOP R /LY %Chg • CP EOP R Comp/LY Comp % Chg • CP EOP R Comp/LY % Chg • CP FWOS R Division • CP FWOS R Class Company • CP FWOS R Div Company <p>Added the following Division Plan measures and historical measures to Division Plan - Planning Workflow - Markdown & Margin Planning:</p> <ul style="list-style-type: none"> • DP Demand R • LY Demand R • LLY Demand R • LLLY Demand R

9/14/2024

Thursday, September 12, 2024 2:54 PM

Type	Summary	Business Description
Improvement	Key item Plan - Weekly Rebalance	Created an Action Button in the 'Key Item - Color' and 'Key Item - Size' plan workspaces. This Action Button takes the OO U values for all currently visible weeks in the Inv & Receipts pivot table and copies the values to the Receipt U measure.
Improvement	Key Item Plan - Create new metric - WOS for Store/Direct EOP	Created two new metrics in the 'Key Item - Color' and 'Key Item - Size' plan workspaces to calculate the WOS by using the EOP Store/Direct U value instead of the total EOP U value. These measures were added to the Planning Workflow > Inv & Receipts and the Summary pages in both plan workspaces.
Improvement	Key Item Plan - Planning Backorders	Updated the KI Backorders and KII Backorders measures to allow for planning these measures in forward planning periods in both Key Item - Color and Key Item - Size planning workspaces.
Improvement	UI Updates in Prod - 9/14/24 Release	<p>Added the below PL measure to the Class Plan > Planning Workflow > Inventory & Receipts Planning > Adjustments & Transfers Planning and Class Plan > OTB Summary pivots:</p> <ul style="list-style-type: none"> - PL CP RTV R - PL CP MPOS R - PL CP PPS Adj R - PL CP Dir Rtn to Rtl Str R - PL CP Trns Dir to Outlet R - PL CP Trns Dir to Rtl Mvmt R - PL CP Trns Dir to Rtl Strs R - PL CP Trns Dir to Whlsl R - PL CP Trns General R - PL CP Trns Rtl Strs to Dir R - PL CP Trns Rtl Mmt Strs to Dir R - PL CP Trns Rtl to Outlet R - PL CP Trns Rtl to Whlsl R - PL CP Trns to Outlet R <p>Added the following measures to the Class Plan > Planning Workflow > Inventory & Receipts Planning pivot:</p> <ul style="list-style-type: none"> - TY Receipt R Daily - Total OO C Daily - Total OO U Daily - Total OO Daily <p>Created two new measures (KI Plan to OO Variance & KIS Plan to OO Variance) using the calculation Receipt U - Total OO U and added them to the Inventory & Receipts Planning and Summary pages in the Key Item - Color and Key Item - Size workspaces.</p>
Bug	Class Plan - Scheduled Lock Issue	Need the ability to lock elapsed time periods
Bug	Attribute Plan - PA FWOS R 1 Calc Issue and LY blank	PA FWOS R1 needs to update to reflect the updated forward weeks of supply for the PA version
Bug	Class Plan - Total OO R not correct in	When actualizing scenario plans the Total OO R are not correct, during actualization it is expected that Total OO R will actualize properly as the

	CP in Scenario Planning	other metrics do
Bug	Class Plan - LY EOP Comp is blank all months after FY26 SEPT	The issue is that LY EOP Comp is blank for the months after FY26 SEPT, which should copy from the CP EOP Comp from FY25.

9/28/2024

Monday, September 30, 2024 3:24 PM

Type	Summary	Details
Improvement	Key Item Plan - Create % to Total Metrics	Create the following metrics in Key Item and Key Item Size Plans: 1. % of KI to WP Class Plan Sales R Reg/ % of KIS to WP Class Plan Sales R Reg 2. % of KI to WP Class Plan Receipt R / % of KIS to WP Class Plan Receipt R 3. % of KI to WP Class Plan EOP U Reg/ % of KIS to WP Class Plan EOP U Reg
Improvement	Division Plan - Create FWOS Division Company	Create FWOS Division Company in DP. This measure currently exists in CP, use this as an example. Needs to be added to the following pivots: Division Plan > OTB Summary Division Plan > Planning Workflow > Inventory & Receipts
Improvement	UI Updates in Prod - 9/28/24 Release	9/5/2024 - Requested by Anthropologie <ul style="list-style-type: none"> Add metrics below to Key Item Plan Color and Size workspaces > Buyer Handoff Report (these look like they will be added by the o9 Project team) <ul style="list-style-type: none"> Color_Code Color_Name Vendor_Style_Number 9/19/24 - Requested by Anthropologie during KIP TB <ul style="list-style-type: none"> In both KIP workspaces, add all action buttons in Planning Workflow to the Dynamic Workflow tab In both KIP workspaces, add monthly build metrics to the Planning Workflow > Dynamic Workflow tab <ul style="list-style-type: none"> KI Sales U Reg Build <i>Monthly</i> KI Demand U Reg Build <i>Monthly</i> In both KIP workspaces, add conditional formatting (highlight red) when KI FWOS U does not equal PL KI TGT FWOS U. This should be done in the Planning Workflow > Sales & Demand and OTB Summary views. <ul style="list-style-type: none"> when KI FWOS U does not equal PL KI TGT FWOS U > Highlight KI FWOS U in red
Improvement	Class Planning KPI's to be added for Budget Planning	Metrics to be added to the Class Plan > Budget Planning > Budget Planning Pivot CP MPOS R % Sales R LY MPOS R % Sales R CP MPOS R LY MPOS R CP Dir Rtn to Rtl Str R % Sales R LY Dir Rtn to Rtl Str R % Sales R CP Dir Rtn to Rtl Str R LY Dir Rtn to Rtl Str R CP PPS Adj R % Sales R LY PPS Adj R % Sales R CP PPS Adj R LY PPS Adj R CP Trns Dir to Rtl Strs R LY Trns Dir to Rtl Strs R CP Trns Rtl Strs to Dir R CP LY Trns Rtl Strs to Dir R
Improvement	Key Item Plan - Expose Vendor Style	COLOR_CODE COLOR_NAME

	Field and color code to bring into the UI	VENDOR_STYLE_NUMBER
Go Live	Location Attribute Plan	Location attribute plan is now available in the production environment

10/12/2024

Monday, October 14, 2024

11:04 AM

Type	Summary	Business Description
Improvement	Class Plan - Seed from Like Class History	Users now have the option to Seed from Like Class History (LY, LLY, LLLY, 3AVG)
Improvement	FWOS can't calculate further than filtered time period	CP FWOS R 1 corrected to calculate properly regardless of future time periods selected in scope filters
Improvement	Ability to delete a placeholder in Key Item Planning	When a KIP placeholder is no longer needed, the ability to delete the placeholder from structure needs to allow the business user to remove style, style color, or style color size.
Improvement	Key Item Plan - Projection Forward process	For key item plans that are actualizing we want the functionality to either hold the future builds and recalculate future KI sales U Reg (Retail) / KI Demand U Reg (Direct), for the second method of re-projection we want the ability to calculate a variance between plan and actual for the trailing 4 weeks and apply and apply an average of that variance to the go forward plan. The third method of re-projection is the ability to calculate a variance between LY and TY actual for the trailing 4 weeks and apply an average to the go forward based on that.
Improvement	Class Plan - Create Historical Sales & Demand R Reg Build Measures	Historical demand and Sales R Build were added for OTB summary and Sales & Demand Planning in class plan
Improvement	Division Plan - Add EOP Validation view to DP	Replicated the EOP Validation view in Class Planning Workflow > Inventory & Receipts Planning in Division Plan
Bug	Location Attribute Plan - Lock Plan Does Not Work	Locking now works correctly for planned periods.
Improvement	UI Updates in Prod - 10/12/24 Release	<p>Added Sales R Build metric to Planning Workflow - Inventory & Receipts pivot in Class Plan, Division Plan, and Location Attribute Plan.</p> <p>Added the following metrics to Class Plan - Planning Workflow - Reg & MD Inventory Planning pivot</p> <ul style="list-style-type: none"> • CP WOS R, CP WOS R MD, CP WOS R Reg • PL CP Sales R • LY Sales R MD • CP Sales R Comp/LY% Chg • CP Sales R Reg % Sales R, CP Sales R MD % Sales R, LY Sales R Reg % Sales R, LY Sales R MD % Sales R <p>Added the following metric to Class Plan - Planning Workflow - Mkd & Margin pivot</p> <ul style="list-style-type: none"> • BD CP Sales R • BD CP Sales R into the class plan, planning workflow - TBC which button
Improvement	Key Item Planning UI Update Add Metrics	<p>Added these metrics to Open to Buy summary as a UI update</p> <p>KI Receipt R / CP Receipt R %</p> <p>KI EOP U Reg / CP EOP U Reg %</p> <p>KI Sales R Reg / CP Sales R Reg %</p> <p>KIS Receipt R / CP Receipt R %</p> <p>KIS EOP U Reg / CP EOP U Reg %</p> <p>KIS Sales R Reg / CP Sales R Reg %</p>
Improvement	Location Attribute Plan - Update LAPL translations	<p>Updated Location Attribute PL metrics names.</p> <p>All metrics beginning with 'LAPL' were updated to begin with 'PL LA'</p>

10/26/2024

Monday, October 28, 2024 12:49 PM

Type	Summary	Business Description
Improvement	Add Comment to Cell in UI Pivot	<p>The cell and intersection will now be tagged when a user has made a comment against it. The red tag indicates the comment has not been read, while the black tag indicates the comment has been read.</p> <p>Additionally, enabling the 'Pulse Indicator' function in the Action column will display a word bubble when there are comments for the intersection. Note that this only works when the pivot is filtered at the sub class level. It will not work at the higher product levels.</p>
Improvement	Key Item Plan - Create Daily OO and Receipt U metrics	<p>Planning Workflow → Inv & Receipt Views, Summary views and Scenario Planning</p> <p>Created new metrics in Key Item and Key Item Size for:</p> <ul style="list-style-type: none"> • TY OO U Daily • TY Receipt U Daily
Improvement	Ability to delete a placeholder in Key Item Planning	When a KIP placeholder is no longer needed, the ability to delete the placeholder from structure needs to allow the business user to remove style, style color, or style color size.
Improvement	Location Attribute Plan Monthly Build	<p>Created a monthly LAP Sales R Build measures that properly calculates and adjusts Sales R at the Month level.</p> <p>Renamed the currently weekly Sales R Build metric to be 'Sales R Build Weekly'.</p>
Bug	Location Attribute Plan - Scenario Planning Views Set Up	Action button was created in LAP scenario planning to copy the location attribute/store setup from CWV to the 4 scenario versions with flexibility to adjust as needed.
Improvement	Key Item Plan - Create KI % Total Style Metrics	<p>In Key Item Planning for Color & Size create the following metrics</p> <ol style="list-style-type: none"> 1. % of KI (color level) Sales U Reg to Total KI Style level Sales U Reg/ % of KI (Size Level) Sales U Reg to Total KI Style Level Sales U Reg 2. % of KI (color level) Demand U Reg to Total KI Style level Demand U Reg/ % of KI (Size Level) Demand U Reg to Total KI Style Level Demand U Reg 3. % of KI (color level) EOP U Reg to Total KI Style level EOP U Reg/ % of KI (Size Level) EOP U Reg to Total KI Style Level EOP U Reg 4. % of KI (color level) Receipt U Reg to Total KI Style level Receipt U Reg/ % of KI (Size Level) Receipt U Reg to Total KI Style Level Receipt U Reg
Improvement	UI Updates in Prod - 10/26/24 Release	<ul style="list-style-type: none"> • In LAP Hindsight tab : <ul style="list-style-type: none"> ◦ Added Plan Summary view which includes sales & inventory/receipts metrics all in one pivot vs living on separate tabs • In LAP Plan Summary <ul style="list-style-type: none"> ◦ Added Seed Plan Action Button ◦ Added Export Pivot functionality in view • LAP Reconciliation - Added view for MFP CP vs LAP - this includes LAP metrics and their respective CP metrics • In LAP Planning Workflow View <ul style="list-style-type: none"> ◦ Deleted DNU LA Sales R1 from view ◦ Added FWOS and WOS metrics • LAP Plan Summary <ul style="list-style-type: none"> ◦ Added all metrics available in Planning Workflow tabs to the Plan Summary tab. • Updated translation for LAP Sales R Build to have Weekly included.
Bug	Class Plan RTV R & U not matching EDW	A mechanism for actualizing RTV R & U is needed.
Improvement	Location Attribute Plan - Remove WBP from LAP Setup View	Working Budget Plan has been removed in the 'Location Attribute Setup' view

11/09/2024

Tuesday, November 12, 2024 9:55 AM

The next prod release will be on **Nov. 23, 2024**.

Module	Type	Summary	Business Description
Attribute Plan	Improvement	Attribute Plan - New % to Total Class Input penetration metrics	<p>New % to Total Class Input Penetration metrics were added to the Planning Workflow > Sales & Demand Planning and Inventory & Receipts views.</p> <p>Note that these are available except for the LLY, LLLY, AVG3LY penetration metrics for EOP & receipts.</p> <p>The work for the new split view which will include the above metrics is in progress.</p>
Attribute Plan	Improvement	Attribute Plan - New Metrics Requests	<p>Created two new metrics (PA Sales R Comp/LY % Chg & PA EOP R Comp/LY % Chg) and added them and the following measure to the OTB Summary, Sales & Demand, and Inventory & Receipts planning workspaces:</p> <p>LY AUR LLY AUR LLLY AUR Avg3LY AUR</p>
Attribute Plan	Bug	NA MFP - Attribute Plan - Historical FWOS/WOS Metrics Blank in PROD	Historical metrics for FWOS/WOS were blank in production for Attribute Plan.
Class Plan	Improvement	UI Updates for 11/9/2024 Prod Release	<p>Added the following metrics to Class Plan - Inventory & Receipts Planning - EOP Validation view:</p> <p>CP WOS R CP WOS R Reg CP WOS R MD CP WOS U CP Sales U Reg CP Sales U MD CP Sales R Reg % Sales R CP Sales R FP CP Sales R FP % Sales R CP Sales R FP % Sales R Reg CP Sales R Promo CP Sales R Promo % Sales R CP Sales R Promo % Sales R Reg CP Sales R MD % Sales R CP IMU % Receipt CP GM % CP IMU % COGS</p> <p>Added the following metrics to the Class Plan - Inventory & Receipts - Reg & MD Inventory Planning view:</p> <p>LY Sales R Promo LY Sales U Promo LY Sales U MD LY EOP U MD</p>
Key Item Plan	Improvement	KIP - Class Spreading Action Button	Created an Action Button in Key Item Color (SpreadCPToKI) and Key Item Size (SpreadCPToKII) to copy Class Plan values down to Key Item level to allow for Key Item to Class Plan penetration metric calculations.
Key Item Plan	Improvement	KIP – UI Updates	<p>Added the below action buttons to the Key Item Color and Key Item Size OTB Summary and Dynamic Time Summary views:</p> <ul style="list-style-type: none"> • Seed Plan (only added to the Dynamic Time Summary views) • Overlay Any Plan • Create PH Style • Create PH StyleColor • Create PH StyleColorSize (only added to Key Item Size plan views) • Lock Plan <p>Added conditional formatting to the KI & KIS WOS U Reg measure with the following rules:</p> <ul style="list-style-type: none"> • < 1 Week = no formatting • >= 1 Week and < 2 Weeks = yellow highlight • >= 2 Weeks = red highlight

Key Item Plan	Improvement	KIP - Create new metric - ST%	Create new metric below in both KI and KIS workspaces: KI ST % = KI Sales U Reg/(KI Sales U Reg + KI EOP U Reg) Add to both OTB Summary tabs once created.
Key Item Plan	Bug	Key Item Plan - Change Aggregation for Backorders	Changed the aggregation logic for the Backorders R & Backorders U measures in Key Item Color and Key Item Size to aggregate up the most recent period with a value in the plan (changed from being a simple summation).
MFP EU	Improvement	EU - Admin Workspace only accessible for Executive User Groups	Updated the UI roles in the Admin Data Management workspace to only allow EU Executive user roles to have access.
MFP EU	Improvement	EU UI Updates – Nov. 9, 2024 Release	<p>Formatted the WSSI view like OTB summary so that the key rows are Grey:</p> <ul style="list-style-type: none"> • CP Sales R • CP EOP R • CP MkdTot R • CP MkdTot R % Sales R • CP Receipt R <p>In Reg & MD inventory planning could we add:</p> <ul style="list-style-type: none"> • PL Receipts • PL Reg sales • PL MD Sales • LY CP WOS R, LY WOS R Reg & LY WOS R MD • CP vs PL Receipt R • CP vs PL Receipt R % • PL Mkd POS R • PL Mkd Perm R <p>Add Total OO R to the WSSI view in</p> <ul style="list-style-type: none"> • PAP • DP • CP <p>Add country group to be in the OTB Summary layout options</p> <p>Change the WSSI defaults to have the below when you click on factory settings:</p> <ul style="list-style-type: none"> • Open by default with Retail and Direct <p>Add to OTB Summary</p> <ul style="list-style-type: none"> • CP COGs R • CP vs PL Receipt R • CP vs PL Receipt R %
MFP EU – Class Plan	Improvement	EU Class Plan OTB Summary View Add Metrics 2	<p>We would like to add the following metrics to the EU Class Planning > Open to Buy Summary View Page</p> <p>DP Sales R DP MkdTot R DP IMU% COGS DP PL Sales R DP PL MkdTot R DP PL IMU % COGS</p> <p>(Note that these Division Plan metrics will only be accurate when viewing the OTB subtotalled at Division).</p>
MFP EU – Class Plan	Bug	Rolling OTB / Carry Forward not correct	Updated the way that Carry Forward OTB actualizes so that it reduces to 0 for past periods. Also updated the aggregation for Carry Forward OTB and Rolling WOS R to display the correct value from lower levels.
MFP EU – Division Plan	Improvement	DP EU Metric Requests	<p>Added the following metrics to the Division Plan > OTB Summary view:</p> <p>Avg3LY Sales R Build CP BD EOP R CP BD FWOS R CP BD WOS R CP FWOS R 1 CP GM % CP GM R CP IMU % COGS CP Inv Adj R CP MkdPerm R % Sales R CP MkdPOS R % Sales R CP MkdTot R CP MkdTot R % Sales R CP PL FWOS R 1 CP PL MkdTot R CP PL MkdTot R % Sales R CP PL Receipt R CP PL WOS R CP Receipt R</p>

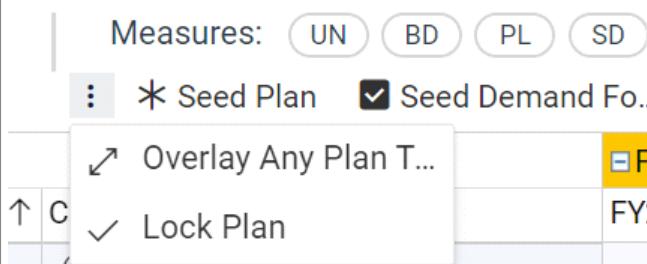
	CP Sales R CP Sales R Build Monthly CP Sales R Comp TY/LY Comp % Chg CP WOS R DP BD EOP R DP BD MkdTot R DP BD Sales R Comp TY/LY Comp % Chg DP BD Sales R ExVat DP BD WOS R DP EOP R TY/LY % Chg DP PL MkdTot R DP PL Sales R Build DP PL WOS R DP WOS R IMU % OO R LLLY IMU % COGS LLLY MkdPerm R % Sales R LLLY MkdPOS R % Sales R LLY FWOS R 1 LLY IMU % COGS LLY MkdPerm R % Sales R LLY MkdPOS R % Sales R LLY WOS R LY Demand R LY/LLY % Chg LY EOP R Comp LY/LLY Comp % Chg LY MkdPerm R LY WOS R DP vs DP BD GM R DP vs DP BD GM % DP to DP PL MkdTot R DP to DP PL Receipt R DP BD FWOS R CP to CP PL Receipt R CP WP to PL MkdTot R
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12/08/2024

Monday, December 9, 2024

4:12 PM

Module	Type	Summary	Business Description
Key Item Plan	Improvement	Key Item Plan - Adjusted Recommended Receipt	<p>Added a new metric for Recommended Receipt that rounds up to take minimum order quantity and pack size into consideration. Pack Qty was also added as an editable metric for this calculation to occur.</p> <p>This new metrics were added to the Inventory & Receipt and OTB Summary views for Key Item Color and Key Item Size.</p>
Key Item Plan	Improvement	Key Item Planning - Expand Presentation Fields	<p>Created Minimum Presentation U Per Store, Number of Stores with EOP U, and Total Presentation U metrics with Grades A, B, and C. These metrics allow for the planning of these metrics at store grade levels. These new metrics follow the below calculations:</p> <p>KI No of Stores with EOP U = KI No of Stores with EOP A Grade + KI No of Stores with EOP B Grade + KI No of Stores with EOP C Grade</p> <p>KI Min Presentation U Per Store = KI Min Presentation U Per Store A Grade + KI Min Presentation U Per Store B Grade + KI Min Presentation U Per Store C Grade</p> <p>KI Total Presentation A Grade = KI No of Stores with EOP A Grade * KI Min Presentation U Per Store A Grade</p> <p>KI Total Presentation B Grade = KI No of Stores with EOP B Grade * KI Min Presentation U Per Store B Grade</p> <p>KI Total Presentation C Grade = KI No of Stores with EOP C Grade * KI Min Presentation U Per Store C Grade</p> <p>KI Total Presentation = KI Total Presentation A Grade + KI Total Presentation B Grade + KI Total Presentation C Grade</p>
Key Item Plan	Bug	Key Item Plan - KI/NKI Association Issues	A mechanism has been created to be able to toggle off the Key Item flag in Key Item Planning and set that items as a Non Key Item without losing any associated plan data
Key Item Plan	Improvement	Key Item Plan - % to Total Class Metrics Not Actualizing	Updated the Key Item Color and Key Item Size actualization process to also actualize the KI/KII to CP comparison metrics.
Key Item Plan	Improvement	KIP/PA - Class Spreading Nightly Batch	Updated the nightly batch process to include copying Class Plan values down to the Attribute and Key Item levels. This should make the need to use the Spread action buttons less, as the Class Plan values will copy down entirely on a nightly basis.
Brand / Division / Class Plan	Improvement	New Comp Metric in CP, DP, BP	<p>Created new Comp comparison metrics in Class Plan, Division Plan, and Brand Plan that use the following logic:</p> <p>In actualized periods, the metric displays TY Sales R Comp compared to LY Sales R Comp</p> <p>In planning periods, the metric displays TY Sales R Comp compared to LY Sales R</p> <p>These measures were added to the Sales & Demand and OTB Summary views in each plan type.</p>
Division / Class / Product Attribute / Location Attribute Plan	Improvement	Create new EOP WOS R and EOP WOS U Metrics	<p>Created the below measures in the Class Plan, Division Plan, Attribute Plan, and Location Attribute Plan workspaces:</p> <p>EOP WOS R EOP WOS U CP/DP BD EOP WOS R PL EOP WOS R PL EOP WOS U EOP (Exc IT) WOS R EOP (Exc IT) WOS U</p>
Division / Class / Product Attribute / Location Attribute Plan	Improvement	Add In Transit Metrics to DP/CP/PAP/LAP	Created EOP IT (In Transit) R and U metrics and editable EOP IT % EOP metrics used to calculate the EOP IT values. These metrics were created for the Class, Division, Attribute, and Location Attribute plans. The metrics were added to the Inventory & Receipts, OTB Summary, and WSSI views (where applicable).
Class Plan	Improvement	Class Plan - Create WOS Reg/MD U metrics	Created WOS U Reg and WOS U MD metrics for Class Plan. These metrics have been added to the EOP Validation view.
Class Plan	Bug	Class Plan: MkdPOS R + MkdPerm R does not equal Mkdtot R in production	Fixed scenario causing rules to not trigger which resulted in Mkdtot not equaling Perm + POS for some intersections.
Class Plan	Improvement	Class Plan – Seed	Updated the Seed Plan action button in Class Plan to allow for the selection of seeding LY

		from LY Inv Adjustment	Inv Adj values.
Class Plan	Bug	NA MFP - Class Plan - Dynamic Attr 28 Issue	Updated rules so that data populates for past weeks for the metrics below in Attribute Plan: <ul style="list-style-type: none">• PA Sales R Monthly Build• LY IMU % Receipt• LY FWOS R 1• LY Receipt R• PA Receipt R
Attribute Plan	Improvement	Attribute Plan - Add New Penetration Metrics to OTB Summary View	Added all of the new Attribute Plan to Class Plan penetration metrics to the OTB Summary view in Attribute Plan. Updated the historical PA to CP comparison metrics to correctly reflect the LY/LLY/LLLY/Avg3LY PA values to the corresponding CP values (previously was incorrectly using the TY PA value in the comparison).
Location Attribute Plan	Improvement	Location Attribute - Copy History to Scenario AB Missing	Created the 'Copy LY to Scenario' action button for Location Attribute Plan. Added this action button and the 'Export Pivot' action button to the Scenario Planning view.
MFP EU	Improvement	EU UI Updates	Updated the row highlighting in the Attribute Plan WSSI to highlight important rows and fixed an issue where the highlighted rows weren't visible in Dark Mode. Added four new metrics to the Division Plan Reg and MD Inventory view: CP Reg Sales v PL Reg Sales R CP Reg Sales v PL Reg Sales R % CP MD Sales v PL MD Sales R CP MD Sales v PL MD Sales R % Added CP Sales R Build Weekly and CP WOS U to the Class Plan Scenario Planning view. Added the following metrics to the Attribute Plan Scenario Planning view: PA Sales R Weekly Build PA Demand R Weekly Build PA WOS R PA WOS U Update the translation names for all the Class Plan Franchise Inventory Transfer metrics. Added all of the Class Plan Franchise Inventory Transfer metrics to the Class Plan Inventory & Receipt, Adjustments & Transfers, and OTB Summary views.
MFP EU	Bug	PA Sales R Not re-aggregated, URBNEU	Sales re-aggregated in Attribute planning history when attributes are changed on styles
MFP EU – Attribute Plan	Improvement	Update Attribute WSSI Filters	Updated the settings for the Attribute Plan WSSI view so that only Attributes that are set up for the Class selected will appear in the scope filters. Also set GBP as the default Currency selection in the scope filter.
O9	Improvement	O9 Platform Upgrade - Validation	o9 Platform Upgrade. The only visible change is to action buttons. If you do not see the action button you are looking for, click the vertical dots to see additional actions. 

09 Tips and Tricks



How to create a calculated metric in o9?

- In the pivot, click the Layout button then go to the Data tab
- Use the + button to create a calculated metric that can be added to the view
 - Enter a name for the metric
 - Create the formula by using the arrow button to move a metric into the formula box
 - Set the format for the metric and then click Save

The screenshot shows two windows of the Oracle BI Pivot Layout application. The left window is titled 'Pivot Layout' and has tabs for Layout, Data (which is selected), Options, and Display. It includes a search bar and a 'Select All' checkbox. A section titled 'Select/Unselect the Metric' contains several checkboxes, with 'CP Demand R' being checked. To the right of this is a 'Calculated Metric' section with a '+' button and a 'Move the order' dropdown menu. The right window is also titled 'Pivot Layout' and has similar tabs. It shows a list of metrics with arrows pointing from the left window's list to the right window's list. A 'Calculated Measure Details' panel on the right contains fields for 'Name' (with 'CP Sales R' entered) and 'Formula' (with a large empty text area). At the bottom of both windows are 'Reset', 'Cancel', and 'Save' buttons.



Are you getting the 'Attempt to divide by zero' error message in your pivot? Use the SAFE DIVIDE function in your calculated metric to prevent this error.

Query Execution Failed with the following Errors: 6: Attempt to divide by zero.

Anytime you are performing division it's best practice to use the SAFEDIVIDE function.
This is utilized by SAFEDIVIDE(Numerator, Denominator).

Example - Instead of entering CP Sales R/LY Sales R, enter SAFEDIVIDE(CP Sales R, LY Sales R)

12/21/2024

Monday, December 23, 2024 11:46 AM

Module	Type	Summary	Business Description
Attribute Plan	Improvement	Attribute Plan - Plan Summary - New UO View	New tabs created in Attribute Plan > Summary > Plan Summary view. The first tab includes the PA CP metrics which populate the class plan values in Attribute Plan. The second tab includes the new PA % to total class metrics.
Attribute Plan	Improvement	Attribute Plan - Spread CP Action Button/PA CP Measure Agg Logic Update	Updated the logic that spreads the IMU % OO, WOS, and FWOS Class Plan values down to Attribute Plan to correctly display the values at the lowest and aggregated levels. Also adjusted the logic around the other Attribute Plan Class Plan metrics so they display correctly and lower and aggregated levels.
Attribute Plan	Improvement	Attribute Plan - LY Data not showing for Planned Periods	Added a process to move non-actualized period data from the current FY into the LY metrics of the next year.
Attribute Plan	Improvement	Attribute Plan - Copy CP Actuals to PA CP metrics in Nightly Batch	Made an adjustment to copy the actuals for the PA CP measures with the nightly batch. Only the Sales, EOP, Demand, MkdTot, and Receipt PA CP measures are copying actuals.
MFP EU	Improvement	EU UI Updates - 12/21/24 Prod Release	<p>Updated the display names for LAP EOP IT R and LAP EOP IT R % EOP R Updated the CP/DP/PAP WSSI views to allow for planner comments Updated the Class Plan OTB Summary view to include the following metrics: LY Transfers Direct to Franchise R LLY Transfers Direct to Franchise R CP Sales R/LLY % Chg BD CP Sales R/LY % Chg CP WOS R Reg CP WOS R MD CP Sales R Reg Comp/LY % Chg CP Sales R FP Comp/LY % Chg CP Sales R Promo Comp/LY % Chg CP Sales R MD Comp/LY % Chg</p> <p>Updated the Class Plan > Planning Workflow > Inventory & Receipts > Reg & MD Inventory view to include the following metrics: PL CP MkdTot R PL CP MkdFirst R PL CP MkdDO R PL CP MkdFirst Discount% PL CP MkdPOS R % Sales R PL CP WOS R PL CP WOS R Reg PL CP WOS R MD BD CP MkdTot R BD CP MkdTot R % Sales R LY MkdTot R LY MkdTot R % Sales R LY MkdPerm R LY MkdFirsts Discount % LY MkdFurther R LY MkdPOS R LY MkdPOS R % Sales R</p> <p>Added the CP Trns Dir to Franchise R metric to the Class Plan WSSI view.</p>
Key Item Plan	Improvement	Key Item Plan - Seed Plan - Add Measure Groups to AB	<p>The ability to seed key item plans for either selected metric groups or all.</p> <ul style="list-style-type: none"> • Receipts & Inventory • Sales & Demand • Cross Channel <p>This will reflect the functionality that exists in the Overlay action button</p>

09 Tips and Tricks



You will now see a grouping feature when there are too many action buttons to display above the pivot. To view the hidden action buttons, select the 3 vertical dots. This may differ by screen depending on the zoom settings of your browser.

The screenshot shows a software interface titled "Sales & Demand Planning". At the top, there are various filters and dropdown menus. Below the title, it says "Showing 9,386 rows of data". A prominent feature is a large group of action buttons located at the top right of the data area. These buttons include "Like Attribute", "SpreadCPValues", "Seed Plan", "Download", "Export Pivot", "Filters", "Layout", and "Local Edit". A red box highlights the three vertical dots button, which is used to expand this group of buttons. The main data area displays a grid of information with columns for "Actions", "Attribute", "Data", and months from "FY25 APR" to "FY25 OCT".

Module	Type	Summary	Business Description
Class Plan	Improvement	Create a version of the OTB Summary View in CP that has no editable fields	Updated the 'Class Plan > Reporting > Reporting > OTB Summary Report - FP' view to not be editable.
Class / Brand / Division Plan	Bug	CP/DP/BP Actualized/Non Actualized Comp Metric Incorrect at Current Month	Corrected the logic that generates the Sales R Comp Actualized/Non-Actualized metric so that partially actualized aggregated Time periods reflect the correct calculation.
Location Plan	Improvement	Location Plan - UI Naming Update	Updated the naming of all Location Plan metrics to be 'LP' instead of 'LAP'. Changed the name of all pages that previously reflected 'Location Attribute Plan' to be 'Location Plan'.
Class Plan	Improvement	UI Updates in Prod - 01/11/2025 Release	Created the following Class Plan BD metrics: MkdFirsts R MkdFurther R MkdDO R MkdFirsts R % MkdPerm R MkdFurther R % MkdPerm R MkdDO R % MkdPerm R These 6 metrics along with the WP versions were all added to the Class Plan > Budget Planning > Budget Planning workspace.

09 Tips and Tricks



Did you know that there are shortcuts that can be used when entering values in o9?

- k - to one decimal point. 1.5k = 1,500
- m - must be whole number. 2m = 2,000,000
- b - must be whole number. 2b = 2,000,000,000
- t - must be whole number. 2t = 2,000,000,000,000

Note that these letters must be lowercase



Are you having issues with copying/pasting values into o9?

Make sure to enable the clipboard in your browser

The screenshot shows a web browser window with a URL starting with "preprod-urban.o9solutions.com". A modal dialog box titled "Clipboard read access denied" is displayed. The dialog states: "This site has been blocked from seeing text and images copied to the clipboard". It contains two radio button options: "Always allow https://preprod-urban.o9solutions.com to see the clipboard" (which is selected) and "Continue blocking this site from seeing the clipboard". Below the options are "Manage" and "Done" buttons. A large red box highlights the first radio button. A black arrow points from the text "Make sure to enable the clipboard in your browser" to this highlighted dialog.

01/25/2025

Monday, January 27, 2025 1:22 PM

Module	Type	Summary	Business Description
Class Plan	Improvement	NA MFP - Class Plan - Remove Currencies from Views	Set default currency in views for Class Planning Class Plan > Scenario (USD) Class Plan > Budget Planning (USD) Class Planning > WSSI (GBP) Budget Planning > Class vs Division Budget (GBP) Reporting > WSSI Attribute Report (GBP) Reporting > WSSI Report (GBP)
Class Plan	Improvement	UI Updates in Prod - 01/25/2025 Release	Updated measure translation names for Class Plan BD metrics MkdFirsts R MkdFurther R MkdDO R MkdFirsts R % MkdPerm R MkdFurther R % MkdPerm R MkdDO R % MkdPerm R
Brand / Division / Class Plan	Improvement	Brand/Division/Class Plan - New Comp Metric in CP, DP, BP	Created new Comp comparison metrics in Class Plan and Division Plan that use the following logic: In actualized periods, the metric displays TY EOP R Comp compared to LY EOP R Comp In planning periods, the metric displays TY EOP R Comp compared to LY EOP R These measures were added to the Inventory & Receipts Planning and OTB Summary views in each plan type.
Key Item Plan	Improvement	Key Item Planning Color & Size Add Action Button Addition	Adding the KI Rebalance action button to the Summary workspace for both Color & Size.
MFP EU – Class / Division Plan	Improvement	MFP EU UI Updates - 1/25/25 release	Added the BD CP Sales R metric to the Class Plan > Planning Workflow > Inv & Receipt Planning > Reg & MD Inv Planning workspace. Added the BD DP Sales R metric to the Division Plan > Planning Workflow > Inv & Receipt Planning > Reg & MD Inv Planning workspace. Added the following metrics to the Division Plan > OTB Summary view: DP PPS Adj R DP PPS Adj R (Calc) DP PPS Adj R % Sales R DP MPOS Sales R DP MPOS Sales R (Calc) DP MPOS Sales R % Sales R DP Dir Rtn to Rtl Str R DP Dir Rtn to Rtl Str R (Calc) DP Dir Rtn to Rtl Str R % Sales R

02/08/2025

Monday, February 10, 2025 11:42 AM

Module	Type	Summary	Business Description
Key Item Plan	Improvement	Add coordinate group to style color for Key Item Planning	Ability to plan coordinate groups at color level in key item planning
Key Item Plan	Improvement	Key Item Plan Size - Add new field for Size Name	We have added the size description and size code to the filters in Key Item Size
Class Plan	Improvement	Class Planning new view OTB Summary Dynamic Time Filtering	Created a new Tab in the Class Plan > OTB Summary utilizing the dynamic time filter that shows the following for time <ul style="list-style-type: none"> • Past 3 And Future 3 Months • Past 3 and Future 6 Months • Past 3 and Future 10 Months • Past 3 and Future 12 Months
MFP EU - Class / Division Plan	Improvement	MFP EU Direct to Franchise PL/BD and Lock/Overlay	Added Transfer Direct to Franchise R metrics to Class & Division Planning for the OTB Summary, Budget Planning, & Class vs Division Budget views in CP/DP Also added Dir to Franchise R to Lock & Overlay action buttons in Class Planning / Division Planning
Class Plan	Improvement	UI Updates in Prod - 02/08/2025	Added the following metrics to Class Plan > Budget Planning view <ul style="list-style-type: none"> • CP Receipt U • LY Receipt U • CP AUR • LY AUR

09 Tips and Tricks



Did you know you that you can take notes and collaborate with other users directly in the system by creating **comments**, **posts**, and **tasks**?

How to create a **Comment**

- Right click on cell and hit + **Add Cell Comment**
- User can notify team members, attach reference documents
- Cell will be tagged in the corner when it has a comment against it
- Comments can be saved in folder and will have the intersections automatically tagged to easily navigate to

Class	T Data	FY25 FEB	FY25 MAR	FY25 APR	FY25 MAY
4160 MASKS (NA)	CP Demand R				
	LV Demand R				
	LLY Demand R		541		
	LLLY Demand R		118,614	11	
	CP Sales R				
	LV Sales R				

The screenshot shows the 'Cell Info' dialog box. In the center, there's a text input field with the placeholder 'Text comment'. Below it, there's a 'Tags' section with several tags selected, including '4160 MASKS (NA)', 'FY25 MAR', 'DemandForecast', 'USD', and 'REST OF WORLD'. At the bottom right of the dialog, the 'Post' button is highlighted.

How to create a **Post**

- Click the word bubble icon in the toolbar
- Users can notify team members on insights and attach reference documents

The screenshot shows the 'Create Post' dialog box. It has a text input field with the placeholder 'Brain...'. Below it is a rich text editor with various formatting options. At the bottom right, the 'Post' button is highlighted.

How to create a **Task**



- Click the task list (3 lines) icon in the toolbar
- Users can create & assign tasks to other team members, attach external documents, and prioritize the task

The screenshot shows the 'Create New Task...' dialog box. It includes fields for 'Title', 'Assignees', 'Due Date' (set to 05/29/2024), and 'Priority' (set to H). At the bottom right, the 'Save' button is highlighted.

The **My Views** workspace will allow you to manage all **comments**, **posts**, and **tasks** that you created or were tagged in.

- The **Pulse/Alerts** tab will display all **comments** and **posts** that were saved in the respected folders
- The **Task** tab will display all a list of all **tasks** created and assigned to you

For more information, visit the 09 Onboarding Notebook on this tab: Collaboration ([Web view](#))

02/22/2025

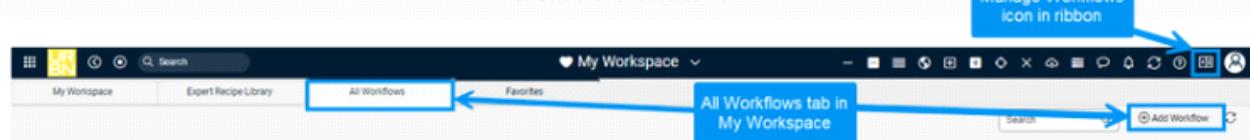
Monday, February 24, 2025 11:23 AM

Module	Type	Summary	Business Description
Key Item Color	Improvement	Key Item Color - Add Coordinate Group to Setup View	Added the 'SC Coordinate Group' selection to the Key Item Color Setup view and to the Key Item Color Planning Workflow views.
Division Plan	Improvement	UI Updates in Prod - 02/22/25 Release	Add metrics below to Division Plan > Budget Planning view <ul style="list-style-type: none">• LY Mkdtot C % Sales R• LY IMU % MkdTot• DP Sales R Comp % Chg Act/NotAct
Class Plan	Improvement	Class Plan - OTB Summary Dynamic Time Filter Additional Time Filter	Added the additional Time filter of 'Past6andFuture6Months' to the Class Plan OTB Summary dynamic time view.

09 Tips and Tricks

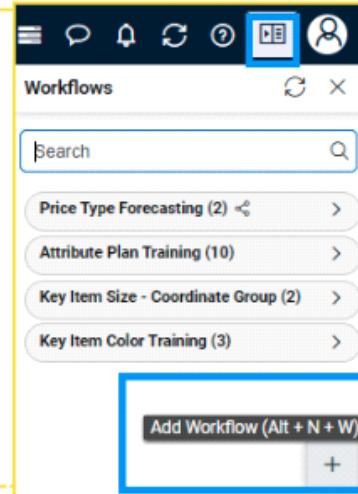
 Did you know that you can **create a workflow** of commonly used favorite views? This allows you to quickly navigate between the different pages / tabs / views to complete a full planning workflow.

Use the Manage Workflows Icon in the ribbon or the All Workflows tab in My Workspace to create a workflow!



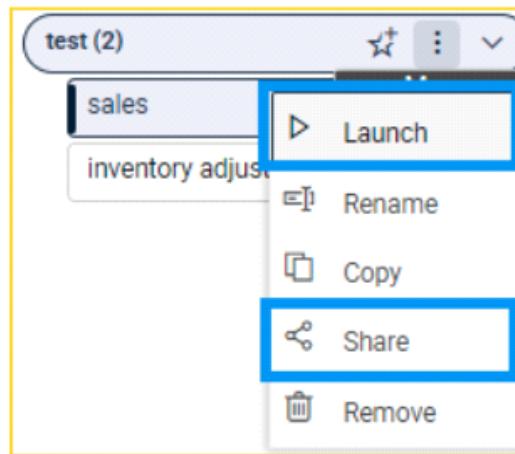
The **Manage Workflow** icon will display all saved/shared workflows.

- To create a new one, click the plus sign in the bottom corner to **Add Workflow**.
- Then, open your favorite view that you want to save to the workflow and click the star icon to **Add Favorite**.



The **Workflows** tab in My Workspace is another area where you can view and create workflows using the same steps mentioned above.

- **Launching** your workflow will allow you to move through the different favorites using a small toolbar at the bottom as a shortcut.
- You can also **share** your workflows with other users in the system!



03/08/2025

Monday, March 10, 2025 10:57 AM

Module	Type	Summary	Business Description
Division / Class / Attribute Plan	Improvement	Division / Class / Attribute Plan - Delete Currency View pages	Removed the 'Currency Planning' views from Division, Class, and Attribute Planning.
Class Plan	Improvement	Class Plan - Budget Plan View - Remove Edit Elapsed Working Budget Plan Action Button	Removed the 'Edit Elapsed Periods' action button from the Class Plan > Budget Planning view.
Key Item Plan	Improvement	Key Item - Add KI Seed Source to Summary Views	Added the KI and KII Seed Source metrics to the Key Item Color and Size OTB Summary workspaces.
Key Item Plan	Improvement	KI UI Updates	Updated the formatting of KI WOS Reg U to include 1 decimal to match the other plan type WOS measures.

09 Tips and Tricks



Did you know that the On Order in o9 is based on the **STORE** on order quantity?

This means if a PO is allocated, the On Order will reflect the quantity that is allocated to stores. As a result, there can be slight variance by channel between o9 and MicroStrategy reports.

For example, a retail PO is allocated to direct stores:

- o9 will show the OO quantity at the direct channel
- MicroStrategy will show OO quantity at the retail channel

Calculated Metric Creation

Wednesday, February 19, 2025 3:17 PM

09 Tips and Tricks



How to create a calculated metric in o9?

- In the pivot, click the Layout button then go to the Data tab
- Use the + button to create a calculated metric that can be added to the view
 - Enter a name for the metric
 - Create the formula by using the arrow button to move a metric into the formula box
 - Set the format for the metric and then click Save

The screenshot shows two overlapping windows of the 'Pivot Layout' application.

Left Window (Main Pivot Layout):

- Tab:** Data (highlighted with a red box).
- Search Bar:** Q Search.
- Filter:** Select All, Select/Unselect the Metric (checkboxes for CP Demand R, LY Demand R, etc.).
- Calculated Metric:** A section with a '+' button (highlighted with a red box) and a 'Move the order' dropdown.
- Buttons:** Reset, Cancel, Save.

Right Window (Calculated Measure Details):

- Tab:** Data (highlighted with a red box).
- Filter:** Filter by keyword.
- Calculated Measure Details:** Name: (empty), Formula: (empty), Number Format: Number, 0.000.
- Buttons:** Reset, Cancel, Save.

Divide by Zero

Wednesday, February 19, 2025 3:18 PM



Are you getting the 'Attempt to divide by zero' error message in your pivot? Use the SAFE DIVIDE function in your calculated metric to prevent this error.

Query Execution Failed with the following Errors: 6: Attempt to divide by zero.

Anytime you are performing division it's best practice to use the SAFEDIVIDE function.
This is utilized by SAFEDIVIDE(Numerator, Denominator).

Example - Instead of entering CP Sales R/LY Sales R, enter SAFEDIVIDE(CP Sales R, LY Sales R)

Hidden Action Buttons

Wednesday, February 19, 2025 3:19 PM

09 Tips and Tricks

You will now see a grouping feature when there are too many action buttons to display above the pivot. To view the hidden action buttons, select the 3 vertical dots. This may differ by screen depending on the zoom settings of your browser.

The screenshot shows a business intelligence interface for Sales & Demand Planning. At the top, there is a navigation bar with various filters and dropdown menus. Below the navigation bar, the main area displays a table of data with columns for Measures (UN, PL, SD, DD, 2L) and time periods (FY25 APR through FY25 OCT). A red box highlights a vertical ellipsis button (three dots) located in the header of the 'Actions' column. A tooltip for this button indicates it provides 'Like Attribute', 'SpreadCPValues', 'Seed Plan', 'Download', 'Export Pivot', 'Filters', 'Layout', and 'Local Edit' options. The table contains several rows of data, each with a similar set of columns and a red box highlighting the 'Actions' column.

Number Shortcuts

Wednesday, February 19, 2025 3:30 PM



Did you know that there are shortcuts that can be used when entering values in o9?

- k - to one decimal point. $1.5k = 1,500$
- m - must be whole number. $2m = 2,000,000$
- b - must be whole number. $2b = 2,000,000,000$
- t - must be whole number. $2t = 2,000,000,000,000$

Note that these letters must be lowercase

Copy/Paste

Wednesday, February 19, 2025 3:31 PM

The screenshot shows a web browser window with a yellow dashed border around the main content area. At the top, there is a lightbulb icon followed by the text "Are you having issues with copying/pasting values into o9?". Below this, it says "Make sure to enable the clipboard in your browser". The main content area displays a software interface titled "Class Plan". A "Clipboard read access denied" dialog box is overlaid on the screen. This dialog contains the message: "This site has been blocked from seeing text and images copied to the clipboard". It offers two options: "Always allow https://preprod-urbn.o9solutions.com to see the clipboard" (radio button unselected) and "Continue blocking this site from seeing the clipboard" (radio button selected). There are "Manage" and "Done" buttons at the bottom of the dialog. A red box highlights the "Always allow" option, and another red box highlights the "Continue blocking" option. A black arrow points from the "Continue blocking" option in the dialog to the "Continue blocking" option in the browser's address bar status bar.

Collaboration Features

Wednesday, February 19, 2025 3:32 PM

09 Tips and Tricks



Did you know you that you can take notes and collaborate with other users directly in the system by creating **comments, **posts**, and **tasks**?**

How to create a **Comment**

- Right click on cell and hit **+ Add Cell Comment**
- User can notify team members, attach reference documents
- Cell will be tagged in the corner when it has a comment against it
- Comments can be saved in folder and will have the intersections automatically tagged to easily navigate to

The screenshot shows a spreadsheet application with a context menu open over a cell containing 'CP Sales R'. The menu includes standard options like Copy, Paste, and Freeze Total, along with a 'Re-spread' button. A specific 'Add Cell Comment' option is highlighted. A sub-menu for 'Add Cell Comment' is displayed, featuring a search bar with 'test comment' and a list of comments from various users and tasks.

How to create a **Post**

- Click the word bubble icon in the toolbar
- Users can notify team members on insights and attach reference documents

The screenshot shows a 'Create Post' dialog box overlaid on a main interface. The dialog includes a rich text editor with bold, italic, and underline buttons. Below the editor are sections for 'Tags' and 'Notify Users...'. A toolbar at the top of the dialog includes icons for file operations like 'New', 'Open', 'Save', and a word bubble icon. The background shows a grid of data with some cells highlighted in red.

How to create a **Task**

- Click the task list (3 lines) icon in the toolbar
- Users can create & assign tasks to other team members, attach external documents, and prioritize the task

The screenshot shows a 'Create New Task...' dialog box. It includes fields for 'Title' (with a placeholder 'New Task Title...'), 'Assignees' (listing 'Followers'), 'Description' (with a rich text editor), and 'Due Date' (set to 05/29/2024). A 'Priority' dropdown is set to 'H'. A toolbar at the top of the dialog includes icons for file operations like 'New', 'Open', 'Save', and a task list icon. The background shows a grid of data with some cells highlighted in red.

The **My Views** workspace will allow you to manage all **comments**, **posts**, and **tasks** that you created or were tagged in.

- The **Pulse/Alerts** tab will display all **comments** and **posts** that were saved in the respected folders
- The **Task** tab will display all a list of all **tasks** created and assigned to you

For more information, visit the o9 Onboarding Notebook on this tab: Collaboration ([Web view](#))

Managing Workflows

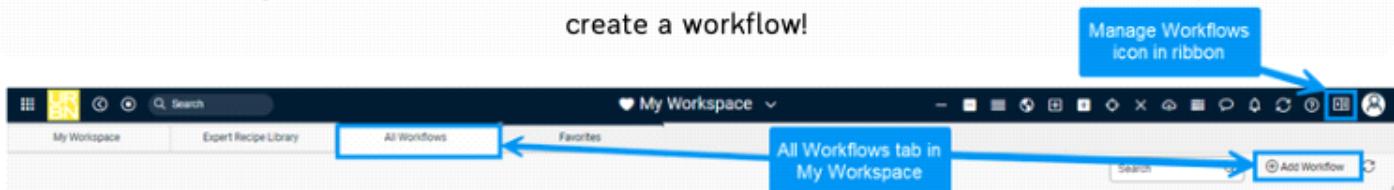
Monday, February 24, 2025 11:19 AM

09 Tips and Tricks



Did you know that you can **create a workflow of commonly used favorite views? This allows you to quickly navigate between the different pages / tabs / views to complete a full planning workflow.**

Use the Manage Workflows Icon in the ribbon or the All Workflows tab in My Workspace to create a workflow!



The **Manage Workflow** icon will display all saved/shared workflows.

- To create a new one, click the plus sign in the bottom corner to **Add Workflow**.
- Then, open your favorite view that you want to save to the workflow and click the star icon to **Add Favorite**.

The **Workflows** tab in My Workspace is another area where you can view and create workflows using the same steps mentioned above.

- Launching** your workflow will allow you to move through the different favorites using a small toolbar at the bottom as a shortcut.
- You can also **share** your workflows with other users in the system!

On Order Report Mismatch

Tuesday, March 11, 2025 9:28 AM

09 Tips and Tricks



Did you know that the On Order in o9 is based on the STORE on order quantity? This means if a PO is allocated, the On Order will reflect the quantity that is allocated to stores. As a result, there can be slight variance by channel between o9 and MicroStrategy reports.

For example, a retail PO is allocated to direct stores:

- o9 will show the OO quantity at the direct channel
- MicroStrategy will show OO quantity at the retail channel

Nuuly Brand Planning

Wednesday, February 12, 2025 4:19 PM

Brand Planning Overview

Wednesday, February 12, 2025 4:20 PM

Navigation

Wednesday, February 12, 2025 4:24 PM

Class Plan Workspace

The Brand Plan workspace allows you to create, shape and edit your Brand Plan. This plan can be edited at brand and by month or any time period higher.

Below is a description of each page group & page that exists in the Brand Plan Workspace.

Page Group	Page	Description
Summary	Dashboard	This page is intended to be used to review a plan's key metrics. There is a graph to compare demand & sales plans to historical time periods and a pivot table to display high level plan metrics.
	Approval Status	This view shows the approval status and date a plan has been approved, as well as a tab to action the locking of a plan (Locking to PL)
Brand Planning	Hindsight Review	This page will allow you to look at all historical time periods for key metrics: Sales, Demand, Markdowns, Margin, Inventory & Receipts. This can be used to help determine what time period to seed from.
	Plan Summary	This page allows you to plan most key metrics on a one page view and can be used for editing the plan while visualizing a variety of metrics from different areas.
	Rental & Inventory Planning	
	Receipt & Cost Planning	
Scenario Planning	Scenario Planning	This page is where you can create a scenario plan and publish a scenario back out to your WP plan version
	Scenario vs WP	This page is used to compare any scenario plan to the current WP plan
	Budget Planning	This page is used to edit your working budget plan and to lock it to become the Budget version of the plan.
	Budget Planning vs WP	
Reconciliation Summary	BP to CP Compare	
	BP to PL Compare	

Seeding

Wednesday, February 12, 2025 4:24 PM

Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Seeding

The starting point of developing a plan is to seed it with data

When you are building a new Merchandise Financial Plan, seeding it with data from the past or from a like plan will save time and improve accuracy by inheriting key data instead of building it from scratch. You will inherit seasonality curves, key metrics, and ratios from the selected time frame. It creates the basis used to shape your future plan.

You can choose to seed from History, from a like Product Level

Shaping the Plan

Wednesday, February 12, 2025 4:24 PM

Nuuly Class Planning

Wednesday, February 12, 2025 4:19 PM

Class Planning Overview

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Nuuly Attribute Plan

Wednesday, February 12, 2025 4:19 PM

Attribute Plan Overview

Wednesday, February 12, 2025 4:21 PM

Environment Update (12/8/24)

Monday, December 23, 2024 11:22 AM

Below are a list of updates that were included in the Environment update released on 12/8/24

Q3

UI

- Re-enter the Same Value in Editable Measure
- 'Set as Null' Option Introduced for Bulk Edit
- Autofit Height for Column Header
 - o In Layout under the Display Tab you can select to Auto-Adjust the Column Header Height



Chart

- Line Chart: Edit Axis Scale & Save as Favorite
- Convert Chart Types, Colors & Save as Favorite
- Data Label Display Enhancement in Bar & Stacked Charts

Filters

- Use Select All Checkbox to Select All Members Across a Dimension

A screenshot of a filter interface. At the top, there are five filter buttons: Item (selected), Location, Company, Currency, and Time. Below these are two rows of filter buttons. The first row contains '4110:BLOUSES - ANTHRO. (NA)' (selected), '4111:HEAVYWEIGHT KNITS (NA)', '4112:CUT AND SEW KNITS-ANTHRO (NA)', '4113:FINE GAUGE-ANTHRO (NA)', '4114:SWEATERS - ANTHRO. (NA)', and '4148:LAYERING (NA)'. A note says '1 selected out of 6 related members. To view all available members click Show All'. Below this is a 'Select All' button. The second row contains '4110:BLOUSES - ANTHRO. (NA)', '4111:HEAVYWEIGHT KNITS (NA)', '4112:CUT AND SEW KNITS-ANTHRO (NA)', '4113:FINE GAUGE-ANTHRO (NA)', '4114:SWEATERS - ANTHRO. (NA)', and '4148:LAYERING (NA)'. A note says '6 selected out of 6 related members. To view all available members click Show All'. Below this is a checked 'Select All' button.

- Sorting of Time like Attribute Members

Others

- Action Button: Overflow Management

Q4

UI Updates

- Flexible Past Operations
- Collapse/Expand Pivot Column

FY25 AUG				
FY25 WK 27	FY25 WK 28	FY25 WK 29	FY25 WK 30	
77,306	71,257	71,766	330	
61,001	69,090	73,819	73,868	
1,298,053	1,214,036	1,310,243	1,253,082	
1,199,034	1,280,861	1,378,805	1,475,003	
903,411	965,379	1,113,745	1,076,051	

FY25 SEP				
FY25...	FY25...	FY25...	FY25...	
220,659	65,565	64,312	61,106	64,648
277,777	64,538	64,393	64,600	65,769
5,075,414	1,210,694	1,211,146	1,328,752	1,298,214
5,333,703	1,280,043	1,292,223	1,307,350	1,227,949
4,058,595	1,128,745	1,139,775	1,208,185	1,143,992

- Bulk Edit Enhancement: Multiple Measure Entry on Single Submission
- Ctrl+Enter Function to Enter the Same Value in Multiple Editable Cells
- Discontinuous Cell Selection
- AutoFit for Column Label

Chart

- Convert Multi-Line Series Chart Type
- Chart Legend Display

Menu Map

- Sticky Header
- Improved Search Functionality

Filters

- Vertical Filter Pane

Others

- Last Updated Date Added to Favorites
- Enable Last Visited View as Home