Logging In

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

Logging In

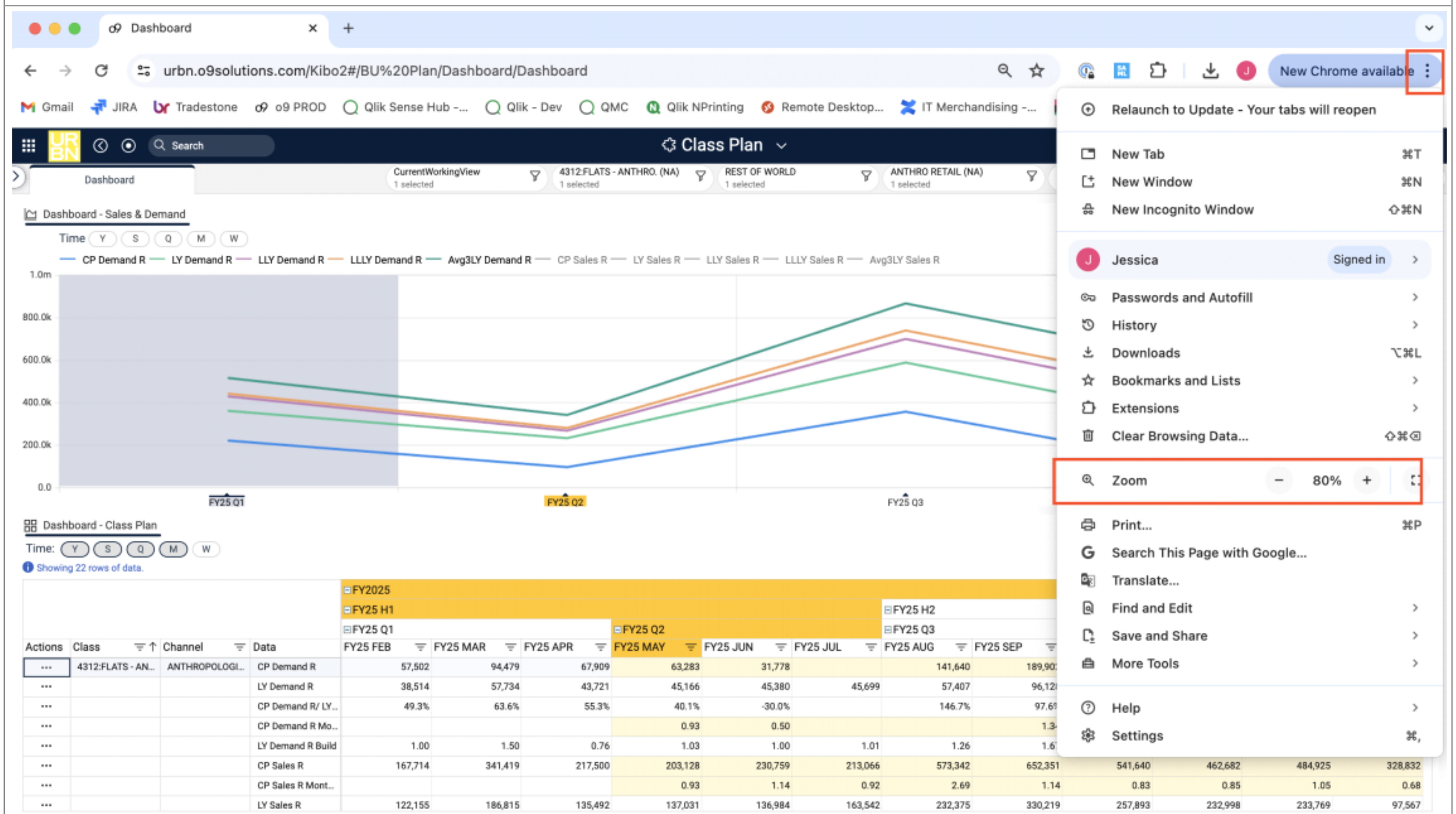
1. Always use Google Chrome to login to o9

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

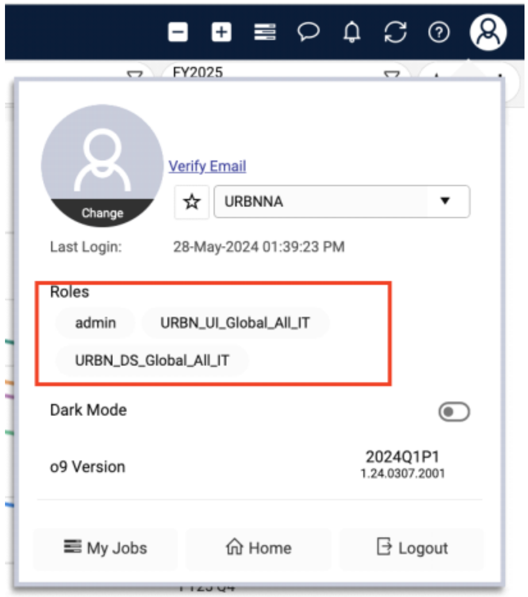
1. System Availability - o9 is expected to be available to users 8AM - 11:30PM Mon-Sat, 7PM-11:30PM Sunday

Tips & Tricks

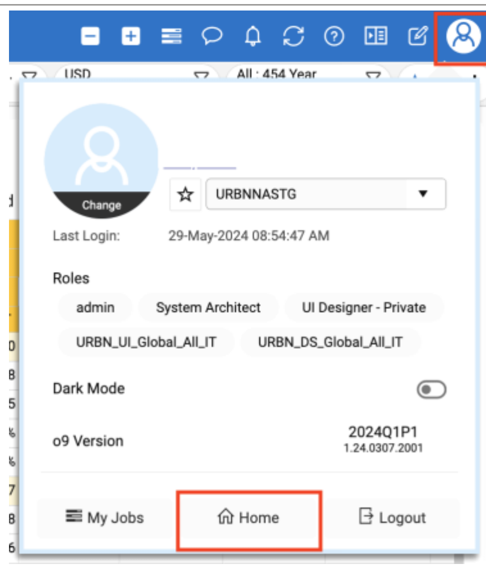
1. Use the zoom functionality in Chrome to maximize the space on the screen, recommendation is 80%



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**

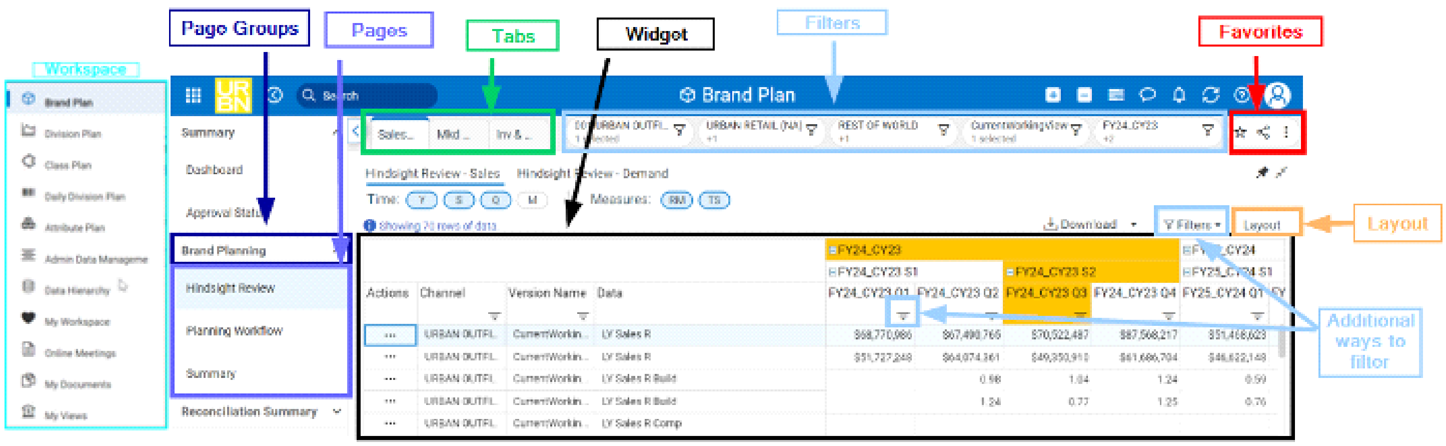


Terminology

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.

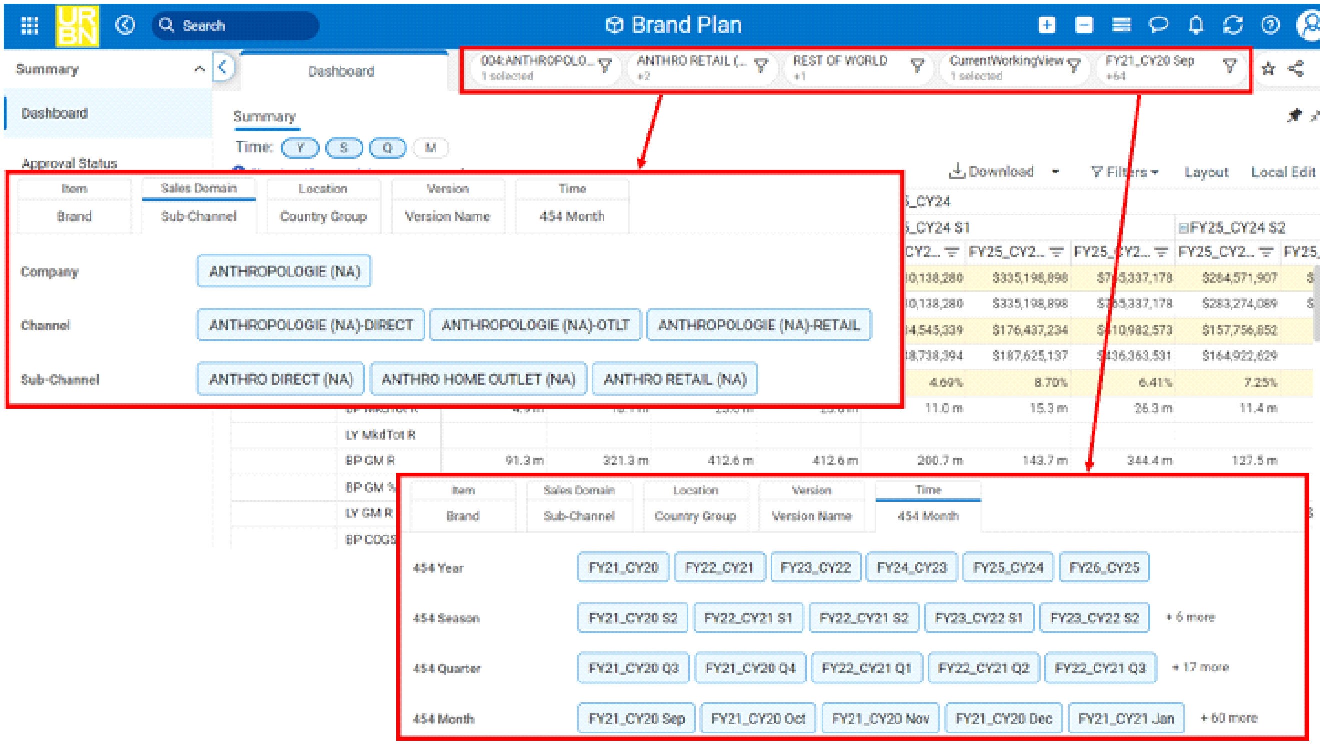


Filtering

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

Page Filters (Scope Filters)

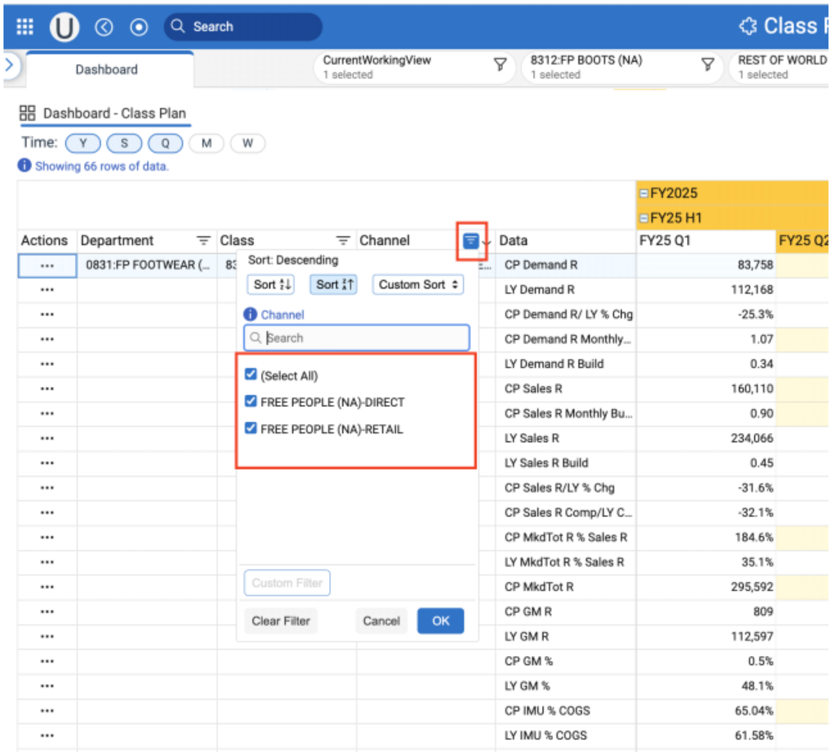
Page Filters allow you to set the parameters of the page you are viewing - this filter will apply to all Tabs/Widgets on that page and carry through to other pages as you navigate



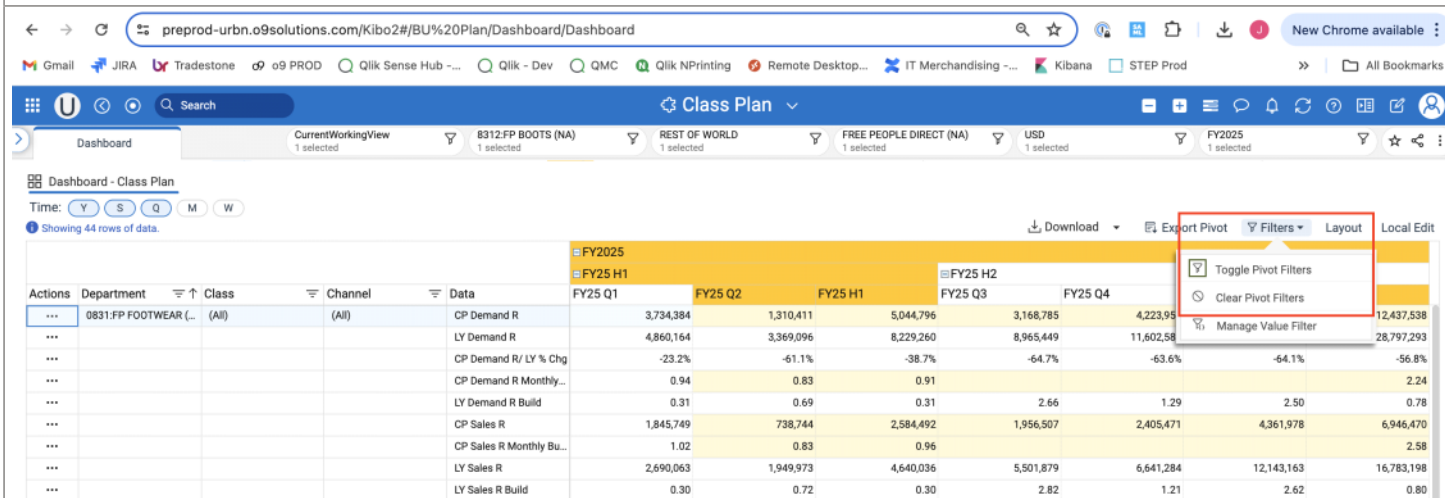
Bulk Filters

Utilize Bulk filtering to filter within a widget on the screen

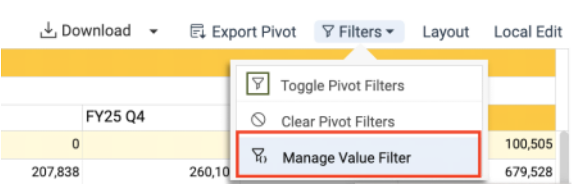
You can copy/paste lists from excel into o9 to filter by



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



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

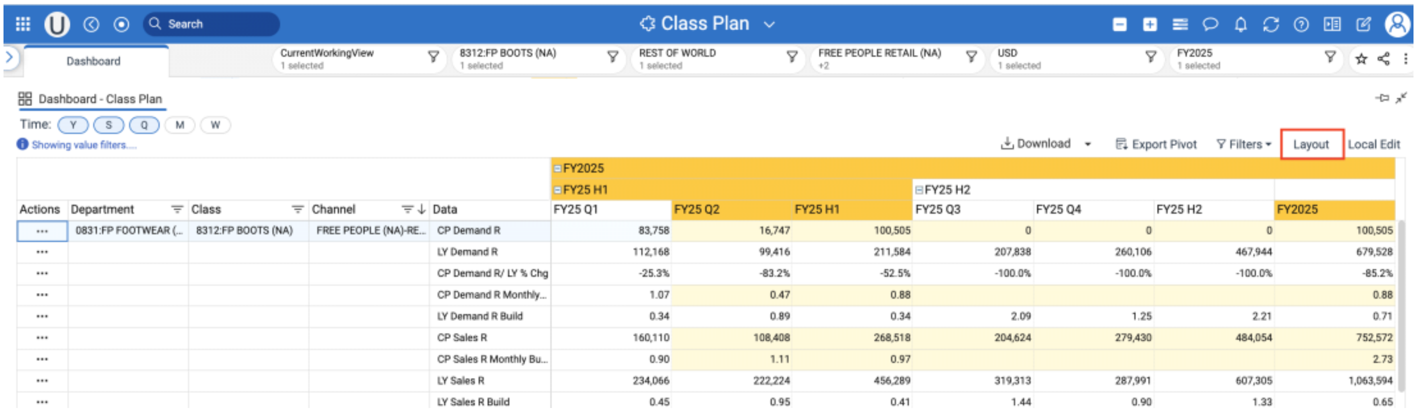


Customizing Views

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

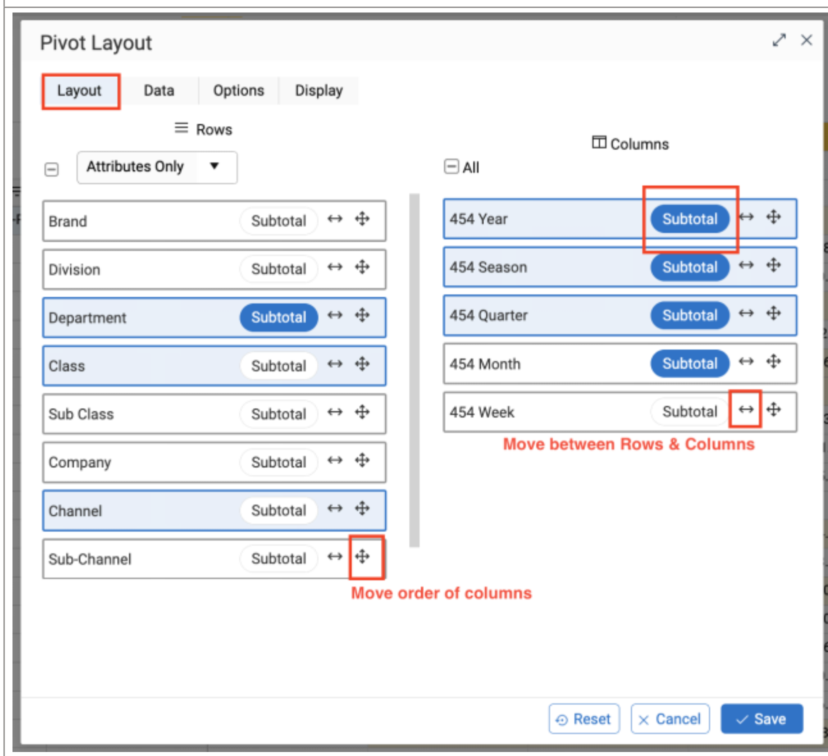
Layout Button

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)



Layout Tab - Managing Dimensions

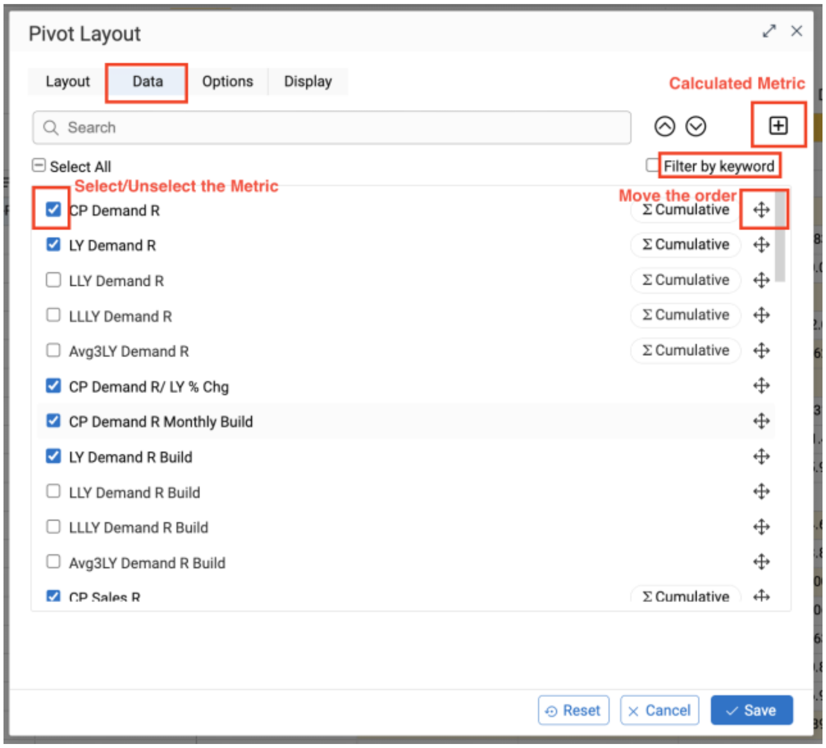
- Fields with a blue highlight are showing as displayed in the widget, the white fields are available to chose
- Select a field to display by clicking it once to turn it blue
- Move the order of the fields or move the fields between rows and columns to see data differently in the widget
- Click on the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



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.

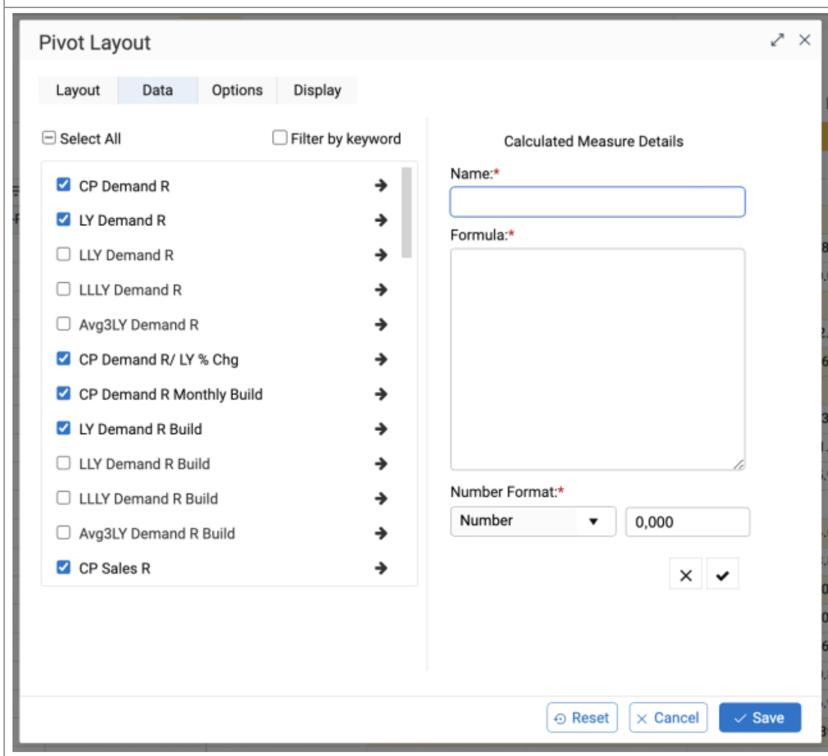
Data Tab - Managing Metrics & Calculated Metrics

- 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

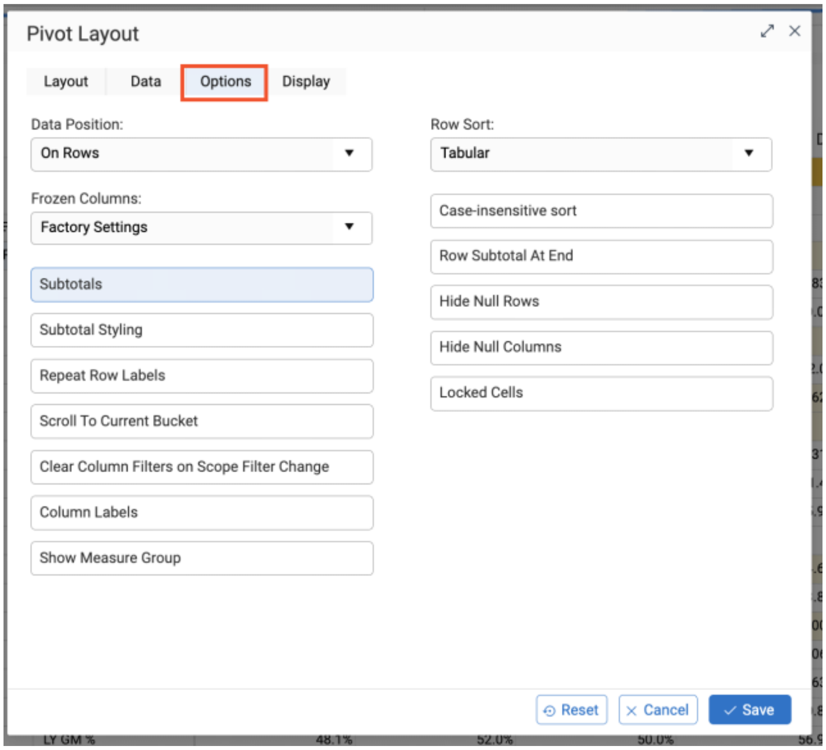


In order to prevent a divide by 0 error, anytime you are performing division it's best practice to use the SAFEDIVIDE function. This is utilized by SAFEDIVIDE(Numerator, Denominator).

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

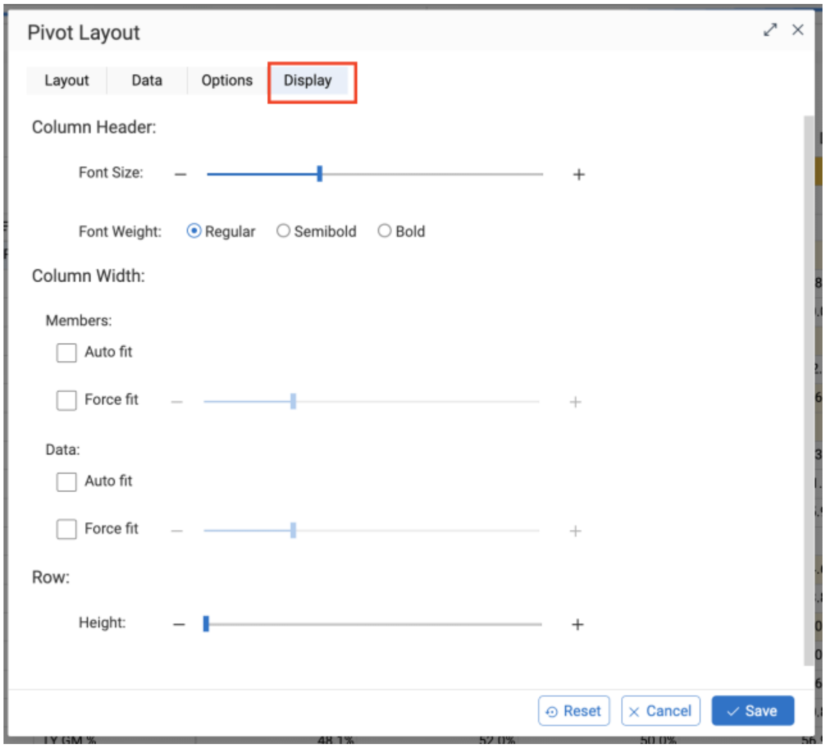
Options Tab - Managing Visuals

- 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


Pivot Layout
Layout
Data
Options
Display
Column Header:
Font Size:
Font Weight:
Regular
Semibold
Bold
Column Width:
Members:
Auto fit
Force fit
Data:
Auto fit
Force fit
Row:
Height:
Reset
Cancel
Save

Favorites & Sharing

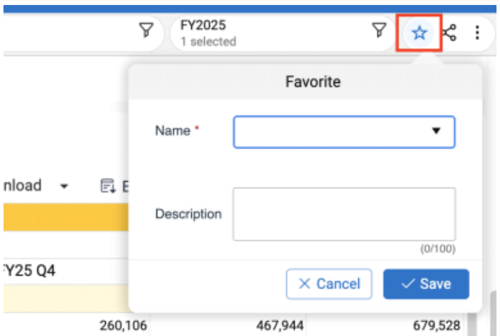
Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

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

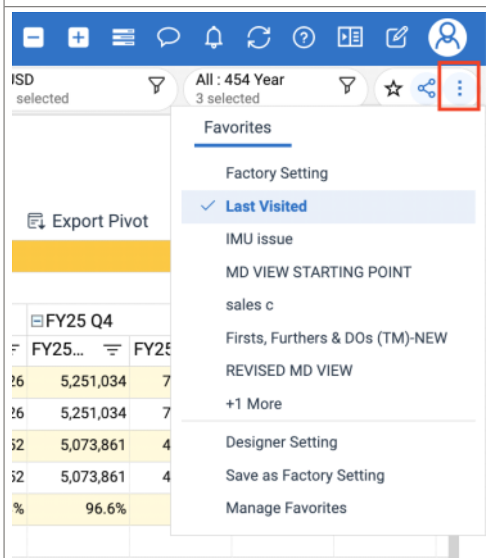
Saving a Favorite

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

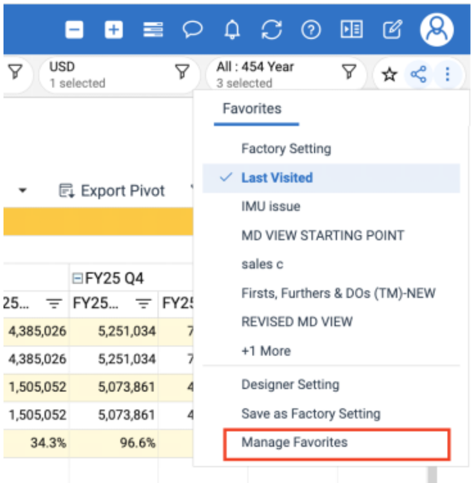


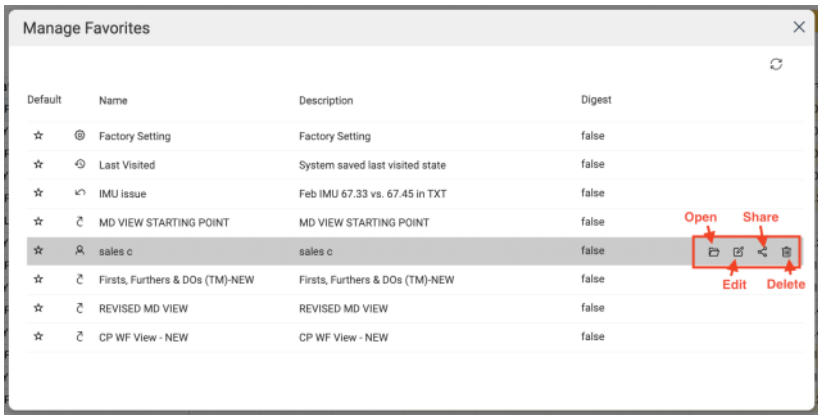
Navigating & Managing Favorites

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

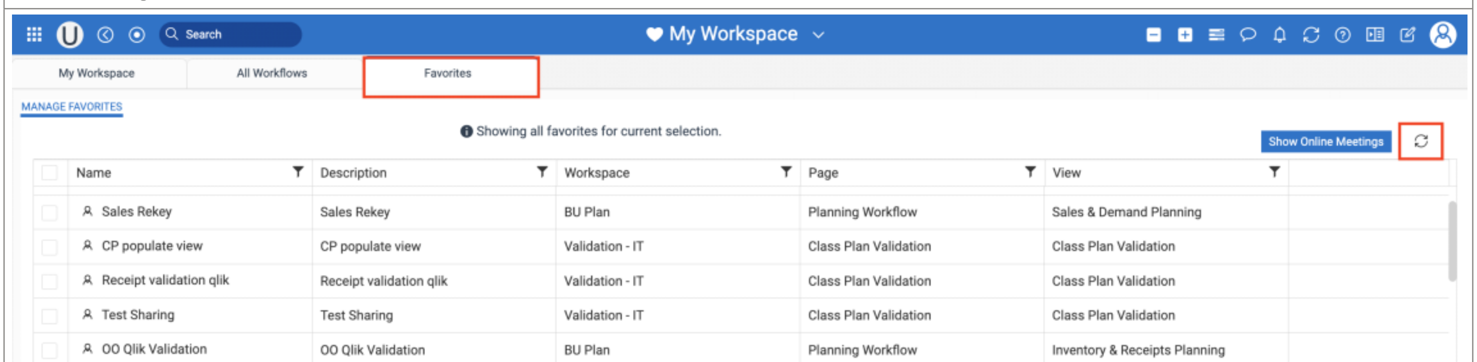


Use **Manage Favorites** to get the full list of favorites from the current page - open, edit, share or delete from this window





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

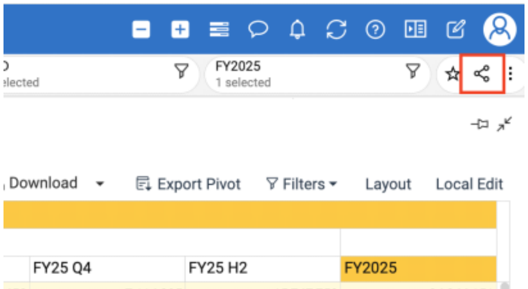


Sharing a Favorite

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



FY2025
1 selected
Download
Export Pivot
Filters
Layout
Local Edit
FY25 Q4
FY25 H2
FY2025

Test Favorite : Share with people and groups
Ra
Bharath Ranganathan
Pradheep Lakshmanaswamy
pradheep.l@o9solutions.com
piyush pradhan
piyush.pradhan@o9solutions.com
niranjan s
niranjan.s@o9solutions.com
Nakshatra Gopi
Last shared on
29-05-2024 02:58:41 PM
Cancel
Share

Collaboration

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

Collaboration

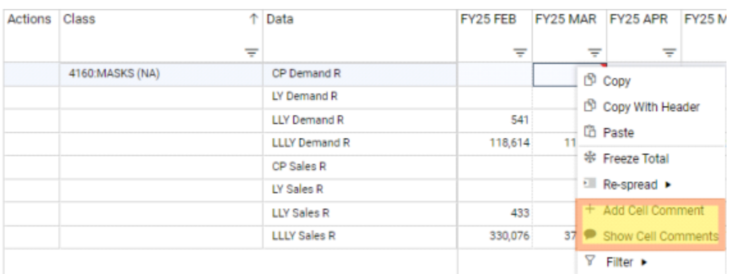
There are many tools within o9 to collaborate with your team to avoid the use of excessive emails and provide a more efficient way to communicate:

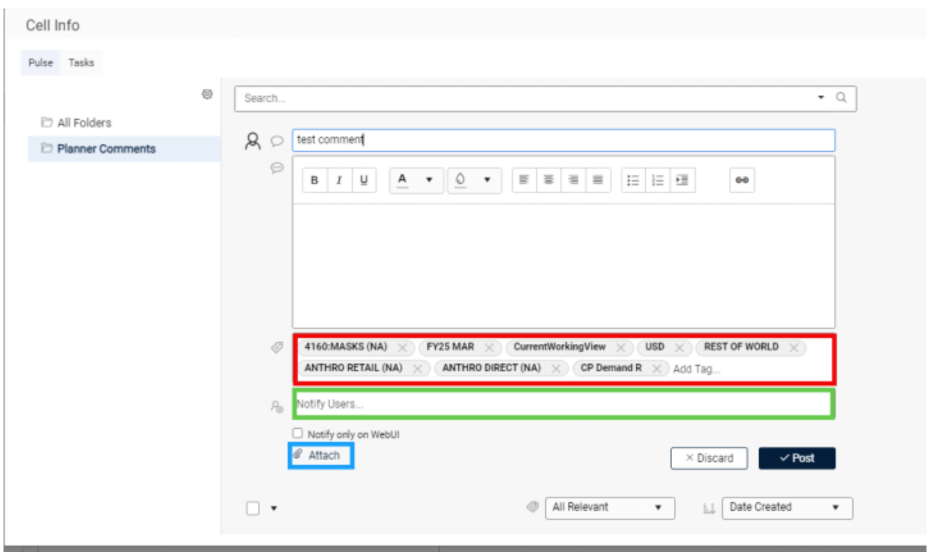
- Comments/Posts
- Tasks

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.

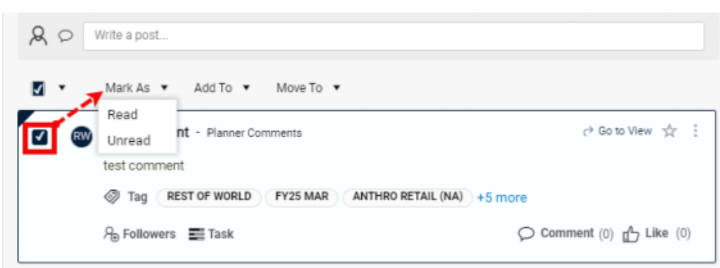




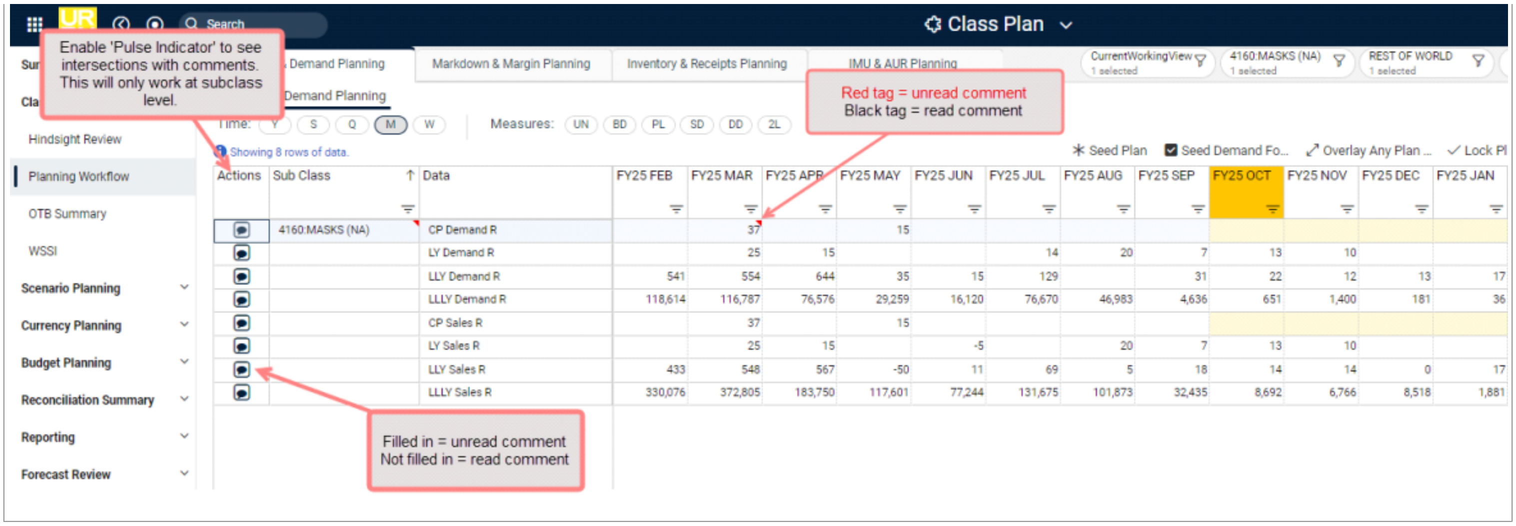
Once your comment has been posted, you will see the cell is flagged in the upper right corner which indicates the comment against it. You can click on the tag to open the comment directly.

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:



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.

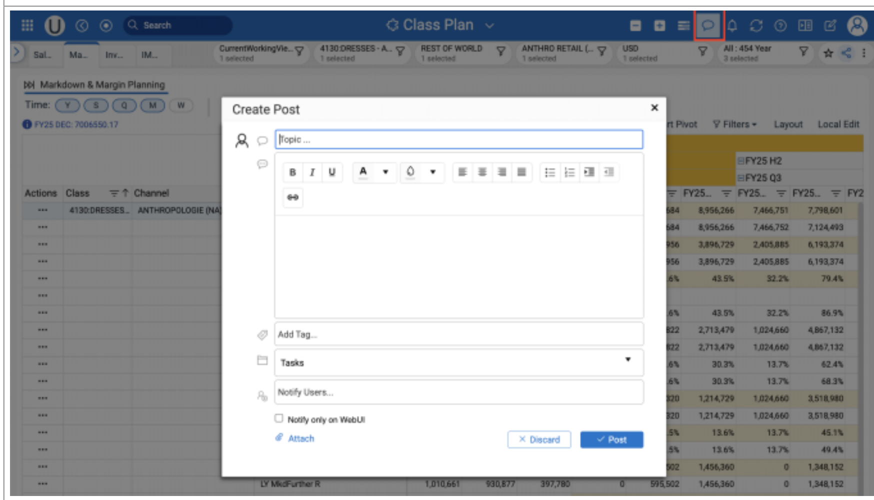


Posts

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

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

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



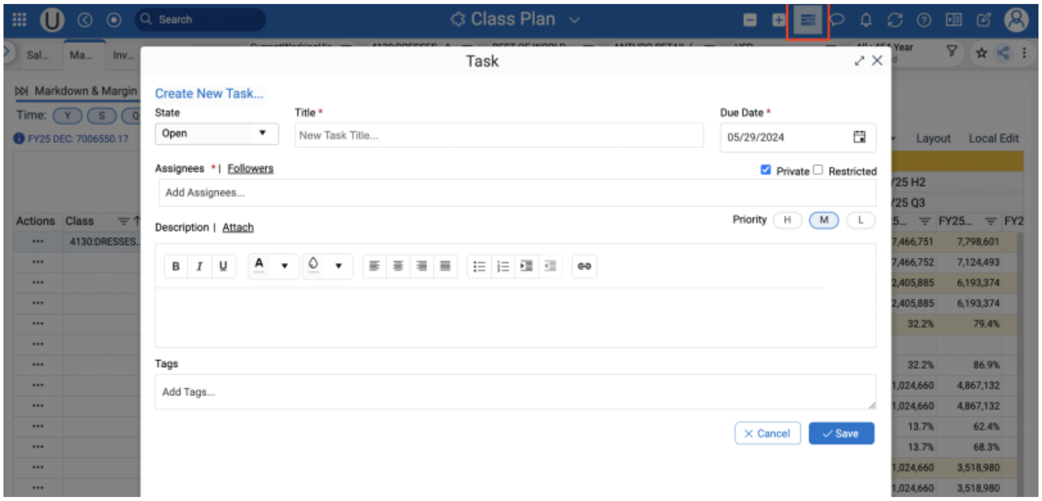
Tasks

Create & Assign tasks to particular users to track workload

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

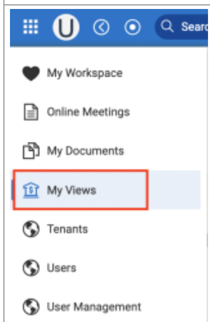
Within a task you can:

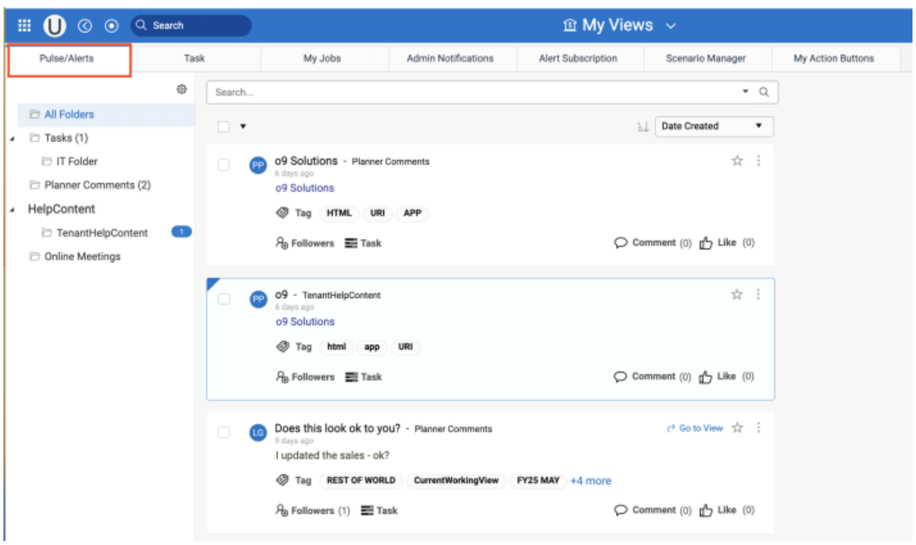
- Assign a user to complete the task
- Add Followers who need to be informed
- Attach external documents
- Select a priority – High, Medium, Low
- Set a due date



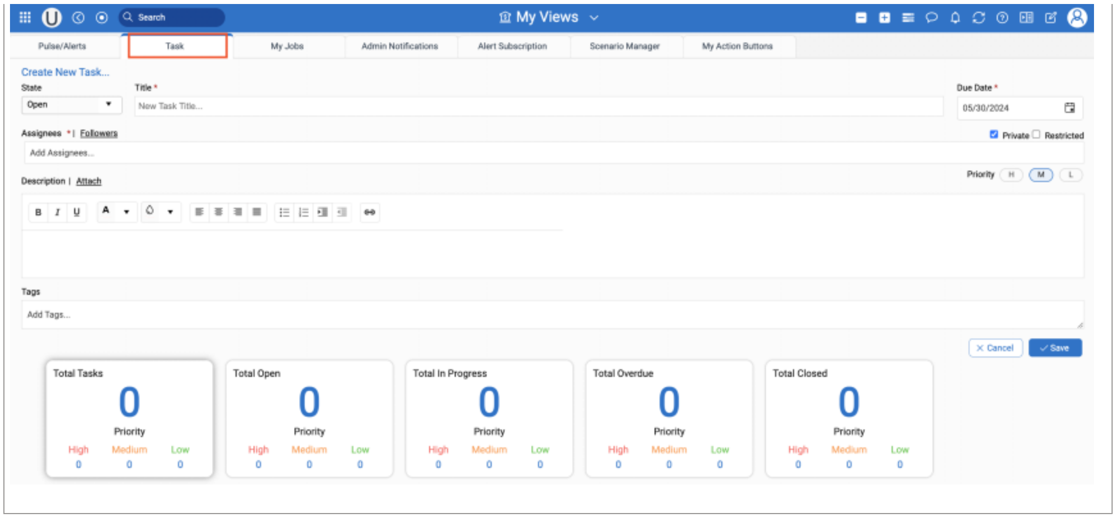
My Views

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





Use the **Task** tab to manage open and overdue tasks:


Search
My Views
Pulse/Alerts
Task
My Jobs
Admin Notifications
Alert Subscription
Scenario Manager
My Action Buttons
Create New Task...
State
Open
Title *
New Task Title...
Due Date *
05/30/2024
Assignees * | Followers
Private
Restricted
Add Assignees...
Priority H M L
Description | Attach
Tags
Add Tags...
Cancel
Save
Total Tasks
0
Priority
High Medium Low
0 0 0
Total Open
0
Priority
High Medium Low
0 0 0
Total In Progress
0
Priority
High Medium Low
0 0 0
Total Overdue
0
Priority
High Medium Low
0 0 0
Total Closed
0
Priority
High Medium Low
0 0 0

Editing & Save / Discard

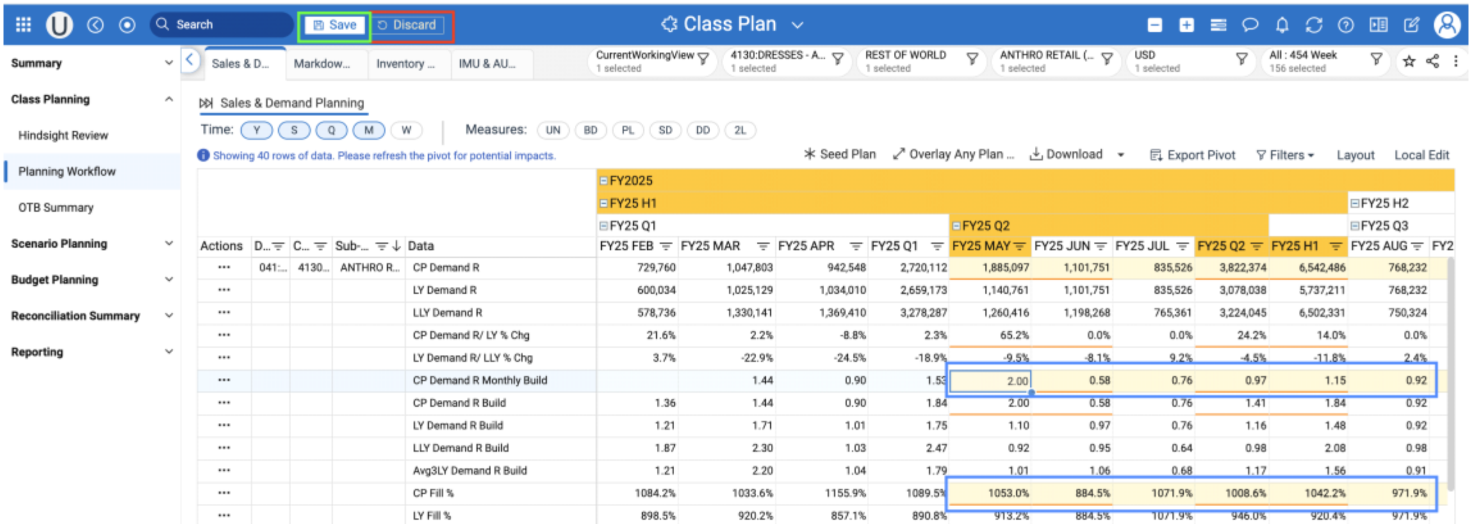
Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

Editing, Saving & Discard

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

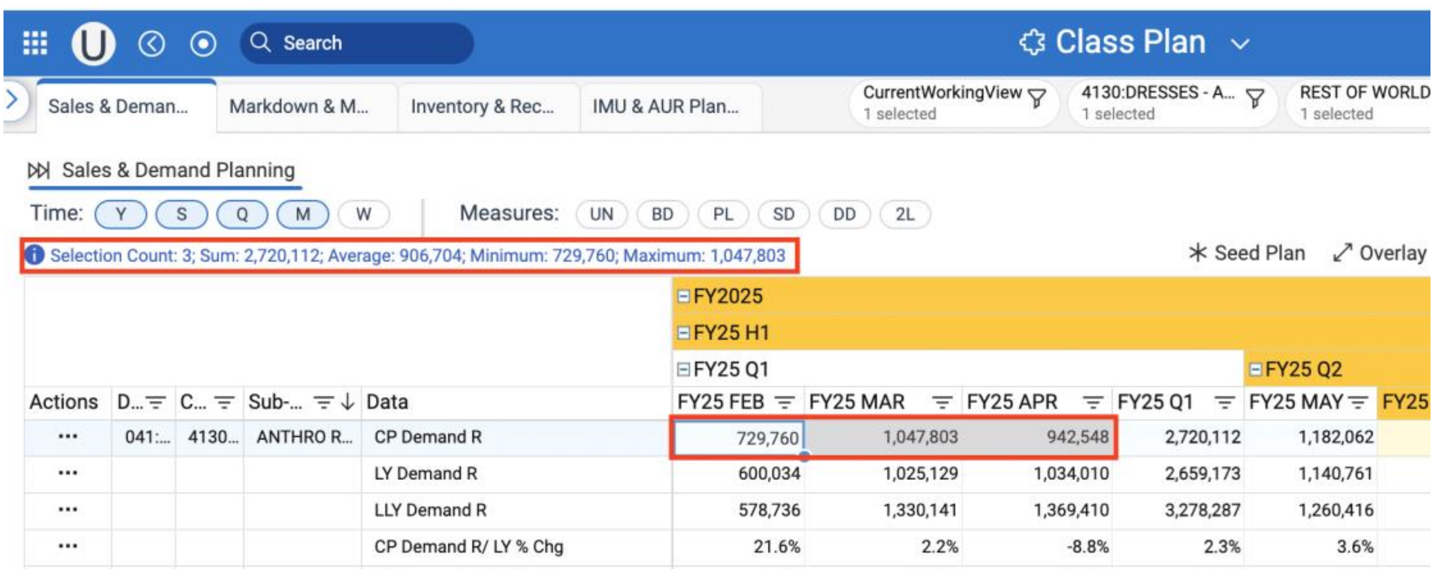
After making edits in the editable cells, **Save** can be used to save any changes that were made.

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



Shortcuts

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



Local Edit

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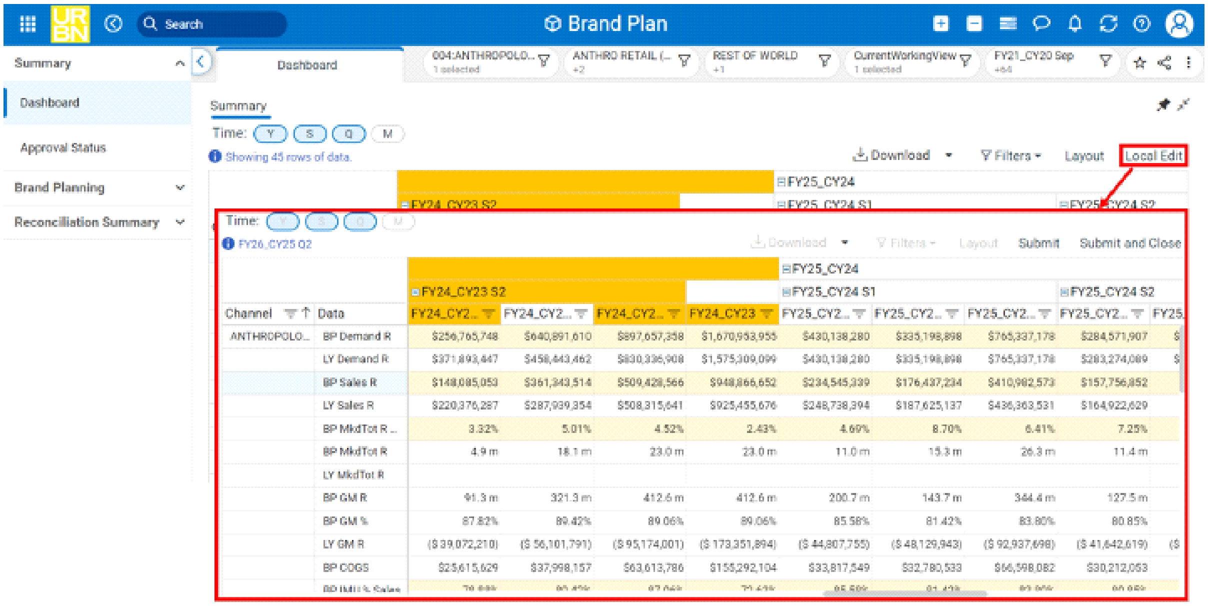
Local Edit

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.



Export to Excel

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

Export to Excel

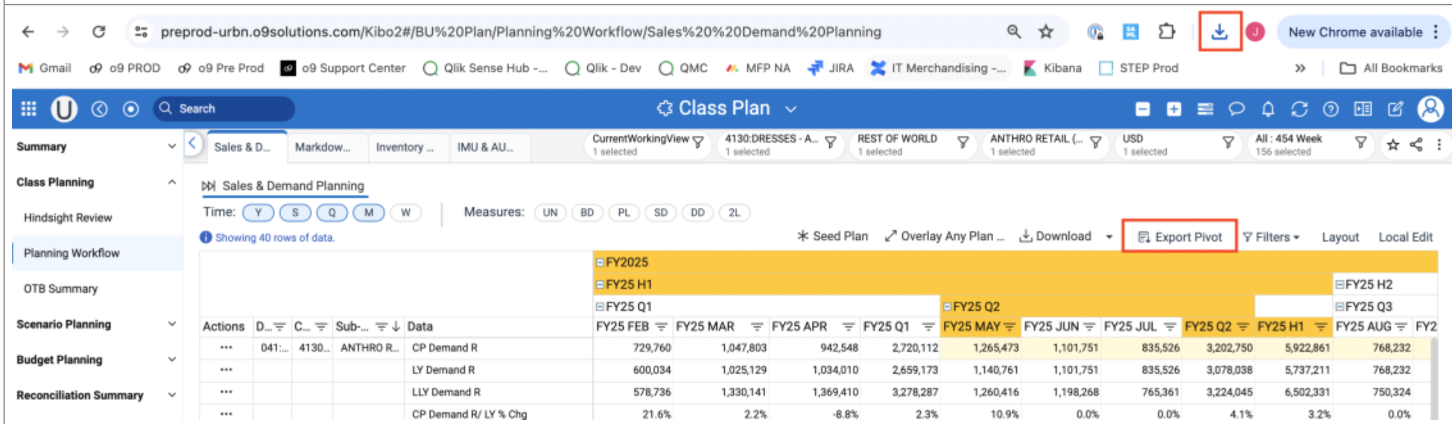
This functionality allows you to export your plan into excel as a read only version for reporting or viewing

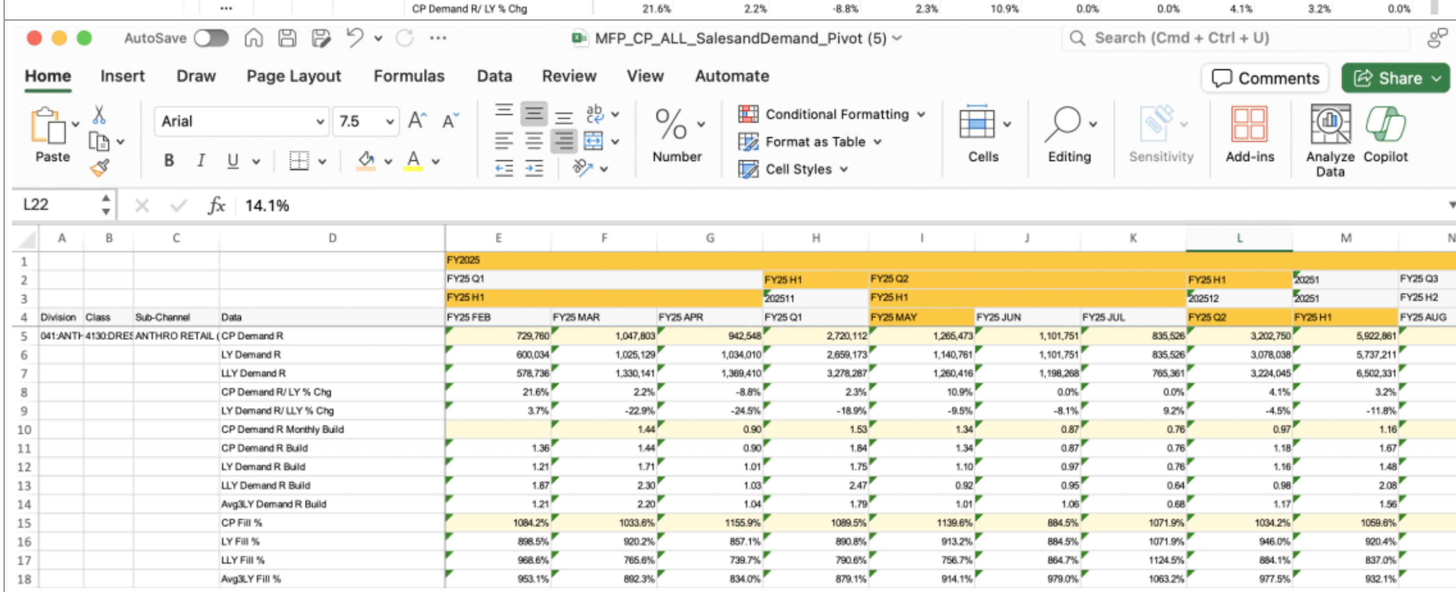
Export Pivot

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





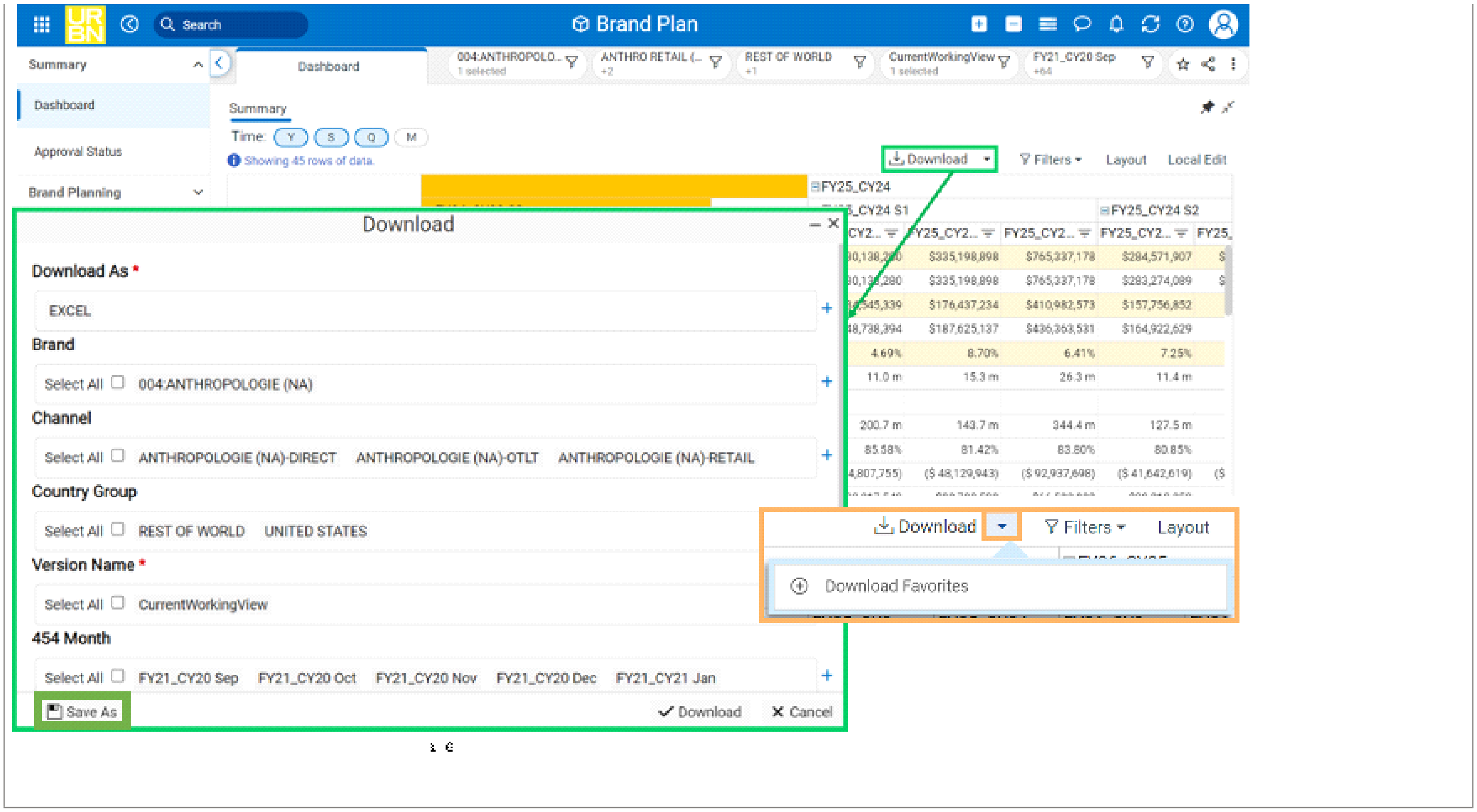
Download

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.

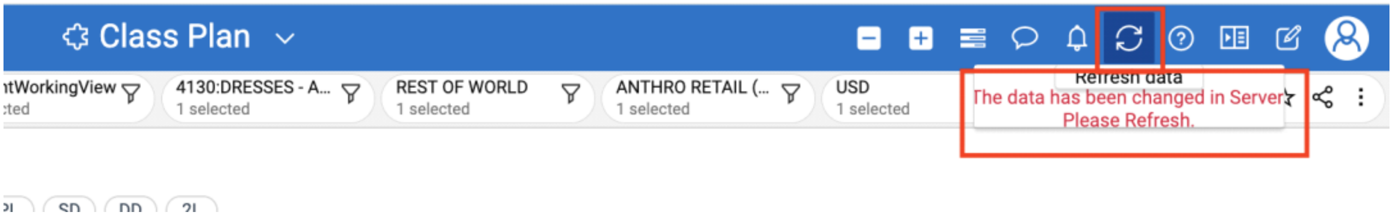
Download Favorites - Download the metrics and data that you are currently viewing using previously saved download filters


Brand Plan
Download
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 Filters Layout
Download Favorites

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

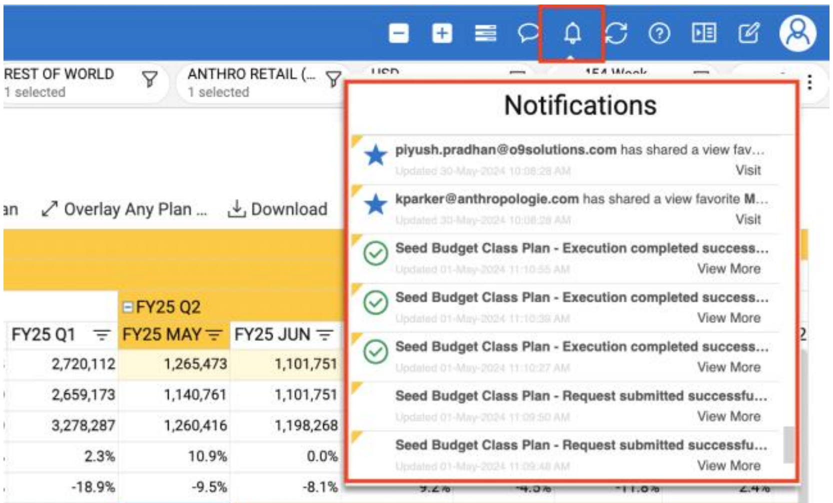
Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

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



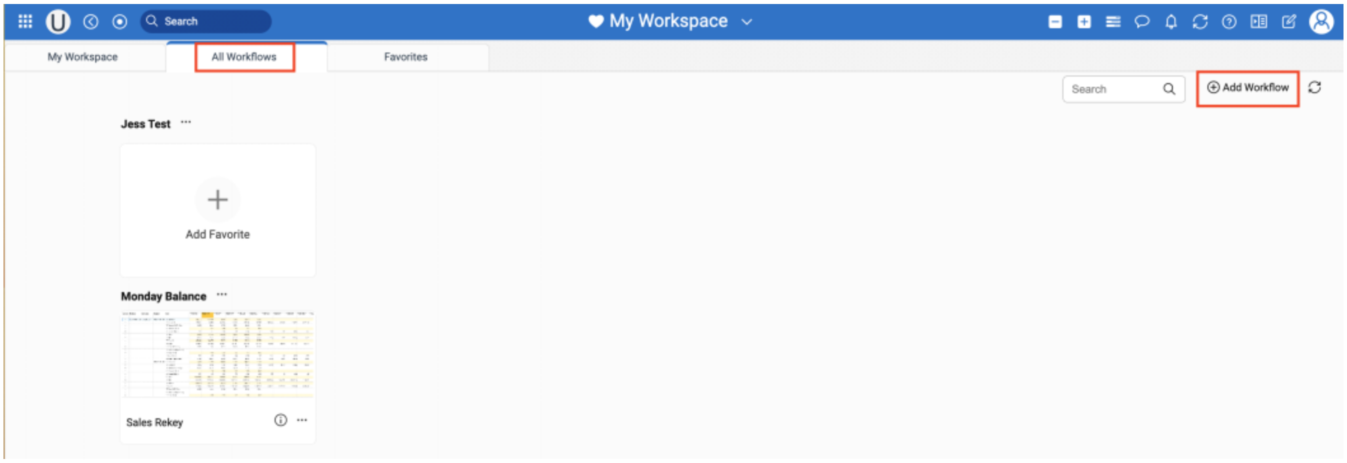
Workflows

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

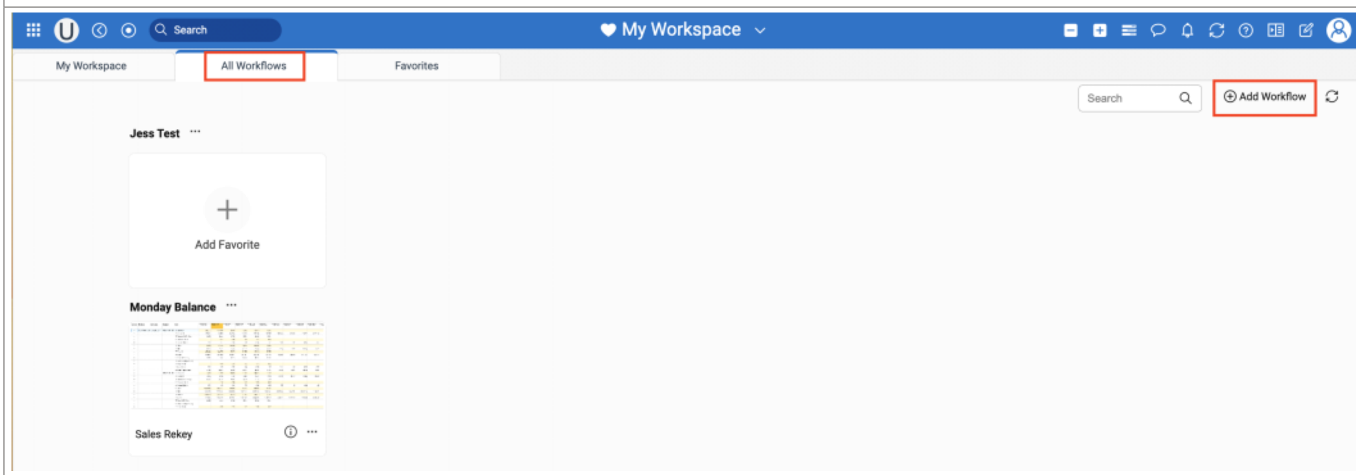
Workflows are combinations of saved favorites that allow you to move between different pages/tabs/views to complete a full planning workflow

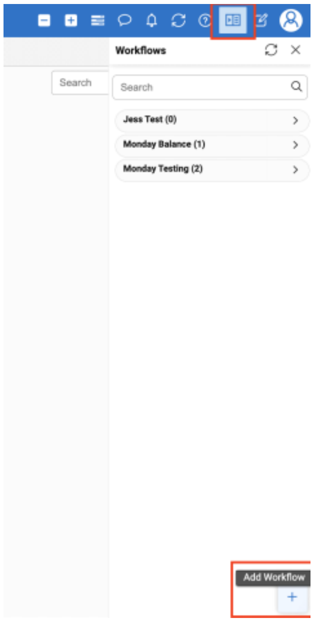


Create New Workflows

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

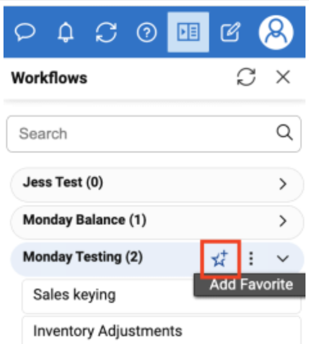
Give the workflow a name



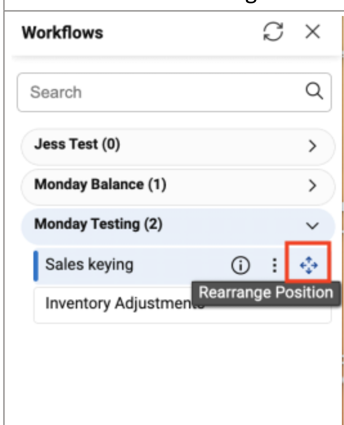


Adding/Managing Favorites

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



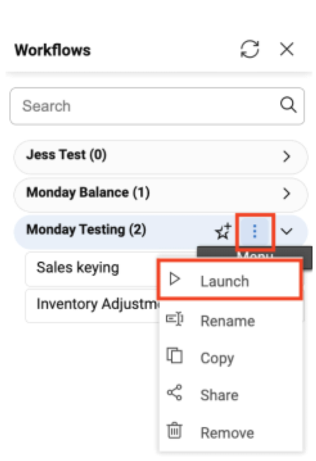
The order can be changed of the favorites by using the arrows to move a favorite up or down



Launch a Workflow

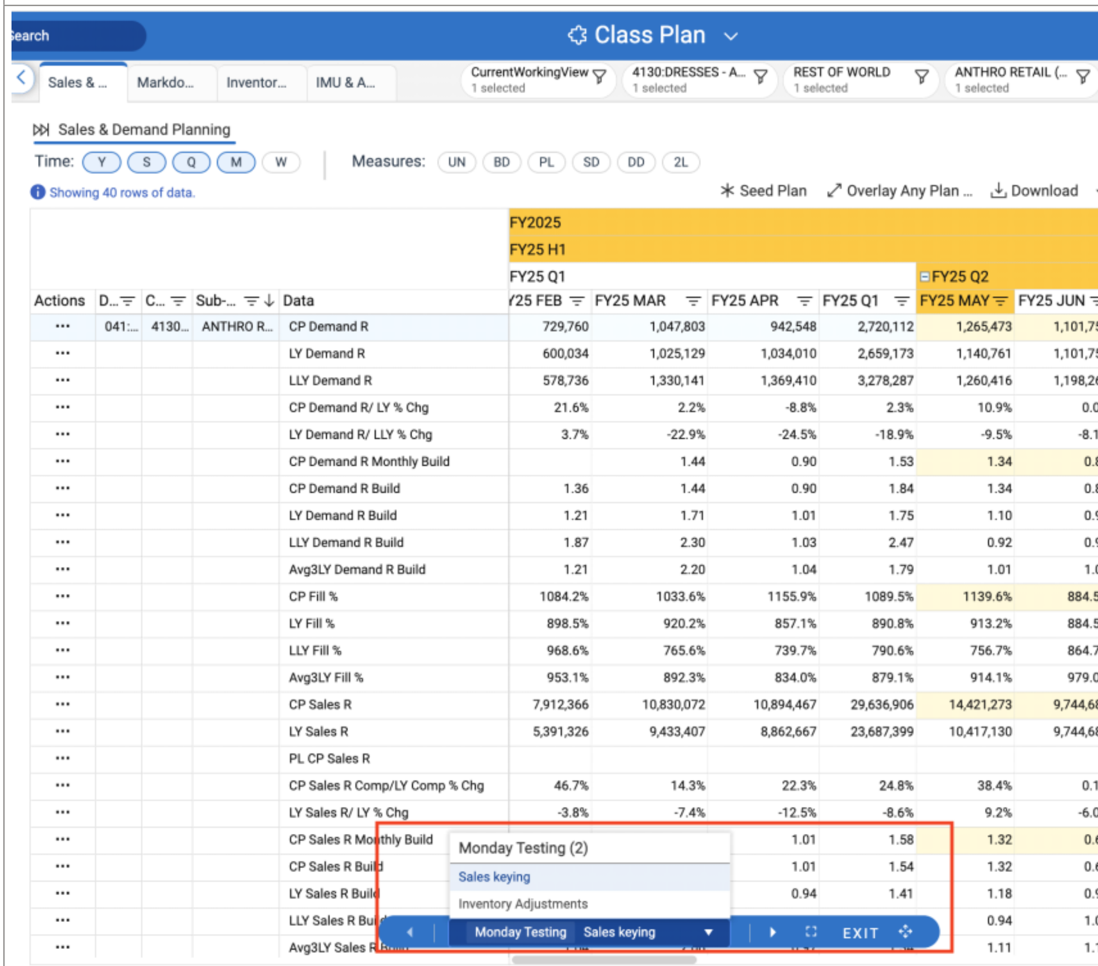
Launching a workflow will allow you to move through the different favorites using a small toolbar at the bottom as a shortcut

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



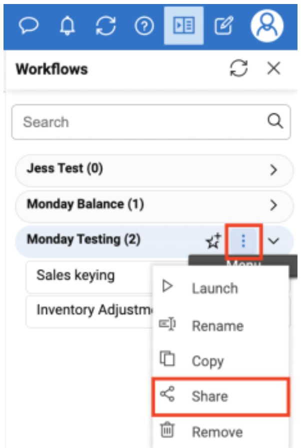
This will bring up a blue tool bar at the bottom of the screen

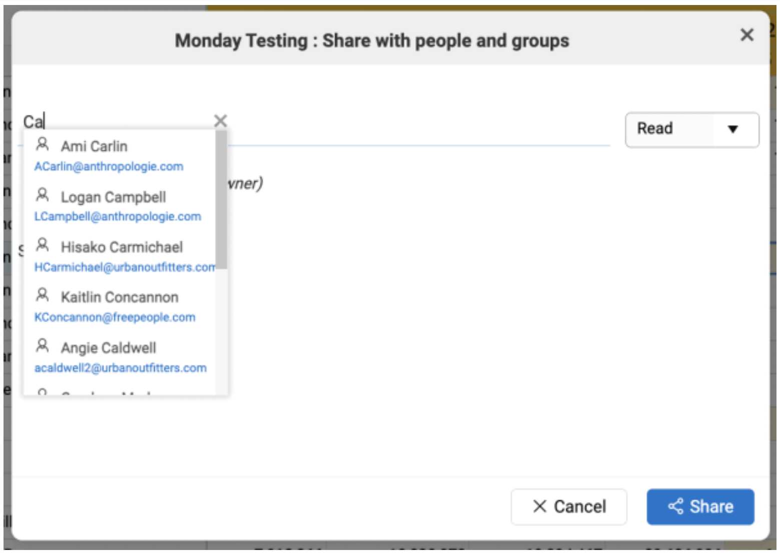
Use the Left/Right arrows to move between different favorites or the drop down to go to a specific favorite



Sharing a Workflow

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


Workflows
Search
Jess Test (0)
Monday Balance (1)
Monday Testing (2)
Sales keying
Launch
Rename
Copy
Share
Remove

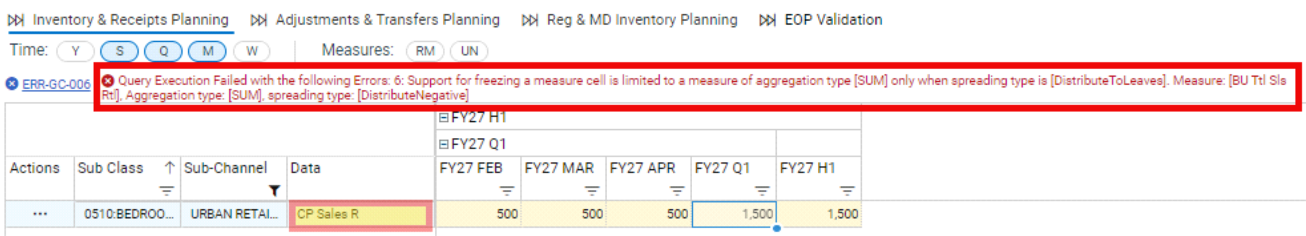

Monday Testing : Share with people and groups
Ca
Read
Ami Carlin
ACarlin@anthropologie.com
Logan Campbell
LCampbell@anthropologie.com
Hisako Carmichael
Kaitlin Concannon
KConcannon@freepeople.com
Angie Caldwell
acaldwell2@urbanoutfitters.com
Cancel
Share

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.

<table>
<tr><th>Function</th><th>Description</th></tr>
<tr><td>Freeze Total</td><td>
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.
- 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

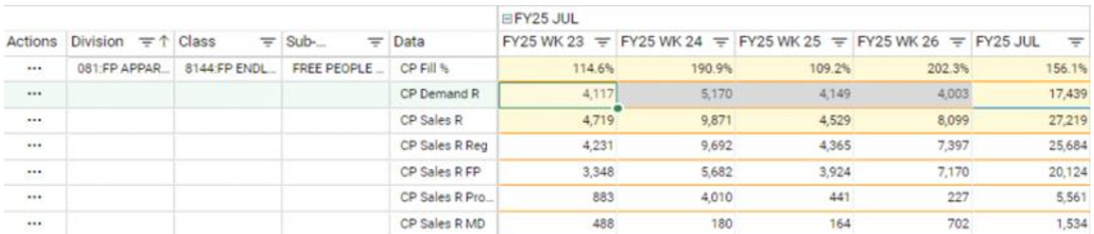
Freeze Total cannot be used for metrics that allow negative values (e.g. Sales). The error message below will display when trying to use this function on these metrics.



</td></tr>
<tr><td>Respread</td><td>
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.
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 onetime activity and will not hold until retriggered using the respread button

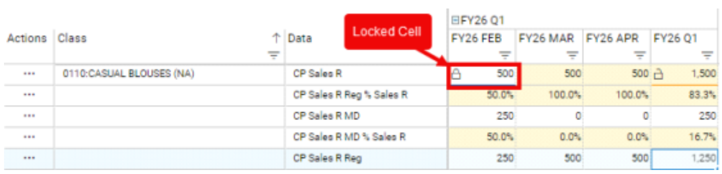
Only editable measures can be respread
The lowest level values cannot be re-spread (only higher levels can respread)
You can also collapse a member attribute and re-spread, instead of enabling subtotals

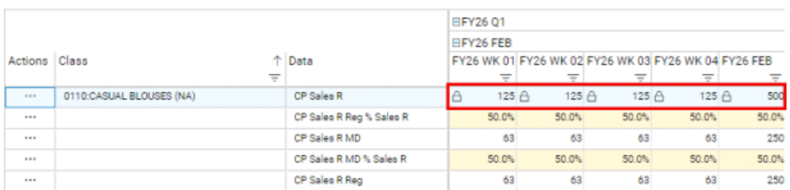
<u>Example:</u> I want to respread my CP Demand R based on the shape of my CP Sales R.
</td></tr>
</table>

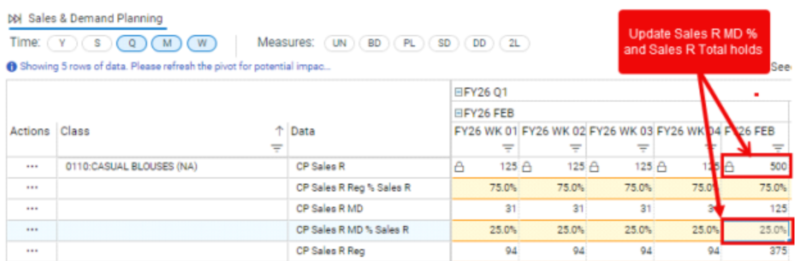


Lock Cell	Use Lock Cell function on editable cells to prevent any further modifications from being made.

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







Office Hours Recordings

Friday, February 28, 2025 10:50 AM

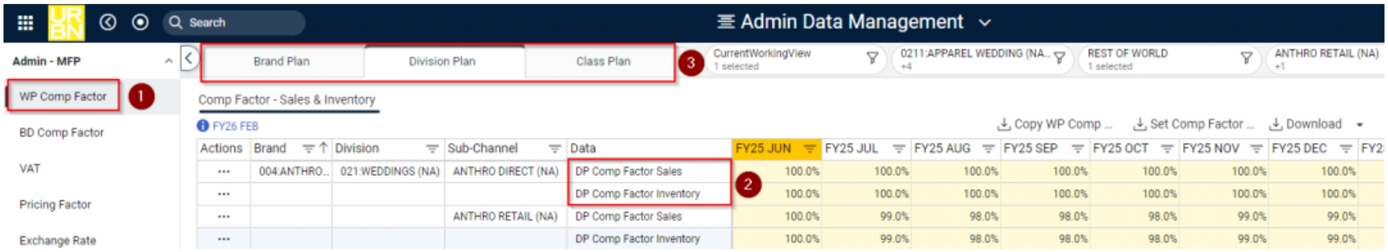
- Collaboration - Comments, Posts, and Tasks - 02/28/2025

Comp Factor

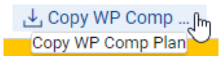
Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

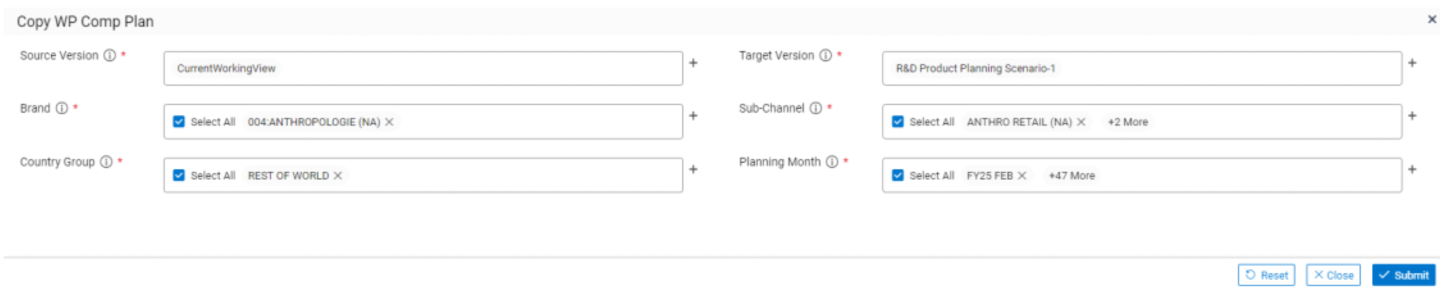
WP Comp Factor

- 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.

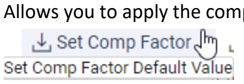


- Copy WP Comp Plan
  - Allows you to copy WP Comp Plan to a Scenario Plan



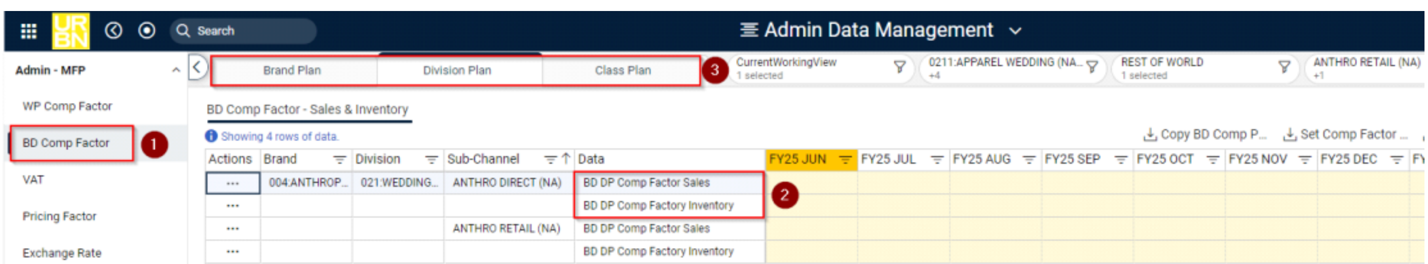


- Set Comp Factor Default Value
  - Allows you to apply the comp factor to your plan

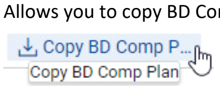


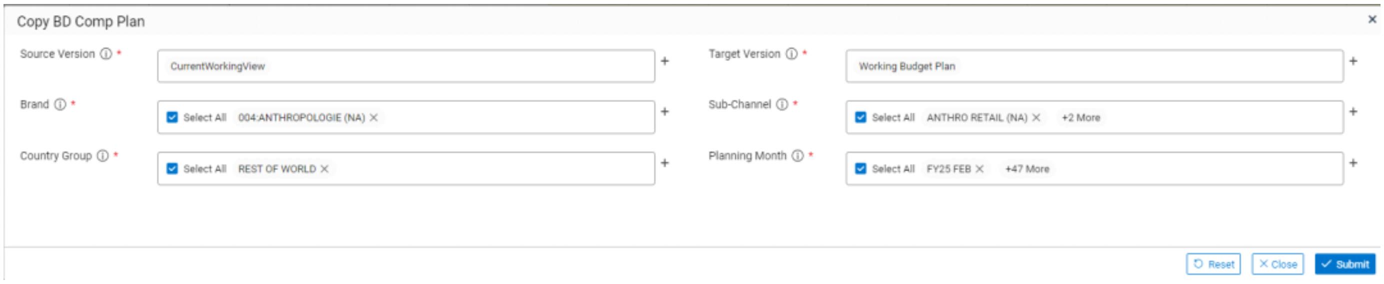
BD Comp Factor

- 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.

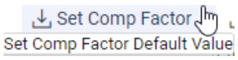


- Copy BD Comp Plan
  - Allows you to copy BD Comp Plan to the Working Budget Plan





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



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

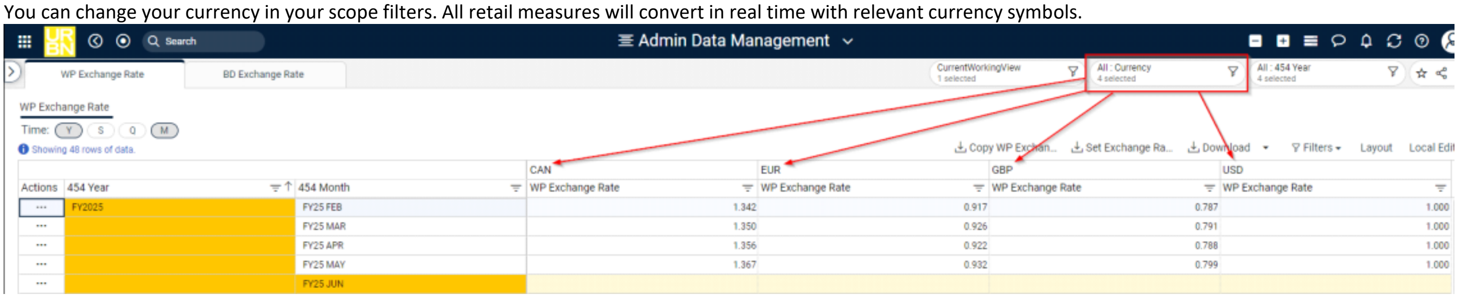
Exchange Rate

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.

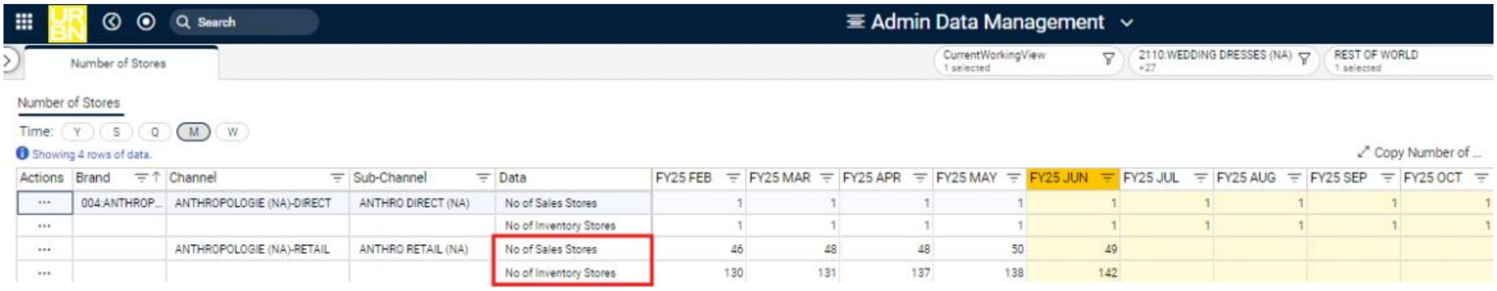


Number of Stores

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.



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.

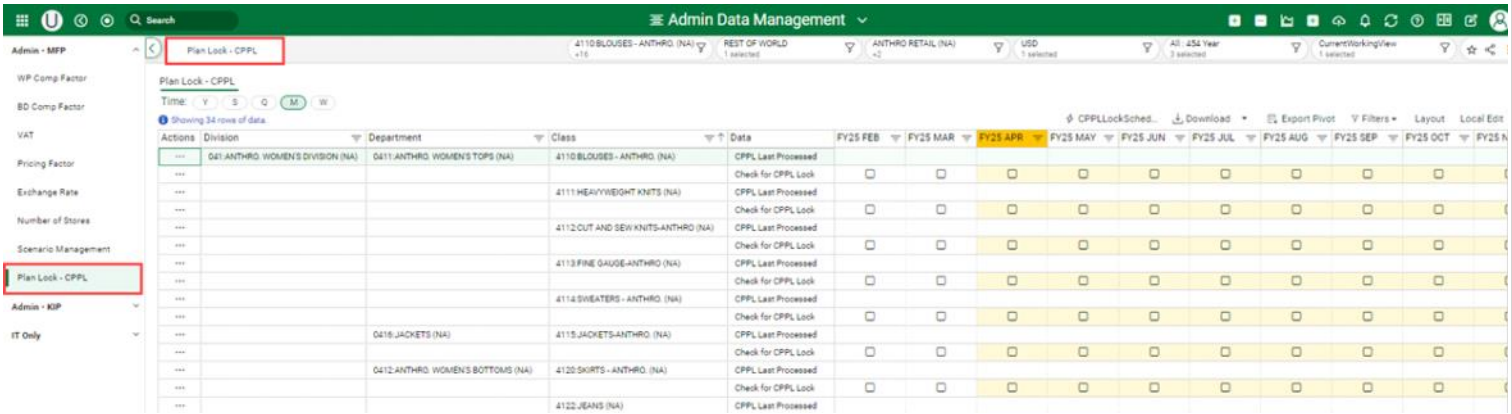
Plan Lock - CPPL

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

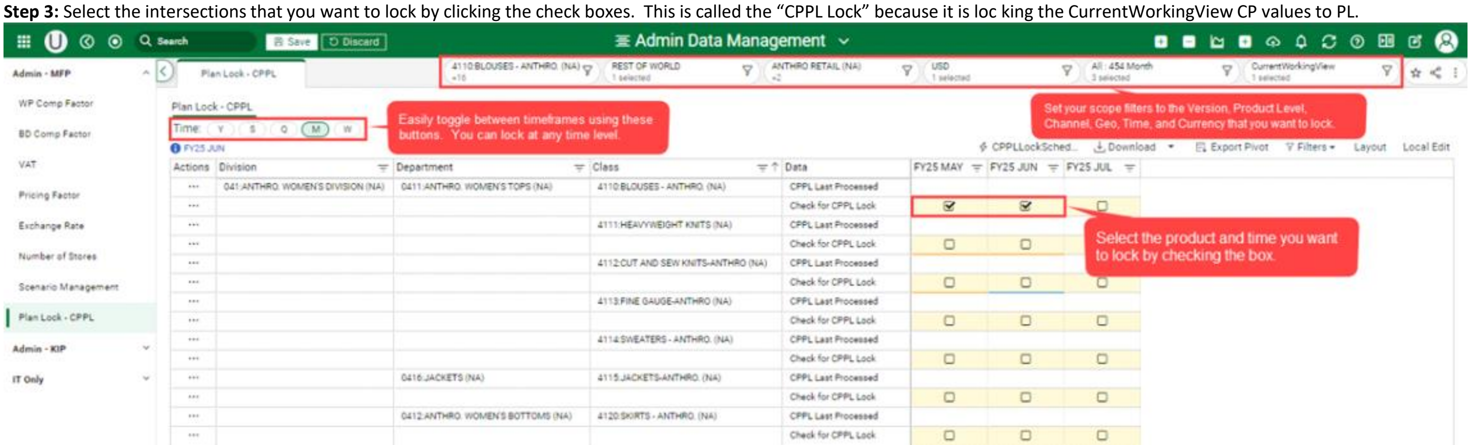
Plan Lock - CPPL

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 p rocedure 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.**

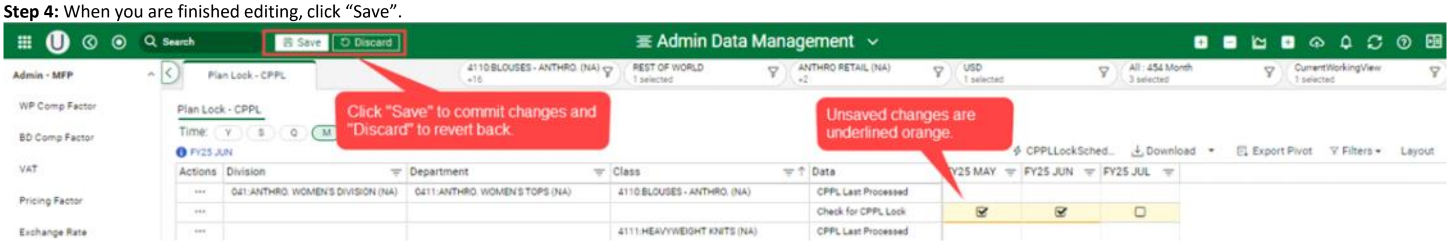


Step 3: Select the intersections that you want to lock by clicking the check boxes. This is called the "CPPL Lock" because it is loc king the CurrentWorkingView CP values to PL.

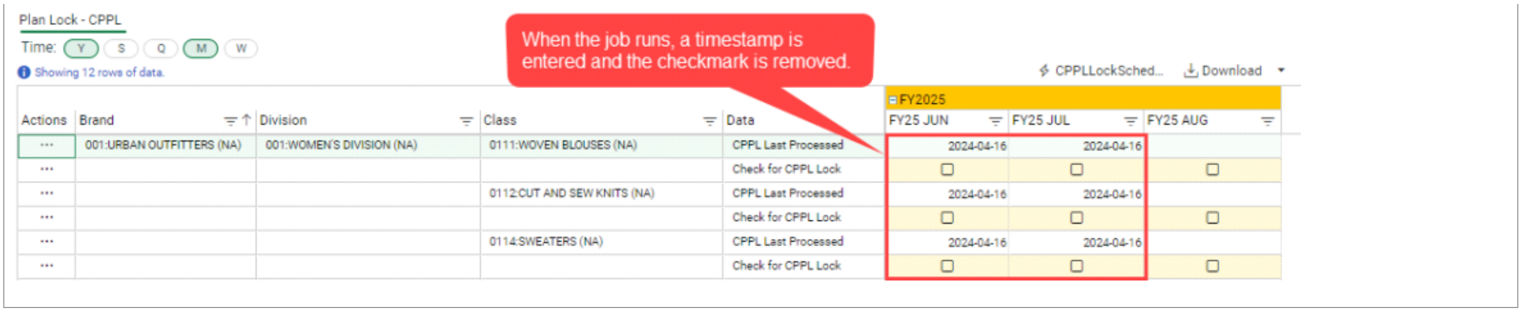


The selection can be done at different levels of the hierarchy. Update the Pivot layout to change the level at which you are selecting. Below shows it being done for the Year at Brand level:

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



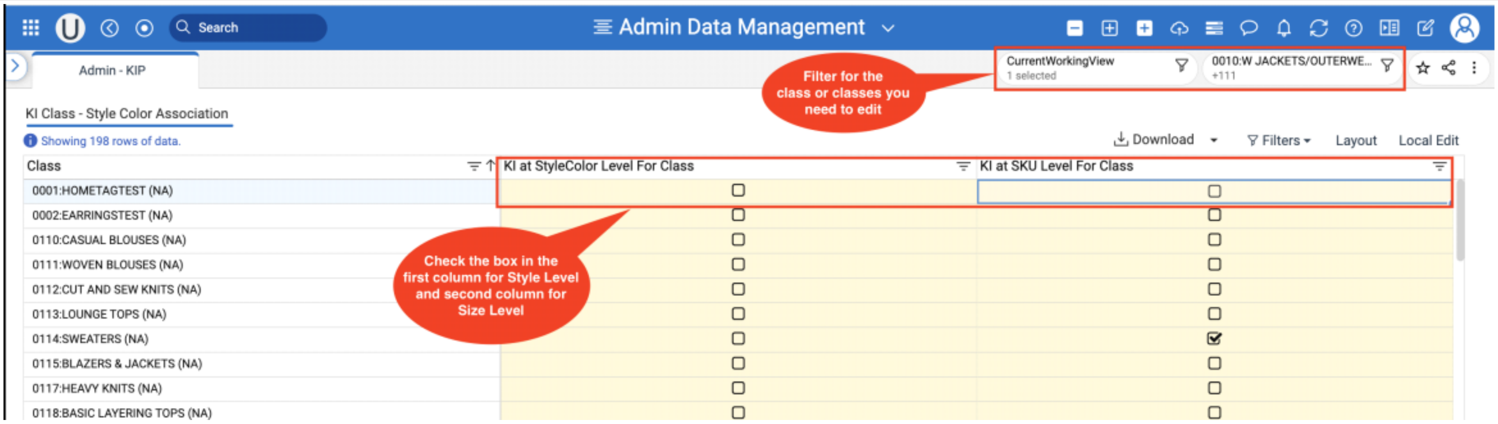
Step 5: The job will run overnight and copy CP to PL for only those intersections selected in the Admin Data Management workspace.
After the process is completed, time will be captured in CPPL Last Processed metric and the checks will be removed from the i ntersections so that they can be selected again 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
FY2025
Actions Brand Division Class Data FY25 JUN FY25 JUL FY25 AUG
001:URBAN OUTFITTERS (NA)
001:WOMEN'S DIVISION (NA)
0111:WOVEN BLOUSES (NA)
0112:CUT AND SEW KNITS (NA)
0114:SWEATERS (NA)
CPPL Last Processed
Check for CPPL Lock
2024-04-16

KIP Class Level

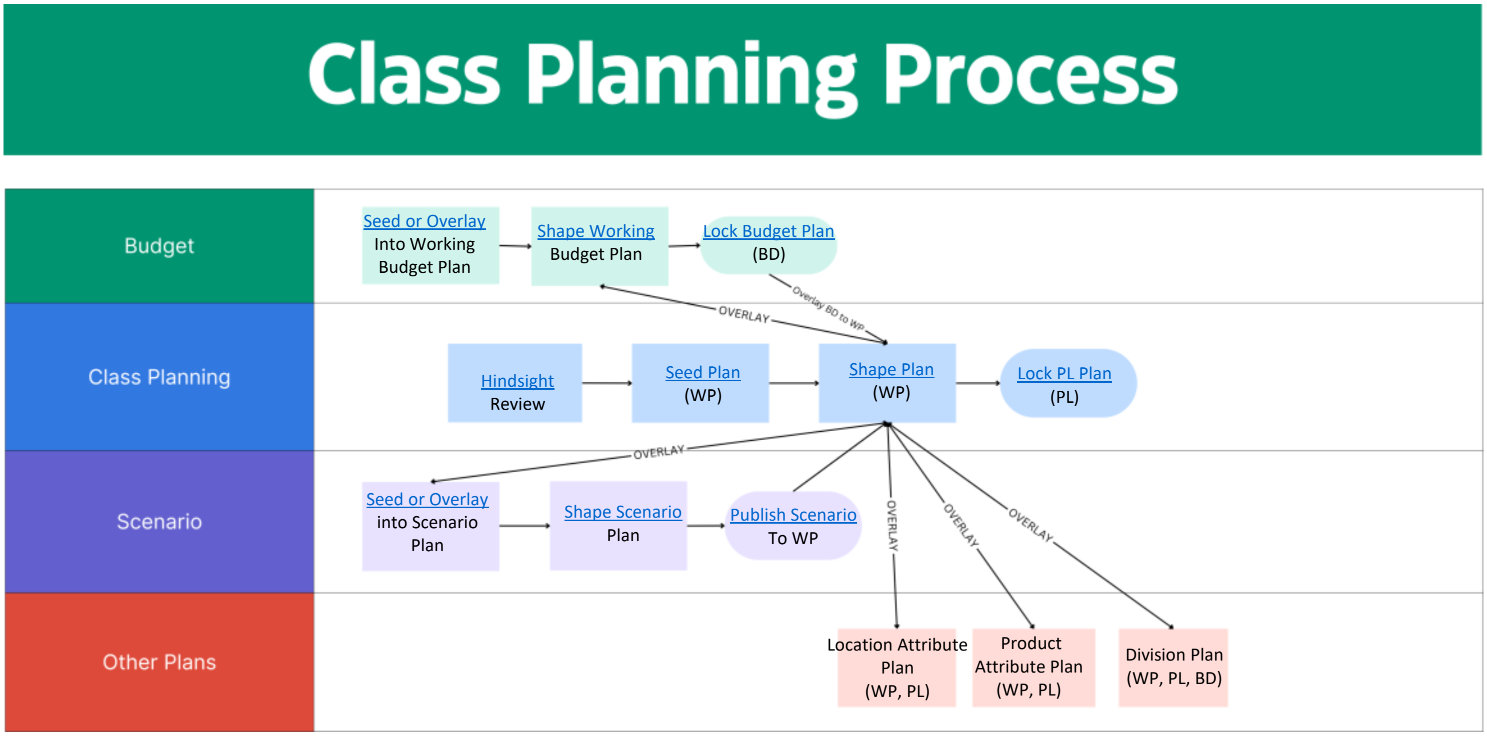
Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

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.



Class Planning Overview

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



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.

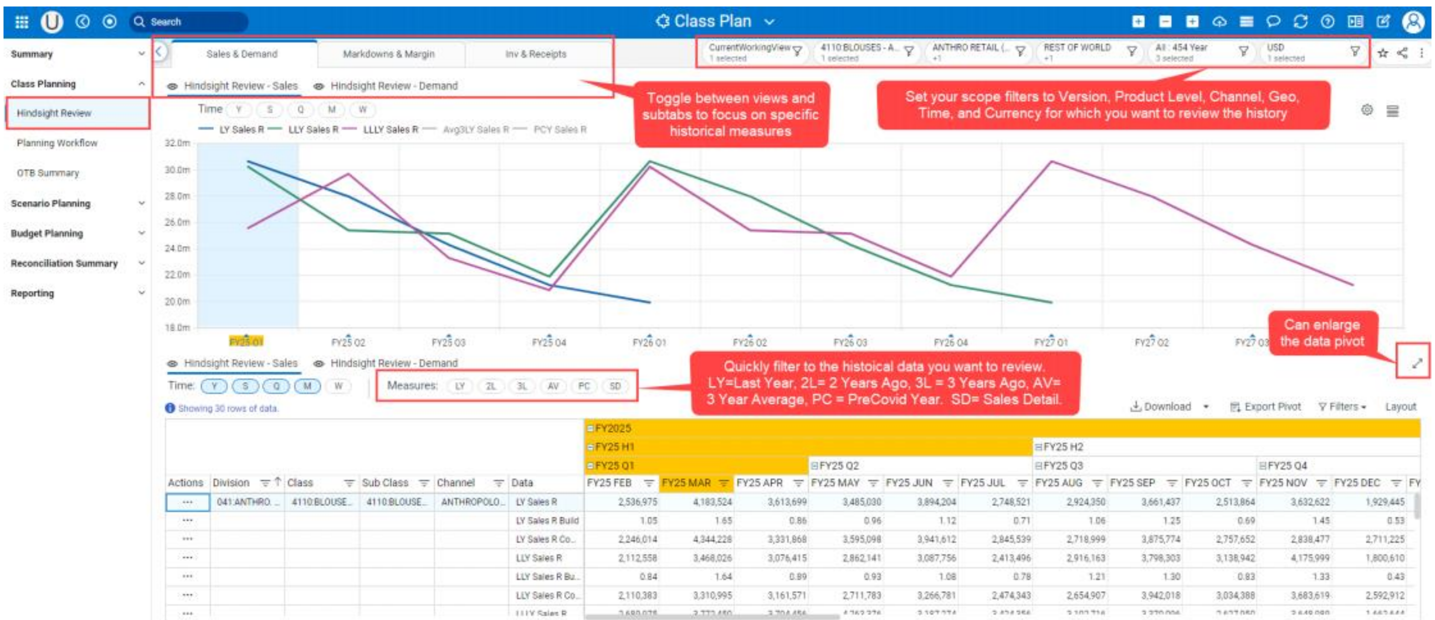
Page Group	Page	Description
Summary		
	Dashboard	This page is intended to be used to review a plan's key metrics. There is a graph to compare demand & sales plans to historical time periods and a pivot table to display high level plan metrics.
	Approval Status	This view shows the approval status and 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

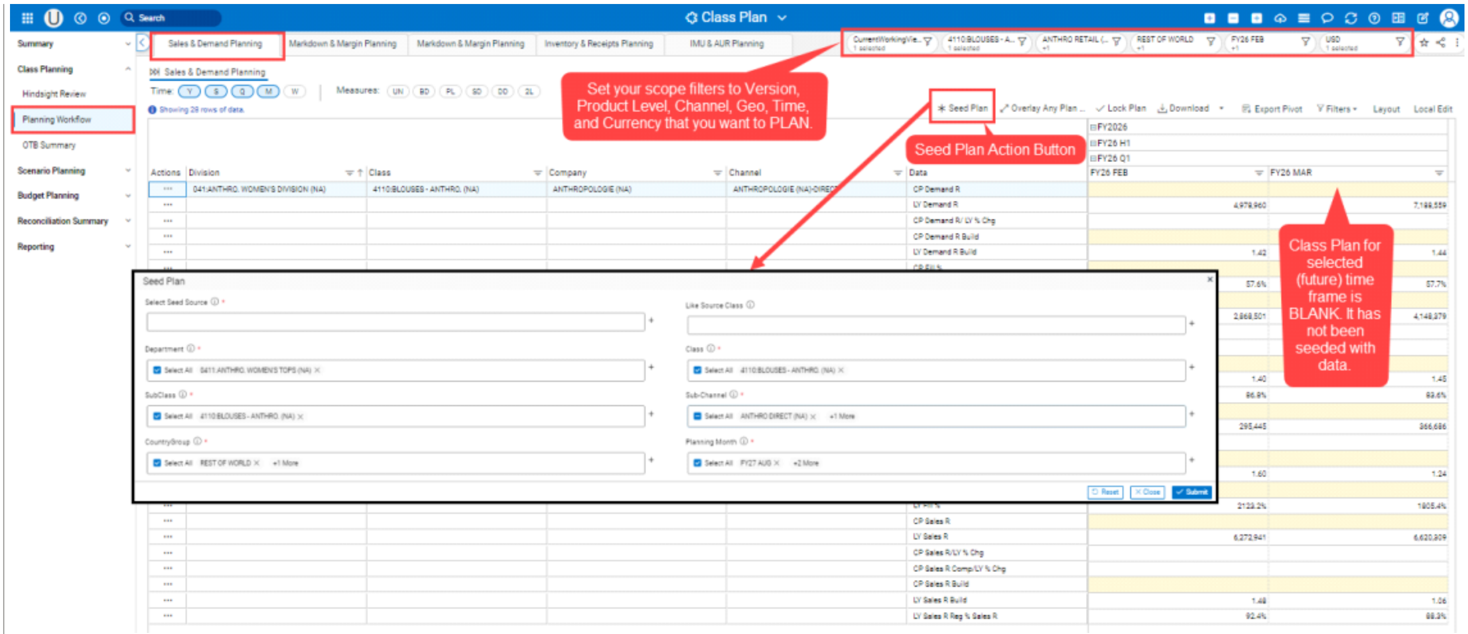
Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

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?*

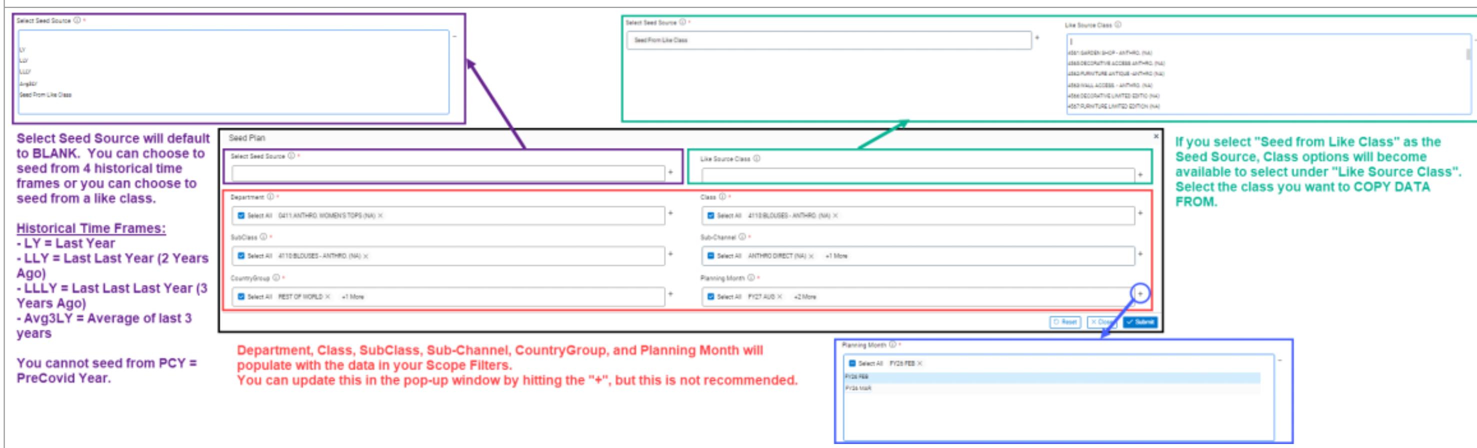


Seeding Workflow
Navigate to **Class Plan Workspace > Class Planning Page Group > Planning Workflow Page > Sales & Demand Planning View** or **Class Plan Workspace > Class Planning Page Group > OTB Summary**
Update your Scope Filters to the time frame you are going to seed with data.
Click on the "Seed Plan" Action Button.



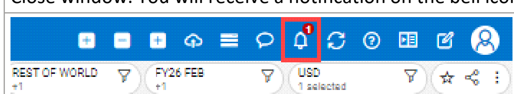
Fill out parameters in the "Seed Plan" Action Button Pop Up

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.



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.



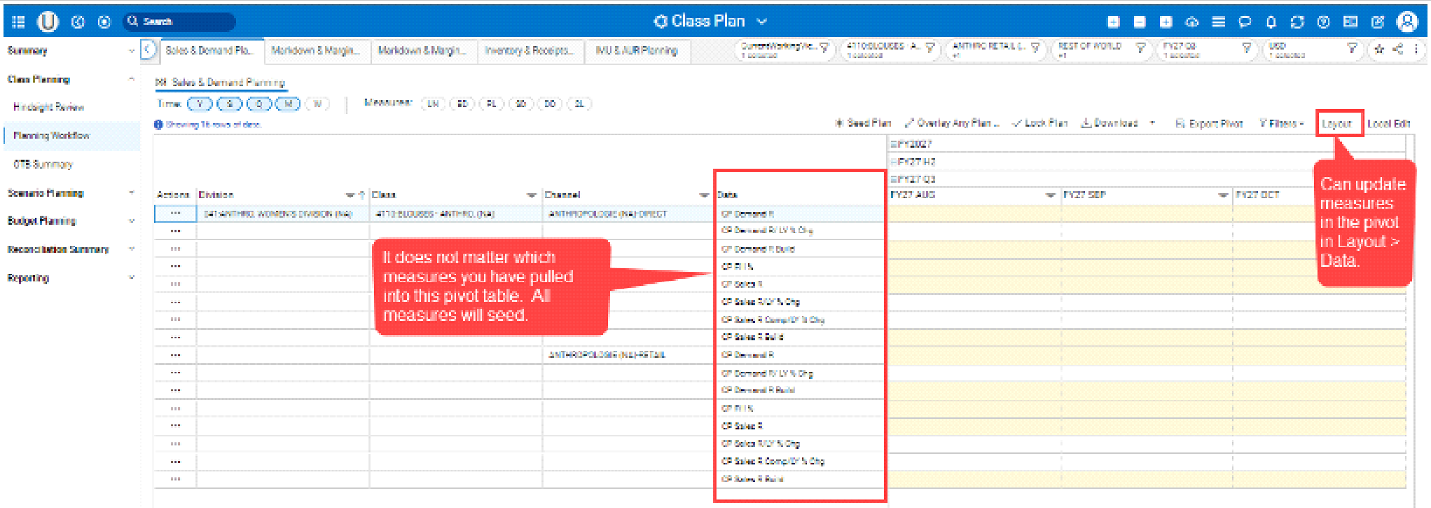
Refresh o9 to see updated data.

Review your updated 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?

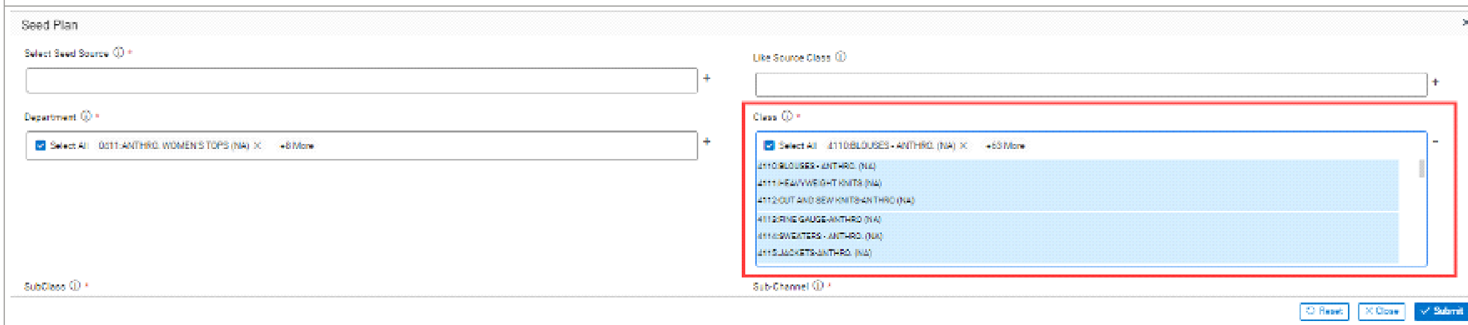
No! All seeding measures will seed no matter what measures you have pulled into the Pivot Table in *Class Plan Workspace > Class Planning Page Group > Planning Workflow Page > Sales & Demand Planning View*. The only measures that do not seed are RTV & Inv Adj.



Tips & Tricks - FAQ 2

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

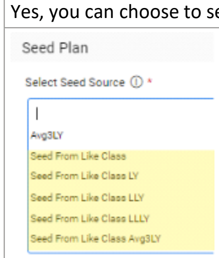
Multiple classes may be seeded at one time by selecting multiple classes in your Seed Plan Action Button Parameters.
This is true for parent/child relationships at any level of the hierarchy (e.g., all classes in a department, departments in a division, divisions in a brand, etc.)



Tips & Tricks - FAQ 3

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

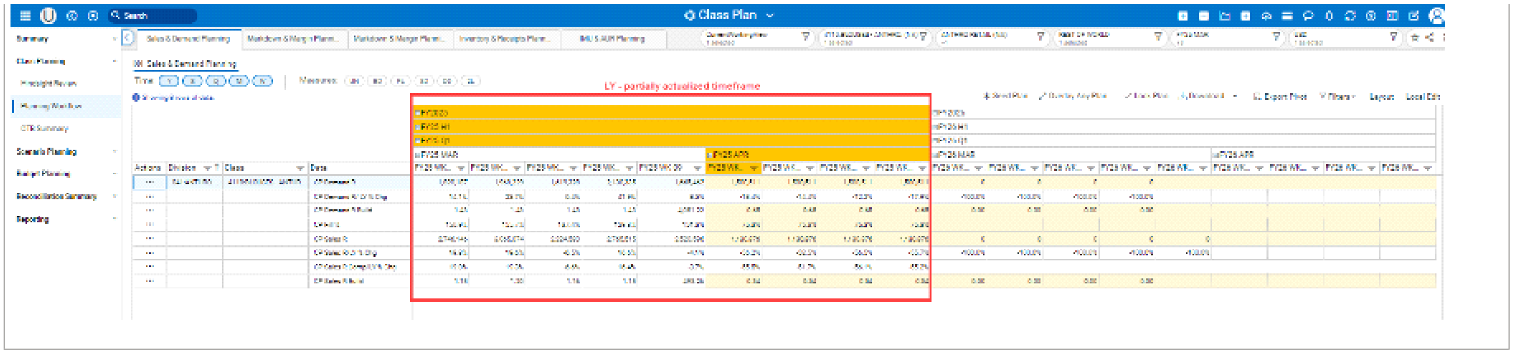
Yes, you can choose to seed from LY/LLY/LLLY/AVG3LY of a Like Class in the Seed Plan action button.



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 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 to 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
		CP Sales AUS Reg	82.19
		CP Sales AUS FP	83.08
		CP Sales AUS Promo	75.00
		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

Not Plannable

Plannable

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%
		CP Sales R Promo	1,800
		CP Sales R Promo % Sales R Reg	10.0%

Plannable

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	16,000,000
	CP Avg Inv R	18,578,774	14,078,524	10,328,274	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

1. Fill % always holds
2. 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 ar e not editable or plannable. They copy from the related sales measure.
3. 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 % De mand R and CP Demand R Promo % Demand R (% to TOTAL Demand) are not plannable or editable. They are calculated and visible.
4. 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 % t o 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%

Not editable

% to Demand is not editable. Measures copy from related sales measures.

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

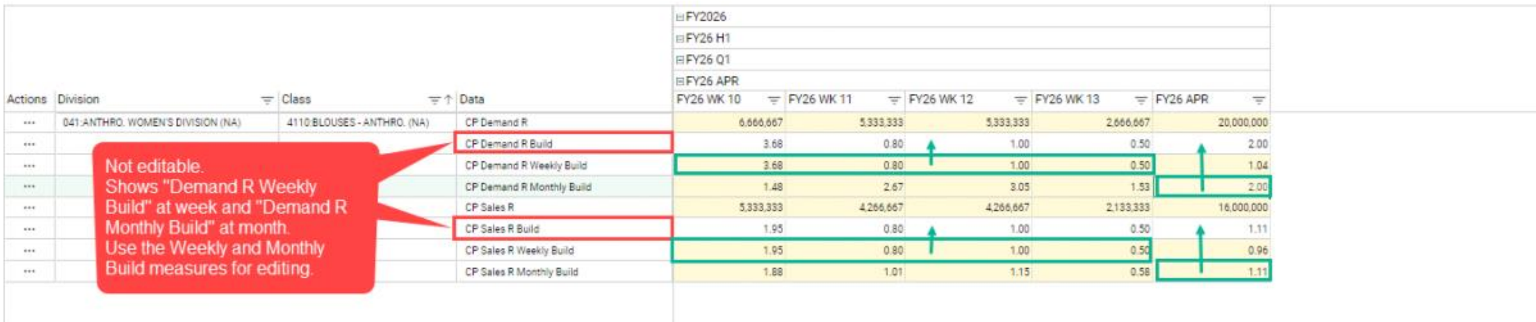
Build is a measure of growth from one time period to the next.

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	FY26 WK 10	FY26 WK 11	FY26 WK 12	FY26 WK 13	FY26 APR
				FY2026				
				FY26 H1				
				FY26 Q1				
				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

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:

SALES R COMP = SALES * SALES COMP FACTOR

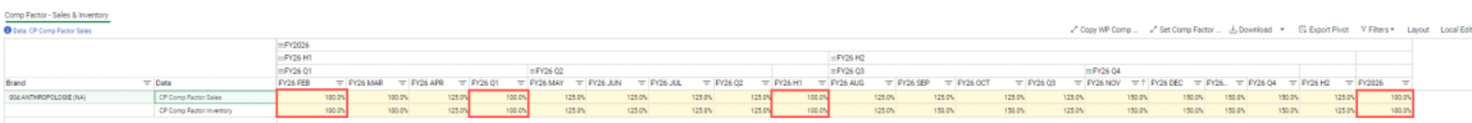
SALES R COMP TY/LY % CHG = (SALES R COMP – SALES R LY) / SALES R LY

SALES R COMP TY/LY COMP % CHG = (SALES R COMP – SALES R COMP LY) / 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.



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)
- Permananent Markdown Retail (MkdPerm R)
- Firsts Markdown Retail (MkdFirsts R)
- Futhers Markdown Retail (MkdFurthers 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 Mkdtot 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 Mkdtot 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 MkdTot 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 + MkdFurthers 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.

First Mkd Inv R Conversion = MkdFirsts R/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.

First Mkd Inv U Conversion = First Mkd Inv R Conversion/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.
MkdFurthers R
MkdFurthers 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)

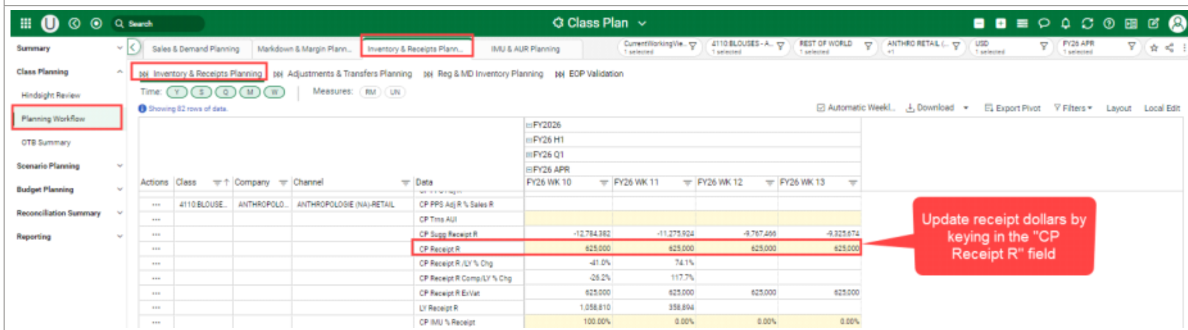
Weekly Rebalancing

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

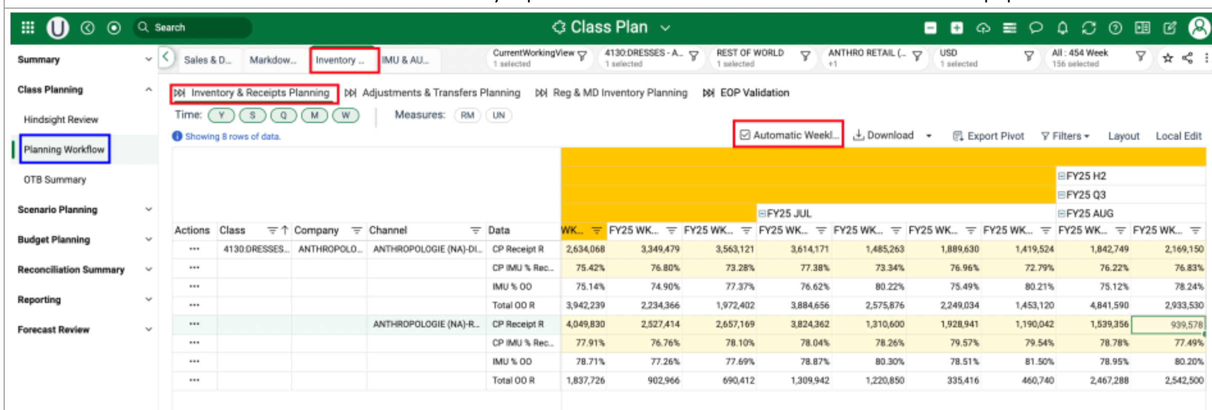
- Manual Rebalance
- Rebalance to On Order
- Rebalance to Receipt Plan

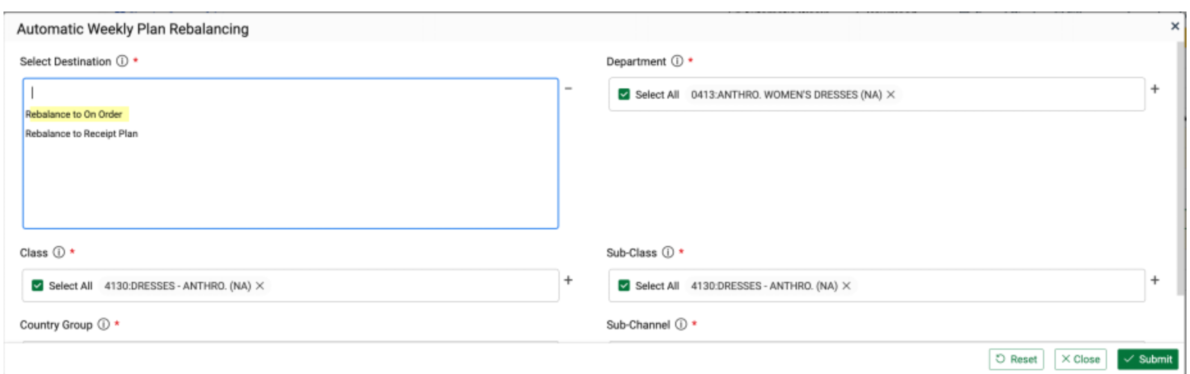
Location for rebalancing:
Class Plan Workspace > Class Planning Page Group > Planning Workflow Page > Inventory & Receipts Planning View
Class Plan Workspace > Class Planning Page Group >OTB Summary

Manually update receipts by keying in the CP Receipt R



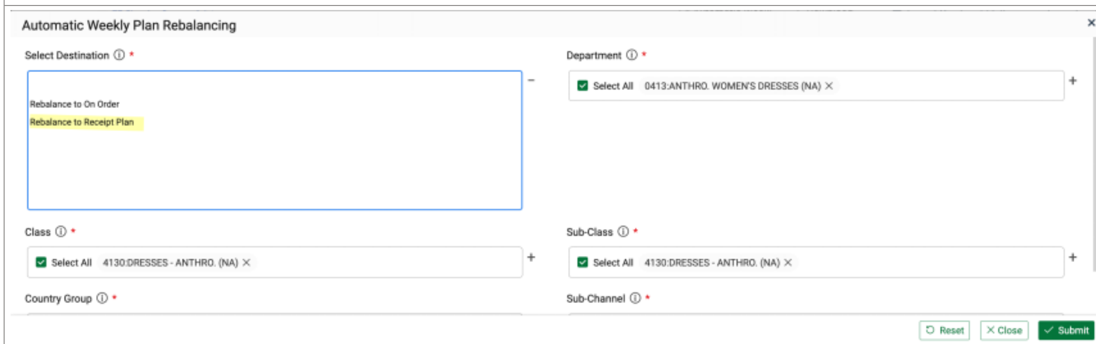
Rebalance to On Order - This action button automatically copies the on order for ANY month selected to the receipt plan





Weekly Plan Rebalancing to On Order (Action Button)					
Before Wk 1 Actualized					
	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
After Wk 1 Actualized					
	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	2300
After Action Button					
	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.



Weekly Plan Rebalancing to Receipt Plan (Action Button)					
Use PL Month Total for rebalancing					
Use WP Week Ratio for rebalancing					
Before Wk 1 Actualized					
	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%*	
After Wk 1 Actualized					
	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
After Action Button					
	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 Whlsl 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 Whlsl 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 Whlsl 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 Whlsl 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 Whlsl 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 Whlsl 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 Whlsl 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 Whlsl 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 Whlsl 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 **Tranfser** 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

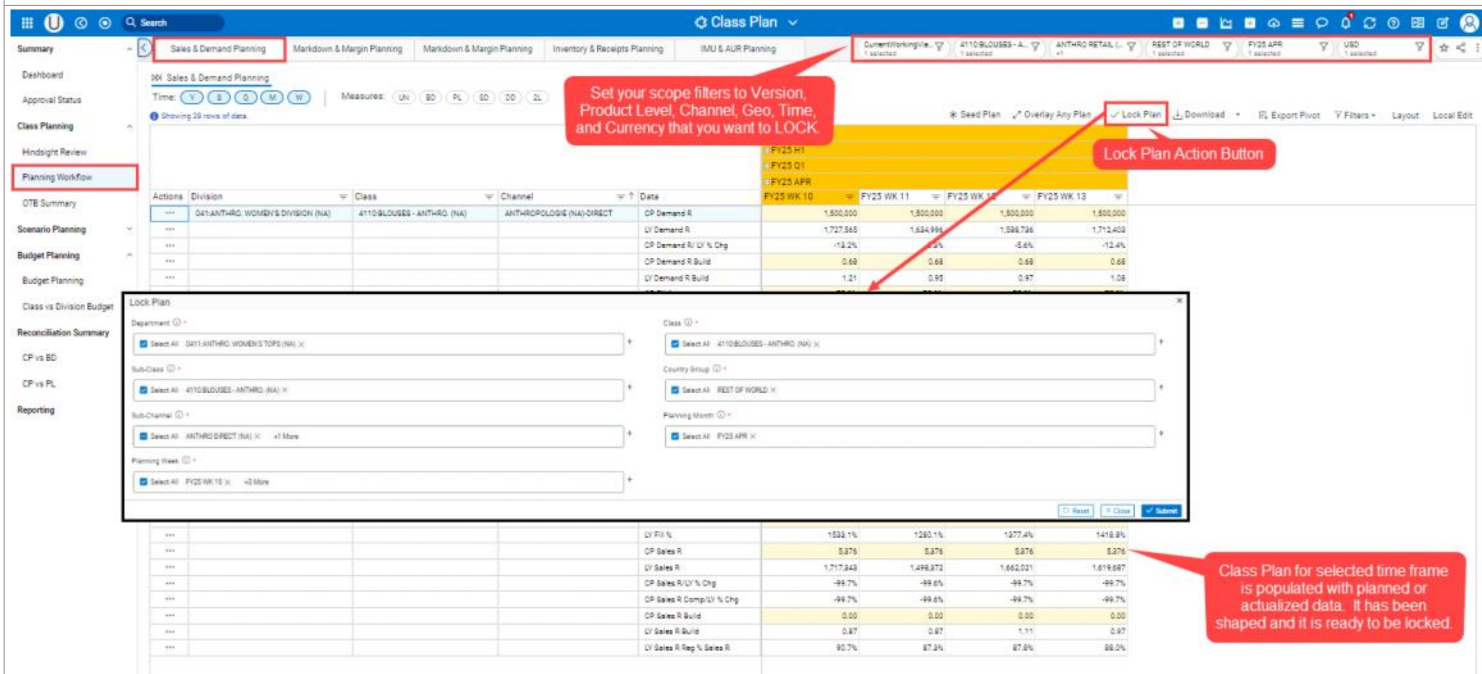
Two Methods of Locking - Action Button vs Scheduled Job:

- 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.

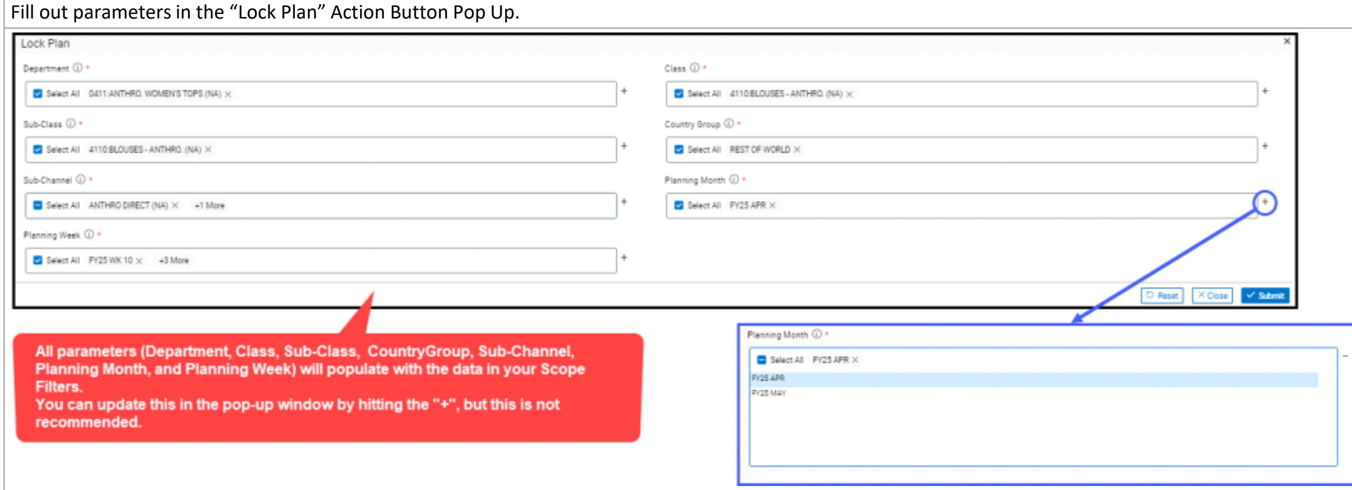
Locking - Action Button

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.

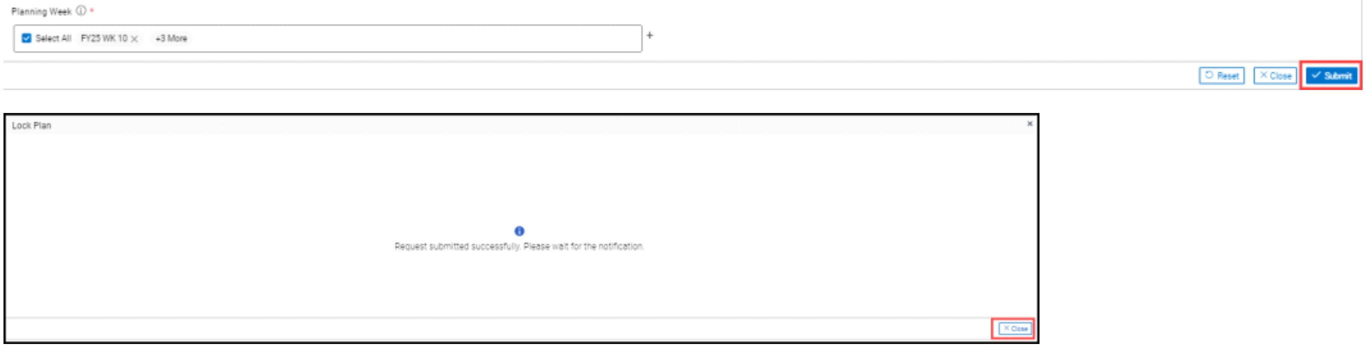
Navigate to **Class Plan Workspace > Summary Page Group > Approval Status Page > Lock Plan Tab**



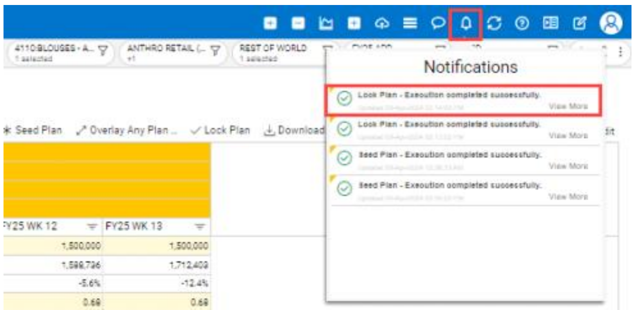
Fill out parameters in the “Lock Plan” Action Button Pop Up.



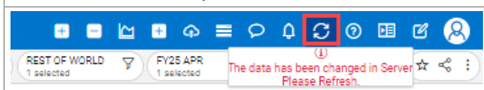
Click Submit! You will receive a message that says “Request submitted successfully. Please wait for the notification.”



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



Refresh o9 to see updated data

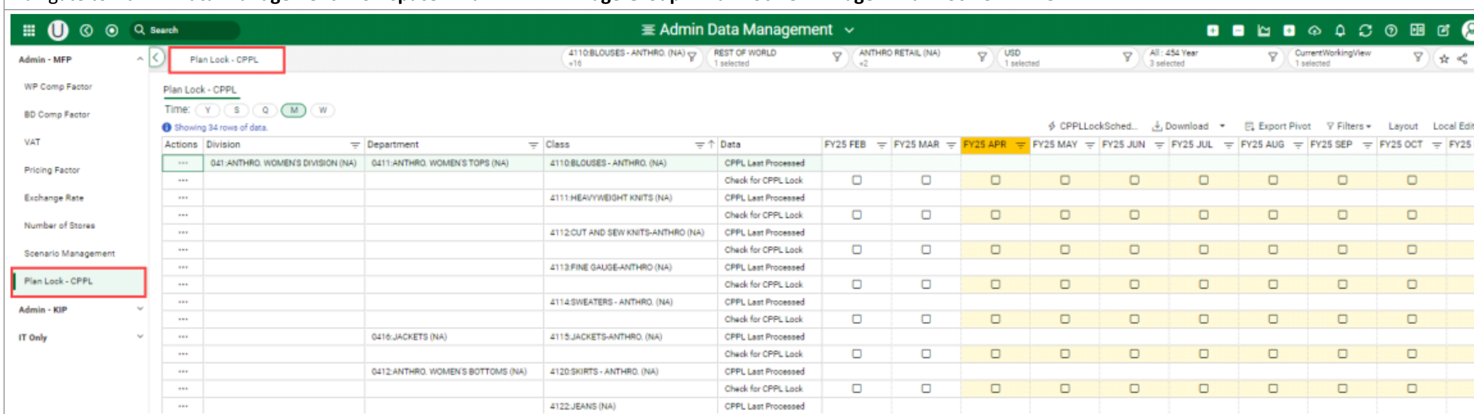


Locking - Scheduled Lock

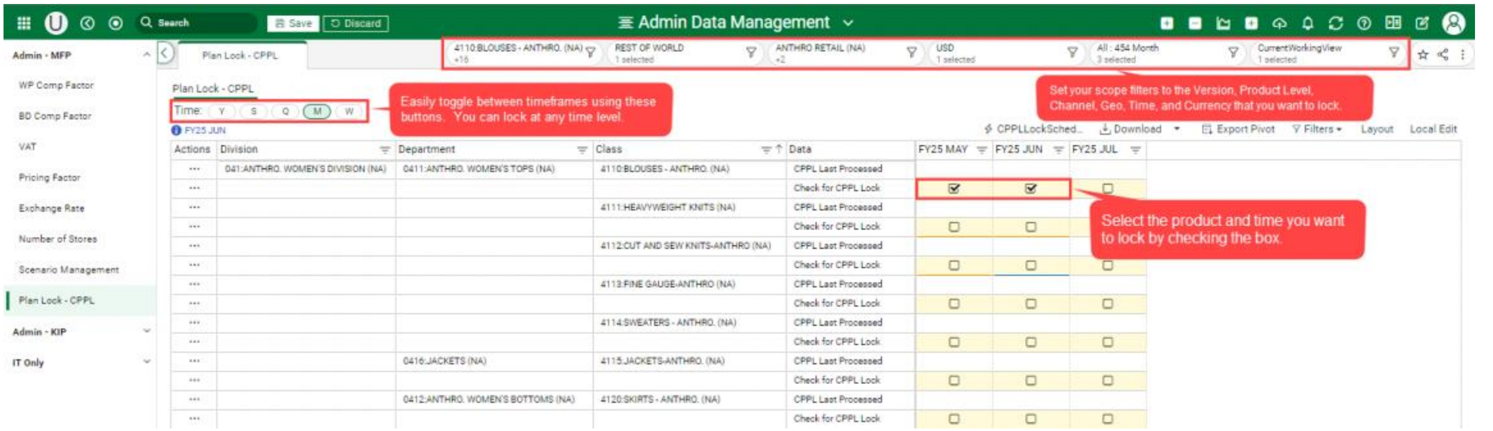
The Lock is scheduled to run nightly as part of the overnight job schedule. It will run daily at approximately 3AM. It will run based on the parameters filled out in the Admin Data Management workspace. If the parameters are blank, the job will run but nothing will copy to PL. The overnight job wil l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

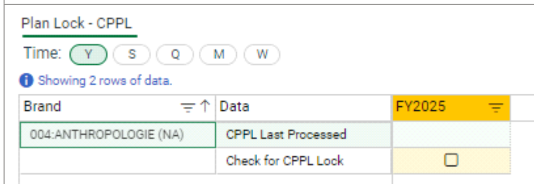
Navigate to **Admin Data Management Workspace > Admin – MFP Page Group > Plan Lock CPPL Page > Plan Lock CPPL View.**



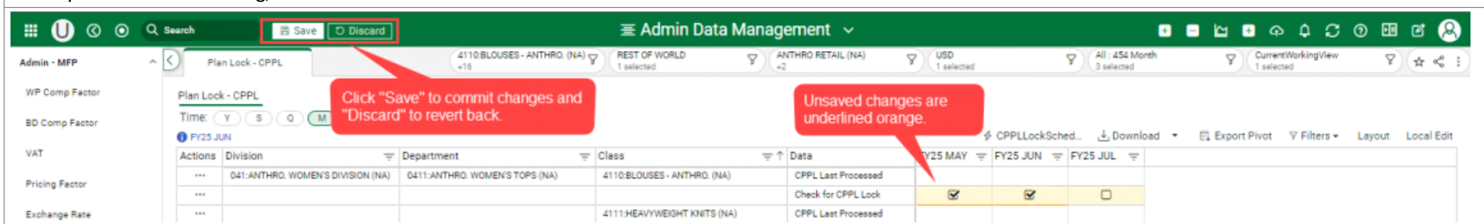
Select the intersections that you want to lock by clicking the check boxes. This is called the “CPPL Lock” because it is loc king the CurrentWorkingView CP values to PL.



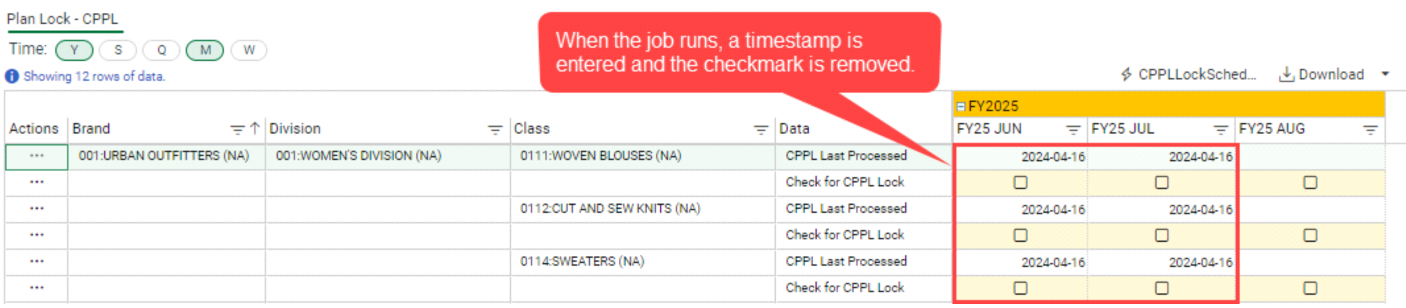
The selection can be done at different levels of the hierarchy. Update the Pivot layout to change the level at which you are selecting. Below shows it being done for the Year at Brand level:



When you are finished editing, click "Save".

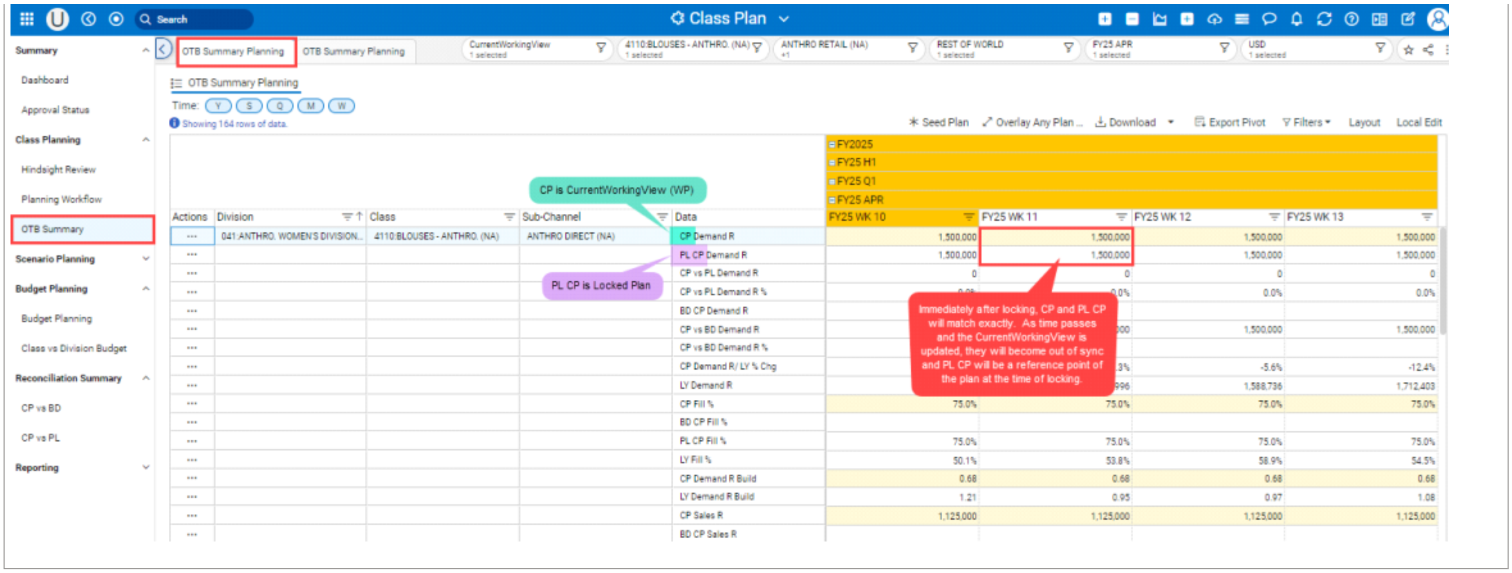


The job will run overnight and copy CP to PL for only those intersections selected in the Admin Data Management workspace.
After the process is completed, time will be captured in CPPL Last Processed metric and the checks will be removed from the intersections so that they can be selected again later. Below shows an intersection after the job has run.



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
Dashboard
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
OTB Summary Planning
OTB Summary Planning
CurrentWorkingView
4110:BLOUSES - ANTHRO. (NA)
ANTHRO RETAIL (NA)
REST OF WORLD
FY25 APR
USD
OTB Summary Planning
Time: Y S Q M W
Showing 164 rows of data.
Seed Plan
Overlay Any Plan ...
Download
Export Pivot
Filters
Layout
Local Edit
FY2025
FY25 H1
FY25 Q1
FY25 APR
CP is CurrentWorkingView (WP)
PL CP is Locked Plan
Actions
Division
Class
Sub-Channel
Data
FY25 WK 10
FY25 WK 11
FY25 WK 12
FY25 WK 13
041:ANTHRO. WOMEN'S DIVISION...
4110:BLOUSES - ANTHRO. (NA)
ANTHRO DIRECT (NA)
CP Demand R
PL CP Demand R
CP vs PL Demand R
CP vs PL Demand R %
BD CP Demand R
CP vs BD Demand R
CP vs BD Demand R %
CP Demand R/ LY % Chg
LY Demand R
CP Fill %
BD CP Fill %
PL CP Fill %
LY Fill %
CP Demand R Build
LY Demand R Build
CP Sales R
BD CP Sales R
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@urbanout.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](#)

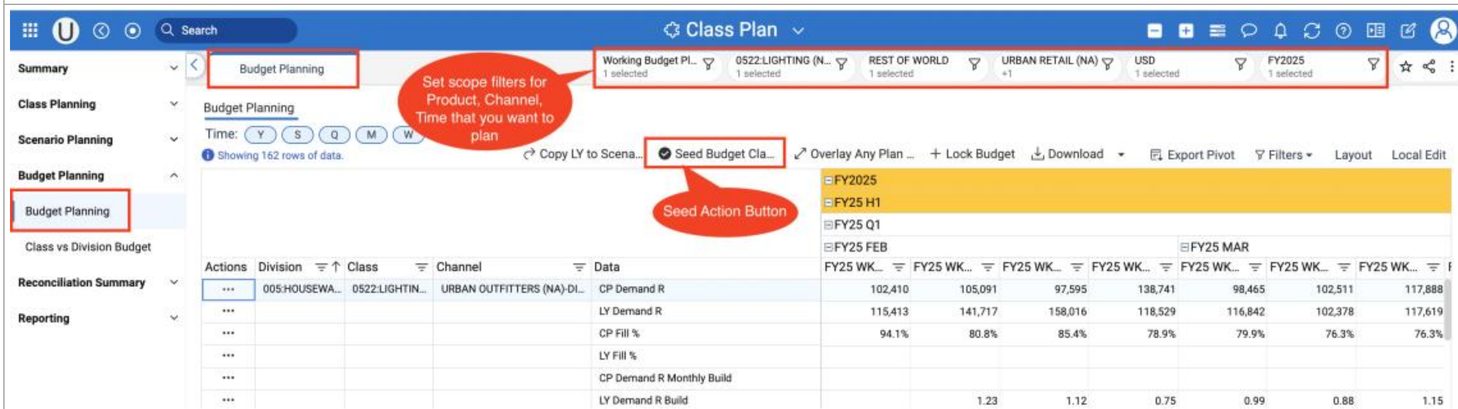
Budget Planning - Seeding the plan

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

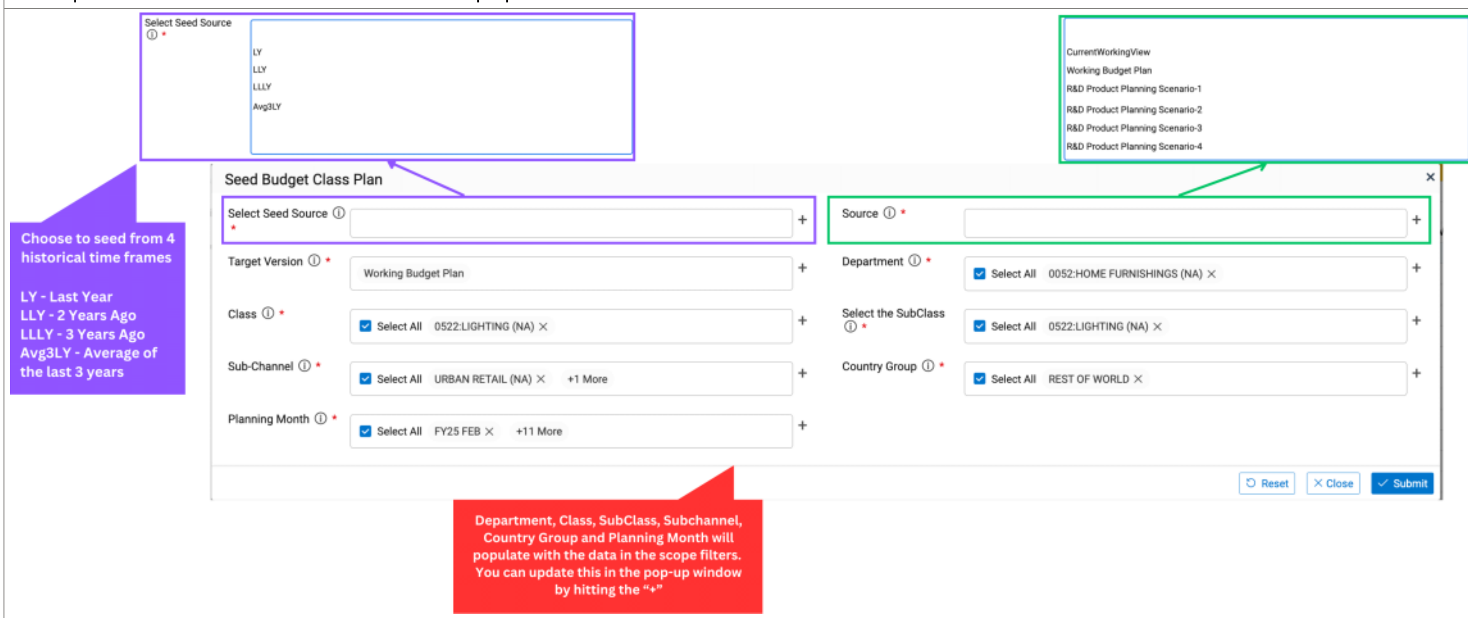
Navigate to the **Class Plan Workspace > Budget Planning Page Group > Budget Planning Page**

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

Click "Seed Plan" action button



Fill out parameters in the "Seed Plan" 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 contin ue to work in o9.

Refresh o9 to see updated data.

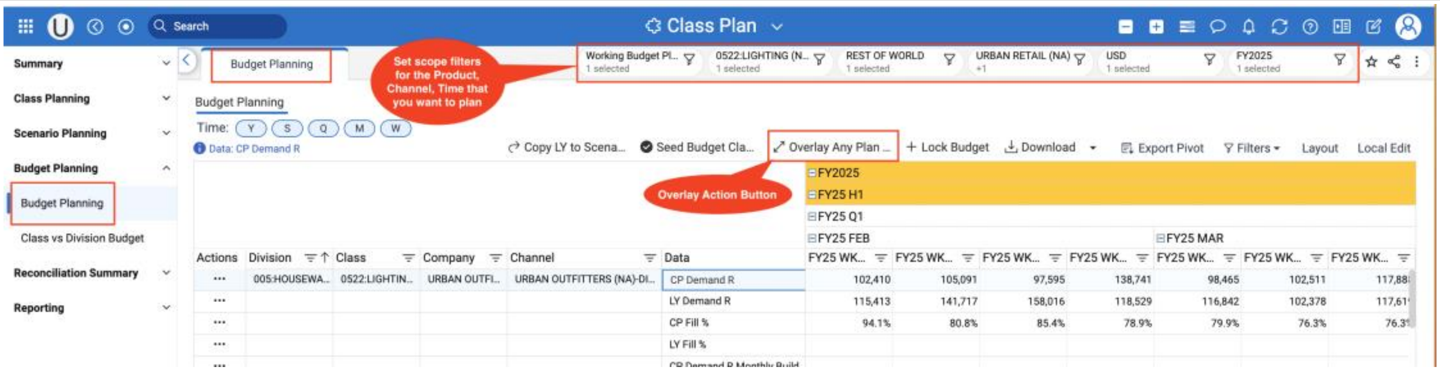
Budget Planning - Overlaying the plan

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

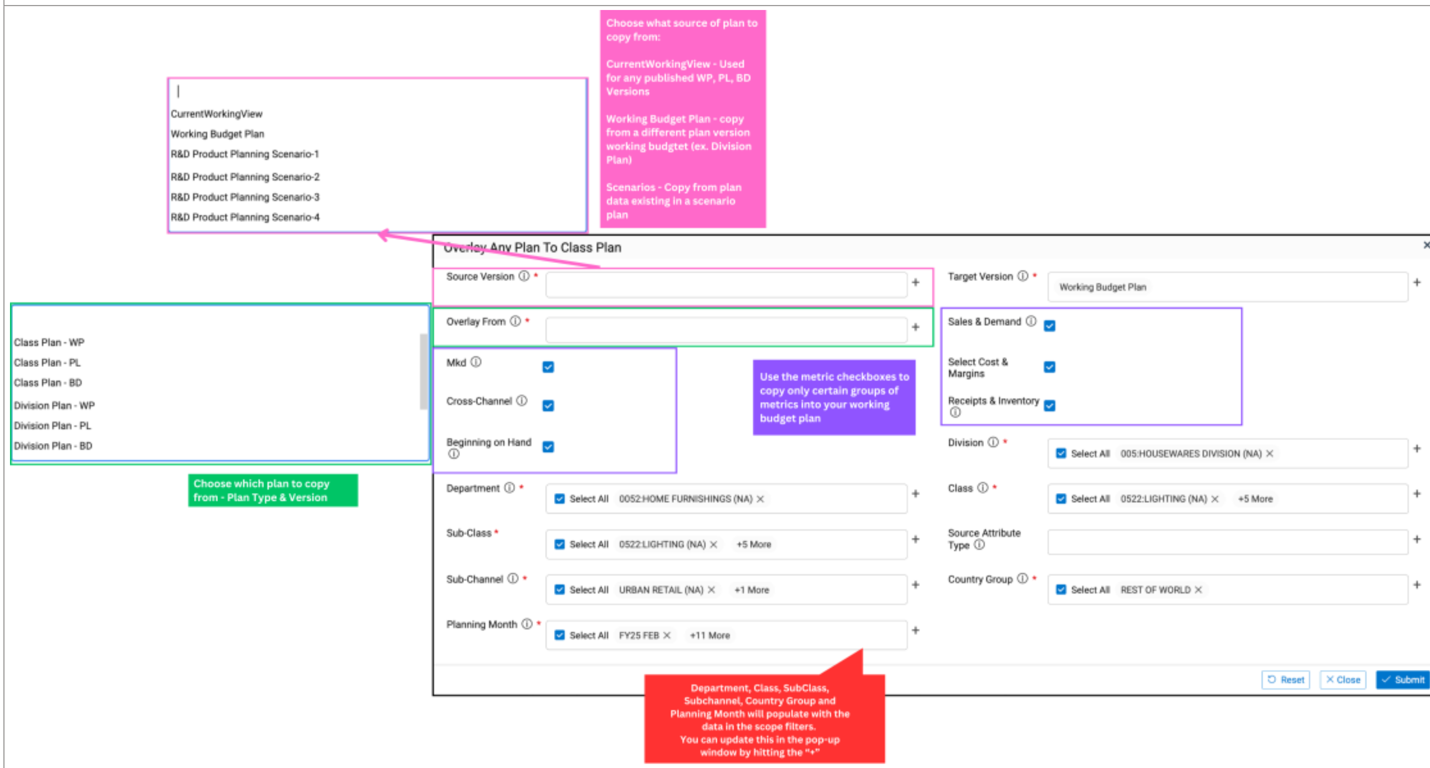
Navigate to the **Class Plan Workspace > Budget Planning Page Group > Budget Planning Page**

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

Click "Overlay Any Plan to Class Plan" action button



Fill out parameters in the “Overlay Any Plan to Class Plan” 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 contin ue to work in o9.

Refresh o9 to see updated data.

Budget Planning - Update LY Data

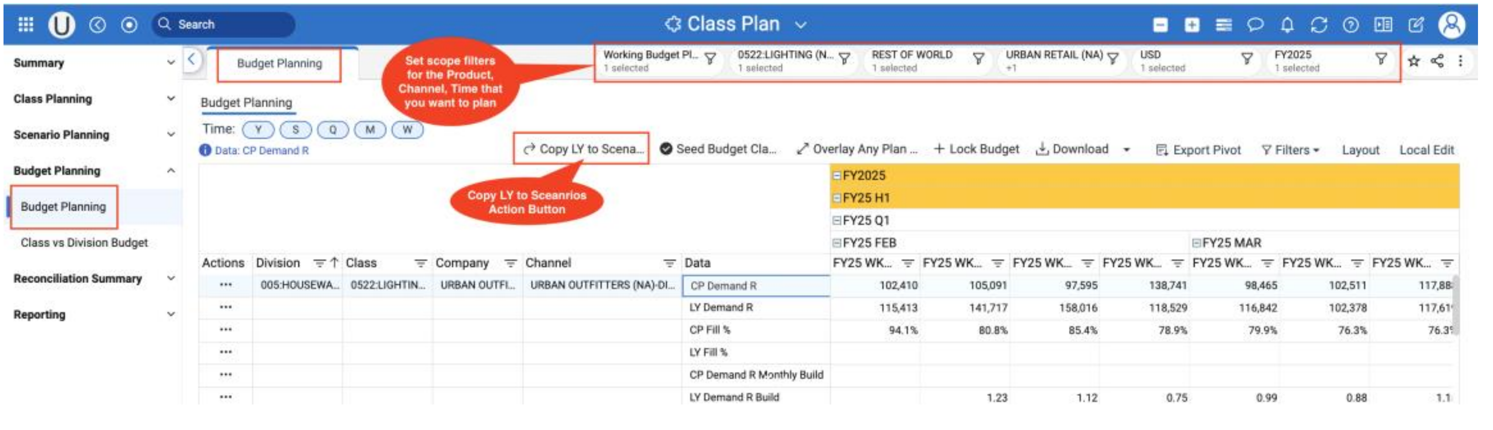
If you would like to reference historical data while planning you can use the "Copy LY to Scenarios" action button.

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



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 contin ue to work in o9.

Refresh o9 to see updated data.

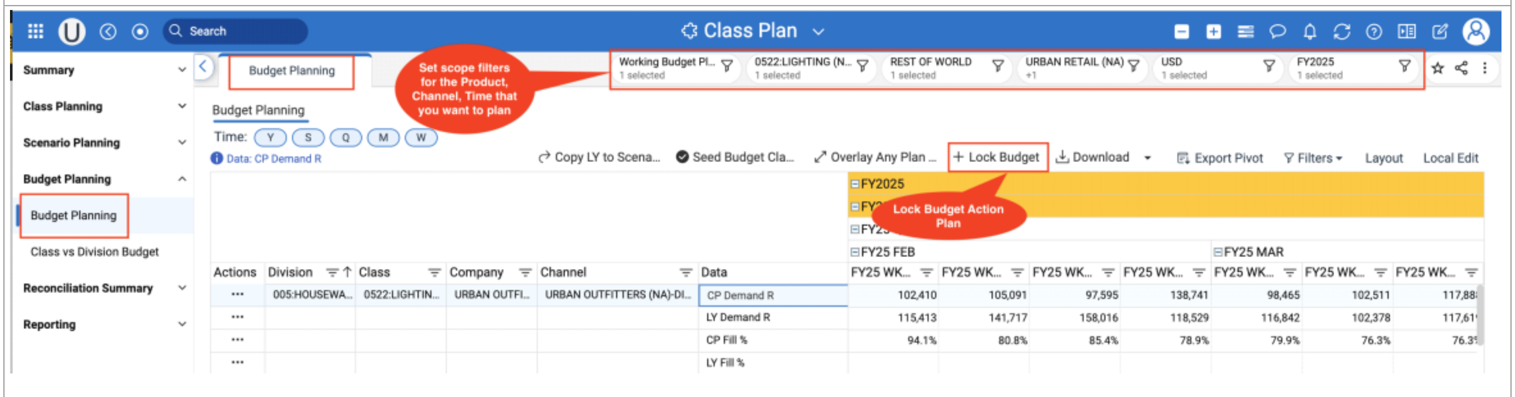
Budget Planning - Lock Budget Plan

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



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 contin ue to work in o9.

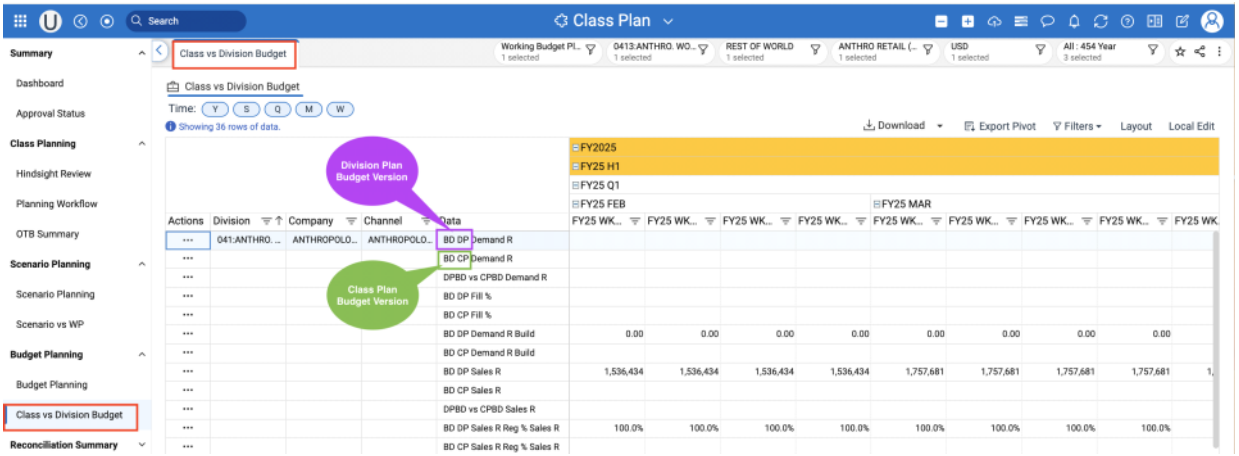
Refresh o9 to see updated data.

Budget Planning - Reconciliation

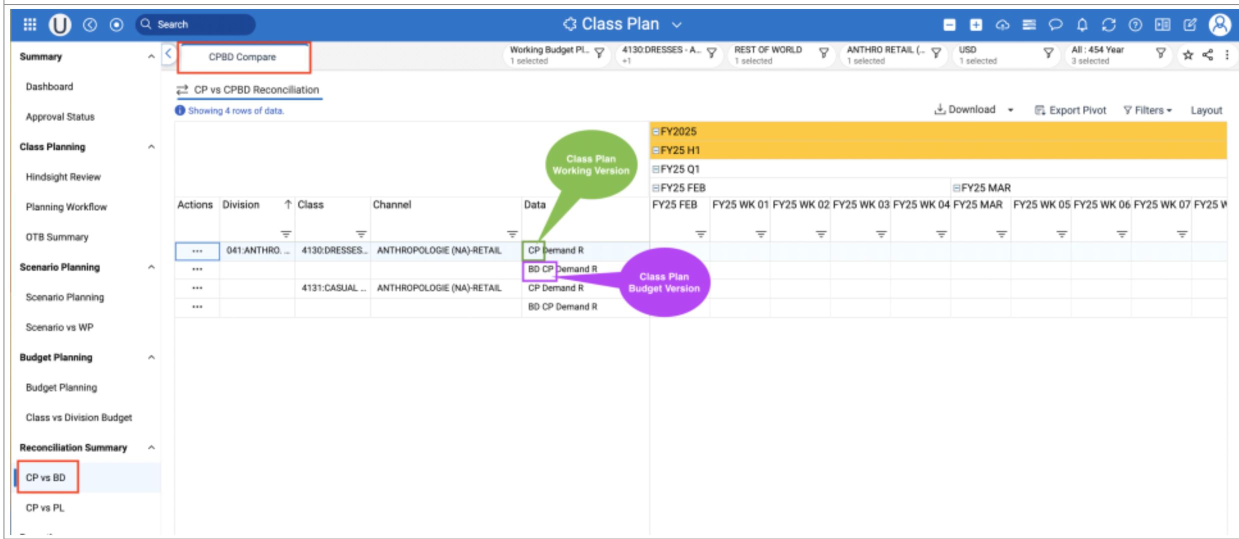
There are two reports created to reconcile the Budget Plan:

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**



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



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]

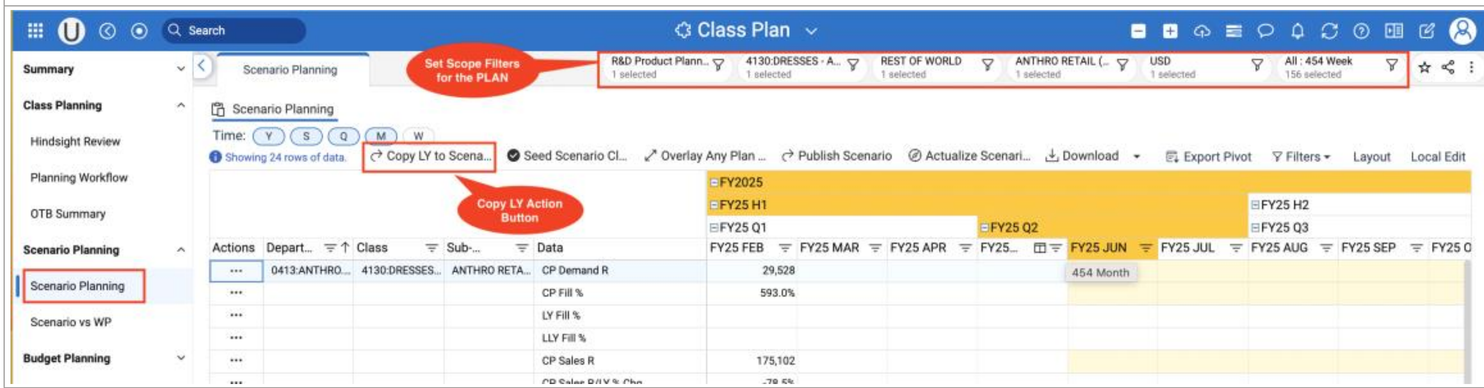
Displaying Historical Information (LY,LLY,LLLY,3yrAvg)

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**

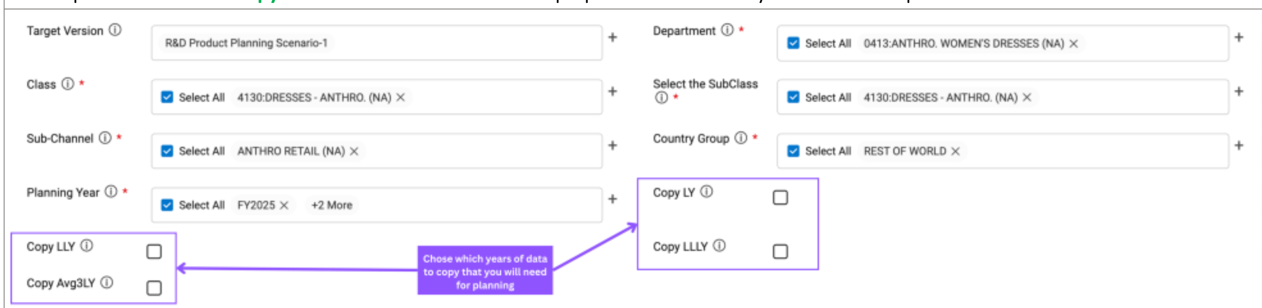
Navigate to the **Class Plan Workspace > Scenario Planning Page Group > Scenario Planning Page**

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

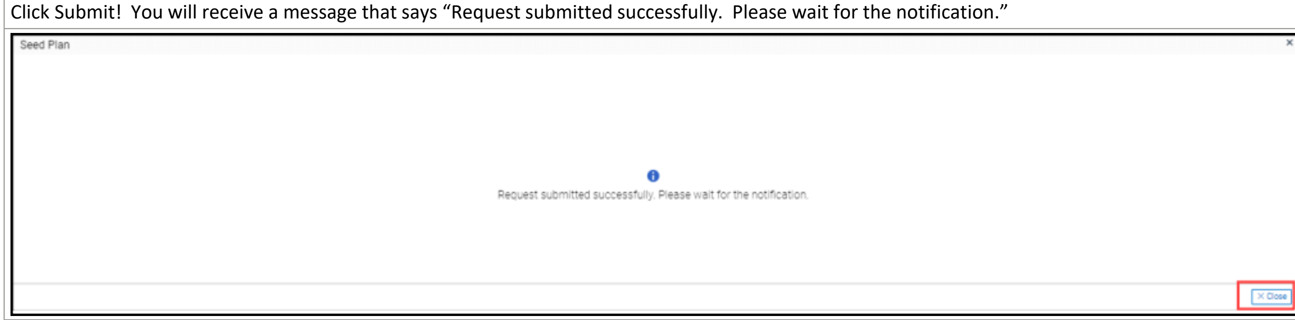
Click **Copy LY to Scenario** action button



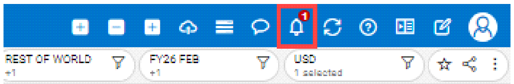
Fill out parameters in the **Copy LY to Scenario** Action Button Pop Up - will automatically inherit from scope filters



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.

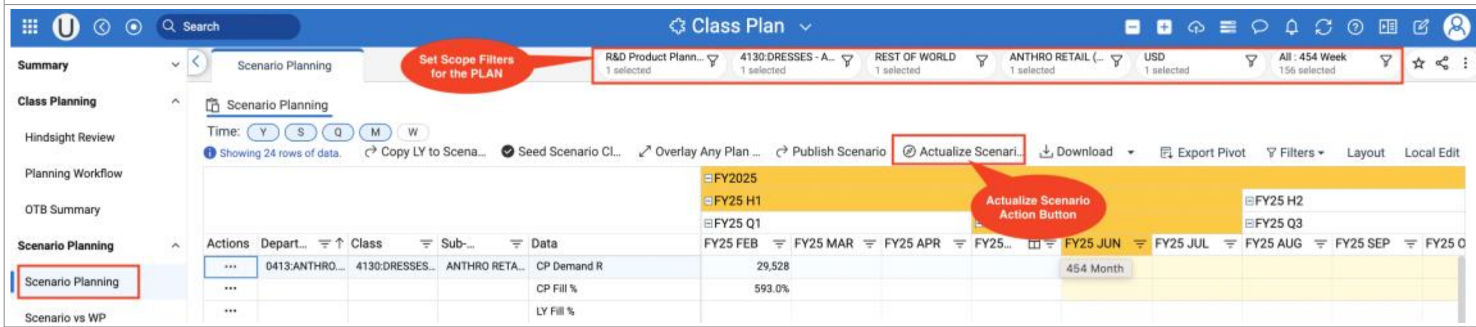
Actualizing the Scenario

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.

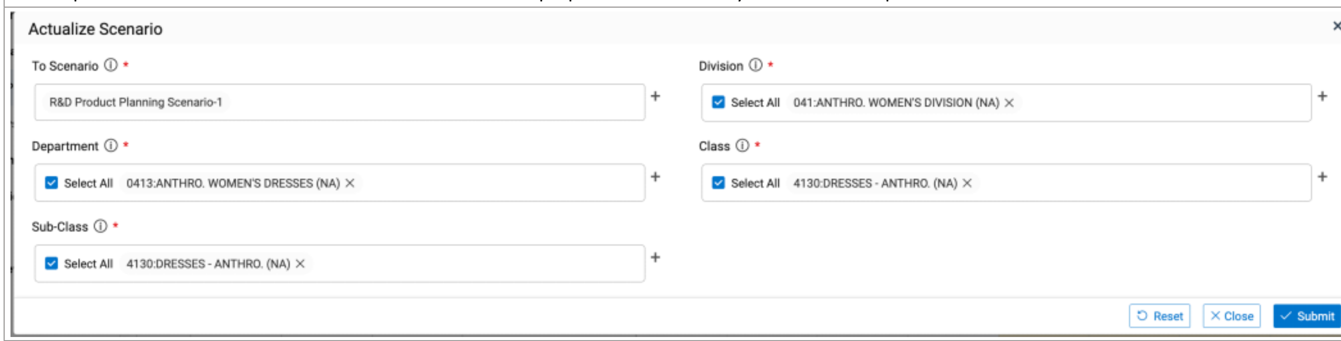
Navigate to the **Class Plan Workspace > Scenario Planning Page Group > Scenario Planning Page**

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

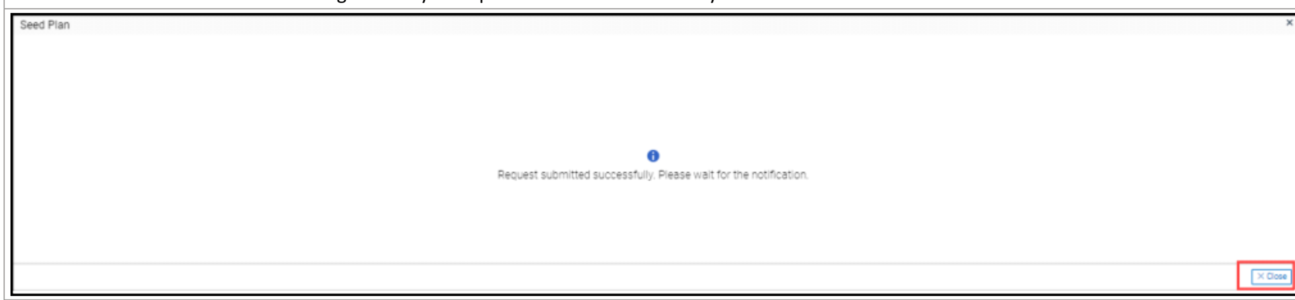
Click **Actualize Scenario** action button



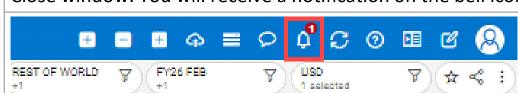
Fill out parameters in the **Actualize Scenario** Action Button Pop Up - will automatically inherit from scope filters



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.

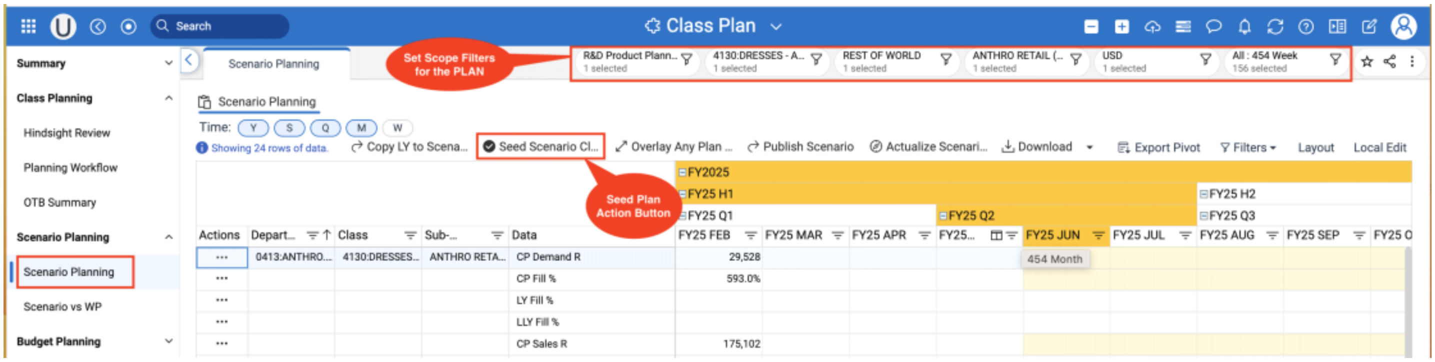
Seeding the plan

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

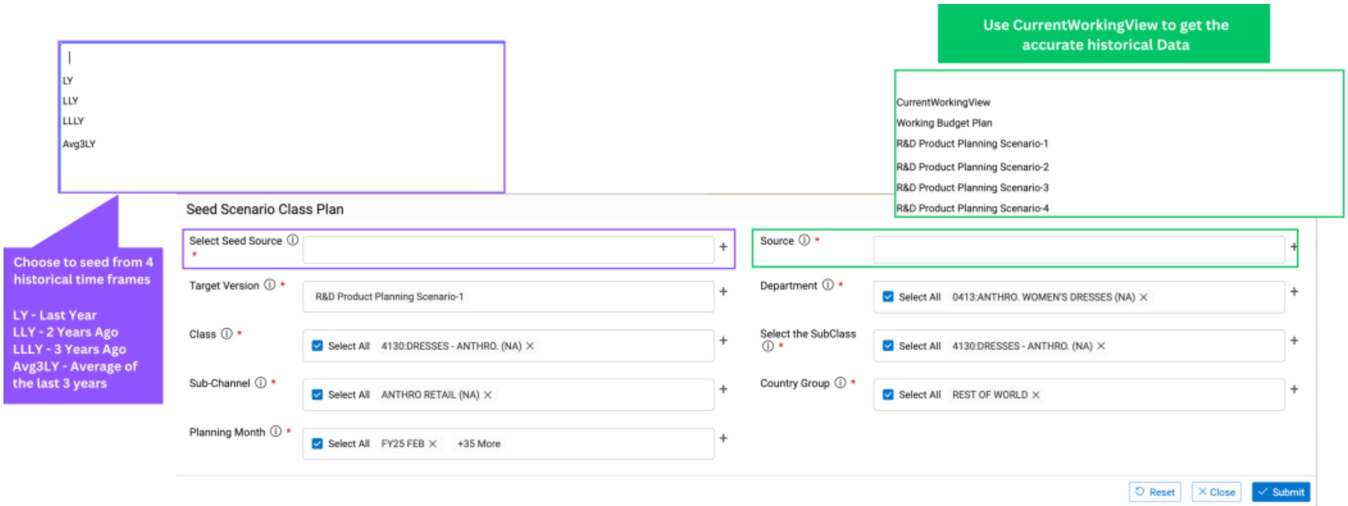
Navigate to the **Class Plan Workspace > Scenario Planning Page Group > Scenario Planning Page**

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

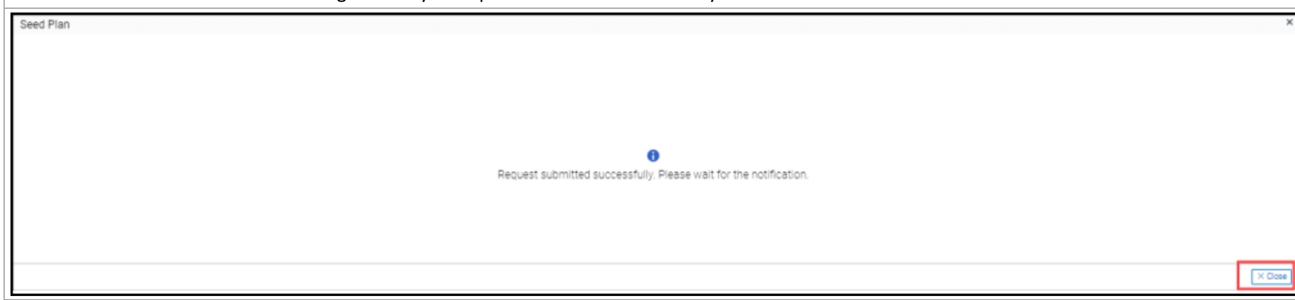
Click **Seed Scenario Class Plan** action button



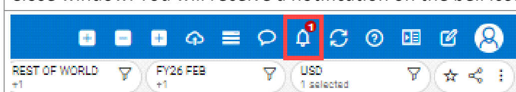
Fill out parameters in the **Seed Scenario Class Plan** Action Button Pop Up - will automatically inherit from scope filters



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

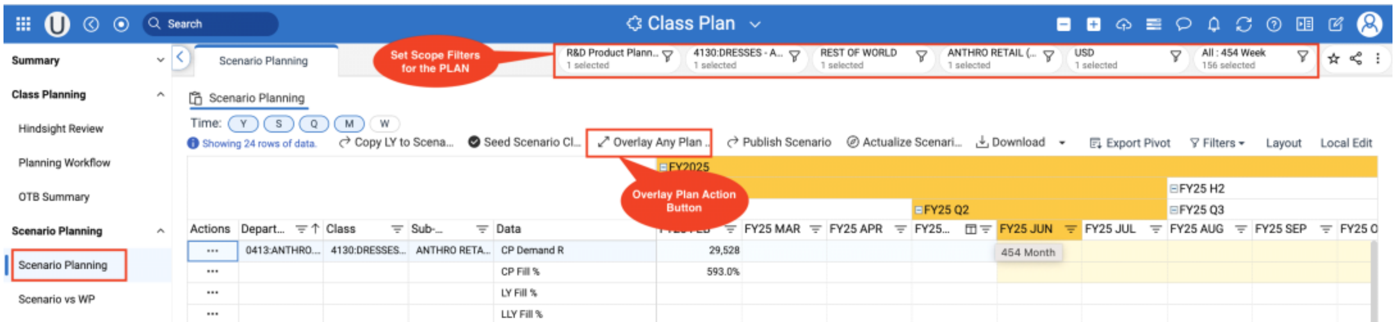
Use the Overlay action button to copy an existing plan into your scenario version. The plans that can be copied in are:

1. 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

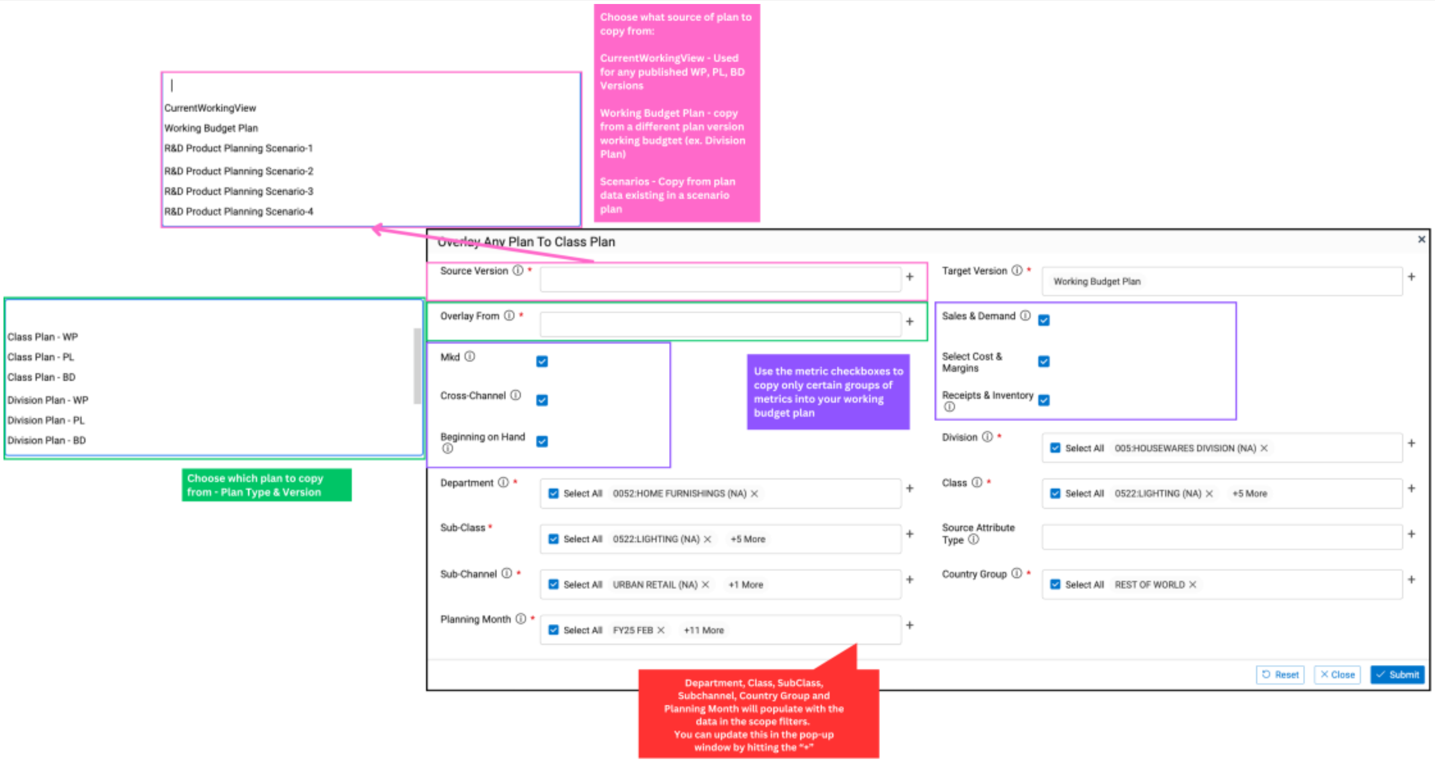
Navigate to the **Class Plan Workspace > Scenario Planning Page Group > Scenario Planning Page**

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

Click **Overlay Any Plan** action button

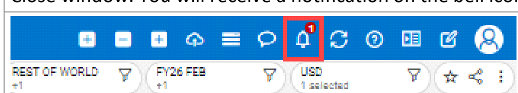


Fill out parameters in the **Overlay Any Plan** Action Button Pop Up - will automatically inherit from scope filters



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 overlayed the values should match the source plan.

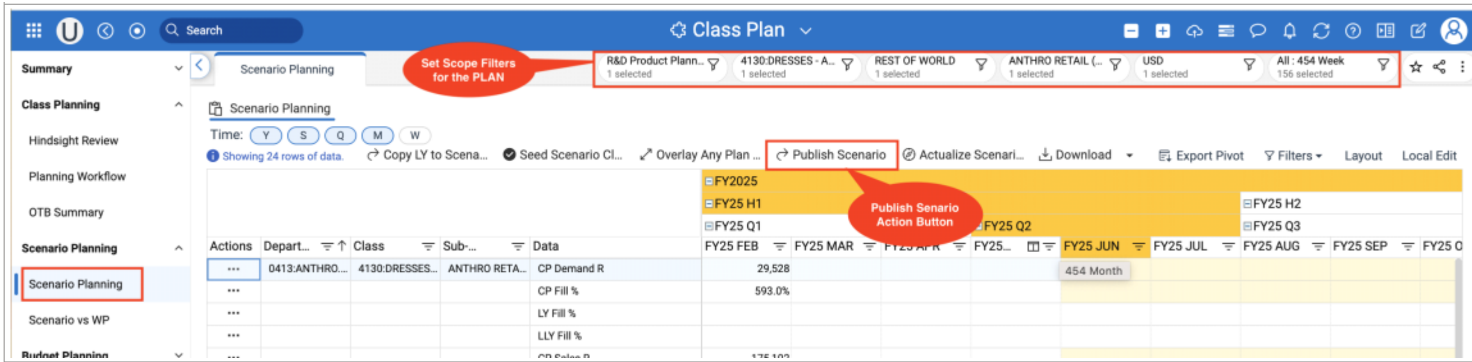
Publish the Plan

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

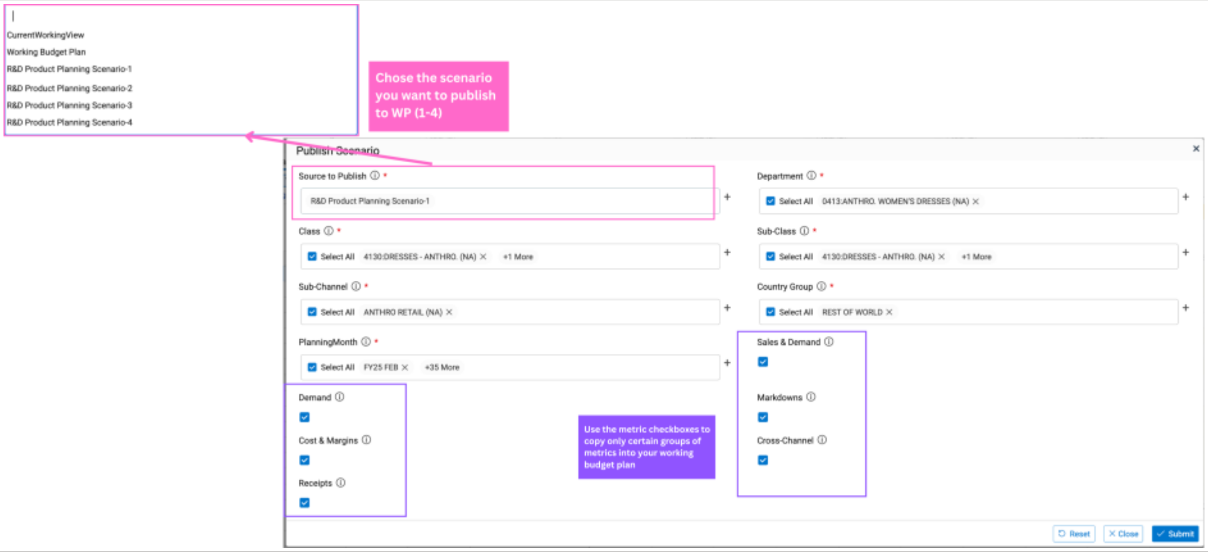
Navigate to the **Class Plan Workspace > Scenario Planning Page Group > Scenario Planning Page**

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

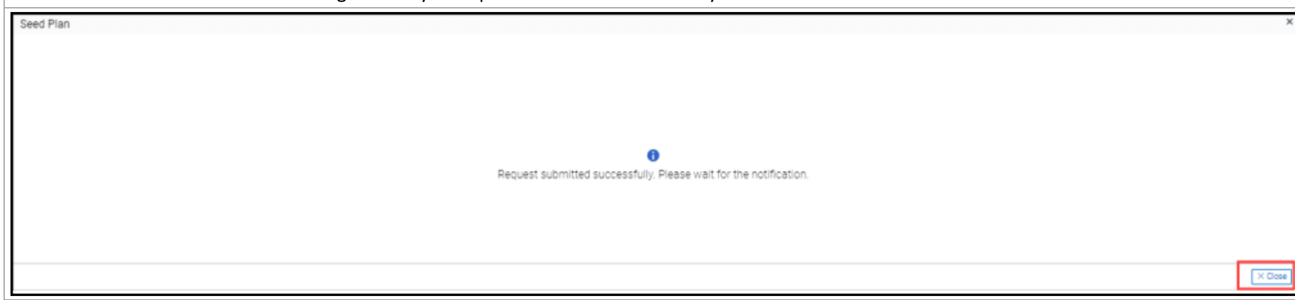
Click **Publish Scenario** action button



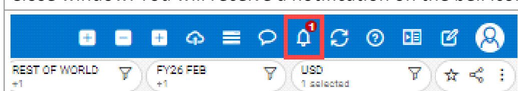
Fill out parameters in the **Publish Scenario** Action Button Pop Up - will automatically inherit from scope filters



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.



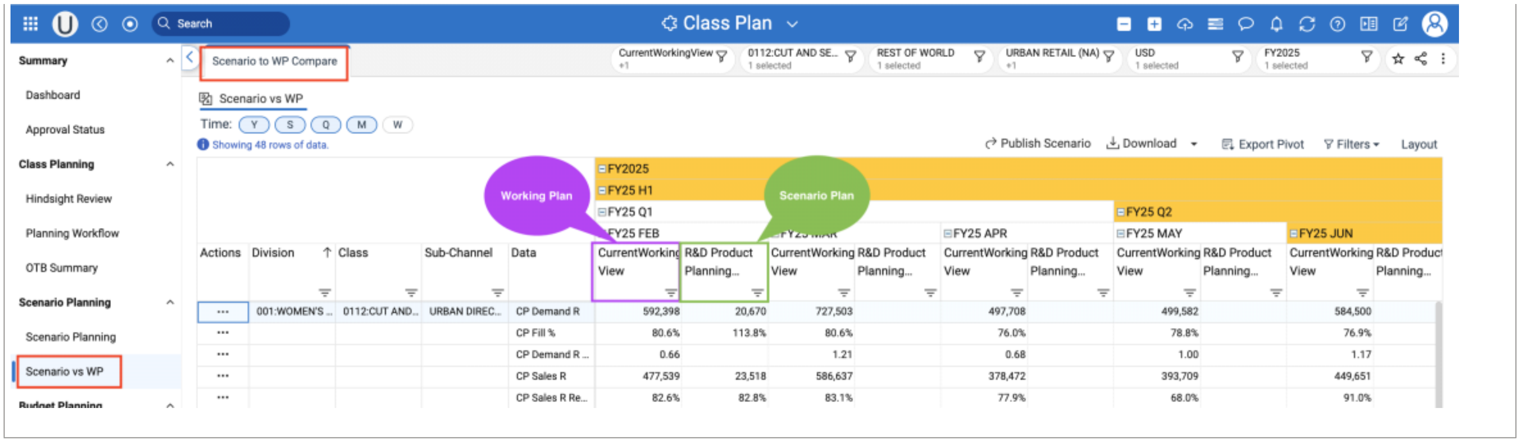
Refresh o9 to see updated data.

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

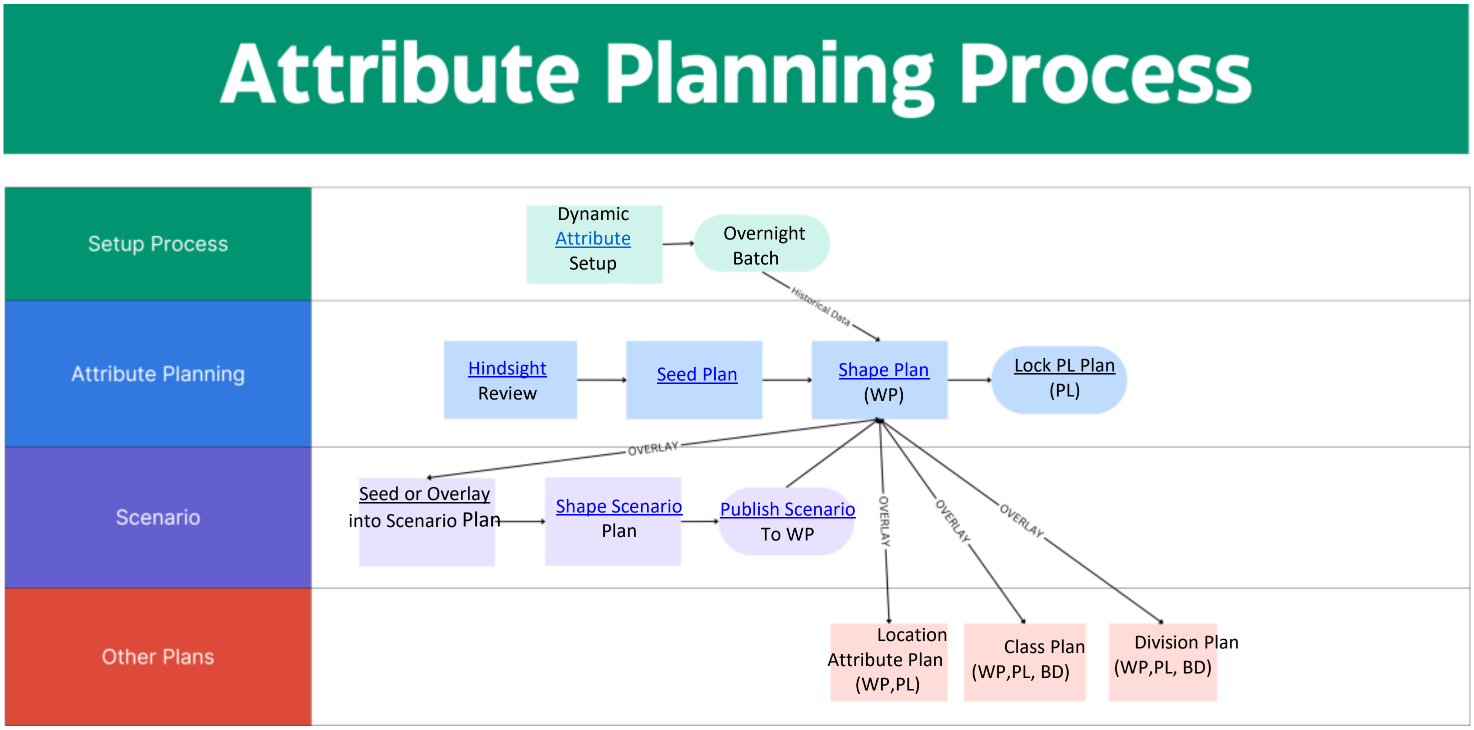
Navigate to the **Class Plan Workspace > Scenario Planning Page Group > Scenario Planning Page**

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


Class Plan
Search
Summary
Dashboard
Approval Status
Class Planning
Hindsight Review
Planning Workflow
OTB Summary
Scenario Planning
Scenario Planning
Scenario vs WP
Scenario to WP Compare
Scenario vs WP
Time: Y S Q M W
Showing 48 rows of data.
Publish Scenario
Download
Export Pivot
Filters
Layout
Working Plan
Scenario Plan
FY2025
FY25 H1
FY25 Q1
FY25 Q2
FY25 FEB
FY25 APR
FY25 MAY
FY25 JUN
Actions
Division
Class
Sub-Channel
Data
CurrentWorking View
R&D Product Planning...
001:WOMEN'S...
0112:CUT AND...
URBAN DIREC...
CP Demand R
CP Fill %
CP Sales R

Attribute Planning Overview

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



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

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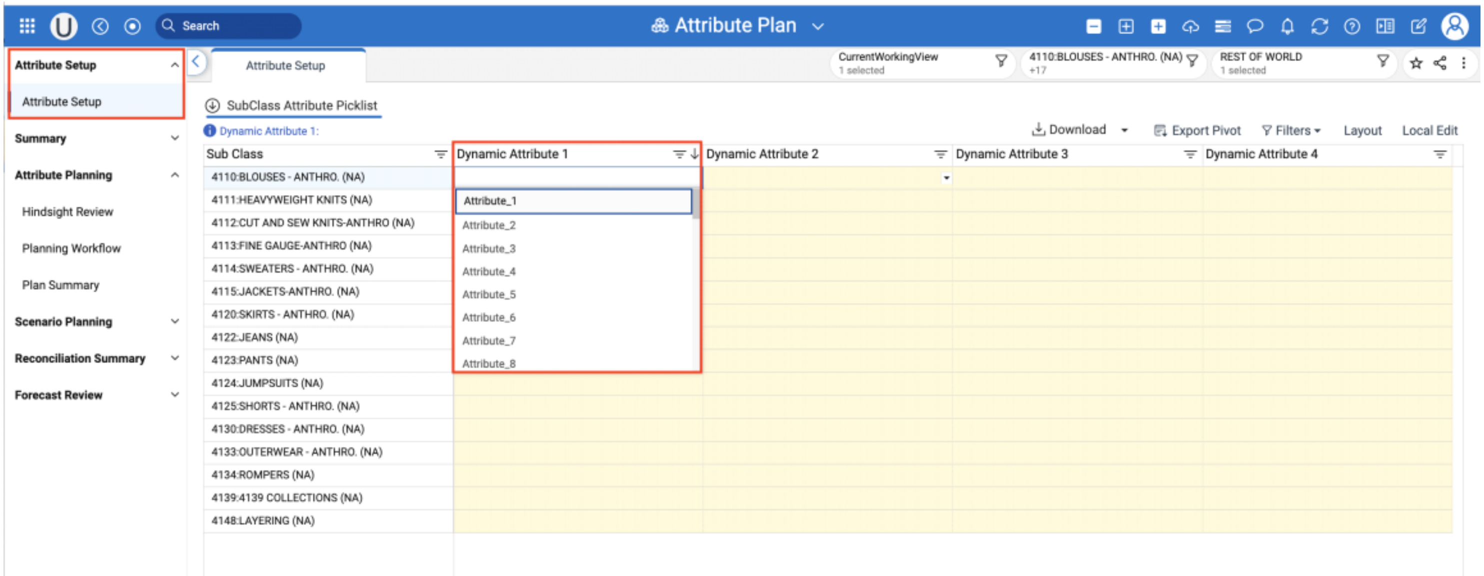
Attribute Plan Setup
All classes will automatically have Attribute 32 - Season and Attribute 39 - Market/OB setup in the system and can start planning at any time.
There are 4 dynamic attributes in addition to the two above that can be setup for each class. Once setup is complete, the process runs overnight 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.



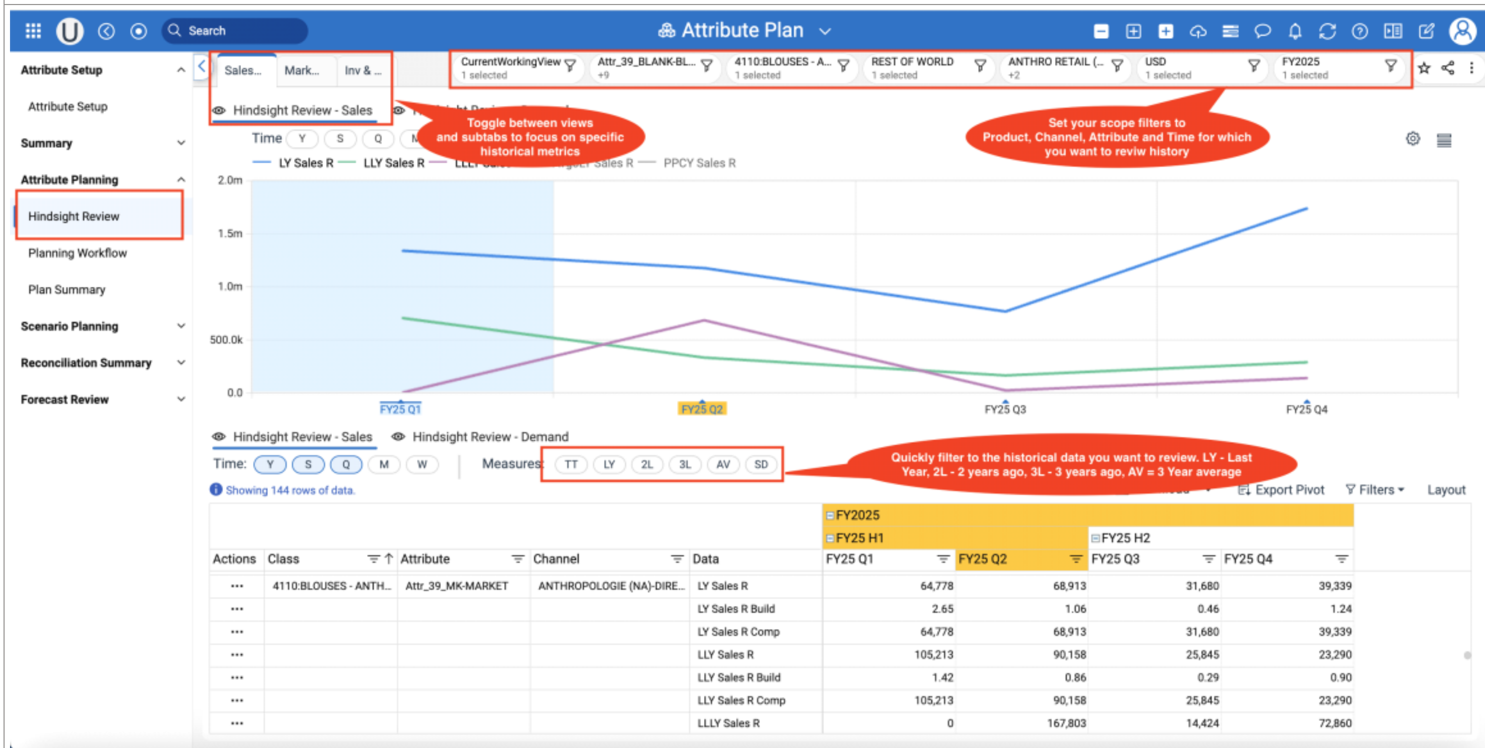
Once the attributes are chosen, an overnight batch will run to populate the history in the plan and create the association. Once this batch runs, you will be able to filter on this combination to plan.

Seeding

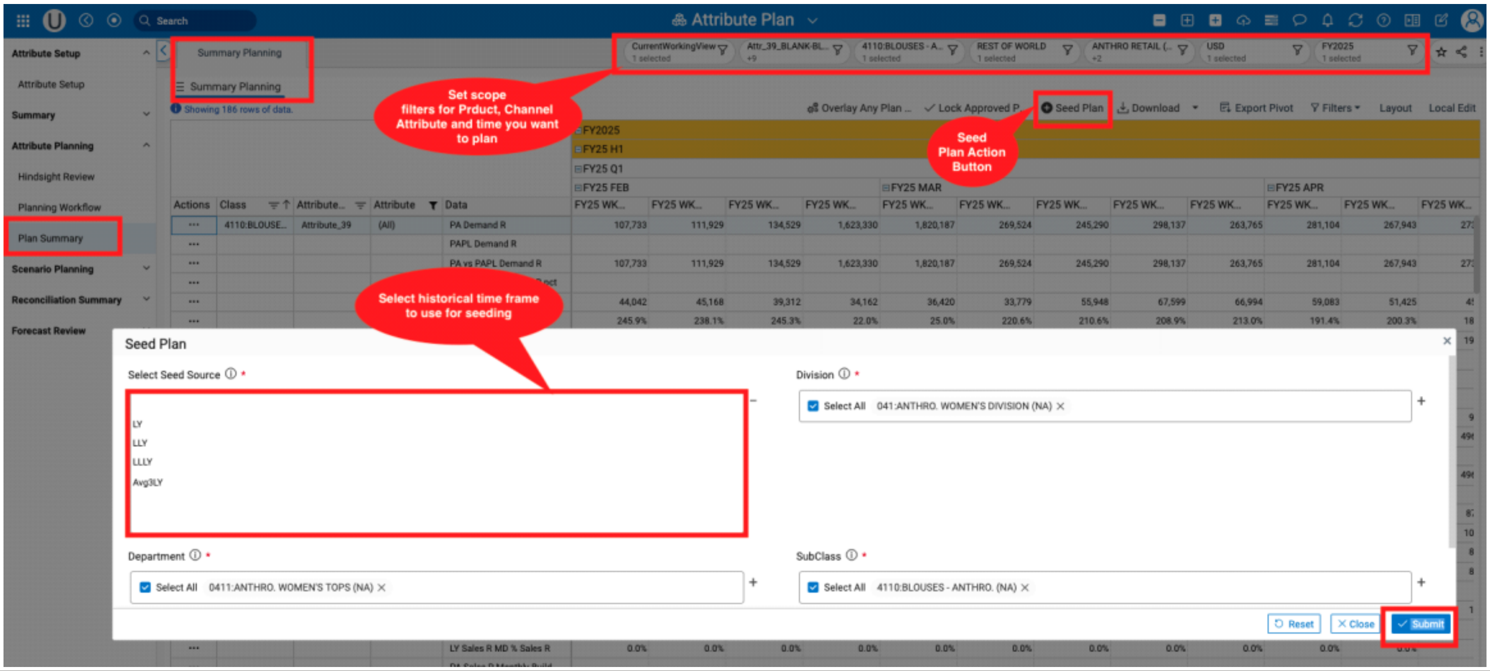
Open a ticket at support.urbn.com or email o9support@urbanout.com for help!

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.

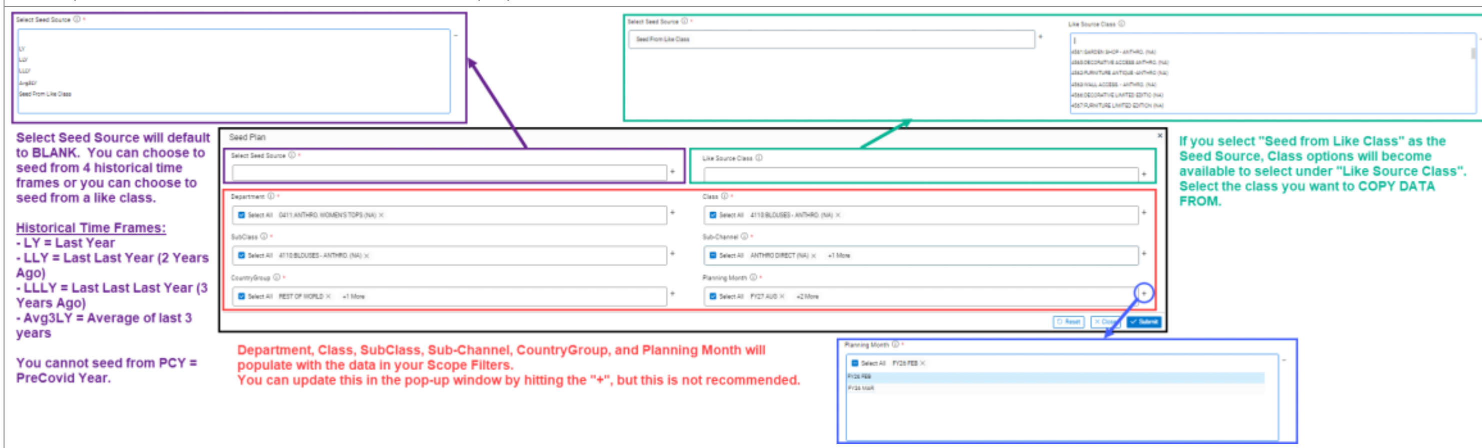
Hindsight Workflow
Review historical data by navigating from the **Attribute Plan Workspace > Attribute Planning Page Group > Hindsight Review Page.** The "Hindsight Review" page exists for all plan types and all plan types have the same layout. This guide focuses on Attribute Planning.
Hindsight Review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



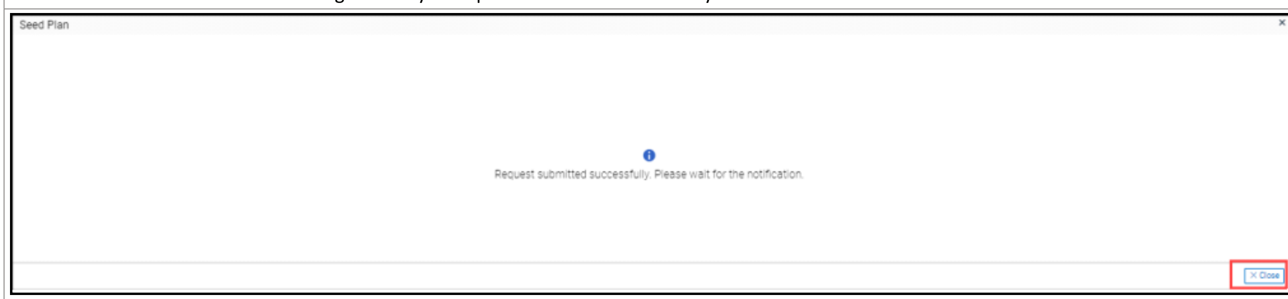
Seeding Workflow
Navigate to **Attribute Plan Workspace > Attribute Planning Page Group > Planning Workflow Page > Sales & Demand Planning View** or **Attribute Plan Workspace > Attribute Planning Page Group > PlanSummary**
Update your Scope Filters to the time frame you are going to seed with data.
Click on the "Seed Plan" Action Button.



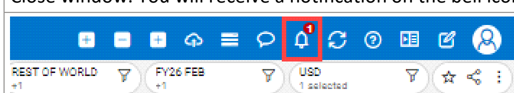
Fill out parameters in the "Seed Plan" Action Button Pop Up



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.

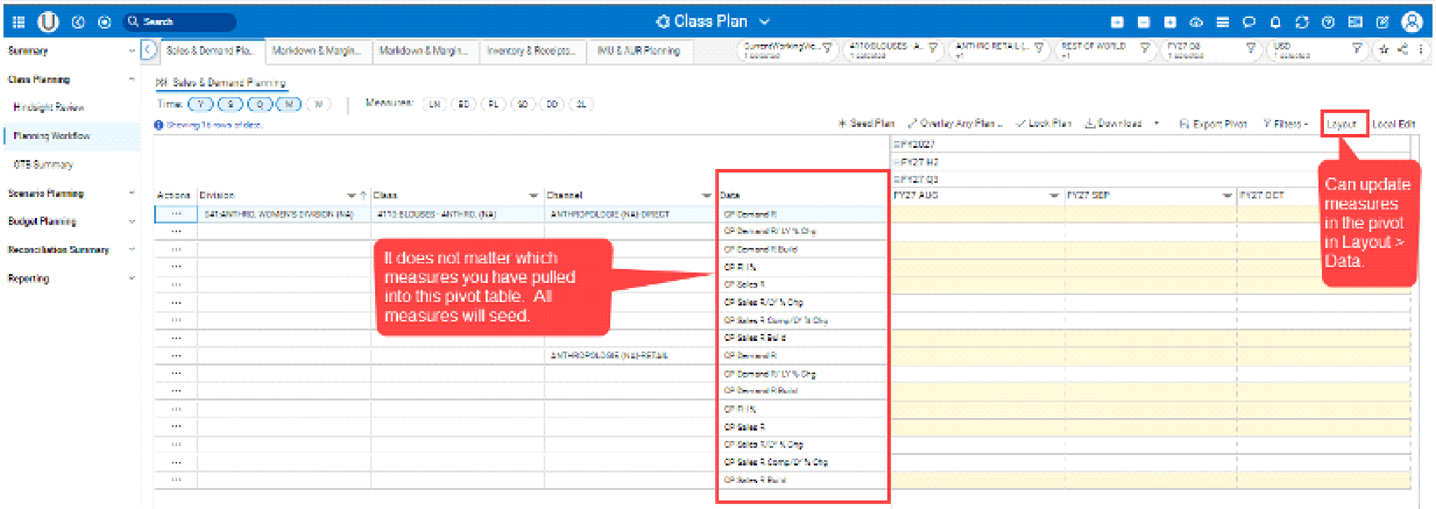
Review your updated Class Plan. Now that the plan has been seeded, the CP values will no longer be blank. They will match the data from which you seeded.

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*

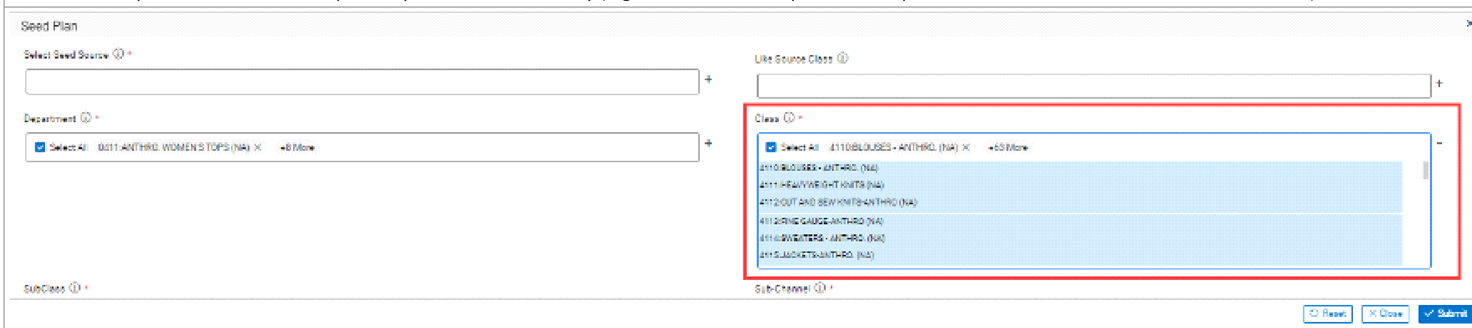
Page > Sales & Demand Planning View. The only measures that do not seed are RTV & Inv Adj.



Tips & Tricks - FAQ 2

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

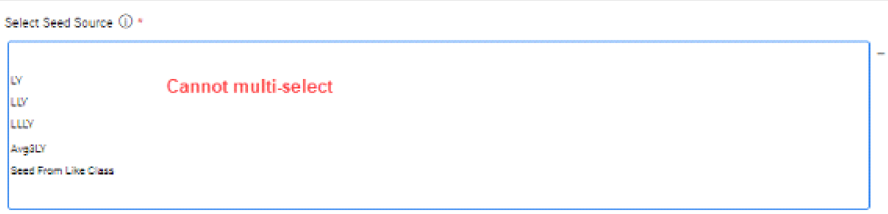
Multiple classes may be seeded at one time by selecting multiple classes in your Seed Plan Action Button Parameters.
This is true for parent/child relationships at any level of the hierarchy (e.g., all classes in a department, departments in a division, divisions in a brand, etc.)



Tips & Tricks - FAQ 3

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

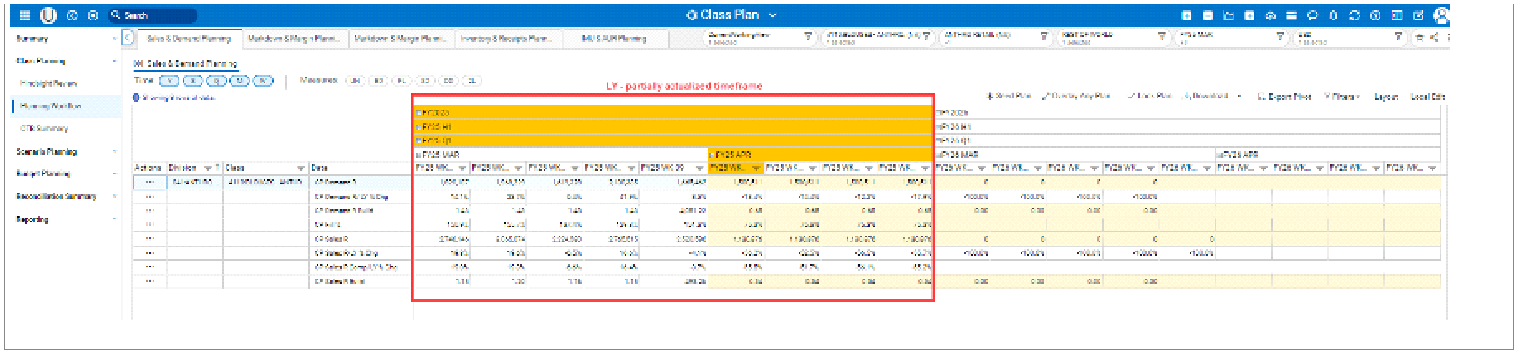
No. When seeding from a like class, it is seeding from the plan time frame (WP). For example, if you seed class 4110 FY26 MAR from 4112, it will copy the data from 4112 FY26 MAR. It is copying the “WP” or “CurrentWorkingView”.
The correct workflow is to seed the Like Class from its own history before 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.

% to Total Class Metrics

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

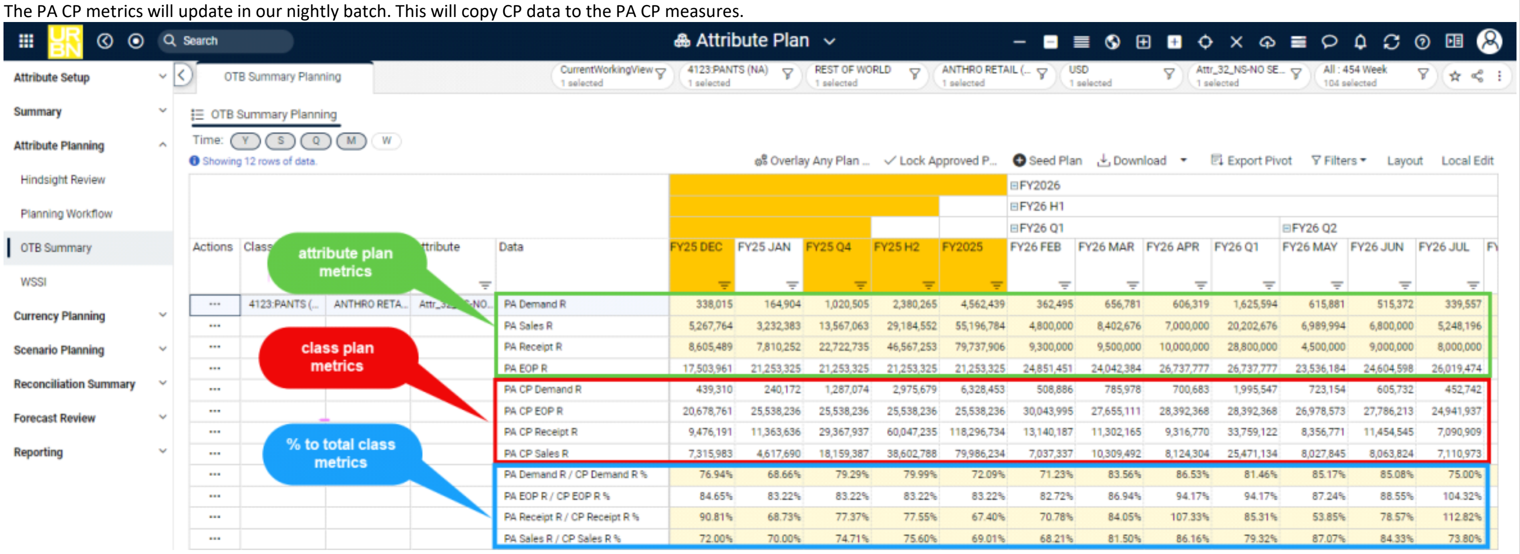
Compare Attribute Plan to Total Class Plan

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.

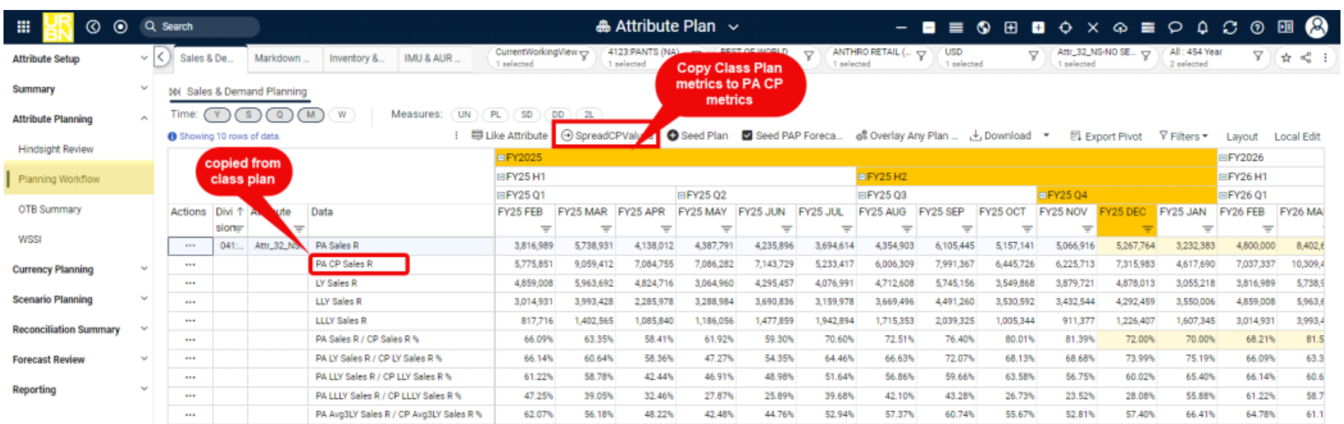
Below are all class plan metrics available in Attribute Plan:

- 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.



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.



% 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.

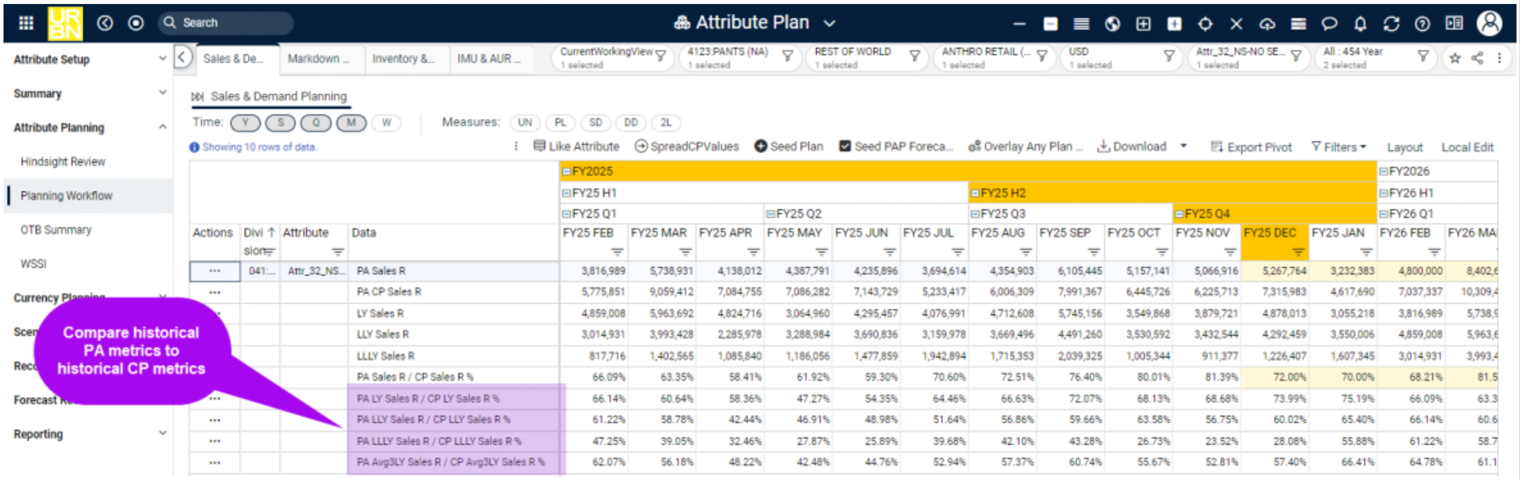
You can compare your historical product attribute plan penetration metrics to your historical class plan metrics for LY, LLY, LLLY, & AVG3LY

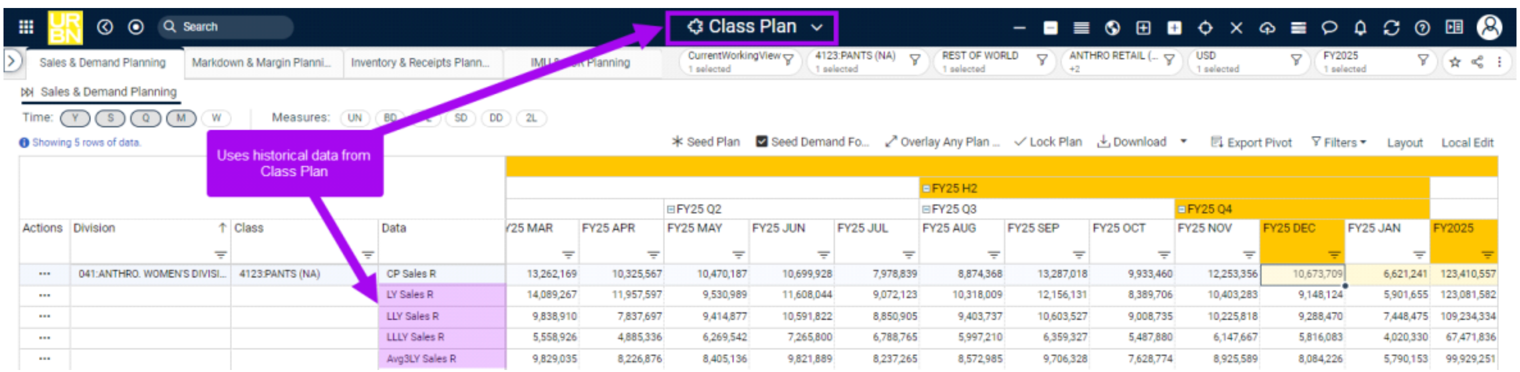
- PA LY Demand R/ CP LY Demand R %
- PA LLY Demand R/ CP LLY Demand R %
- PA LLLY Demand R/ CP LLLY Demand R %
- PA AVG3LY Demand R/ CP AVG3LY Demand R %

- 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 %

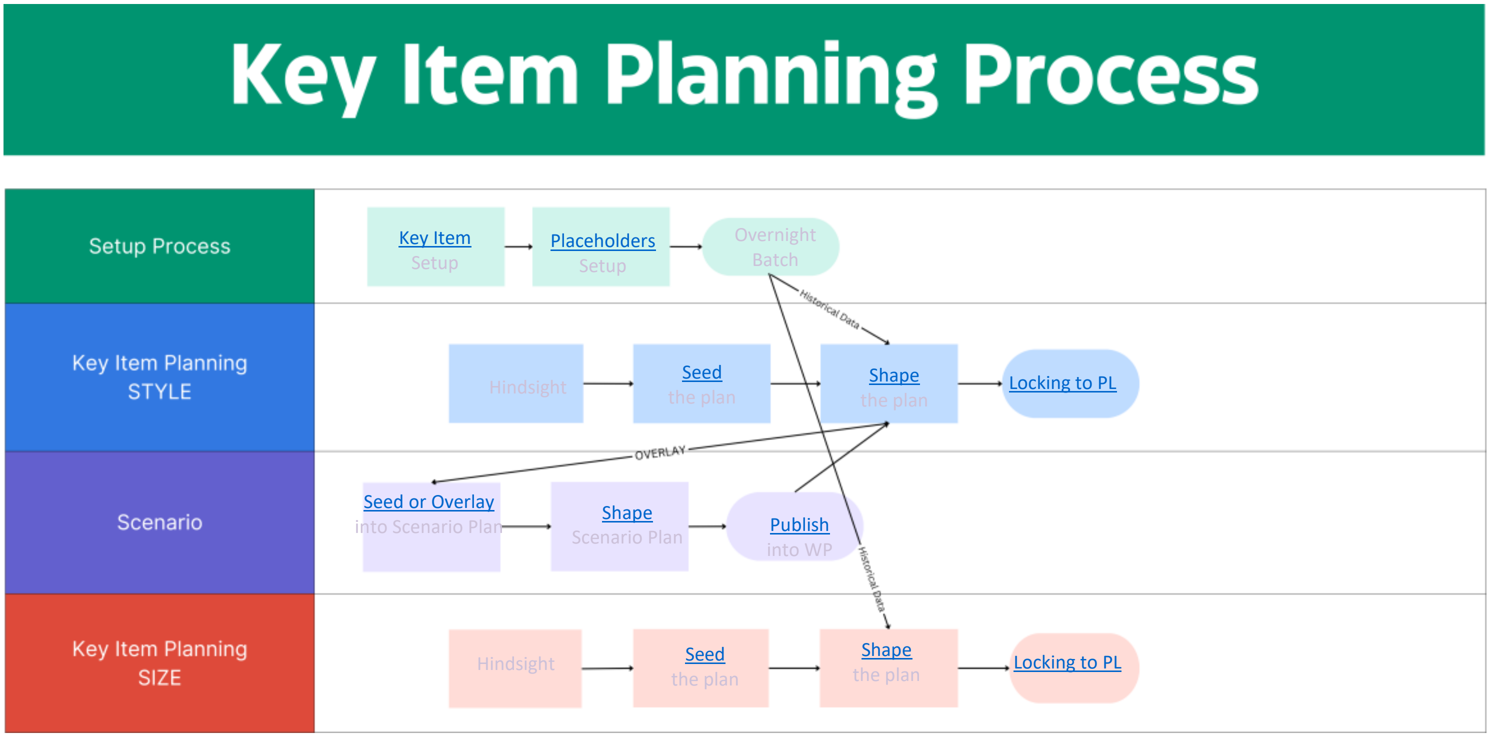
- PA LY EOP R/ CP LY EOP R %
- PA LLY EOP R/ CP LLY EOP R %
- PA LLLY EOP R/ CP LLLY EOP R %
- PA AVG3LY EOP R/ CP AVG3LY EOP R %





Key Item Planning Overview

Tuesday, July 23, 2024 12:50 PM



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 p lanned, 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 th e 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.

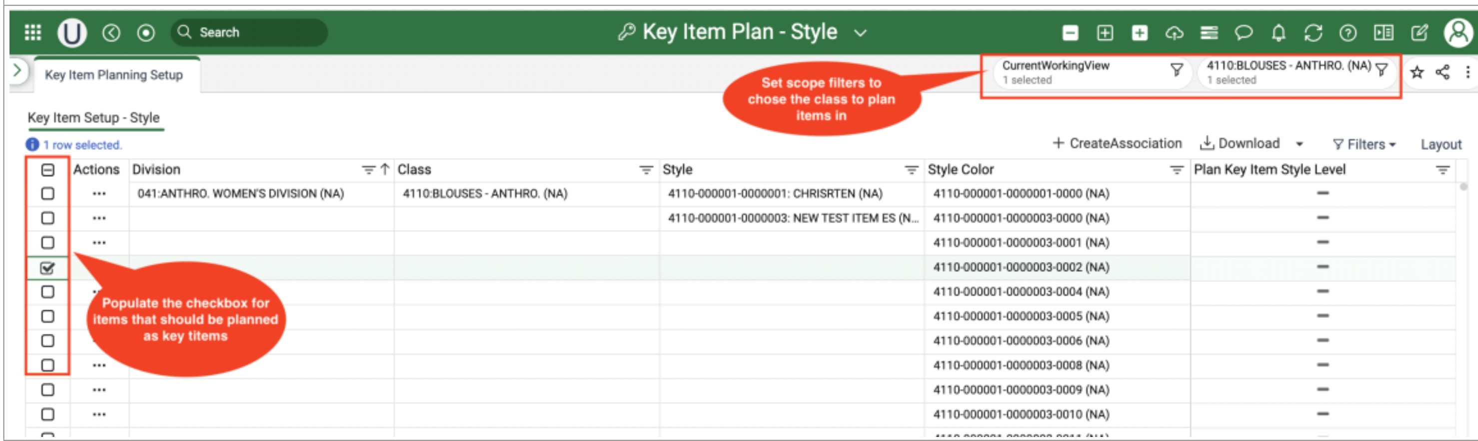
Key Item Plan Setup Steps

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

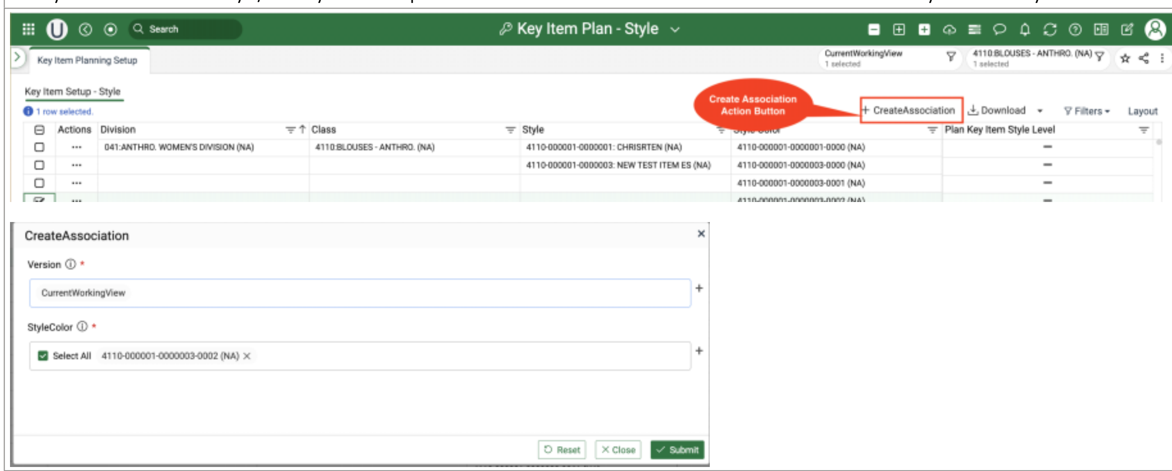
Update your Scope Filters to the class you are looking to plan.

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 a fter the next.



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:



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 contin ue to work in o9.

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

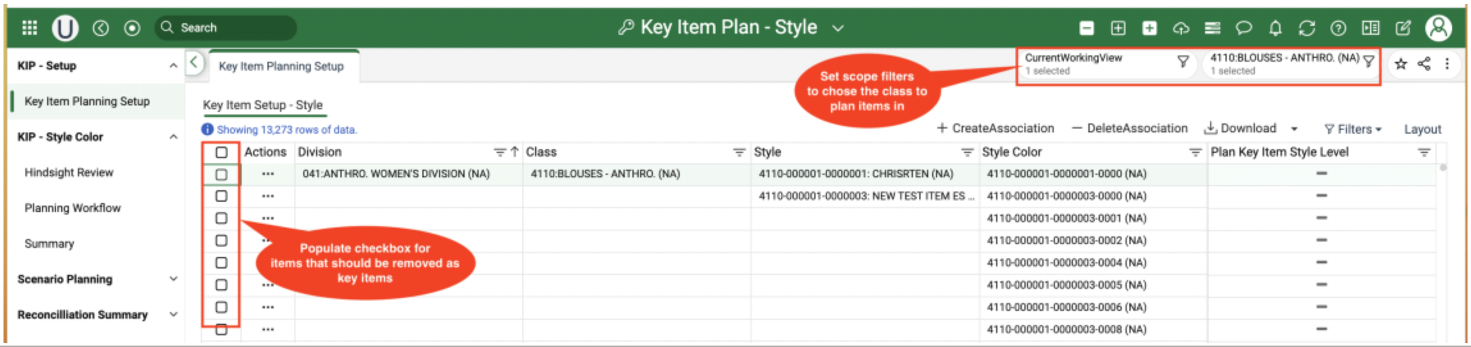
Removing a Key Item from Plan

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

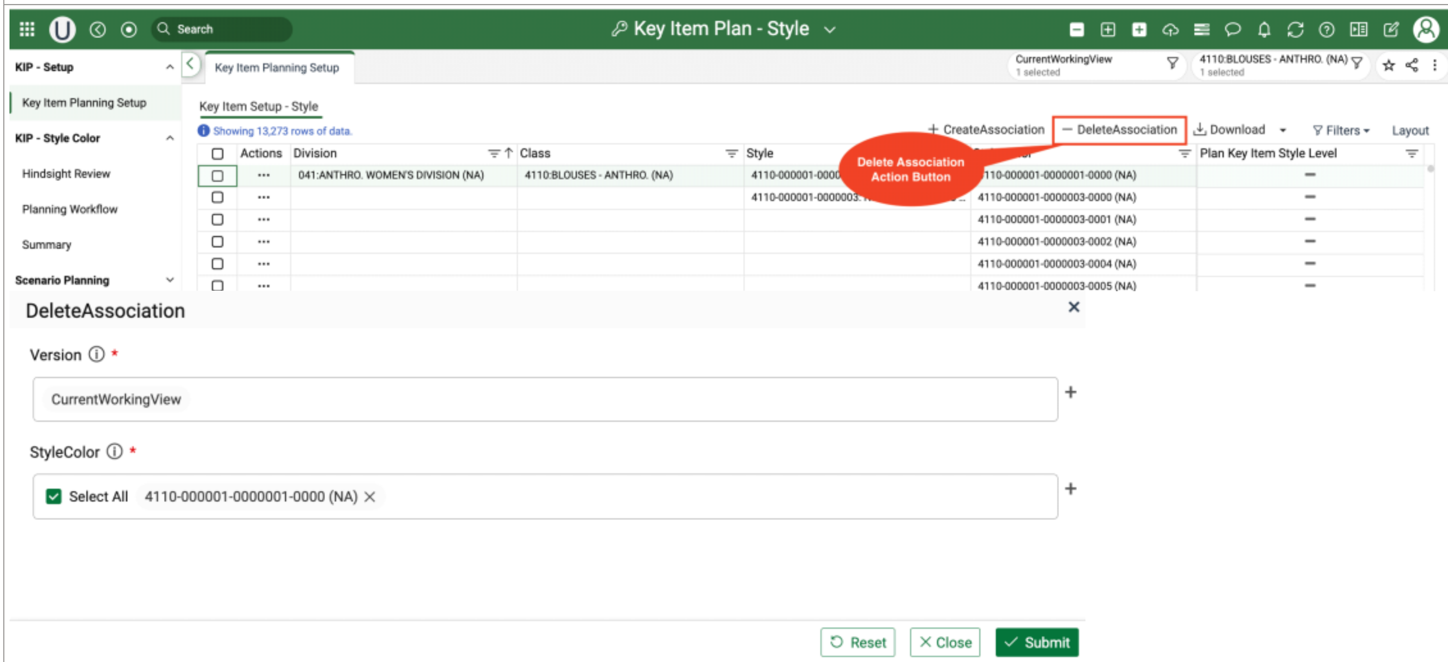
Navigate to **Key Item Plan - Style Workspace > KIP - Setup Page Group > Key Item Planning Setup Page.**

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.



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



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 contin ue to work in o9.

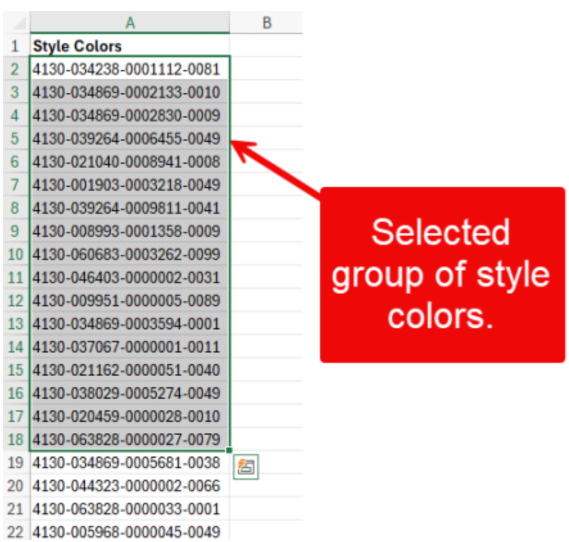
Once complete, the style colors will be removed from the plan.

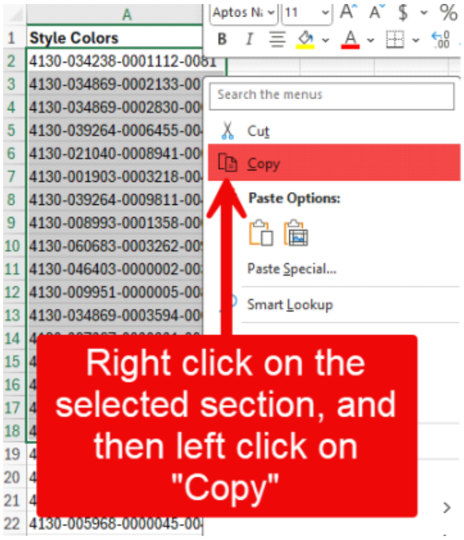
Tips & Tricks - FAQ 1

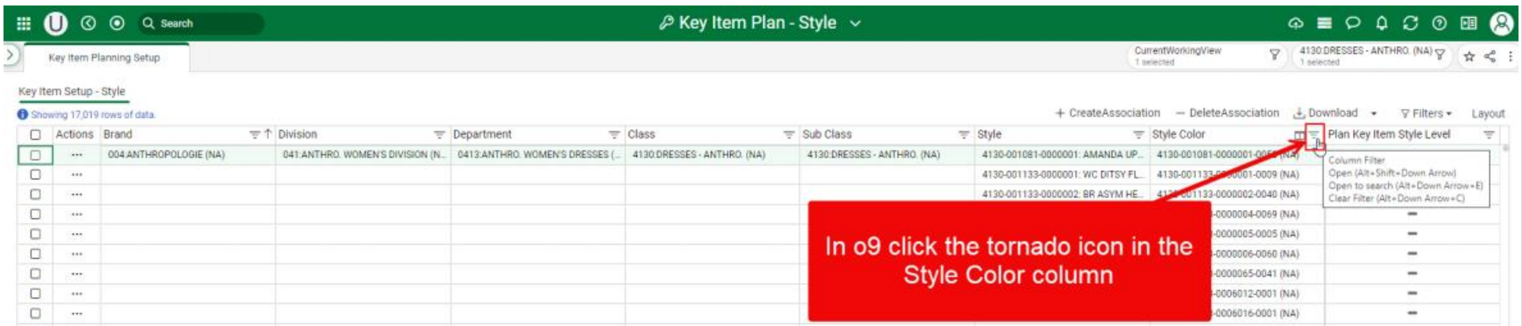
Can I copy & paste a list of style colors into the Key Item Setup?

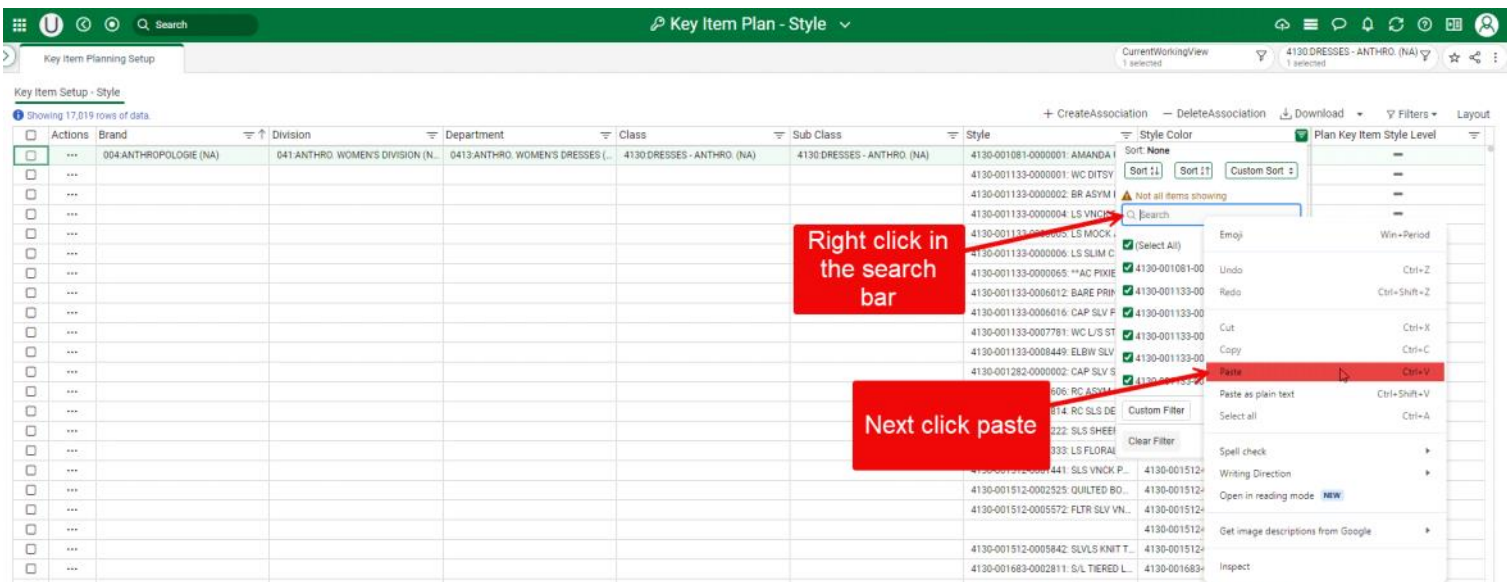
Yes. If you have a list of styles in Excel, or in a Text file you can highlight the list of style colors you wish to filter by and copy & paste them into o9.

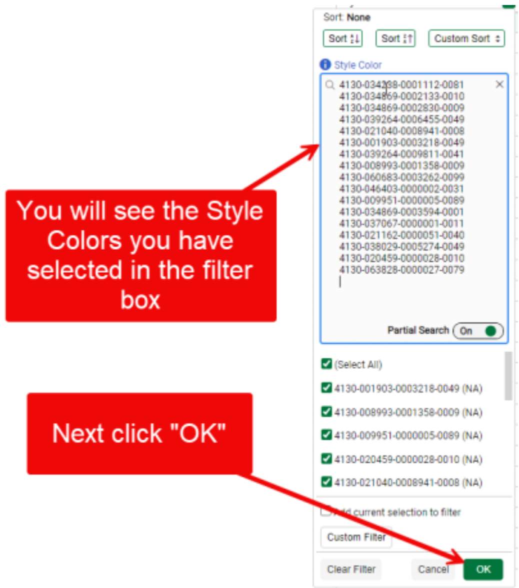
Excel

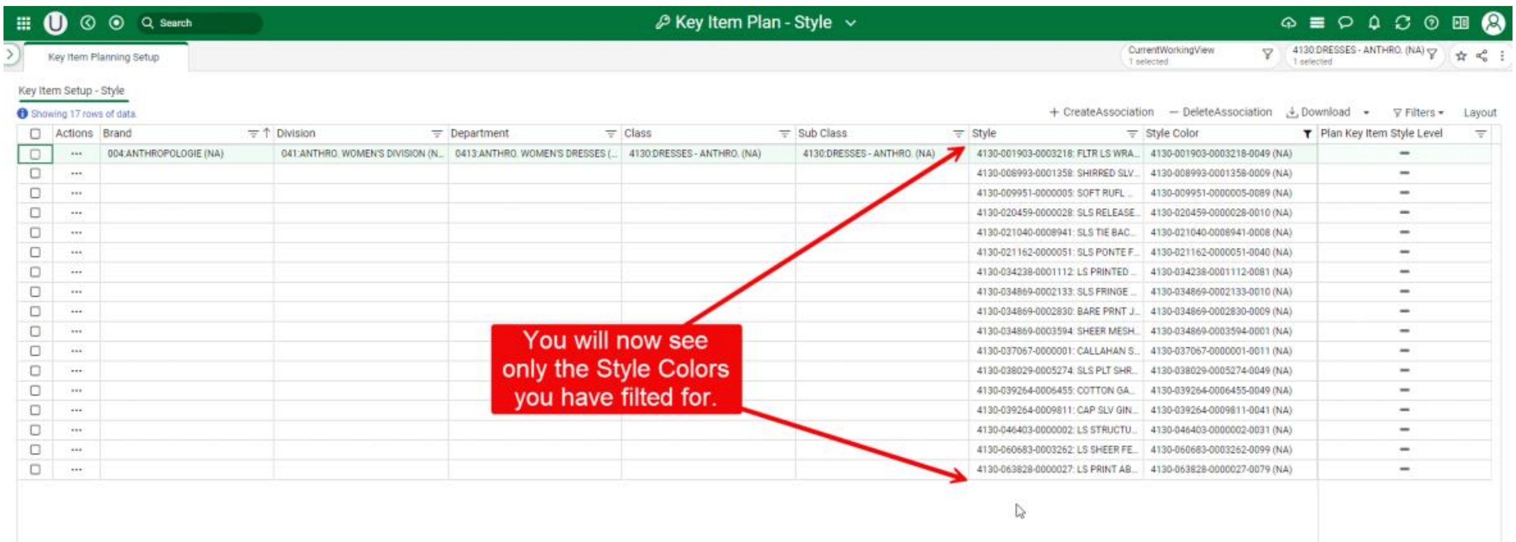



Style Colors
Search the menus
Cut
Copy
Paste Options:
Paste Special...
Smart Lookup
Right click on the selected section, and then left click on "Copy"

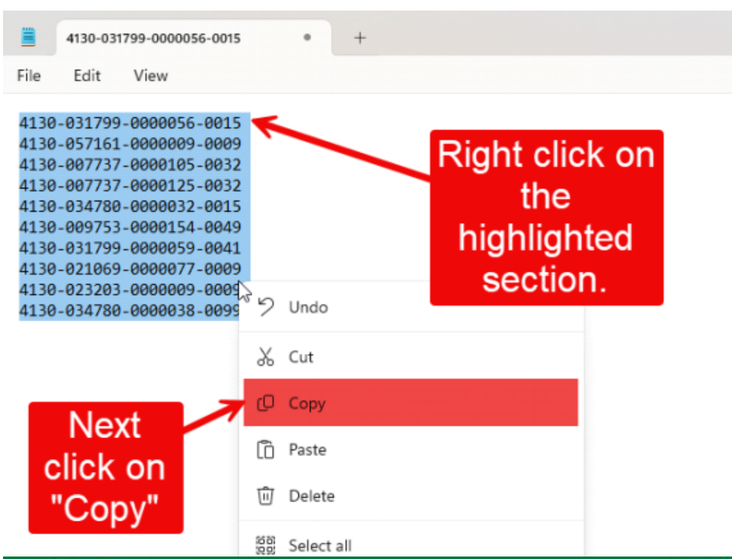

Key Item Plan - Style
Key Item Planning Setup
Key Item Setup - Style
Showing 17,019 rows of data.
Column Filter
In o9 click the tornado icon in the Style Color column

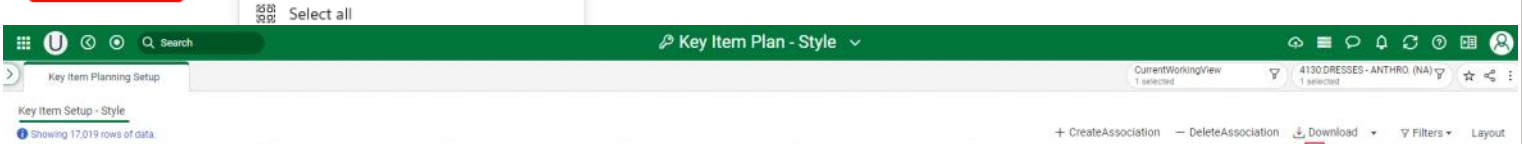

Key Item Plan - Style
Key Item Planning Setup
Key Item Setup - Style
Showing 17,019 rows of data.
Right click in the search bar
Next click paste

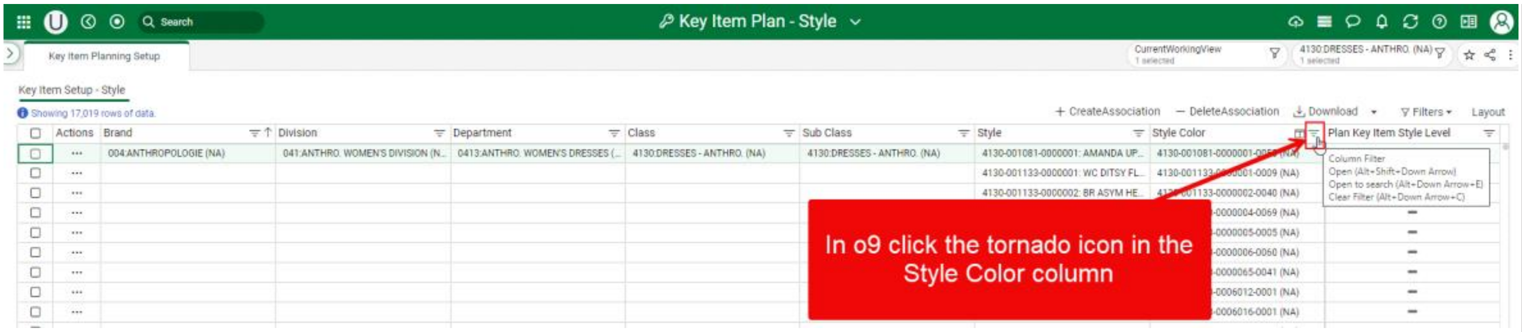

You will see the Style Colors you have selected in the filter box
Next click "OK"
Sort: None
Style Color
Partial Search
(Select All)
Clear Filter
Cancel
OK

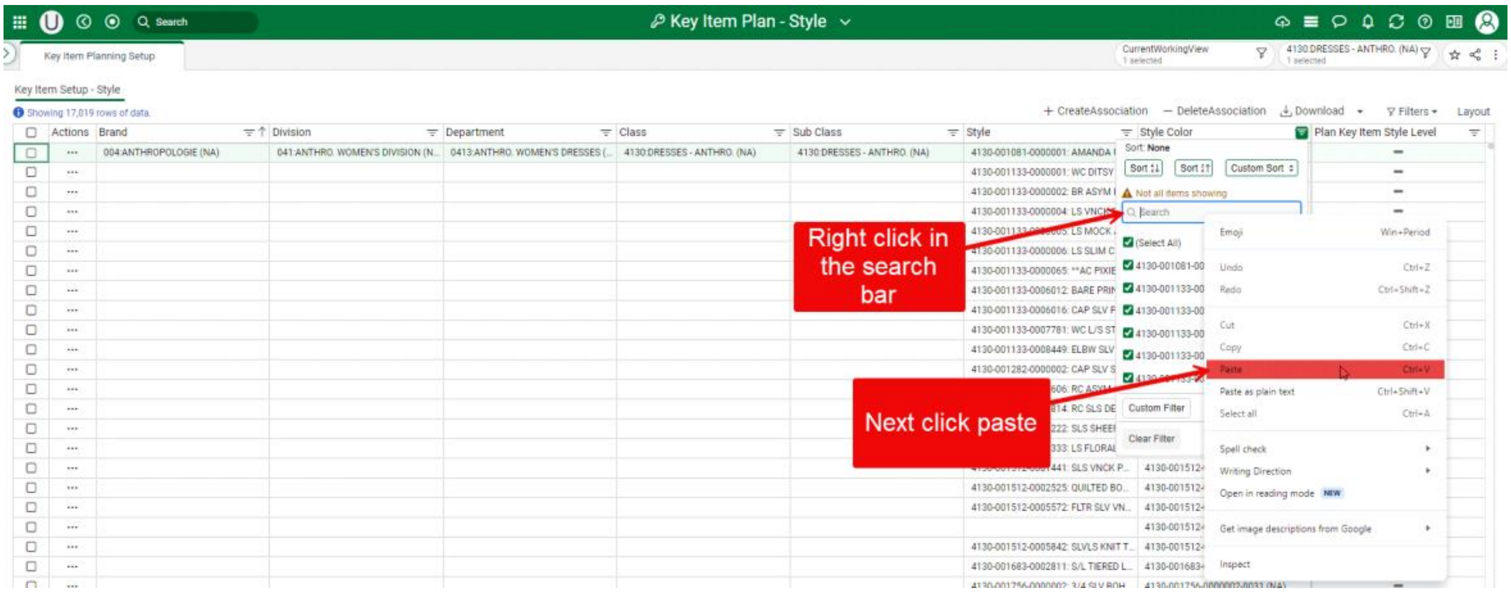

Key Item Plan - Style
Key Item Planning Setup
Key Item Setup - Style
Showing 17 rows of data
You will now see only the Style Colors you have filted for.

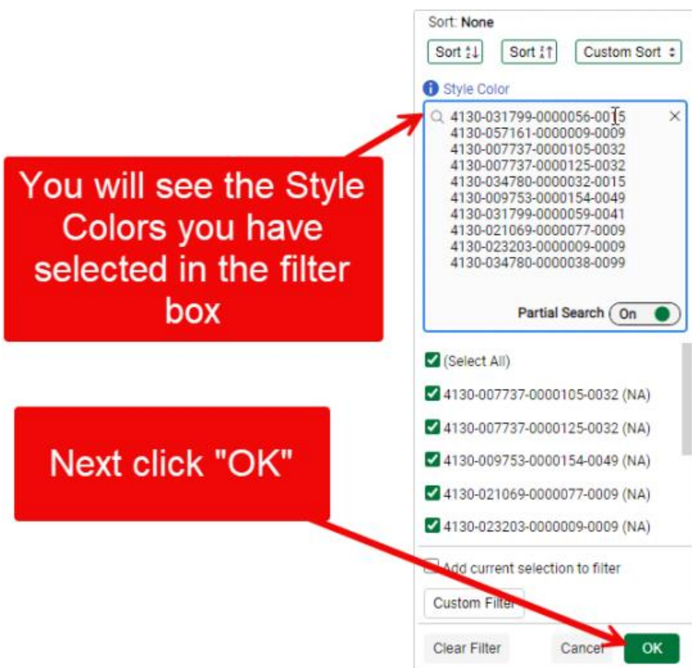
Notepad

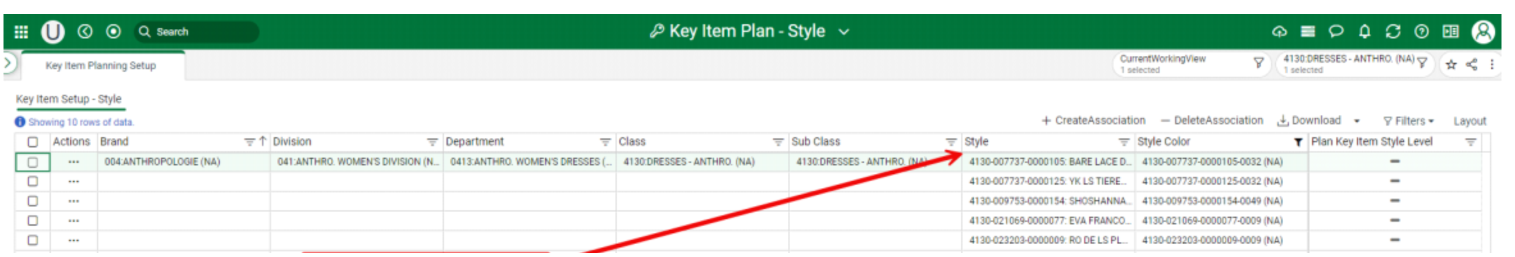

4130-031799-0000056-0015
File
Edit
View
Right click on the highlighted section.
Next click on "Copy"
Undo
Cut
Copy
Paste
Delete
Select all

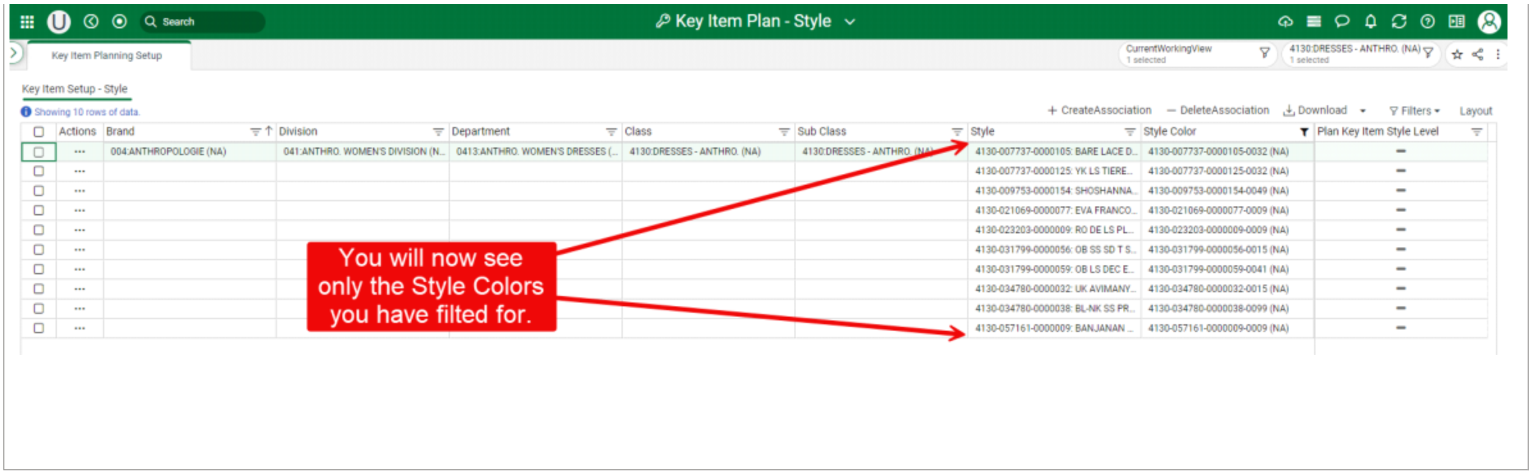

Key Item Plan - Style
Key Item Planning Setup
Key Item Setup - Style
Showing 17,019 rows of data


Key Item Plan - Style
In o9 click the tornado icon in the Style Color column


Key Item Plan - Style
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"
Sort: None
Style Color
4130-031799-0000056-0015
4130-057161-0000009-0009
4130-007737-0000105-0032
4130-007737-0000125-0032
4130-034780-0000032-0015
4130-009753-0000154-0049
4130-031799-0000059-0041
4130-021069-0000077-0009
4130-023203-0000009-0009
4130-034780-0000038-0099
Partial Search
(Select All)
Add current selection to filter
Custom Filter
Clear Filter
Cancel
OK


Key Item Plan - Style



Search
Key Item Plan - Style
Key Item Planning Setup
CurrentWorkingView
1 selected
4130:DRESSES - ANTHRO. (NA)
1 selected
Key Item Setup - Style
Showing 10 rows of data.
+ CreateAssociation
— DeleteAssociation
Download
Filters
Layout
Actions
Brand
Division
Department
Class
Sub Class
Style
Style Color
Plan Key Item Style Level
004:ANTHROPOLOGIE (NA)
041:ANTHRO. WOMEN'S DIVISION (N...
0413:ANTHRO. WOMEN'S DRESSES (...
4130:DRESSES - ANTHRO. (NA)
4130-007737-0000105: BARE LACE D...
4130-007737-0000105-0032 (NA)
4130-007737-0000125: YK LS TIERE...
4130-007737-0000125-0032 (NA)
4130-009753-0000154: SHOSHANNA...
4130-009753-0000154-0049 (NA)
4130-021069-0000077: EVA FRANCO...
4130-021069-0000077-0009 (NA)
4130-023203-0000009: RO DE LS PL...
4130-023203-0000009-0009 (NA)
4130-031799-0000056: OB SS SD T S...
4130-031799-0000056-0015 (NA)
4130-031799-0000059: OB LS DEC E...
4130-031799-0000059-0041 (NA)
4130-034780-0000032: UK AVIMANY...
4130-034780-0000032-0015 (NA)
4130-034780-0000038: BL-NK SS PR...
4130-034780-0000038-0099 (NA)
4130-057161-0000009: BANJANAN ...
4130-057161-0000009-0009 (NA)
You will now see only the Style Colors you have filted 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.

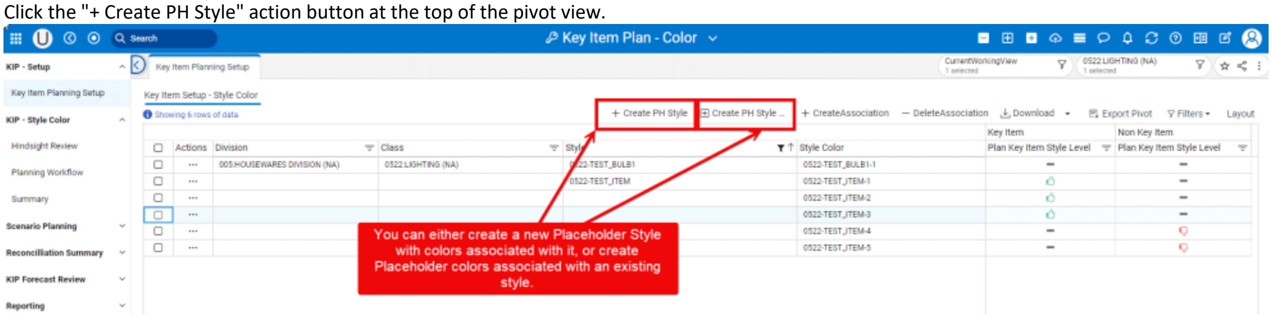
You can create a placeholder style or style color.

Creating a Placeholder Style

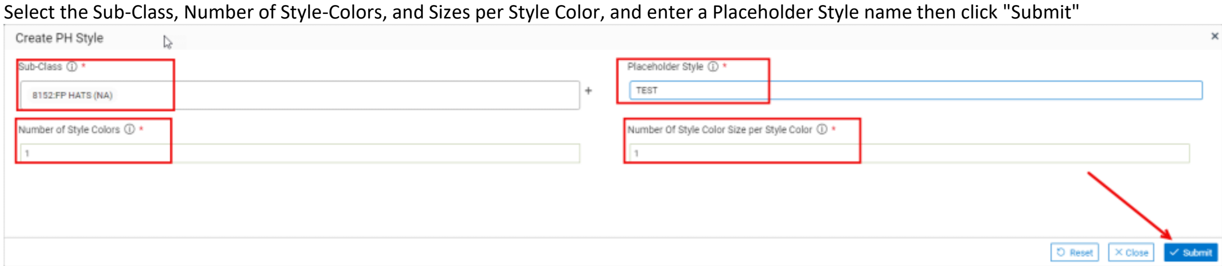
If you would like to create a Placeholder Style in Key Item Plan - Color

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

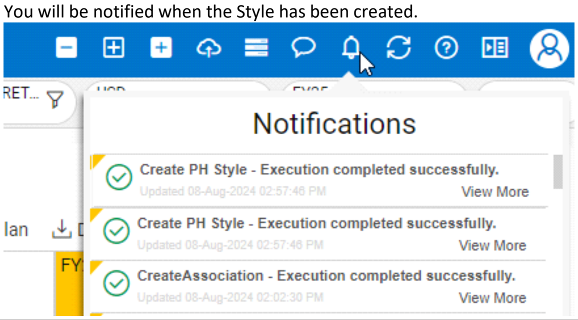
Click the "+ Create PH Style" action button at the top of the pivot view.



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

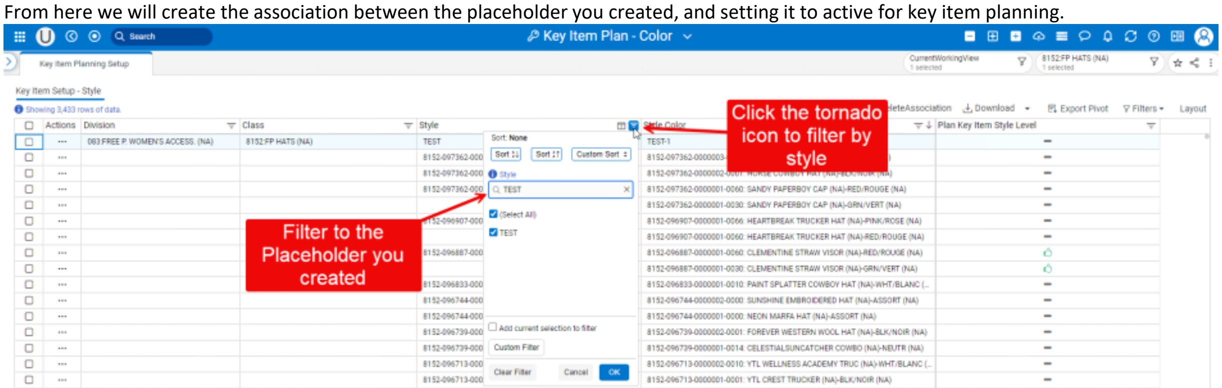


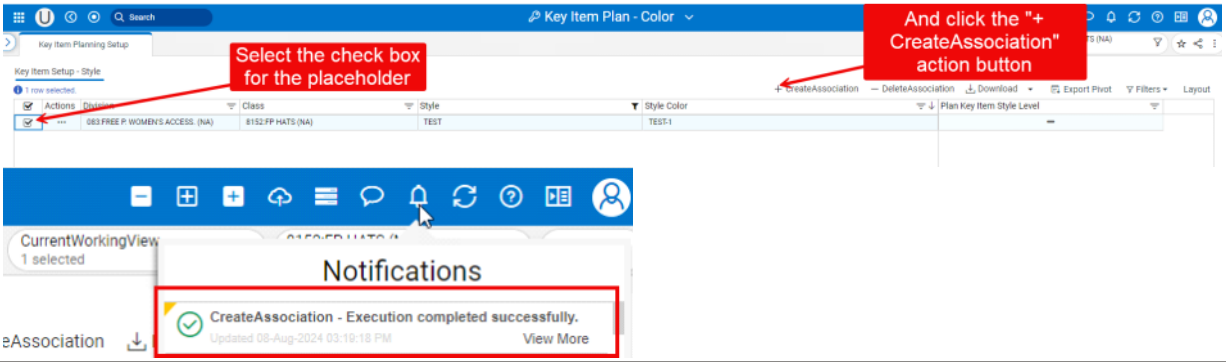
You will be notified when the Style has been created.



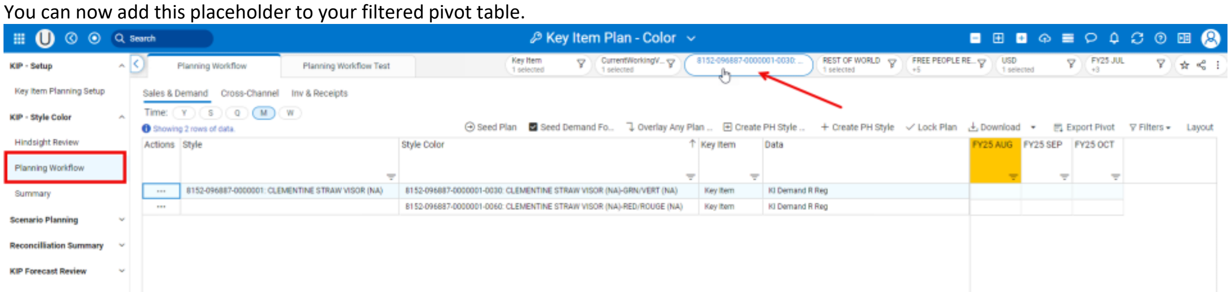
Next navigate to **Key Item Plan – Color > KIP – Setup > Key Item Planning Setup**

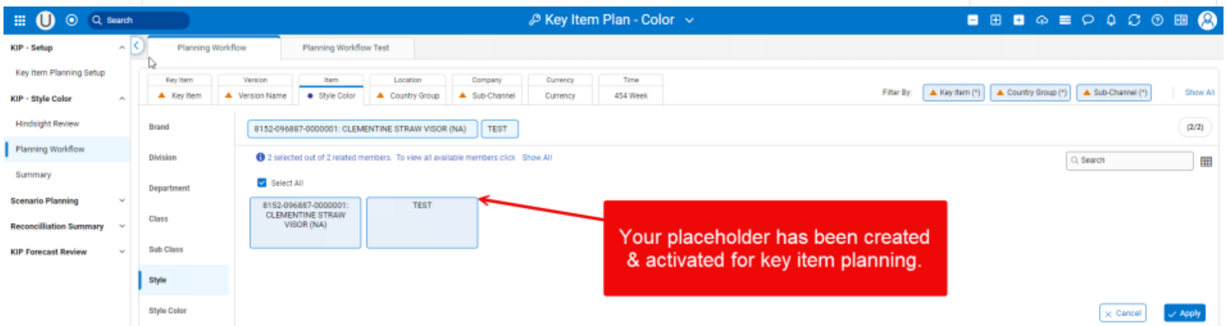
From here we will create the association between the placeholder you created, and setting it to active for key item planning.





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

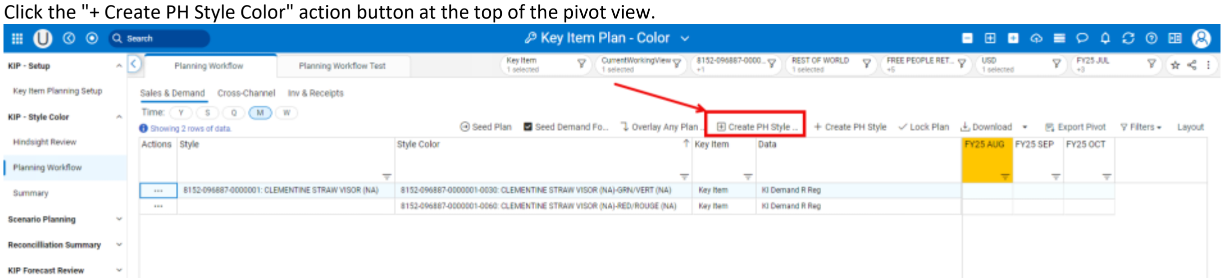




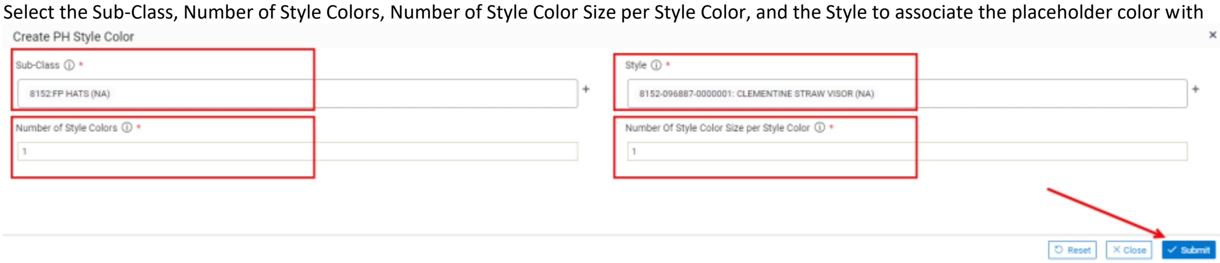
Creating a Placeholder Style Color

If you would like to create a Placeholder Style Color

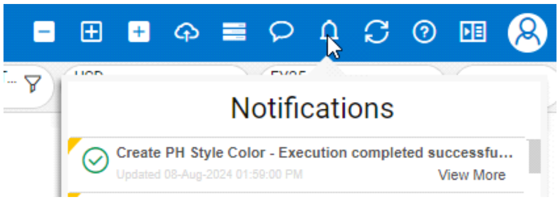
Navigate to **Key Item Plan – Color > KIP – Style Color > Planning Workflow**
Click the "+ Create PH Style Color" action button at the top of the pivot view.



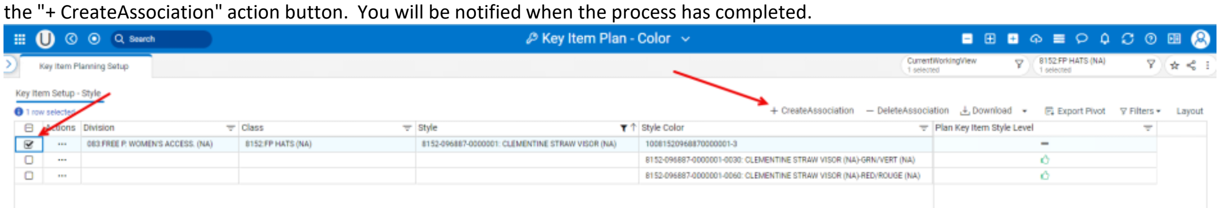
Select the Sub-Class, Number of Style Colors, Number of Style Color Size per Style Color, and the Style to associate the placeholder color with

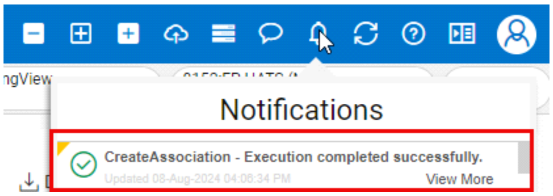


You will be notified when the action has completed.

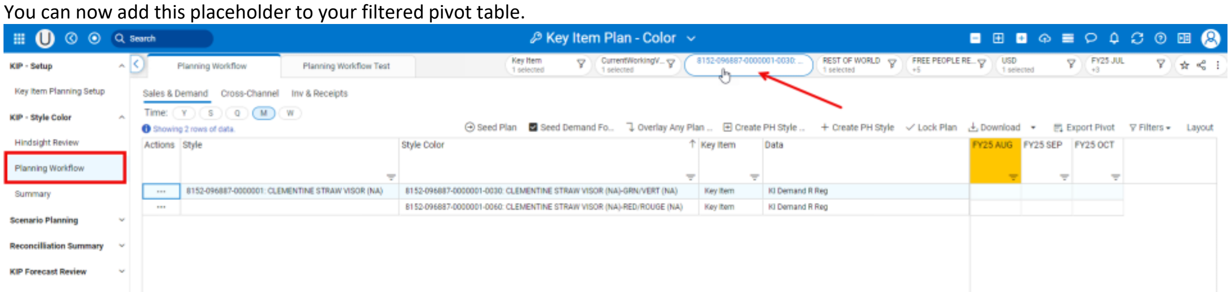


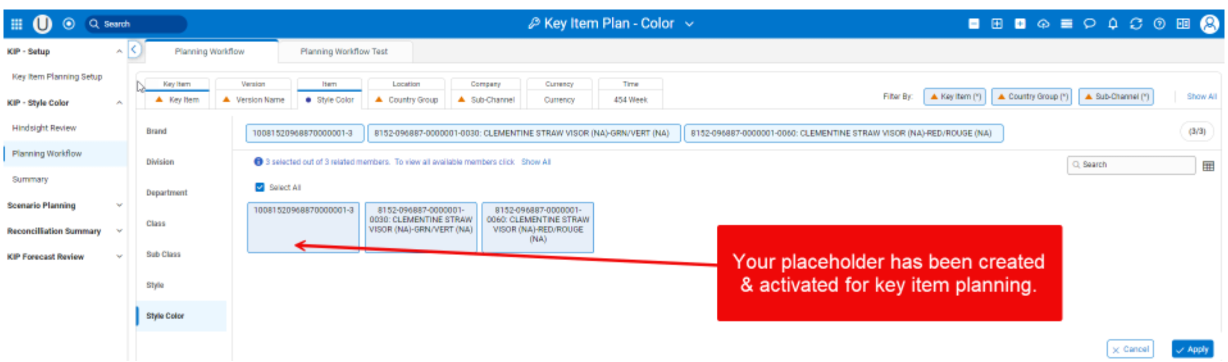
Next navigate to **Key Item Plan – Color > KIP – Setup > Key Item Planning Setup**
From here we will create the association between the placeholder you created, and setting it to active for key item planning. Click the check box for the placeholder and select the "+ CreateAssociation" action button. You will be notified when the process has completed.





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





Deleting Placeholders

Thursday, August 08, 2024 2:47 PM

Deleting Placeholders

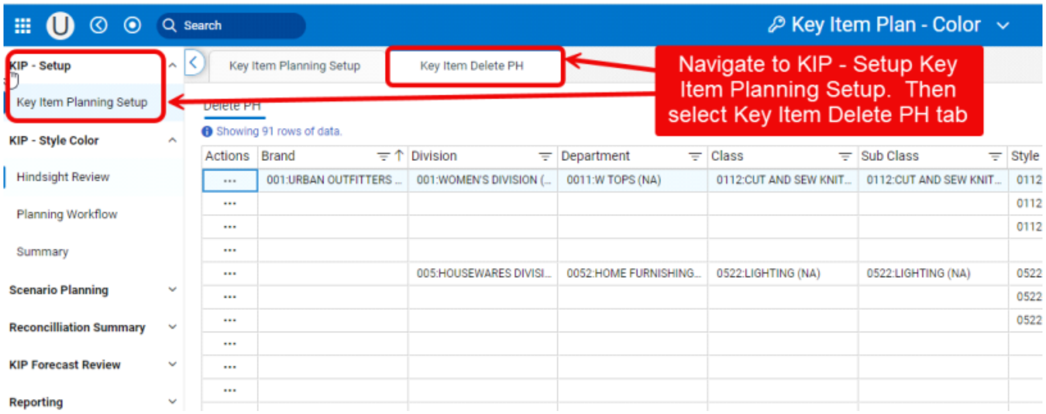
This process is used to delete placeholders in key item planning.

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**



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.

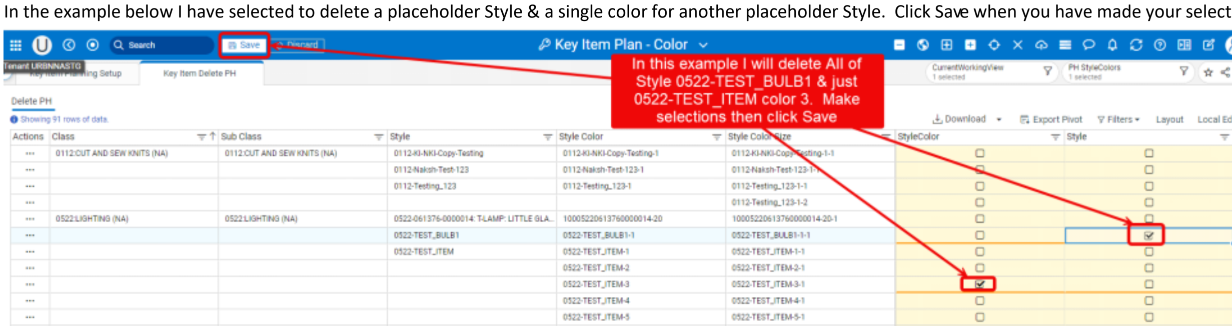
Deleting Placeholder Style Color

- 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



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

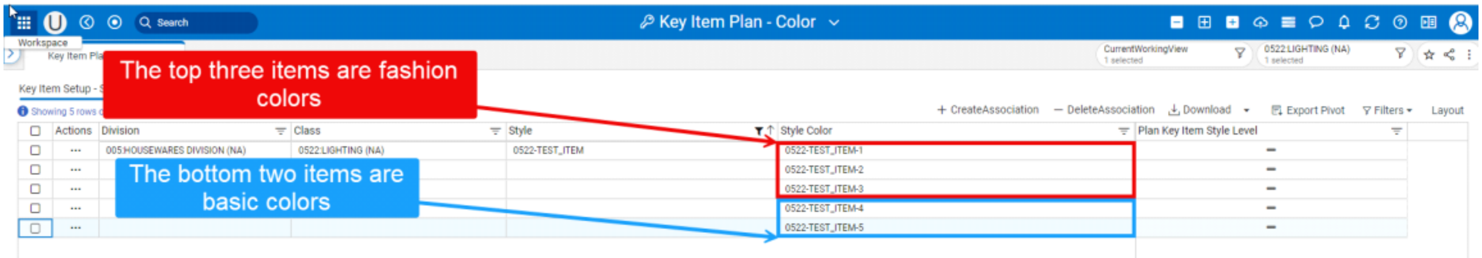
Grouping Style Colors

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

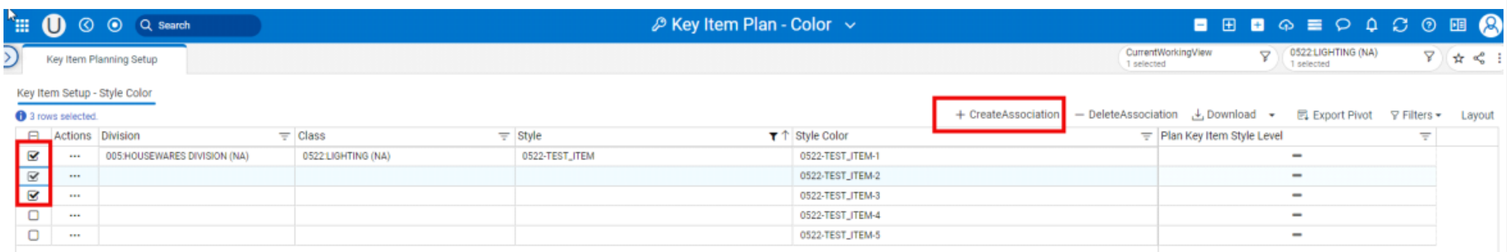
Using KI (Key Item) & NKI (Non Key Item) to form groups

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

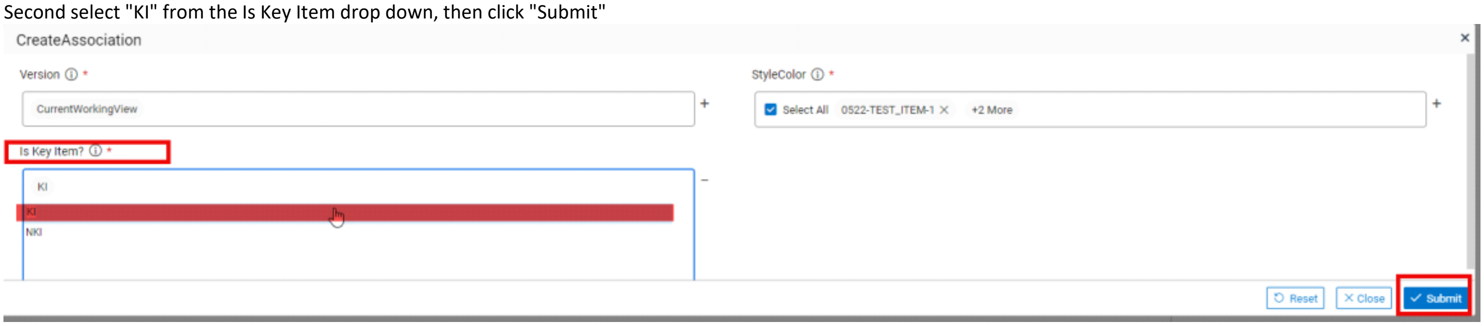
In the example shown We have used a placeholder style with 5 colors associated with it. Style Color 1, 2, and 3 will represent fashion colors, while Style Color 4 & 5 represent basic colors.



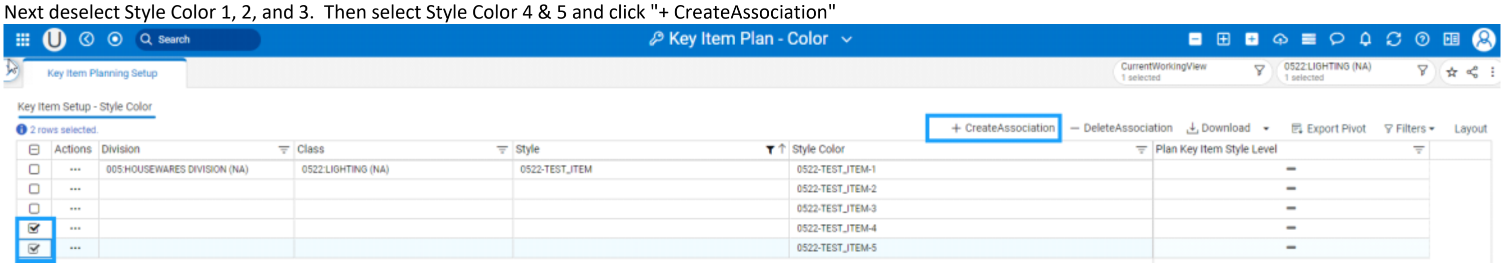
First we will select the tic boxes for the three fashion colors, and then select the "+ CreateAssociation" action button.



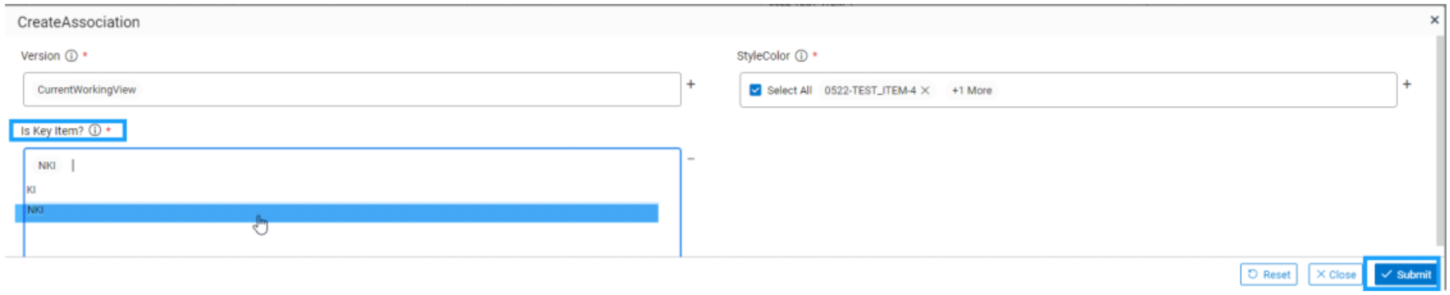
Second select "KI" from the Is Key Item drop down, then click "Submit"



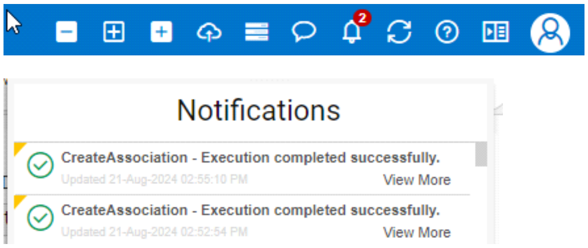
Next deselect Style Color 1, 2, and 3. Then select Style Color 4 & 5 and click "+ CreateAssociation"



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

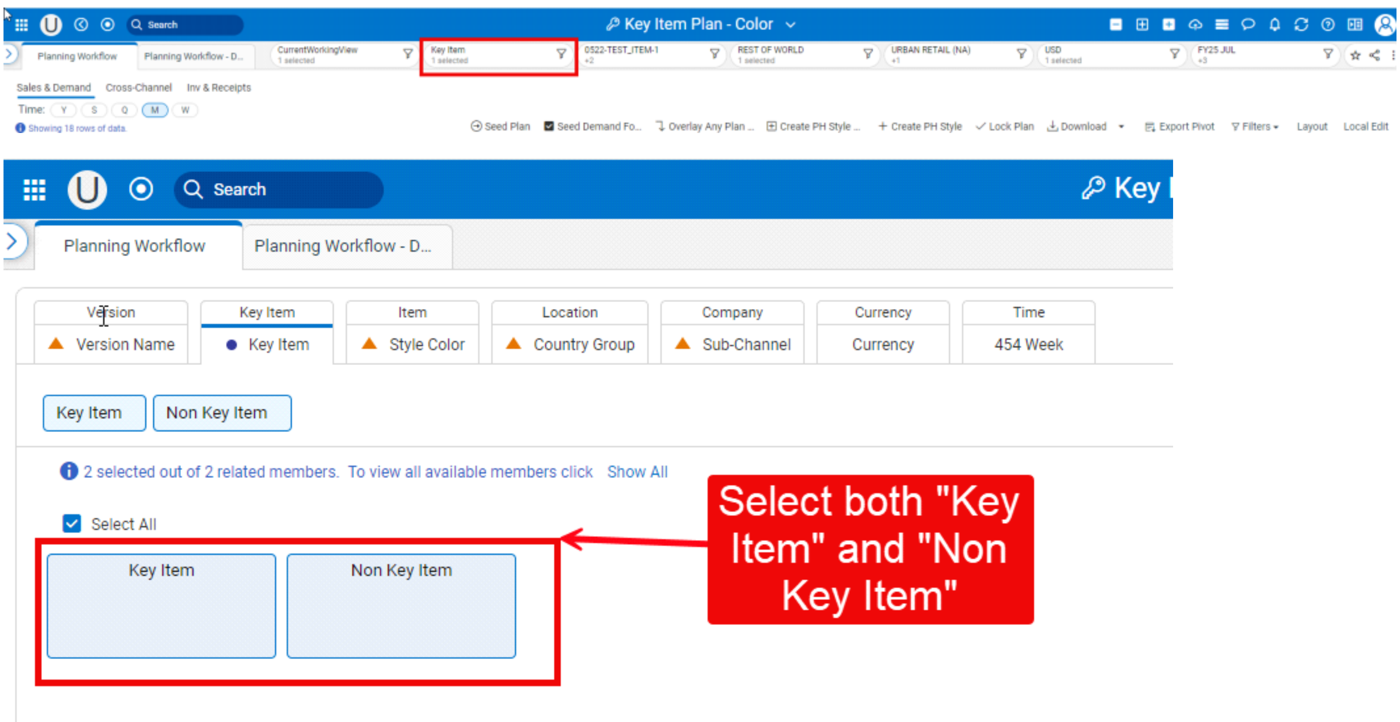


You will be notified when the associations have been created

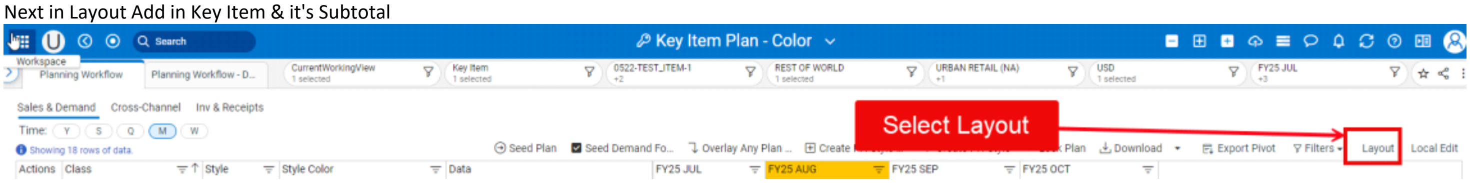


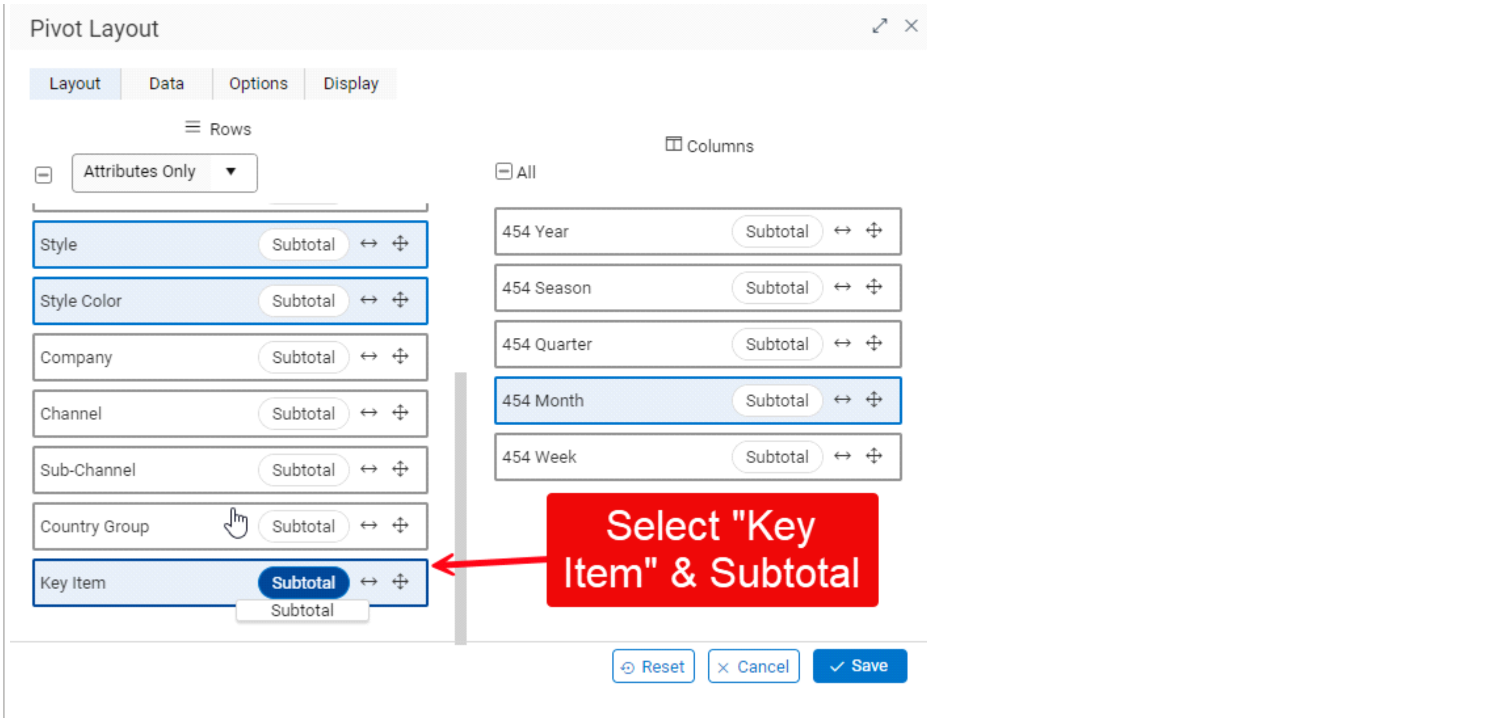
Navigate to **Key Item Plan – Color > KIP - Style Color > Planning Workflow**

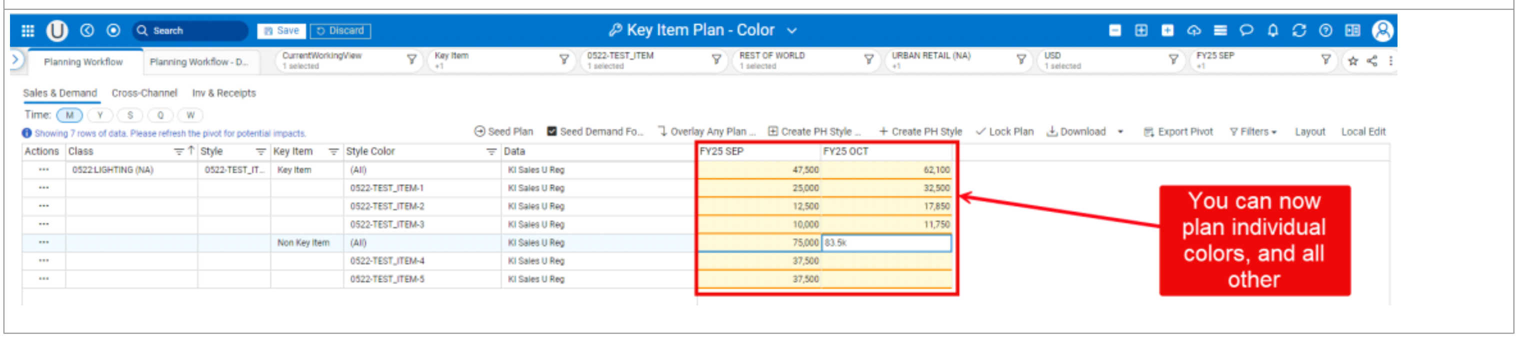
Now in your filters select both "Key Item" & "Non Key Item"



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




Pivot Layout
Layout
Data
Options
Display
Rows
Columns
Attributes Only
All
Style
Style Color
Company
Channel
Sub-Channel
Country Group
Key Item
Subtotal
454 Year
454 Season
454 Quarter
454 Month
454 Week
Select "Key Item" & Subtotal
Reset
Cancel
Save


Key Item Plan - Color
Planning Workflow
Sales & Demand
Cross-Channel
Inv & Receipts
Actions
Class
Style
Key Item
Style Color
Data
FY25 SEP
FY25 OCT
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.

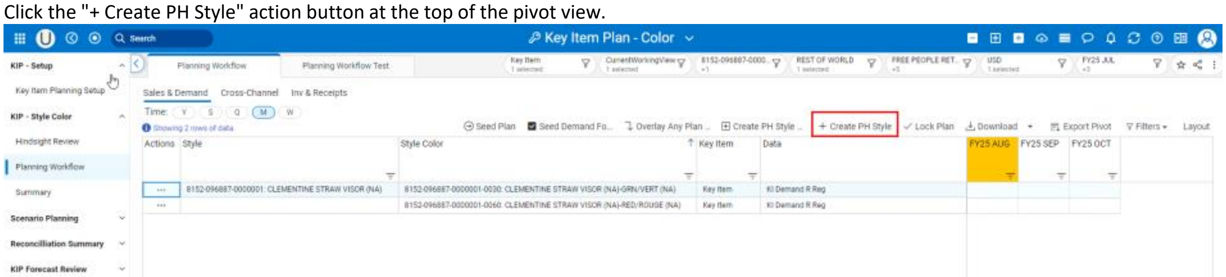
You can create a placeholder style or style color.

Creating a Placeholder Style

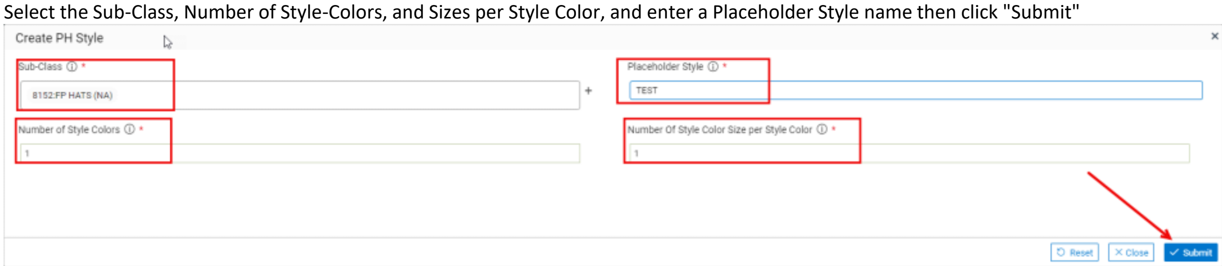
If you would like to create a Placeholder Style in Key Item Plan - Color

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

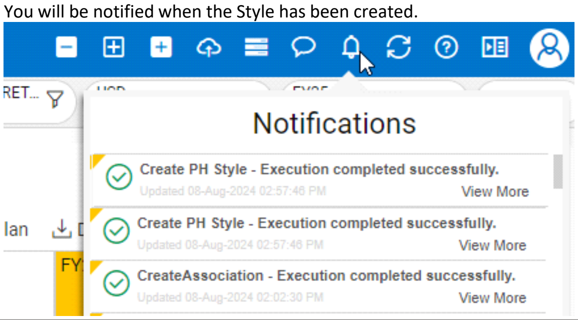
Click the "+ Create PH Style" action button at the top of the pivot view.



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

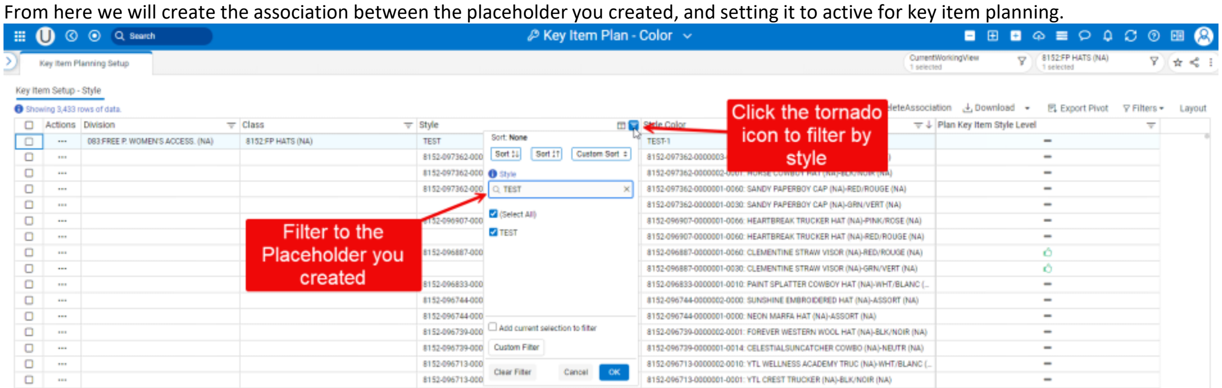


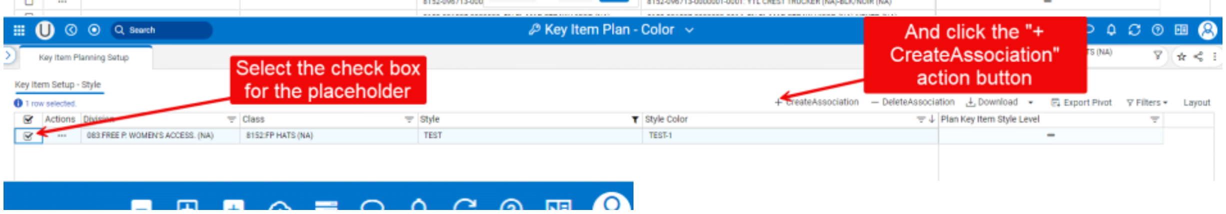
You will be notified when the Style has been created.

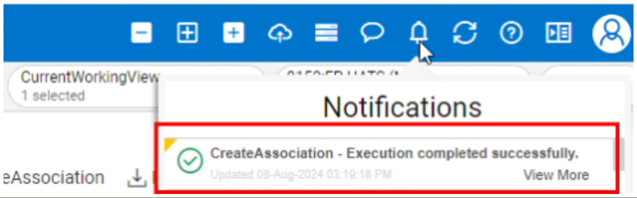


Next navigate to **Key Item Plan – Color > KIP – Setup > Key Item Planning Setup**

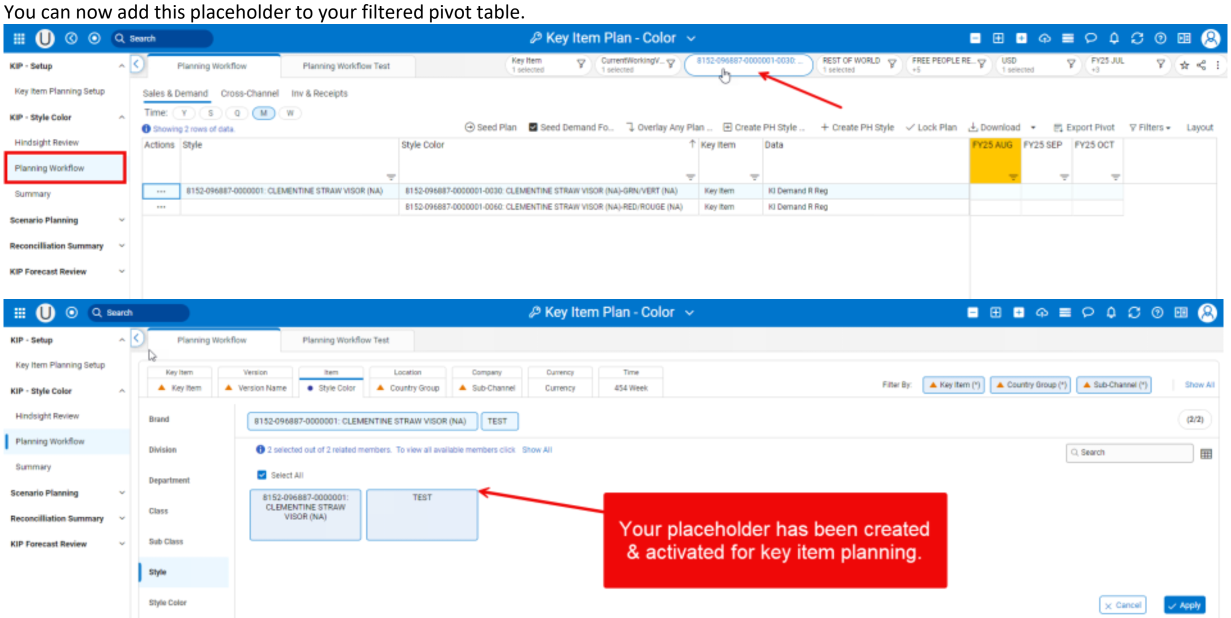
From here we will create the association between the placeholder you created, and setting it to active for key item planning.







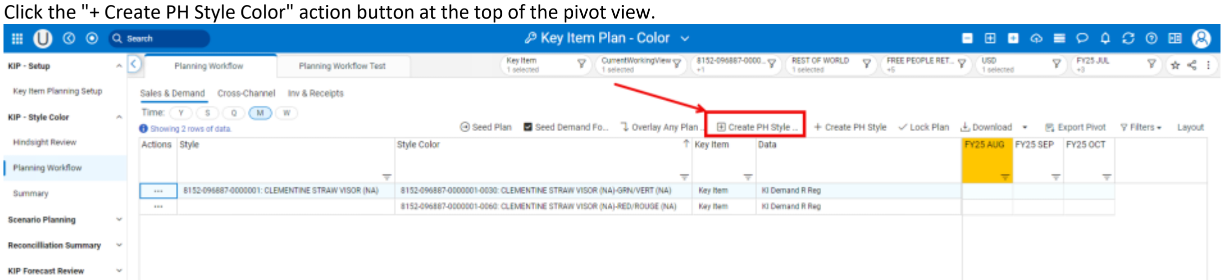
Now navigate back to **Key Item Plan – Color > KIP – Style Color > Planning Workflow**
You can now add this placeholder to your filtered pivot table.



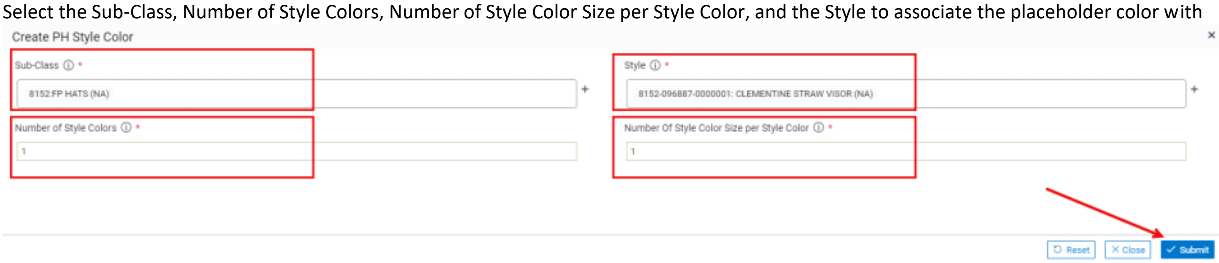
Creating a Placeholder Style Color

If you would like to create a Placeholder Style Color

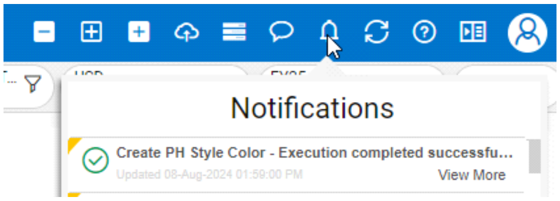
Navigate to **Key Item Plan – Color > KIP – Style Color > Planning Workflow**
Click the "+ Create PH Style Color" action button at the top of the pivot view.



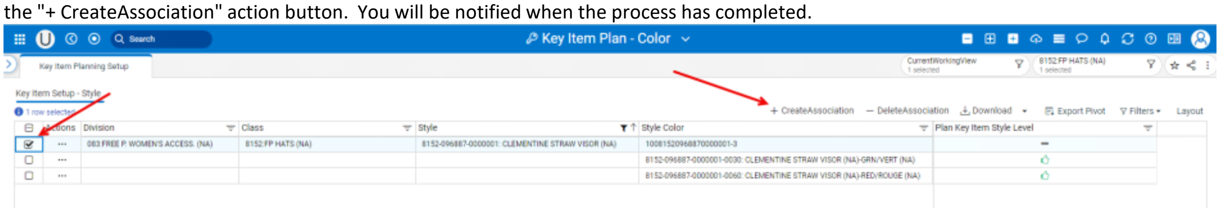
Select the Sub-Class, Number of Style Colors, Number of Style Color Size per Style Color, and the Style to associate the placeholder color with

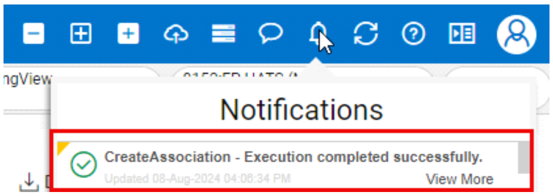


You will be notified when the action has completed.

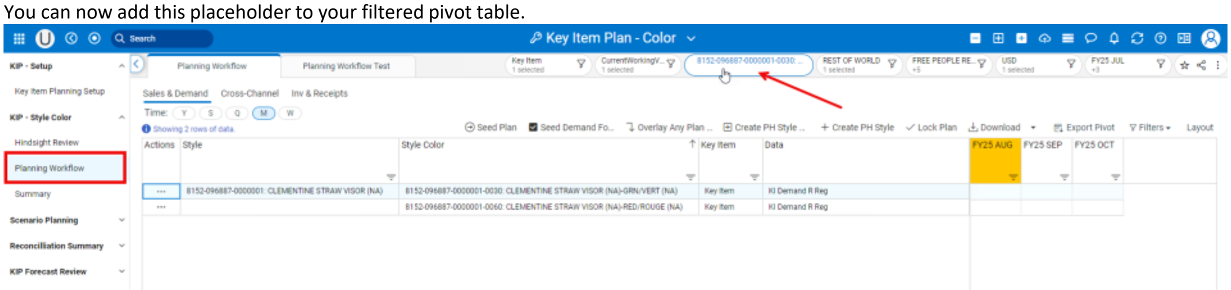


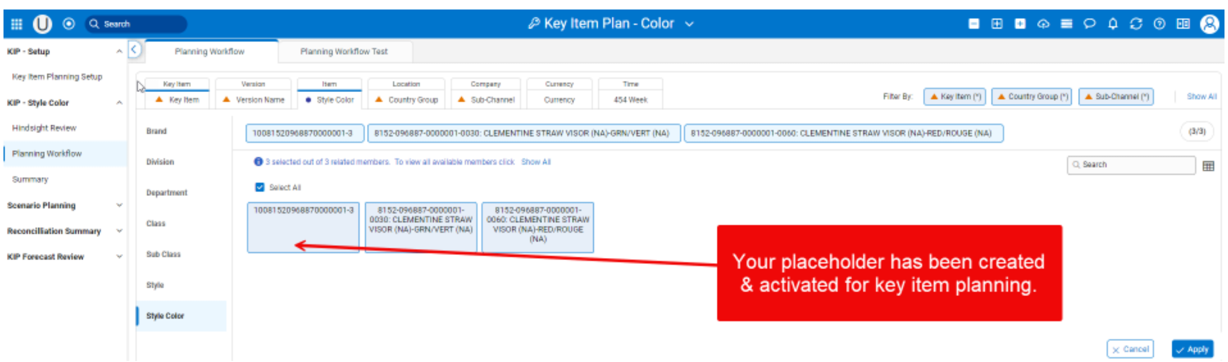
Next navigate to **Key Item Plan – Color > KIP – Setup > Key Item Planning Setup**
From here we will create the association between the placeholder you created, and setting it to active for key item planning. Click the check box for the placeholder and select the "+ CreateAssociation" action button. You will be notified when the process has completed.





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





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.

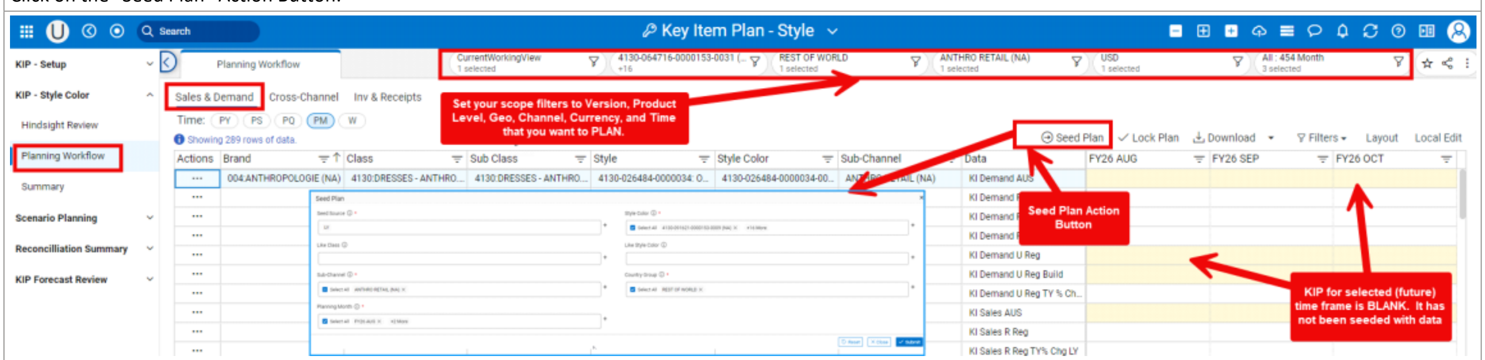
Hindsight Review helps planners determine which historical time frame is most appropriate to use as the baseline for their future plan. *Which past year do you think next year will be most like?*

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.

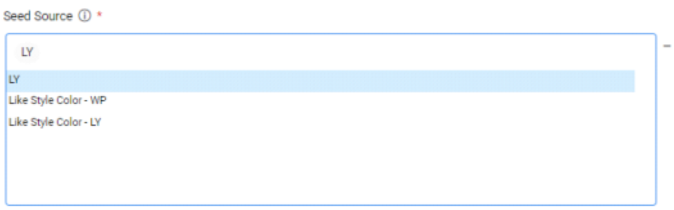
Click on the "Seed Plan" Action Button.



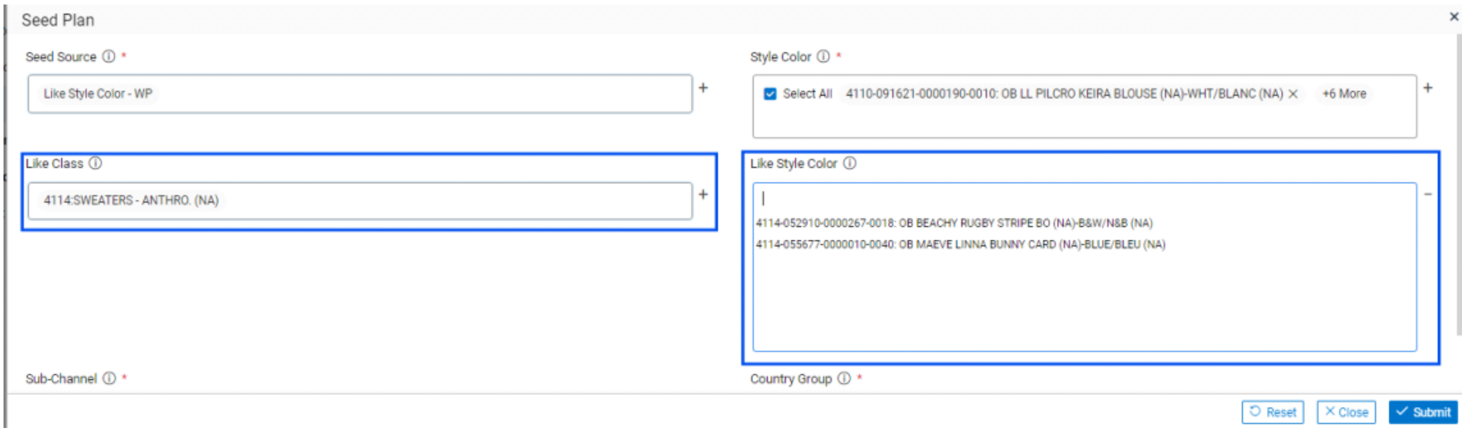
Fill out parameters in the "Seed Plan" Action Button Pop Up

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.

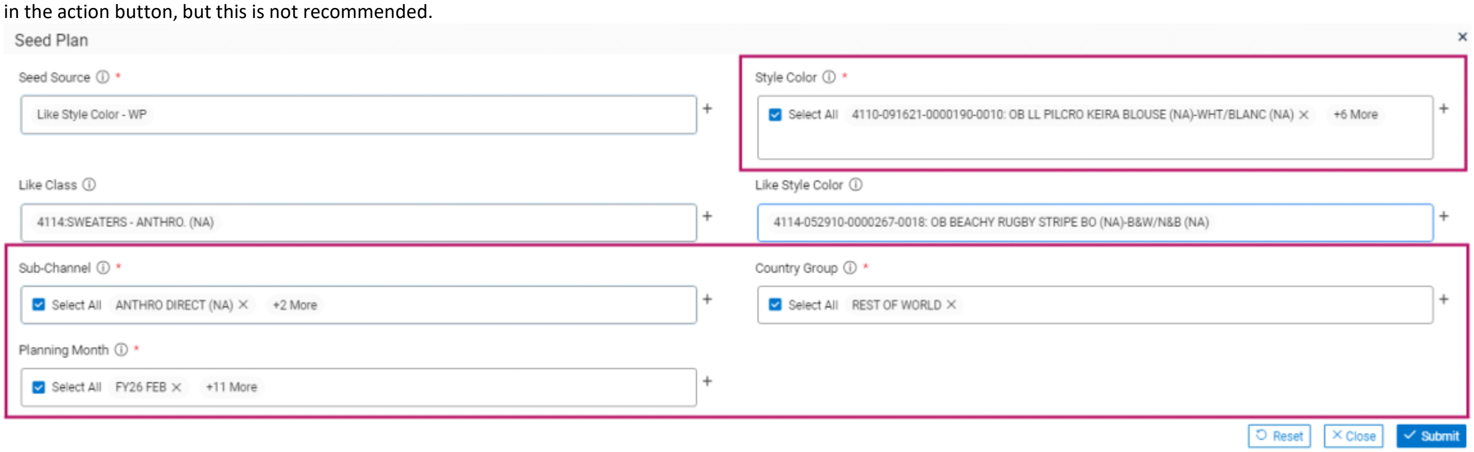
Choose your Seed Source.
You can seed from the LY of KI Style Color, Like Style Color - WP, or Like Style Color - LY.



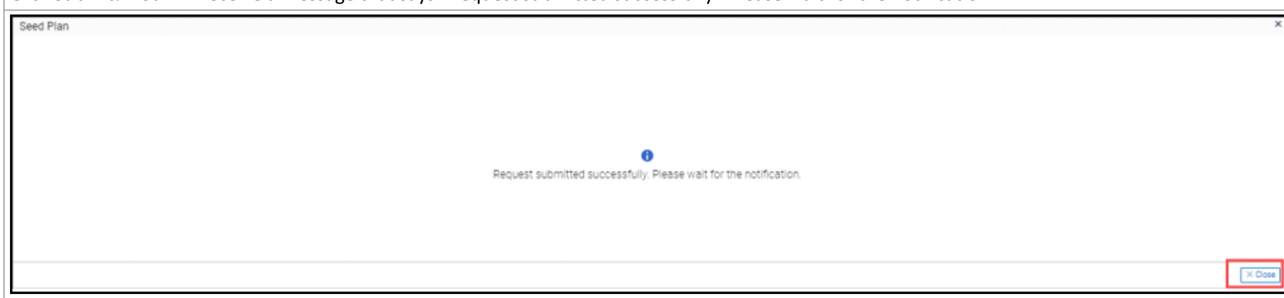
If you choose to seed from 'Like Style Color - WP' or 'Like Style Color - LY', then you should select the **Like Class** to further filter down the list of available key item **Like Style-Colors.**



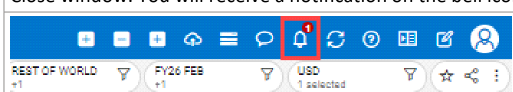
Sub-Channel, Country Group, Planning Month, and Style Color selections will default from your scope filters. You have the optionto update these selections by using the "+" in the action button, but this is not recommended.



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 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

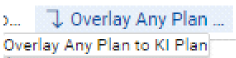
Plan action button.

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.



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

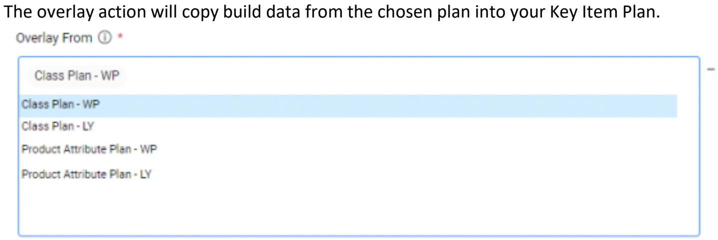
Overlay Any Plan to KI Plan Workflow

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

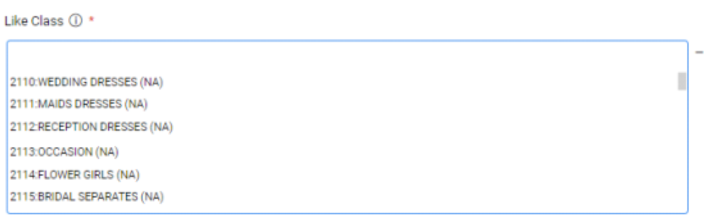
Update your Scope Filters to the time frame you are going to overlay with data.

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

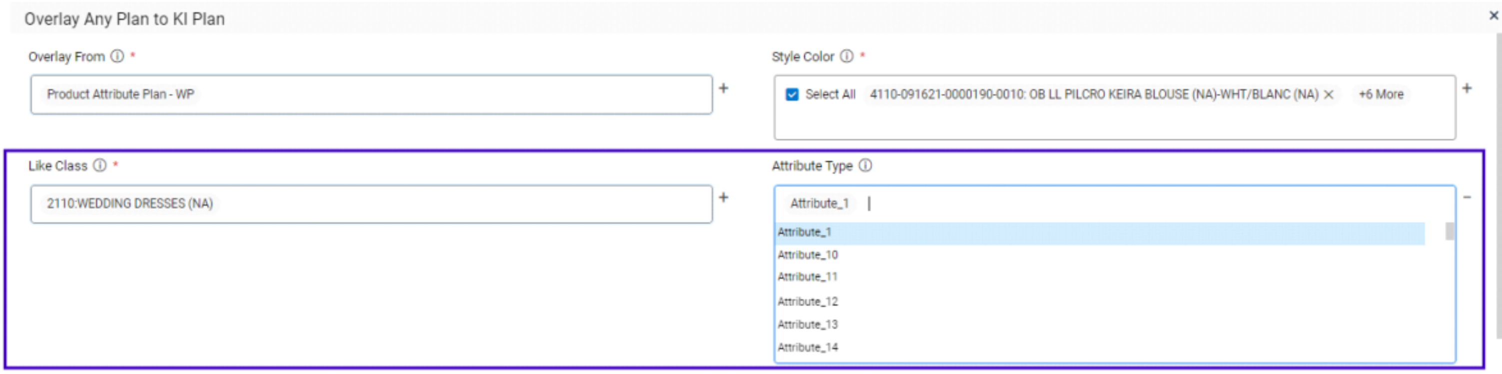
Choose your Overlay From source. You will have the option to overlay from the following plans: Class Plan - WP, Class Plan - LY, Product Attribute Plan - WP, or Product Attribute Plan - LY. The overlay action will copy build data from the chosen plan into your Key Item Plan.



If you chose to Overlay from 'Class Plan - WP' or 'Class Plan - LY'
You will need to select the Like Class:

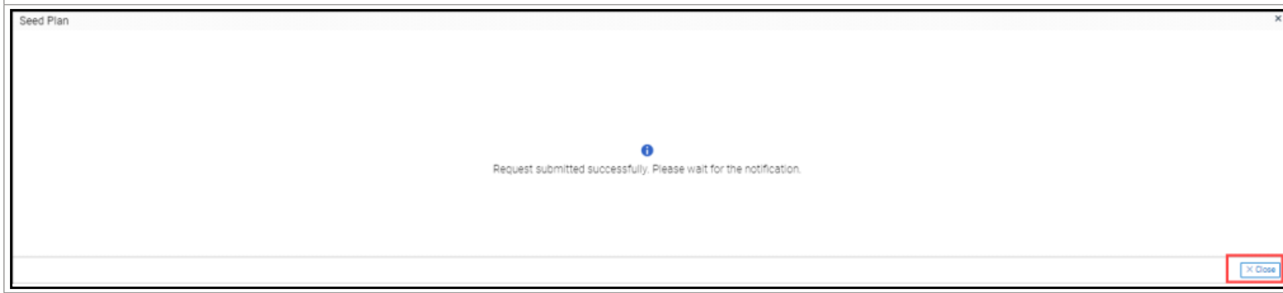


If you chose to Overlay from 'Product Attribute Plan - WP' or 'Product Attribute Plan - LY'
You will need to select the Like Class and Like Attribute:

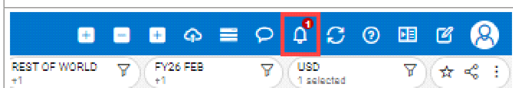


Sub-Channel, Country Group, Planning Month, and Style Color will selections will default from your scope filters. You have the option to update these selections by using the "+" in the action button, but this is not recommended.

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.



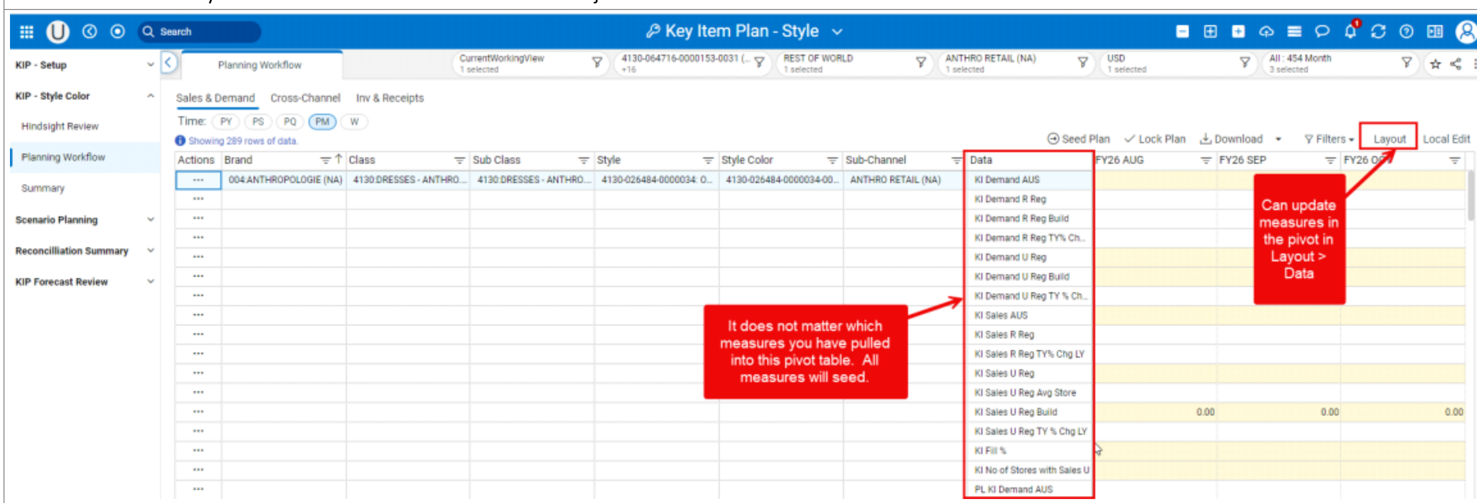
Refresh o9 to see updated data.

Review your updated Key Item Plan. Now that the plan has been overlayed, the KI build values will no longer be blank. Theywill 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?

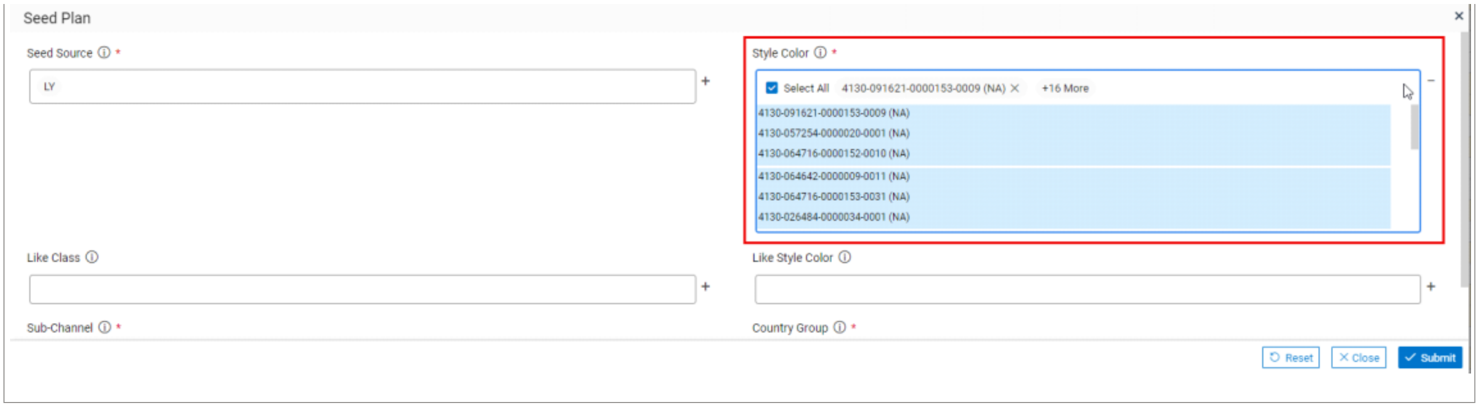
No! All seeding measures will seed no matter what measures you have pulled into the Pivot Table in Key Item Plan - Item Workspace > KIP - Style > Planning Workflow > Sales & Demand View. The only measures that do not seed are RTV & Inv Adj.



Tips & Tricks - FAQ 2

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

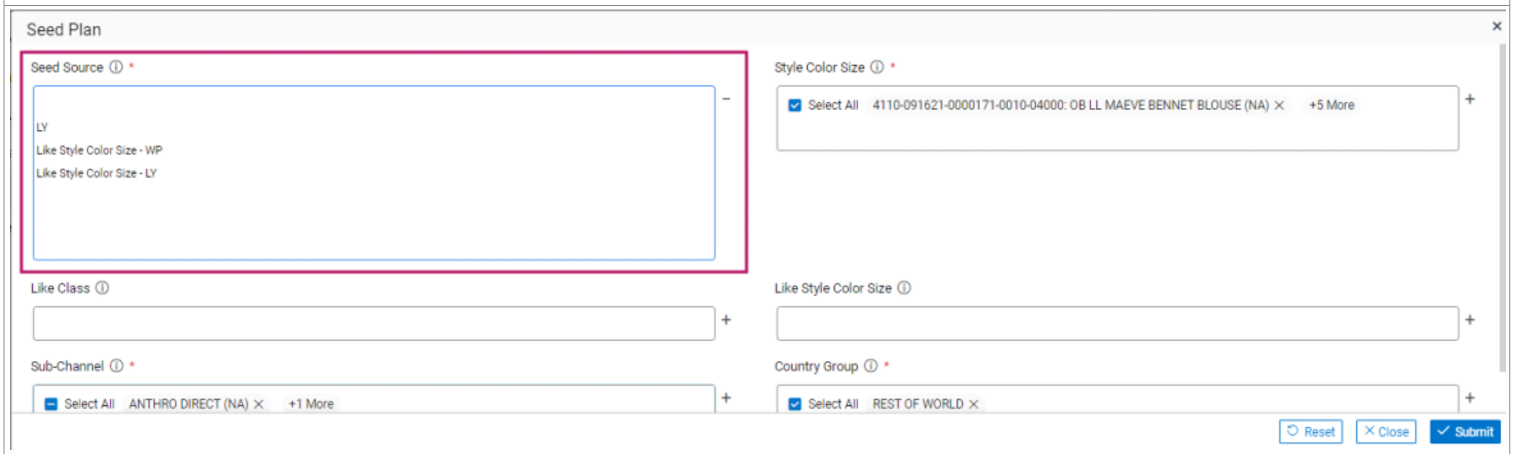
Multiple style colors may be seeded at one time by selecting multiple style colors in your Seed Plan Action Button Parameters.
This is true for parent/child relationships at any level of the hierarchy (e.g., all classes in a department, departments in a division, divisions in a brand, etc.)



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.



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 prioryear 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, theyaffect 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!

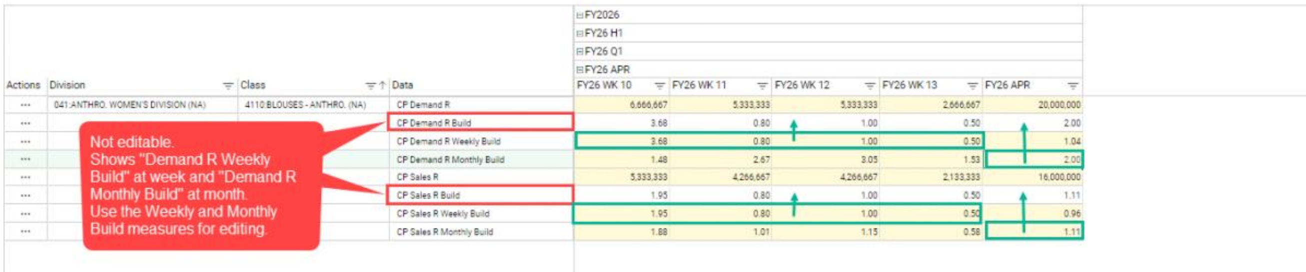
Development on BUILD measures are not complete in o9. Ultimately, there will be a CP Sales R Build metric and a CP Demand R Build metric that will be editable and accurate at all aggregation levels.

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



				FY2026 / FY26 H1 / FY26 Q1 / FY26 APR				
Actions	Division	Class	Data	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

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.

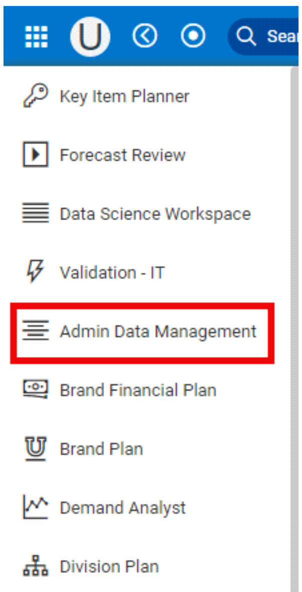
1- Hold the future builds and recalculate the future KI Sales U Reg (Retail) / KI Demand U Reg (Direct).
2- Calculate a variance between plan and actual for the trailing 4 weeks and apply an average of the variance to the go forward plan
3- Calculate a variance between TY & LY for the trailing 4 weeks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

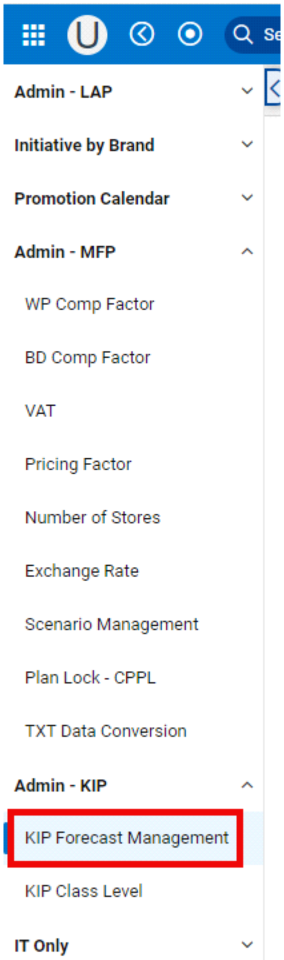
Metrics

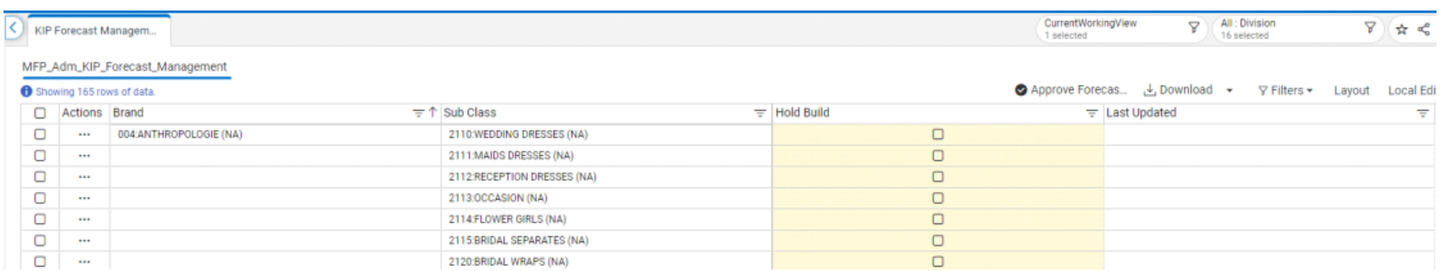
- KP Projection Demand U Reg (Comp to Plan)
- KP Projection Demand U Reg (Comp to LY)
- KP Projection Sales U Reg (Comp to Plan)
- KP Projection Sales U Reg (Comp to LY)
- KI Actual Demand Build
- KI Actual Sales Build

Setup for Hold Build

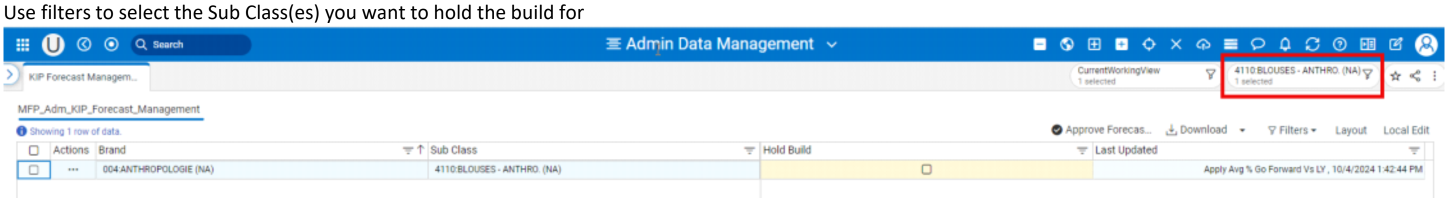
Navigate to Admin Data Management > KIP Forecast Management

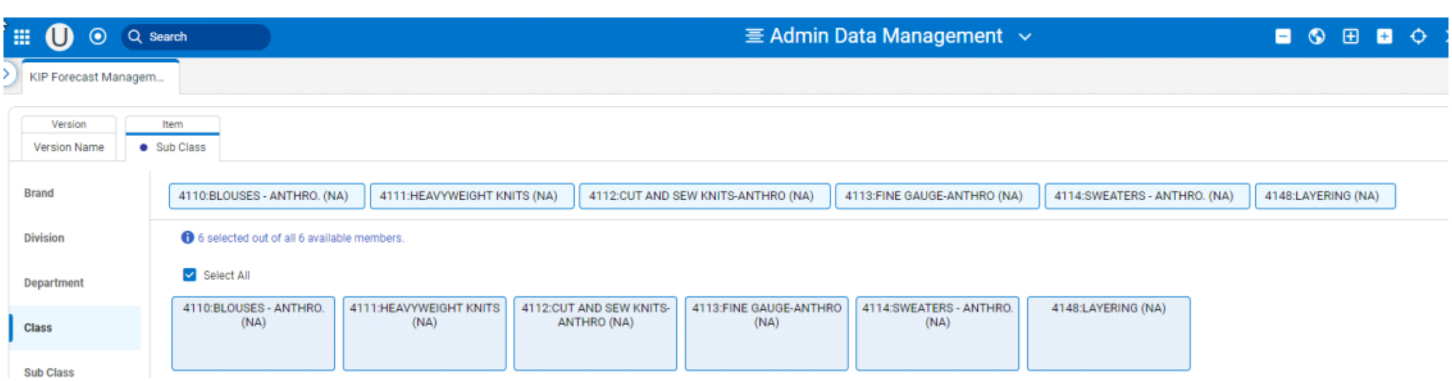


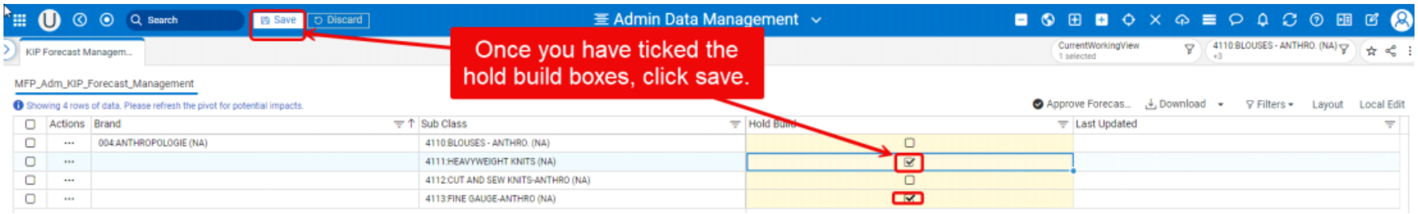


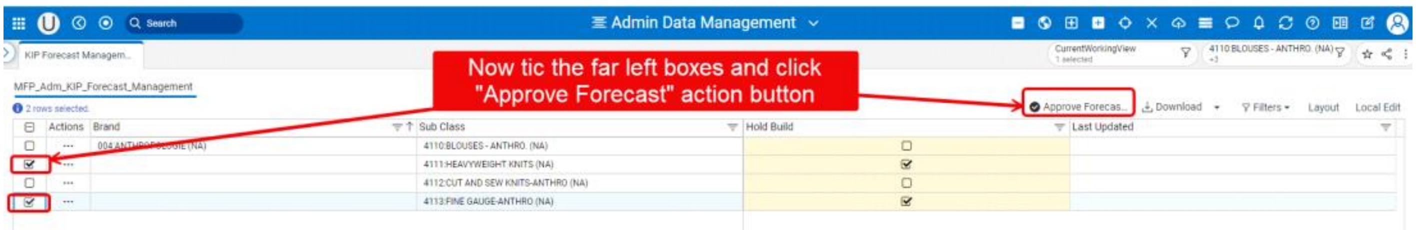


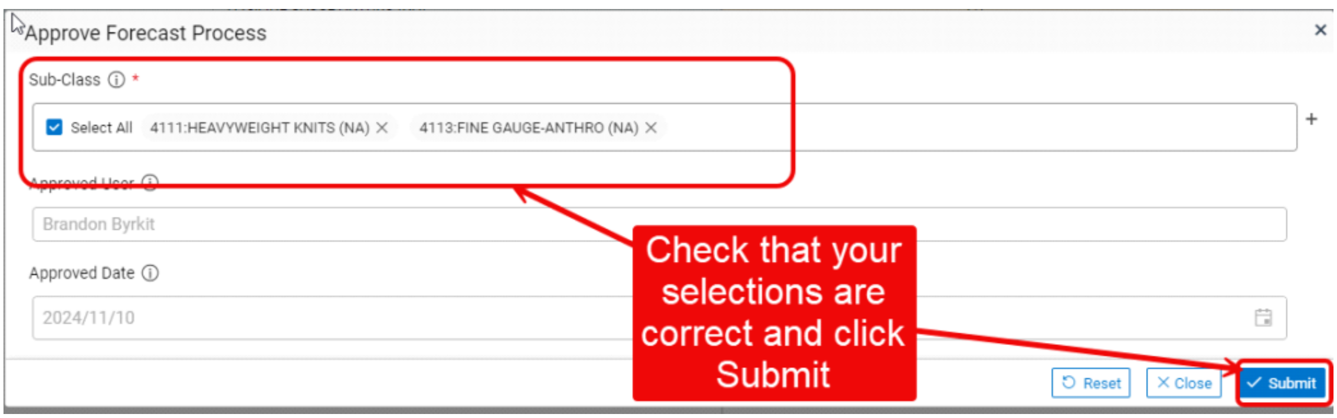
Use filters to select the Sub Class(es) you want to hold the build for

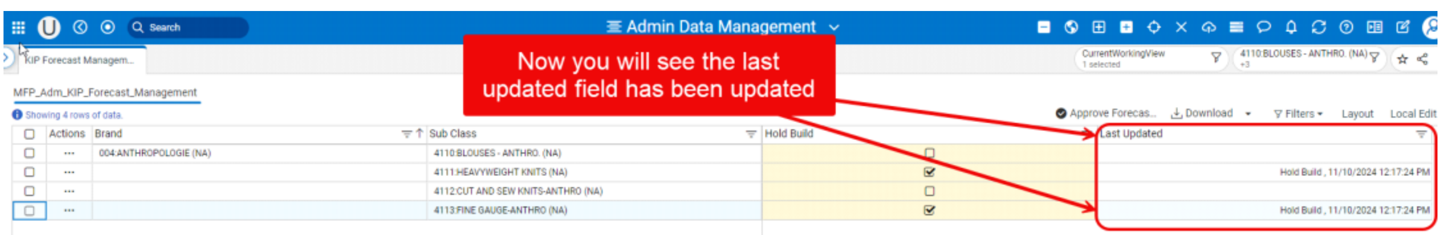




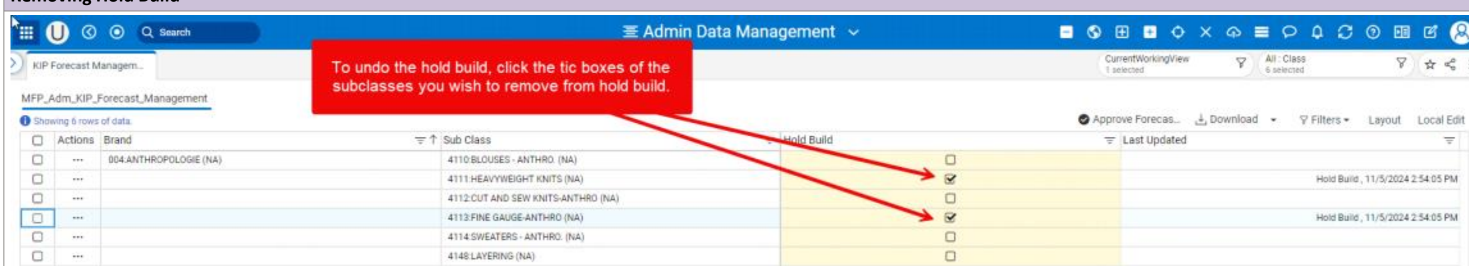


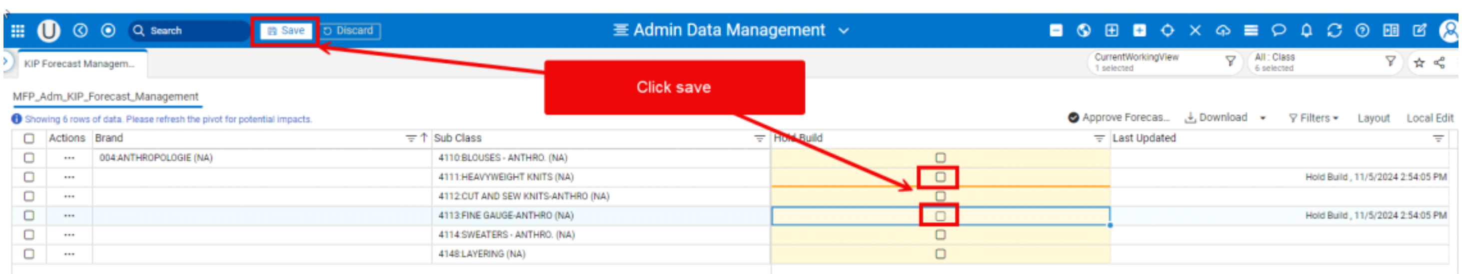


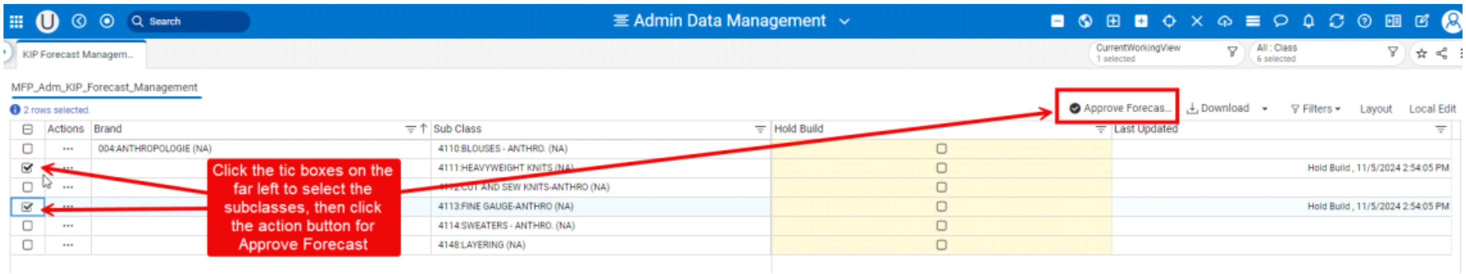


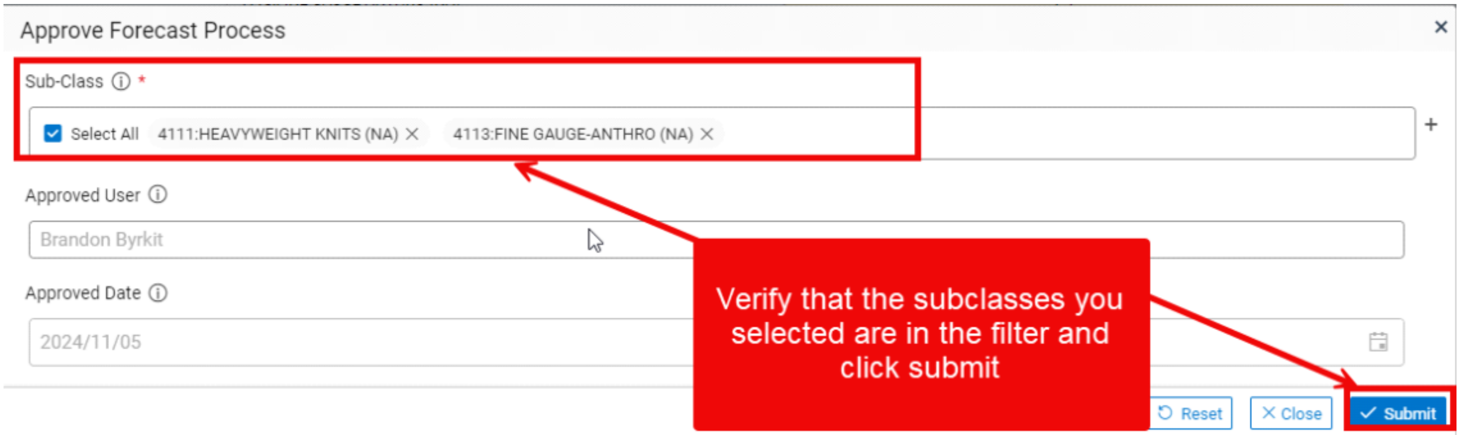


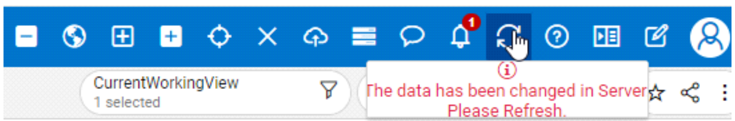
Removing Hold Build

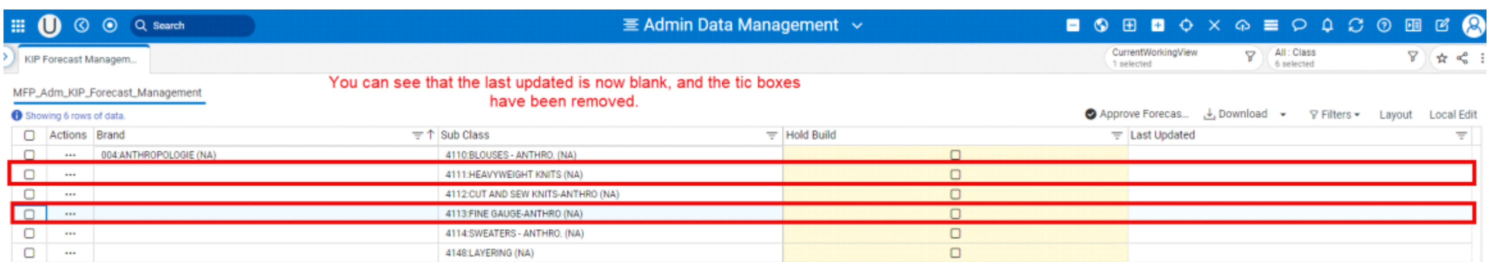






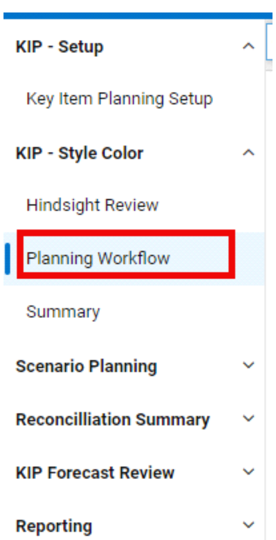


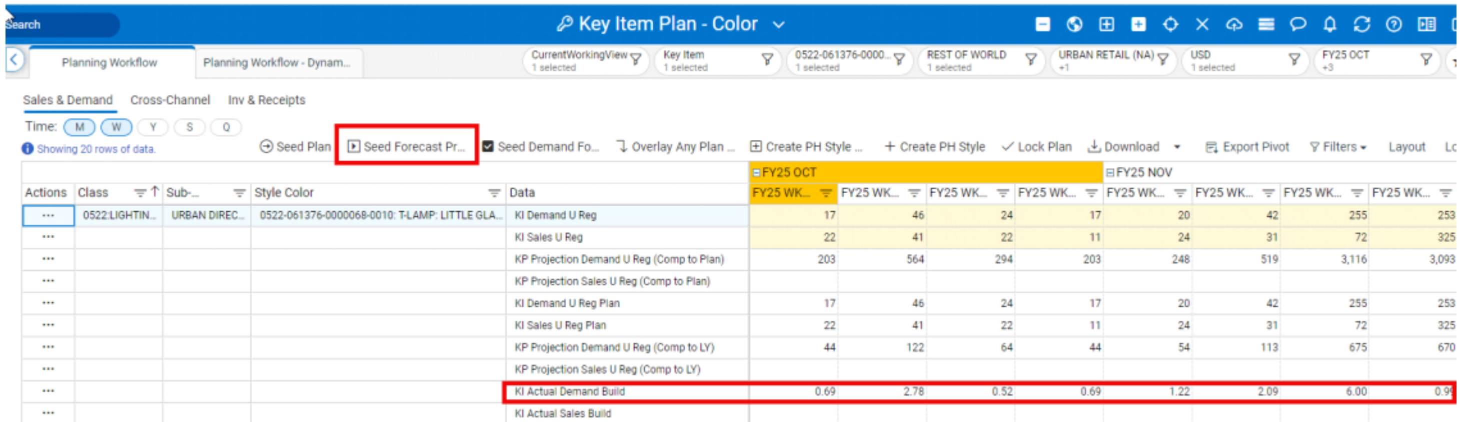


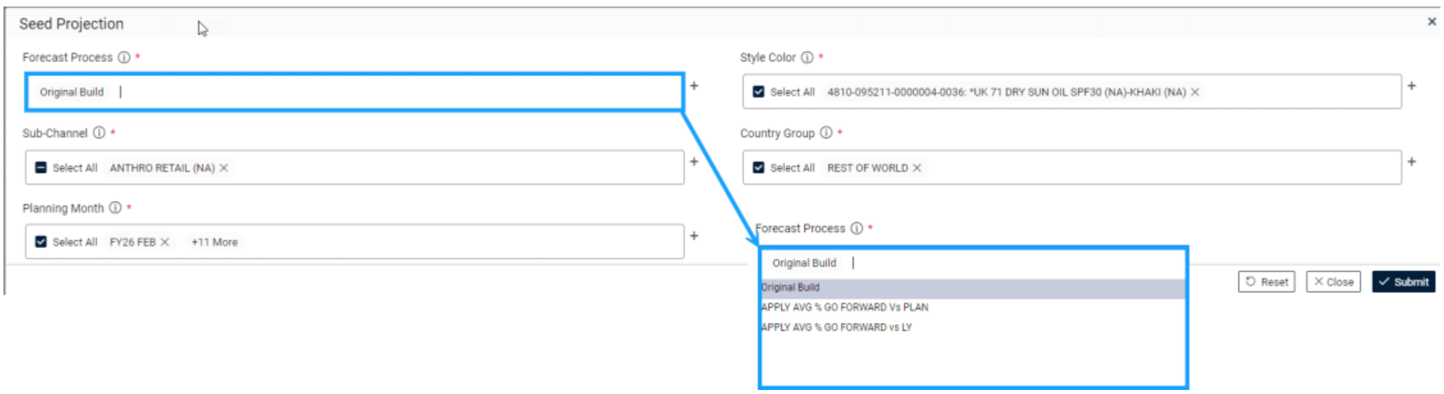


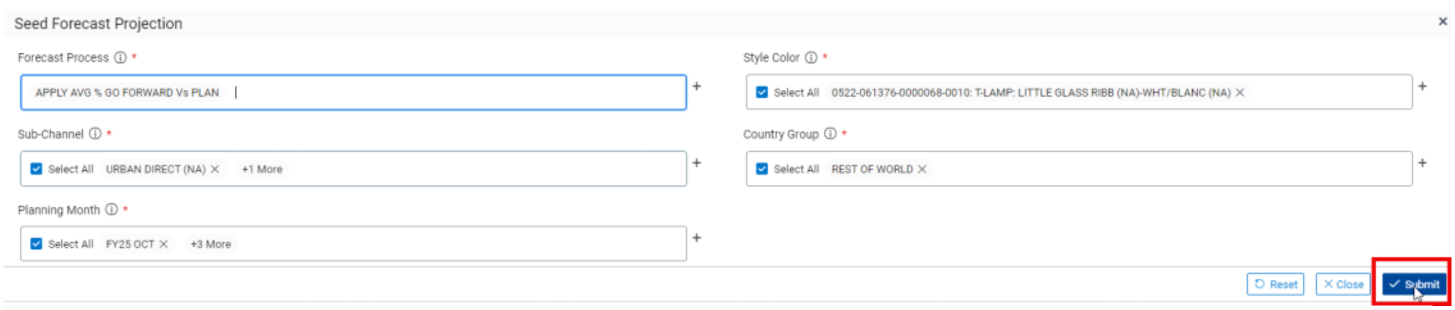
Re-Projecting

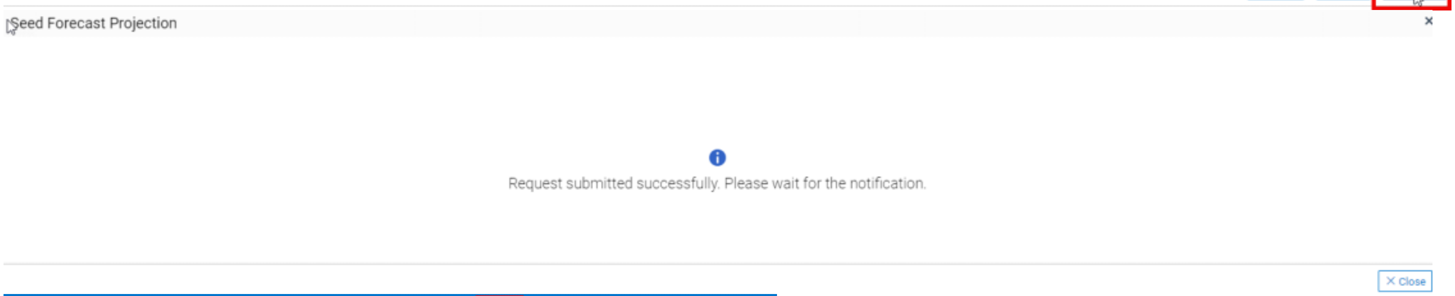
Navigate to

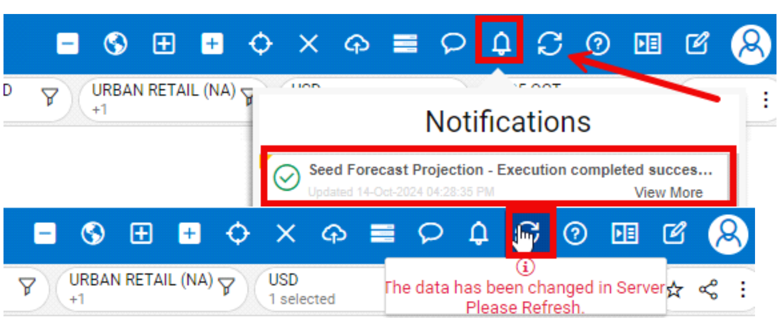


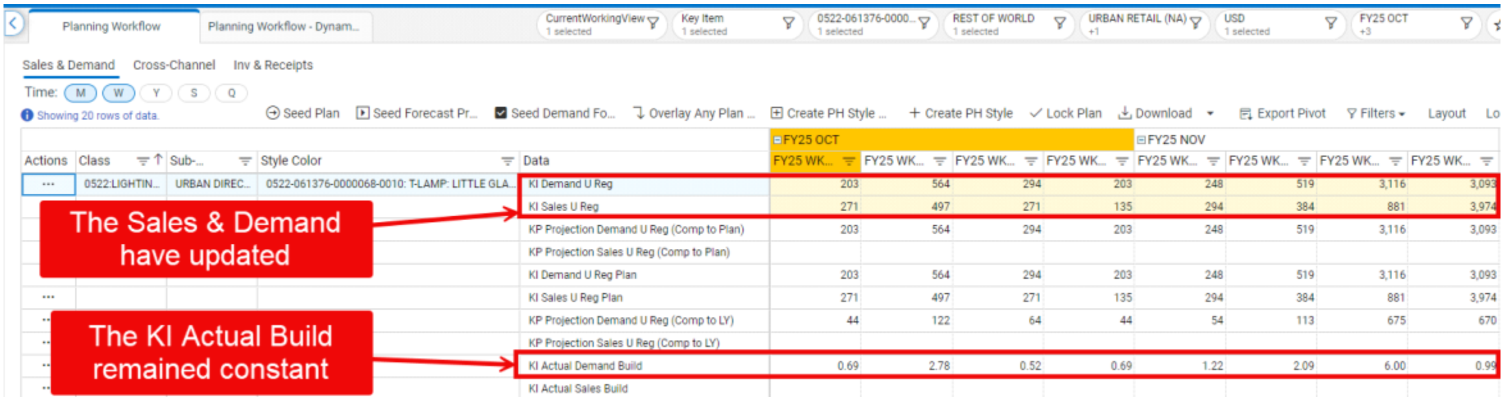

Search
Key Item Plan - Color
Planning Workflow
Planning Workflow - Dynam...
CurrentWorkingView 1 selected
Key Item 1 selected
0522-061376-0000... 1 selected
REST OF WORLD 1 selected
URBAN RETAIL (NA) +1
USD 1 selected
FY25 OCT +3
Sales & Demand
Cross-Channel
Inv & Receipts
Time: M W Y S Q
Showing 20 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
FY25 OCT
FY25 NOV
Actions
Class
Sub-...
Style Color
Data
0522:LIGHTIN...
URBAN DIREC...
0522-061376-0000068-0010: T-LAMP: LITTLE GLA...
KI Demand U Reg
KI Sales U Reg
KP Projection Demand U Reg (Comp to Plan)
KP Projection Sales U Reg (Comp to Plan)
KI Demand U Reg Plan
KI Sales U Reg Plan
KP Projection Demand U Reg (Comp to LY)
KP Projection Sales U Reg (Comp to LY)
KI Actual Demand Build
KI Actual Sales Build

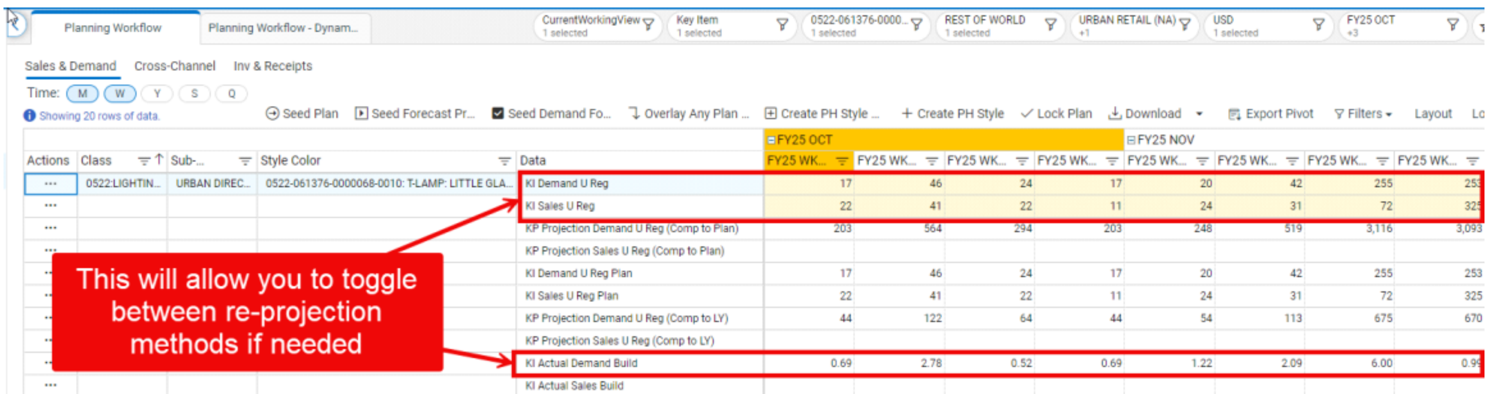

Seed Projection
Forecast Process
Original Build
Style Color
Select All 4810-095211-0000004-0036: *UK 71 DRY SUN OIL SPF30 (NA)-KHAKI (NA)
Sub-Channel
Select All ANTHRO RETAIL (NA)
Country Group
Select All REST OF WORLD
Planning Month
Select All FY26 FEB +11 More
Forecast Process
Original Build
Original 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
Style Color
Select All 0522-061376-0000068-0010: T-LAMP: LITTLE GLASS RIBB (NA)-WHT/BLANC (NA)
Sub-Channel
Select All URBAN DIRECT (NA) +1 More
Country Group
Select All REST OF WORLD
Planning Month
Select All FY25 OCT +3 More
Reset
Close
Submit


Seed Forecast Projection
Request submitted successfully. Please wait for the notification.
Close


URBAN RETAIL (NA) +1
Notifications
Seed Forecast Projection - Execution completed succes...
View More
URBAN RETAIL (NA) +1
USD 1 selected
The data has been changed in Server. Please Refresh.





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

		WK1	WK2	WK3	WK4	WK5(Current)	WK6	WK7	WK8
SKU 1	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

		WK1	WK2	WK3	WK4	WK5(Current)	WK6	WK7	WK8
SKU 1	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)**

SUM | =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)-RETAIL	KI Sales U Reg	208	171	148	159	159	245	256
3			KI Sales U Reg Build Weekly	1.04	0.82	0.87	1.07	1	1.54	1.04
4			PL KI Sales U Reg	208	152	147	163	190	208	324
5			PL KI Sales U Reg Build	0.92	0.99	1.21	1.16	1.02	1.57	0.75
6			LY Sales U Reg	113	112	143	142	192	453	271
7			KI Sales U Reg Plan	210	206	232	173	159	245	256
8			KP Projection Sales U Reg (Comp to Plan)	428	270	213	143	133	205	214
9			KP Projection Sales U Reg (Comp to LY)	251	270	319	247	213	330	344
10			KI Actual Sales Build	0.92	0.99	1.36	1.17	1.08	1.54	1.04
11										
14			Step 1: Sum KI Sales U Reg for Prior 4 weeks	=sum(E2:H2)						
15										

E15 | =sum(E7:H7)

	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)-RETAIL	KI Sales U Reg	208	171	148	159	159	245	256
3			KI Sales U Reg Build Weekly	1.04	0.82	0.87	1.07	1	1.54	1.04
4			PL KI Sales U Reg	208	152	147	163	190	208	324
5			PL KI Sales U Reg Build	0.92	0.99	1.21	1.16	1.02	1.57	0.75
6			LY Sales U Reg	113	112	143	142	192	453	271
7			KI Sales U Reg Plan	210	206	232	173	159	245	256
8			KP Projection Sales U Reg (Comp to Plan)	428	270	213	143	133	205	214
9			KP Projection Sales U Reg (Comp to LY)	251	270	319	247	213	330	344
10			KI Actual Sales Build	0.92	0.99	1.36	1.17	1.08	1.54	1.04
11										
14			Step 1: Sum KI Sales U Reg for Prior 4 weeks	686						
15			Step 2: Sum KI Sales U Reg Plan for Prior 4 Weeks	=sum(E7:H7)						

SUM | =(E14-E15)/E15

	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)-RETAIL	KI Sales U Reg	208	171	148	159	159	245	256
3			KI Sales U Reg Build Weekly	1.04	0.82	0.87	1.07	1	1.54	1.04
4			PL KI Sales U Reg	208	152	147	163	190	208	324
5			PL KI Sales U Reg Build	0.92	0.99	1.21	1.16	1.02	1.57	0.75
6			LY Sales U Reg	113	112	143	142	192	453	271
7			KI Sales U Reg Plan	210	206	232	173	159	245	256
8			KP Projection Sales U Reg (Comp to Plan)	428	270	213	143	133	205	214
9			KP Projection Sales U Reg (Comp to LY)	251	270	319	247	213	330	344
10			KI Actual Sales Build	0.92	0.99	1.36	1.17	1.08	1.54	1.04
11										
14			Step 1: Sum KI Sales U Reg for Prior 4 weeks	686						
15			Step 2: Sum KI Sales U Reg Plan for Prior 4 Weeks	821						
16			Step 3: Calculate the Variance	=(E14-E15)/E15						

I2 | =I2*E16+I2

	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)-RETAIL	KI Sales U Reg	208	171	148	159	159	245	256
3			KI Sales U Reg Build Weekly	1.04	0.82	0.87	1.07	1	1.54	1.04
4			PL KI Sales U Reg	208	152	147	163	190	208	324
5			PL KI Sales U Reg Build	0.92	0.99	1.21	1.16	1.02	1.57	0.75
6			LY Sales U Reg	113	112	143	142	192	453	271
7			KI Sales U Reg Plan	210	206	232	173	159	245	256
8			KP Projection Sales U Reg (Comp to Plan)	428	270	213	143	133	205	214
9			KP Projection Sales U Reg (Comp to LY)	251	270	319	247	213	330	344
10			KI Actual Sales Build	0.92	0.99	1.36	1.17	1.08	1.54	1.04
11										
14			Step 1: Sum KI Sales U Reg for Prior 4 weeks	686						
15			Step 2: Sum KI Sales U Reg Plan for Prior 4 Weeks	821						
16			Step 3: Calculate the Variance	-16.4%						
17			Step 4: Apply the Variance to Current KI Sales U Reg	=I2*E16+I2						

E17 | =I2*E16+I2

	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)-RETAIL	KI Sales U Reg	208	171	148	159	159	245	256
3			KI Sales U Reg Build Weekly	1.04	0.82	0.87	1.07	1	1.54	1.04
4			PL KI Sales U Reg	208	152	147	163	190	208	324
5			PL KI Sales U Reg Build	0.92	0.99	1.21	1.16	1.02	1.57	0.75
6			LY Sales U Reg	113	112	143	142	192	453	271
7			KI Sales U Reg Plan	210	206	232	173	159	245	256
8			KP Projection Sales U Reg (Comp to Plan)	428	270	213	143	133	205	214
9			KP Projection Sales U Reg (Comp to LY)	251	270	319	247	213	330	344
10			KI Actual Sales Build	0.92	0.99	1.36	1.17	1.08	1.54	1.04
11										
14			Step 1: Sum KI Sales U Reg for Prior 4 weeks	686						
15			Step 2: Sum KI Sales U Reg Plan for Prior 4 Weeks	821						
16			Step 3: Calculate the Variance	-16.4%						
17			Step 4: Apply the Variance to Current KI Sales U Reg	133						

- For the LY calculation replace KI Sales U Reg Plan with LY Sales U Reg Plan.

- **KP Projection Demand U Reg (Comp to LY)**

SUM | =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	1.23	0.85	0.96	1.64	0.92	1.55	3.54
4			PL KI Demand U Reg	27	31	25	60	55	85	301
5			PL KI Demand U Reg Build	1.21	1.15	0.81	2.4	0.92	1.55	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
10										
11			Step 1: Sum KI Demand U Reg for Prior 4 weeks	=SUM(E2:H2)						

SUM | =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	1.23	0.85	0.96	1.64	0.92	1.55	3.54
4			PL KI Demand U Reg	27	31	25	60	55	85	301
5			PL KI Demand U Reg Build	1.21	1.15	0.81	2.4	0.92	1.55	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
10										
11			Step 1: Sum KI Demand U Reg for Prior 4 weeks	108						
12			Step 2: Sum KI Demand U Reg Plan for Prior 4 Weeks	=SUM(E6:H6)						

SUM | =(E11-E12)/E12

	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	1.23	0.85	0.96	1.64	0.92	1.55	3.54
4			PL KI Demand U Reg	27	31	25	60	55	85	301
5			PL KI Demand U Reg Build	1.21	1.15	0.81	2.4	0.92	1.55	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
10										
11			Step 1: Sum KI Demand U Reg for Prior 4 weeks	108						
12			Step 2: Sum KI Demand U Reg Plan for Prior 4 Weeks	112						
13			Step 3: Calculate the Variance	=(E11-E12)/E12						

SUM | =I2*E13+I2

	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	1.23	0.85	0.96	1.64	0.92	1.55	3.54
4			PL KI Demand U Reg	27	31	25	60	55	85	301
5			PL KI Demand U Reg Build	1.21	1.15	0.81	2.4	0.92	1.55	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
10										
11			Step 1: Sum KI Demand U Reg for Prior 4 weeks	108						
12			Step 2: Sum KI Demand U Reg Plan for Prior 4 Weeks	112						
13			Step 3: Calculate the Variance	-3.6%						
14			Step 4: Apply the Variance to Current KI Demand U Reg	=I2*E13+I2						

H25 |

	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	1.23	0.85	0.96	1.64	0.92	1.55	3.54
4			PL KI Demand U Reg	27	31	25	60	55	85	301
5			PL KI Demand U Reg Build	1.21	1.15	0.81	2.4	0.92	1.55	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
10										
11			Step 1: Sum KI Demand U Reg for Prior 4 weeks	108						
12			Step 2: Sum KI Demand U Reg Plan for Prior 4 Weeks	112						
13			Step 3: Calculate the Variance	-3.6%						
14			Step 4: Apply the Variance to Current KI Demand U Reg	32						

- 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

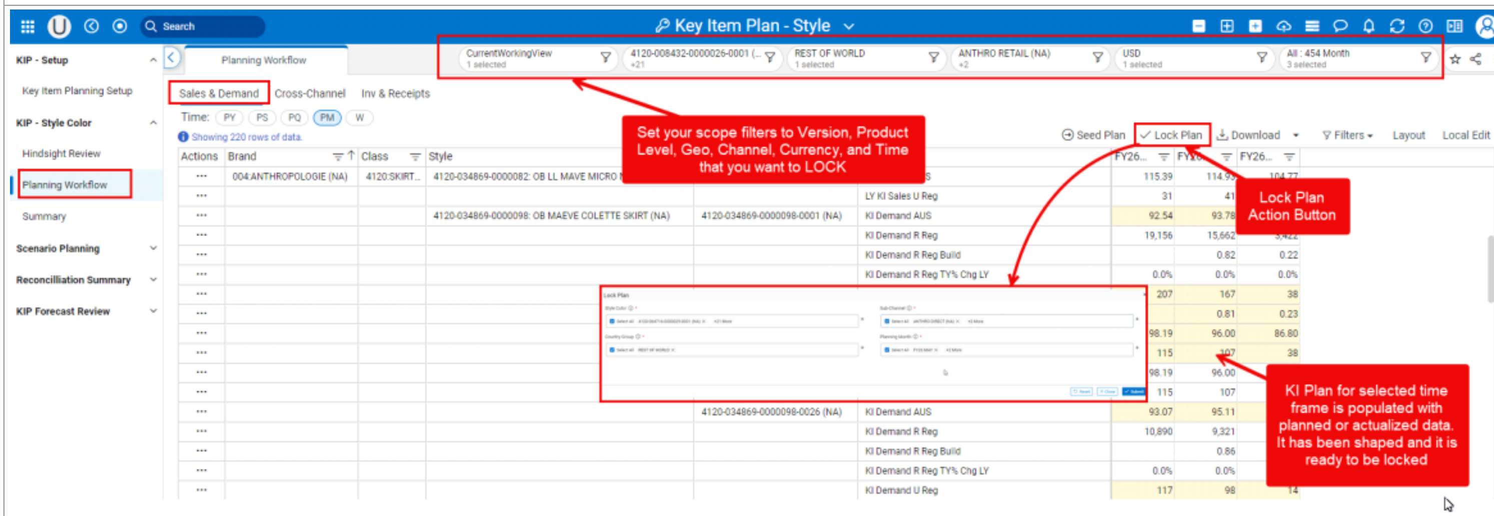
Two Methods of Locking - Action Button vs Scheduled Job:

- 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.

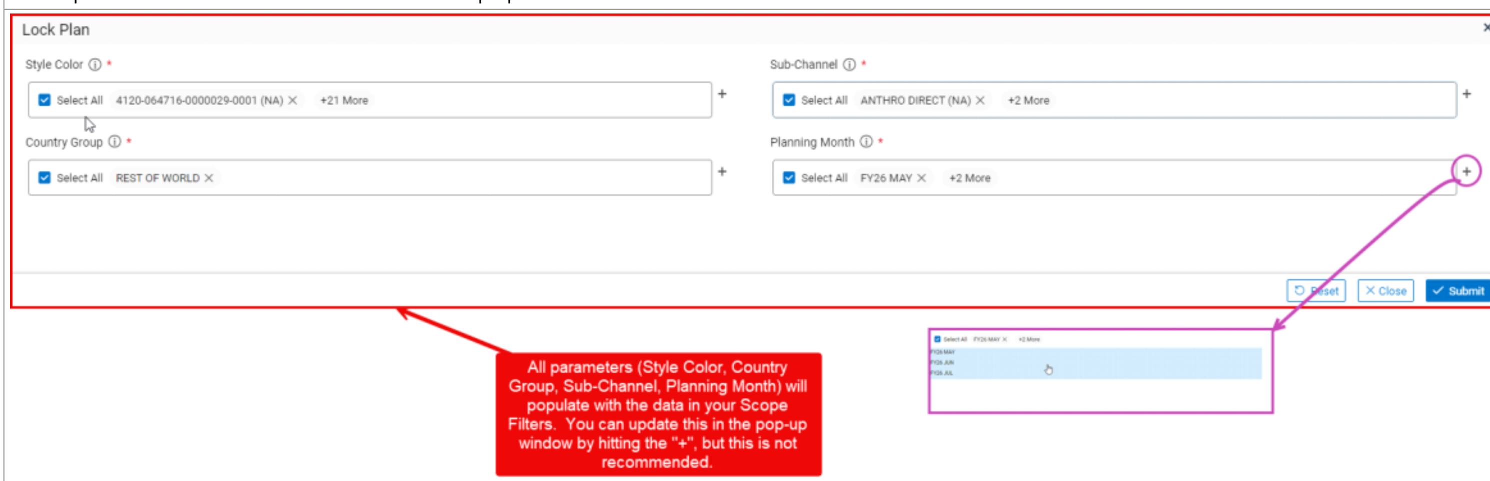
Locking - Action Button

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**

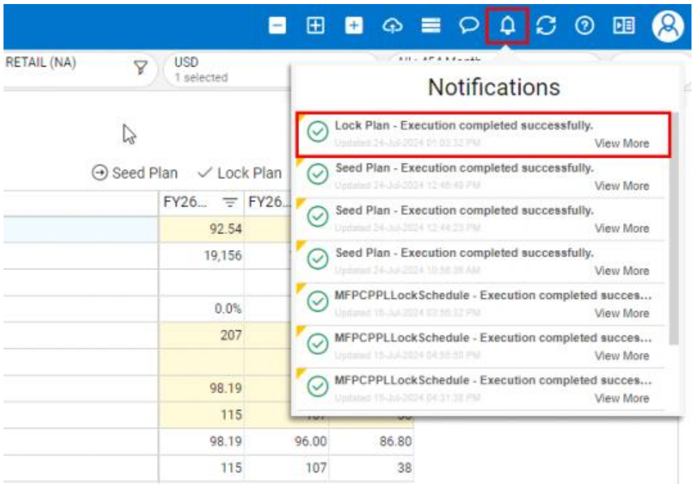


Fill out parameters in the "Lock Plan" Action Button Pop Up.

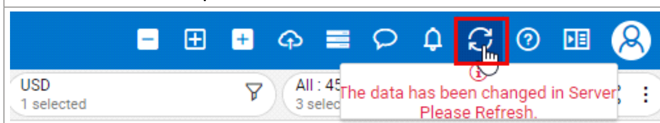


Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."

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.

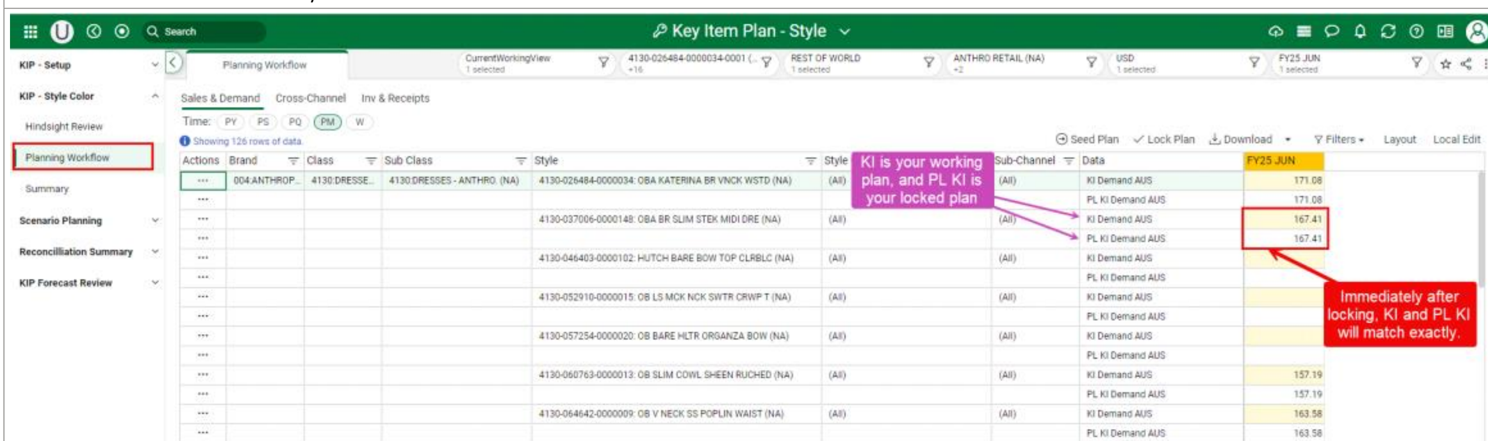


Refresh o9 to see updated data



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.



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

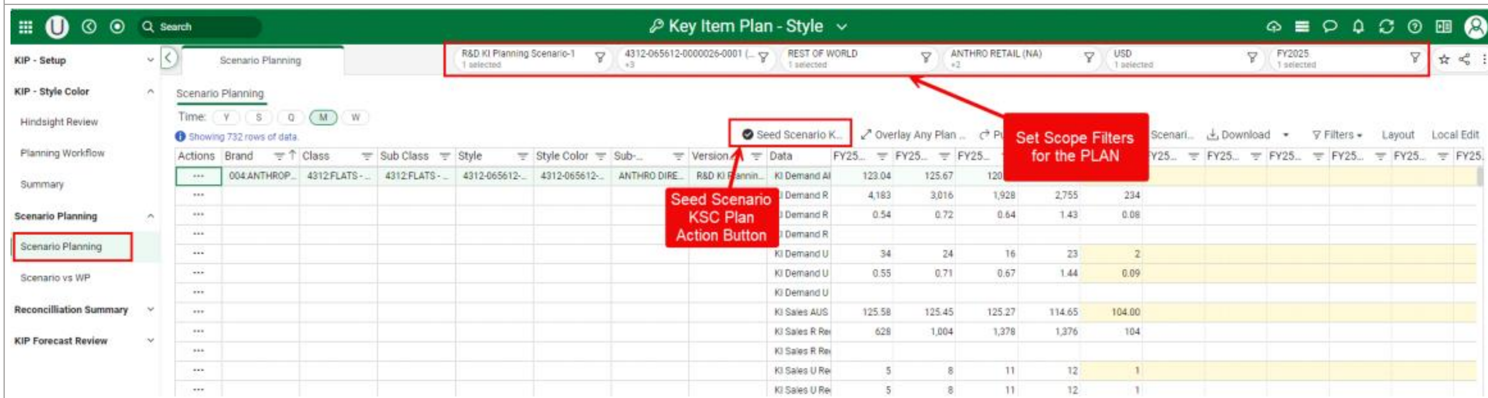
Displaying Historical Information (LY)

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**

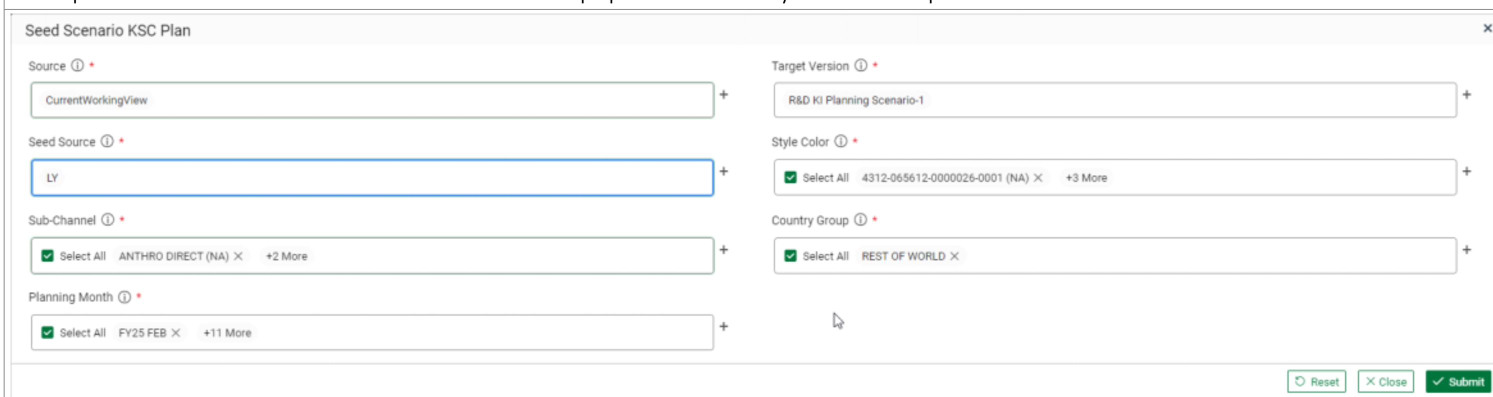
Navigate to the **Key Item Plan - Style > Scenario Planning > Scenario Planning**

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

Click **Seed Scenario KSC Plan** action button

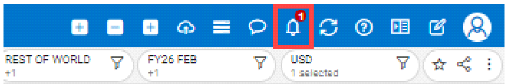


Fill out parameters in the **Seed Scenario KSC Plan** Action Button Pop Up - will automatically inherit from scope filters



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.

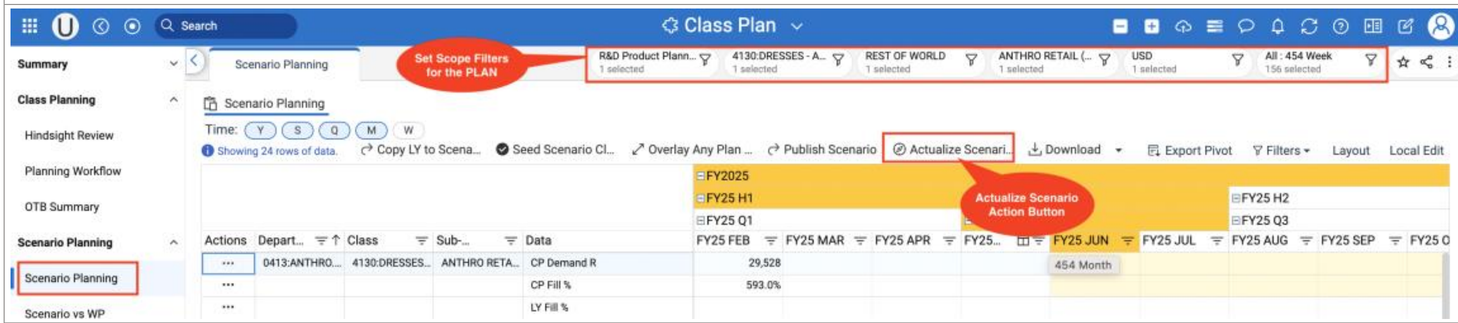
Actualizing the Scenario

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.

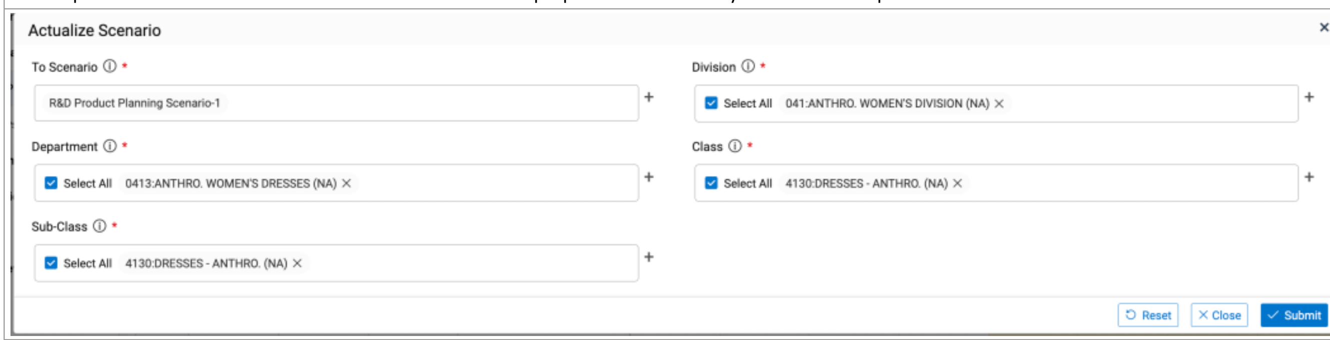
Navigate to the **Class Plan Workspace > Scenario Planning Page Group > Scenario Planning Page**

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

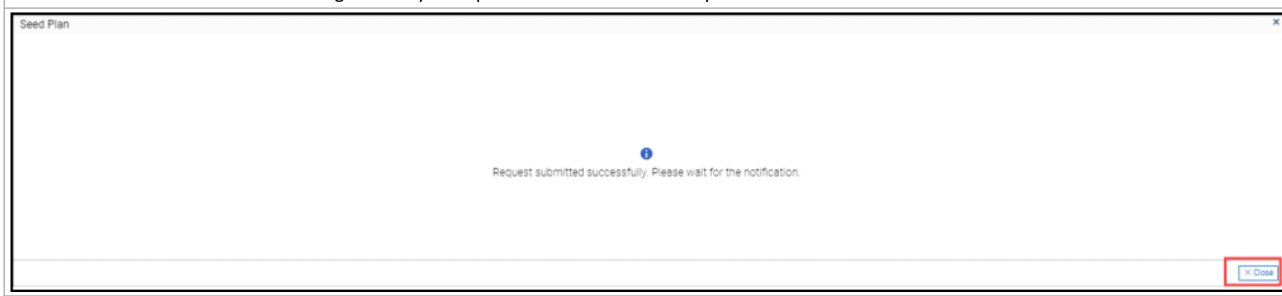
Click **Actualize Scenario** action button



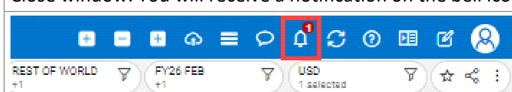
Fill out parameters in the **Actualize Scenario** Action Button Pop Up - will automatically inherit from scope filters



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.

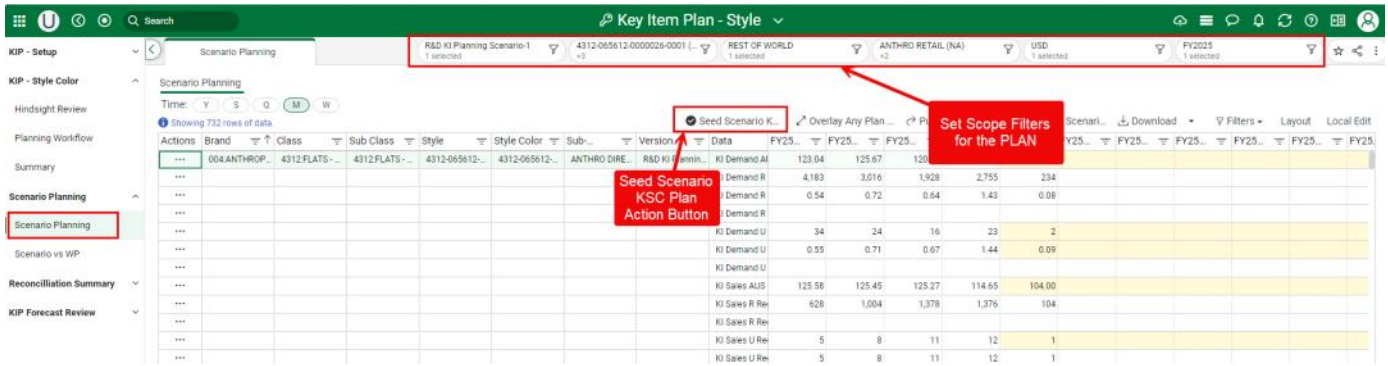
Seeding the plan

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

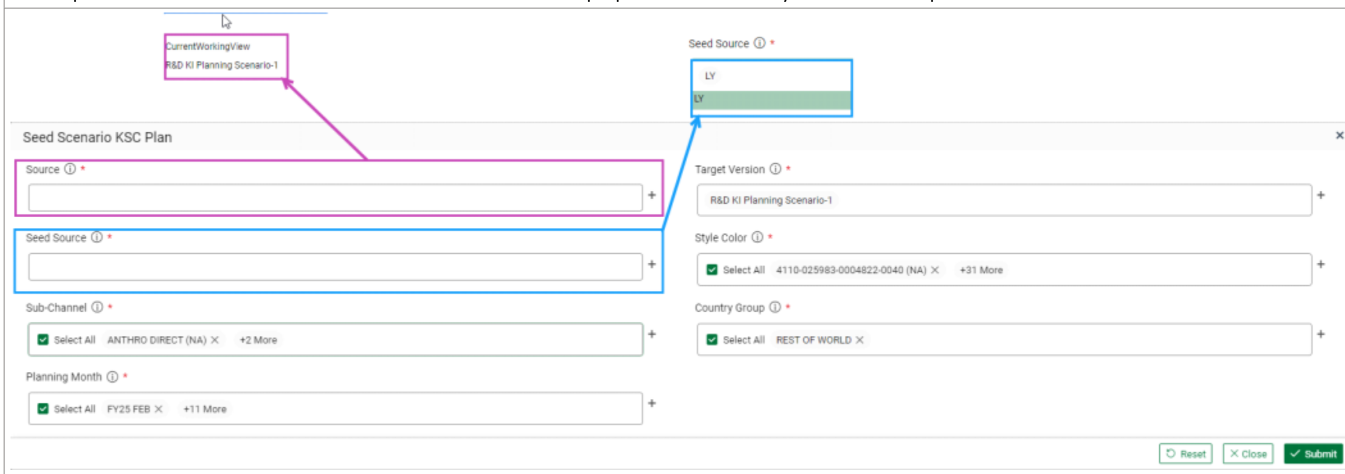
Navigate to the **Key Item Plan - Style > Scenario Planning > Scenario Planning Page**

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

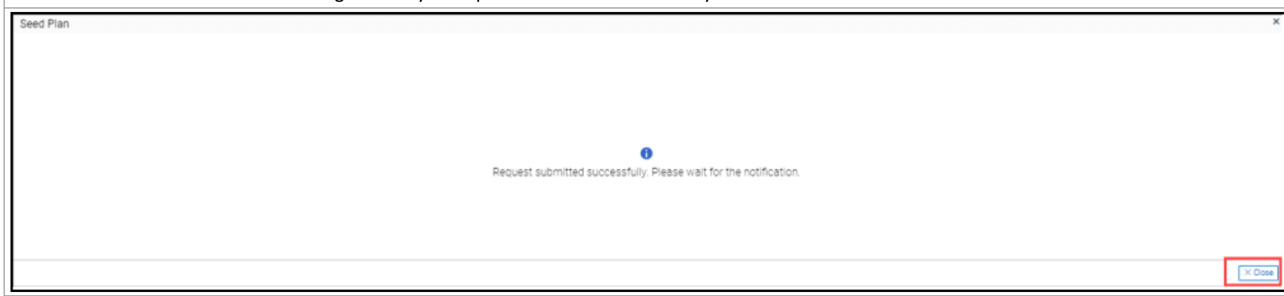
Click **Seed Scenario KSC Plan** action button



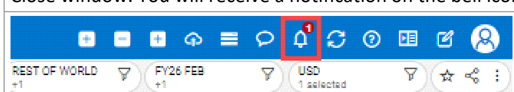
Fill out parameters in the **Seed Scenario Class Plan** Action Button Pop Up - will automatically inherit from scope filters



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

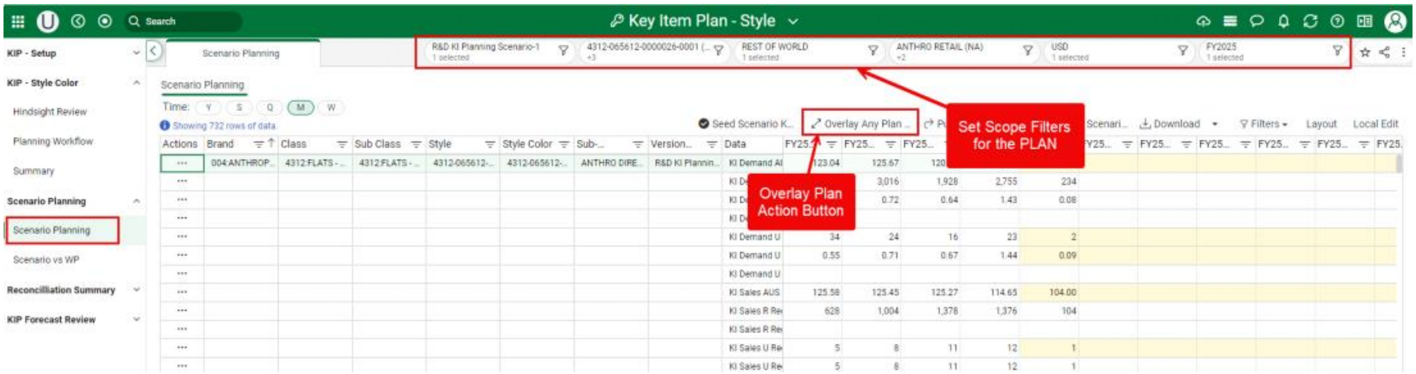
Use the Overlay action button to copy an existing plan into your scenario version. The plans that can be copied in are:

1. Key Item Plan - WP, PL

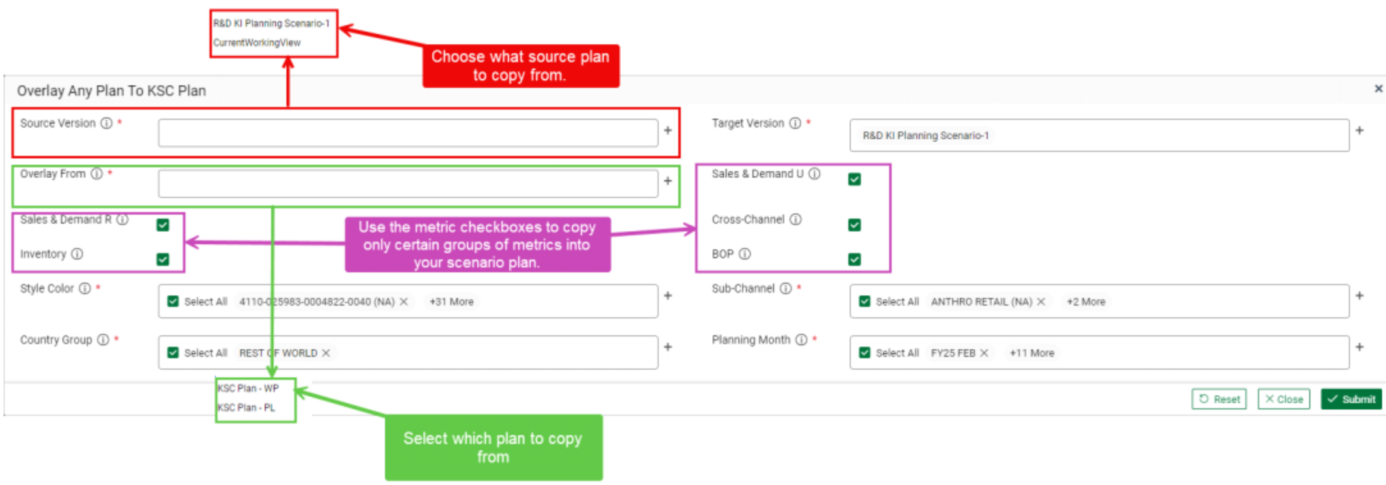
Navigate to the **Key Item Plan - Style > Scenario Planning > Scenario Planning Page**

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

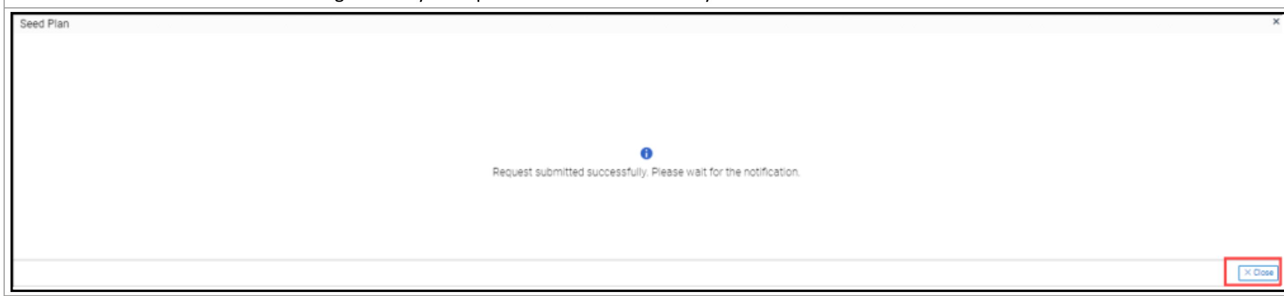
Click **Overlay Any Plan** action button



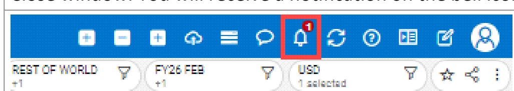
Fill out parameters in the **Overlay Any Plan** Action Button Pop Up - will automatically inherit from scope filters



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 overlayed the values should match the source plan.

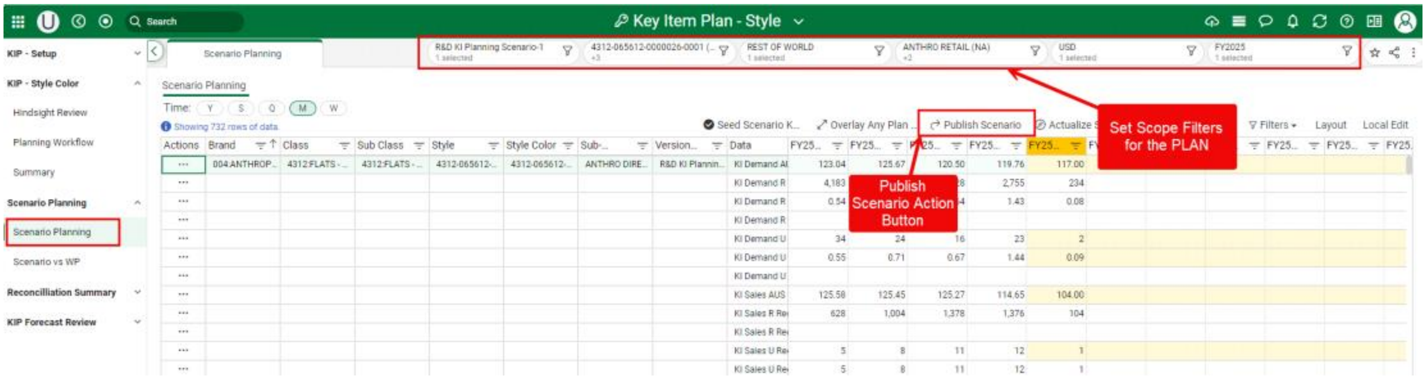
Publish the Plan

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

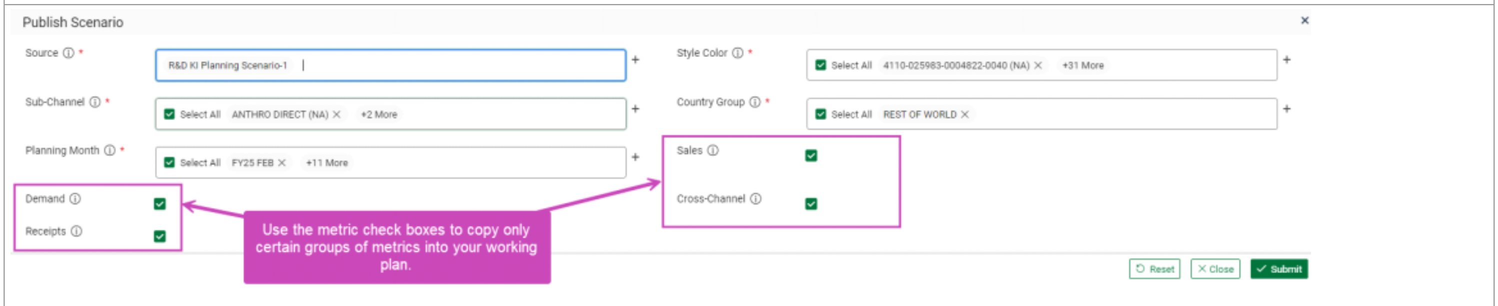
Navigate to the **Key Item Plan - Style > Scenario Planning > Scenario Planning Page**

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

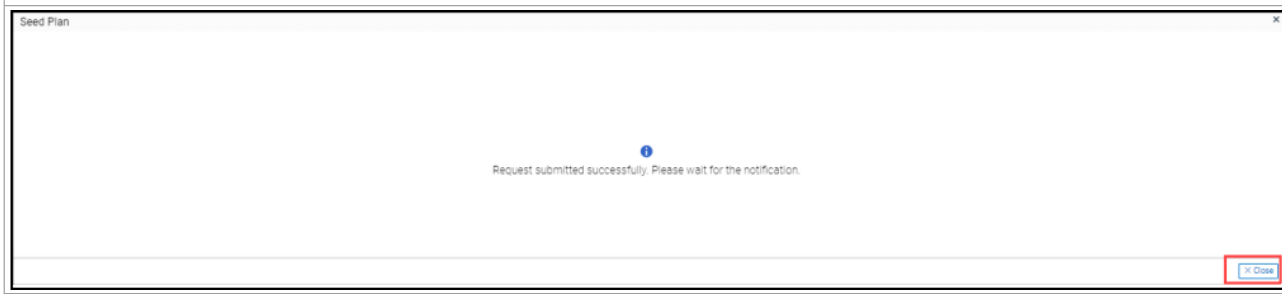
Click **Publish Scenario** action button



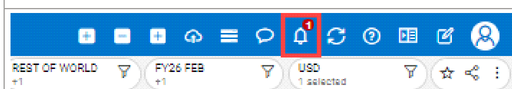
Fill out parameters in the **Publish Scenario** Action Button Pop Up - will automatically inherit from scope filters



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.



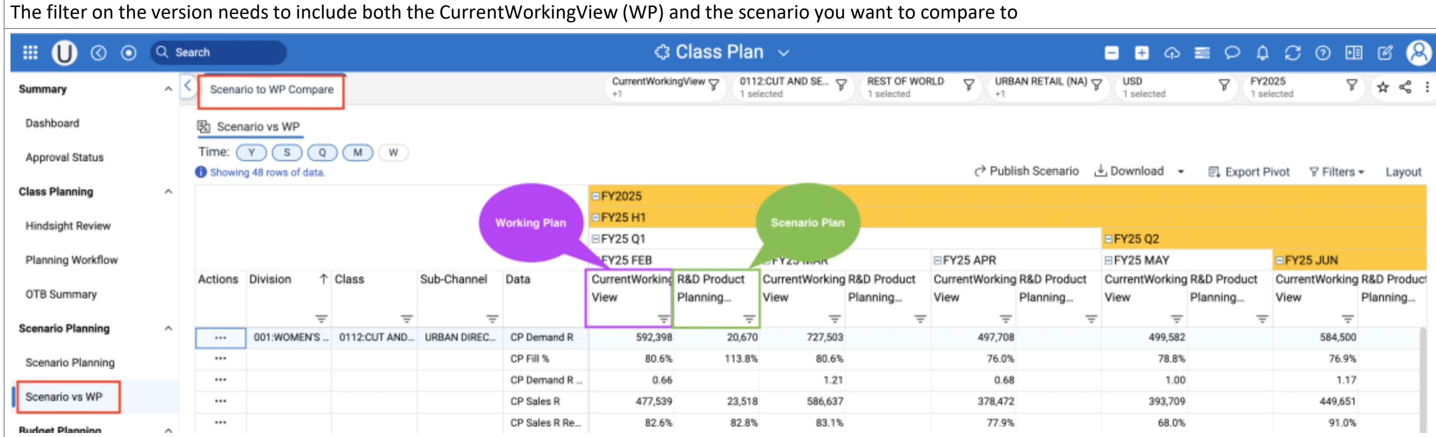
Refresh o9 to see updated data.

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

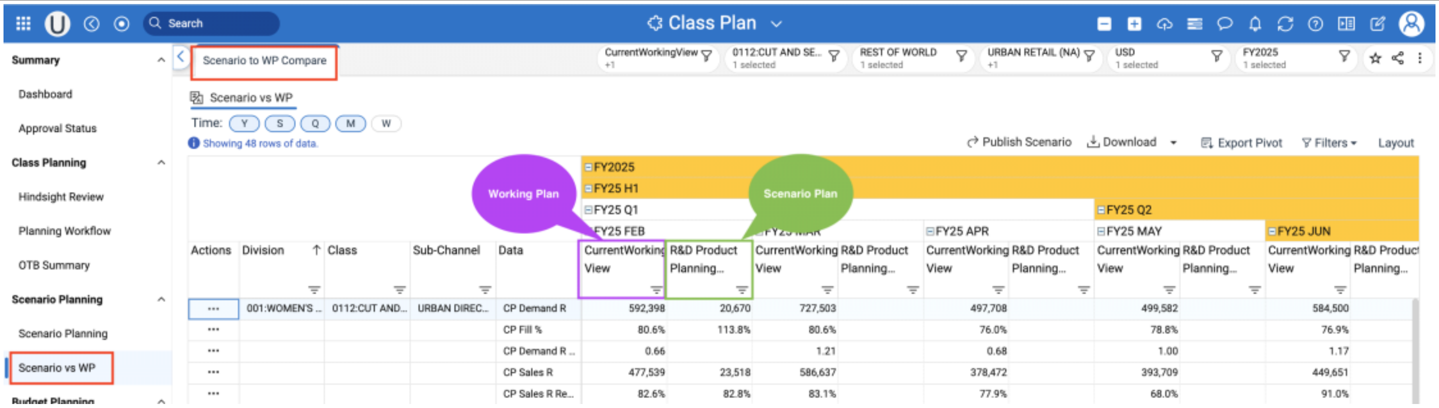


Reconcile the Plan KI vs KIPL

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 > Reconcilliation Summary > KI vs KIPL**

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



KI Rebalance

KI Rebalance from OO U to Receipt U

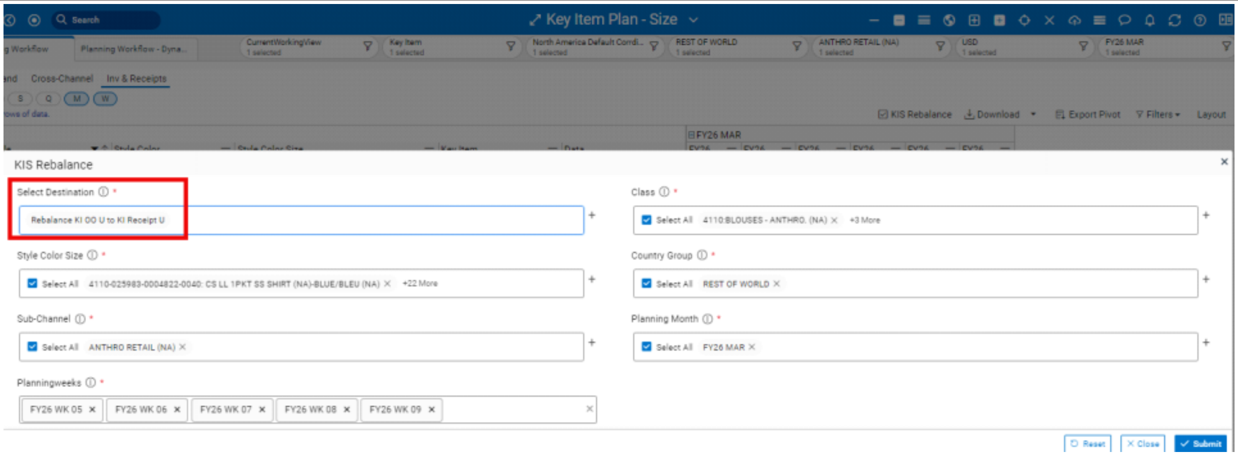
There is an action button available in the Key Item Plan workspace that will allow you to copy your Total OO U into your KI Receipt U

☑ KI Rebalance

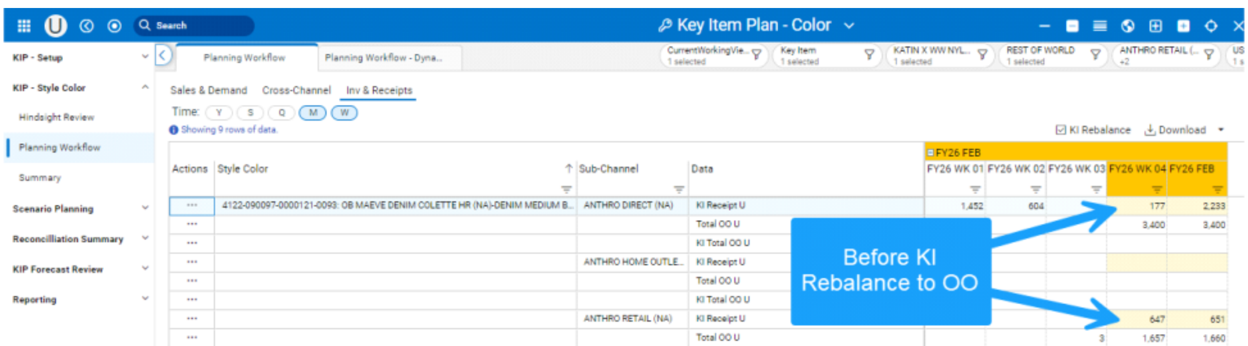
Location for rebalancing:

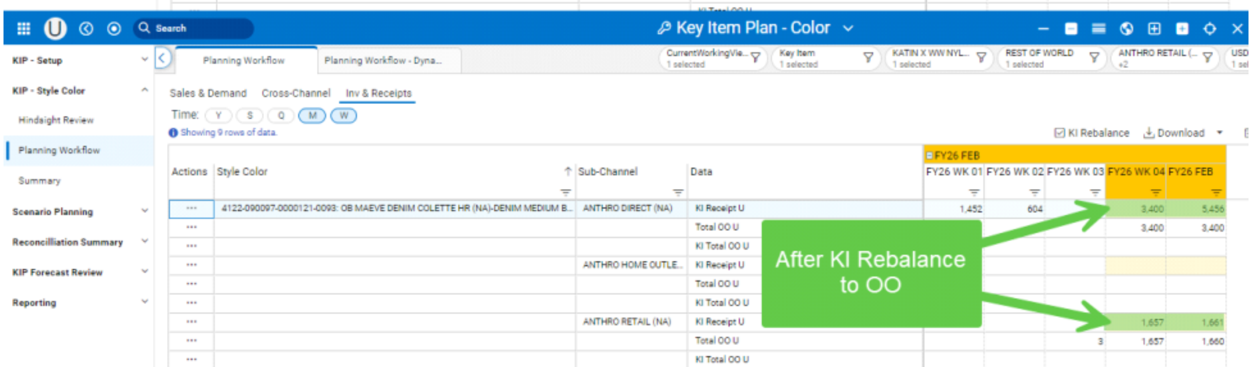
- Key Item Plan - Color Workspace > KIP - Style Color > Planning Workflow Page > Inventory & Receipts Planning View
- Key Item Plan - Color Workspace > KIP - Style Color > Summary

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:





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.

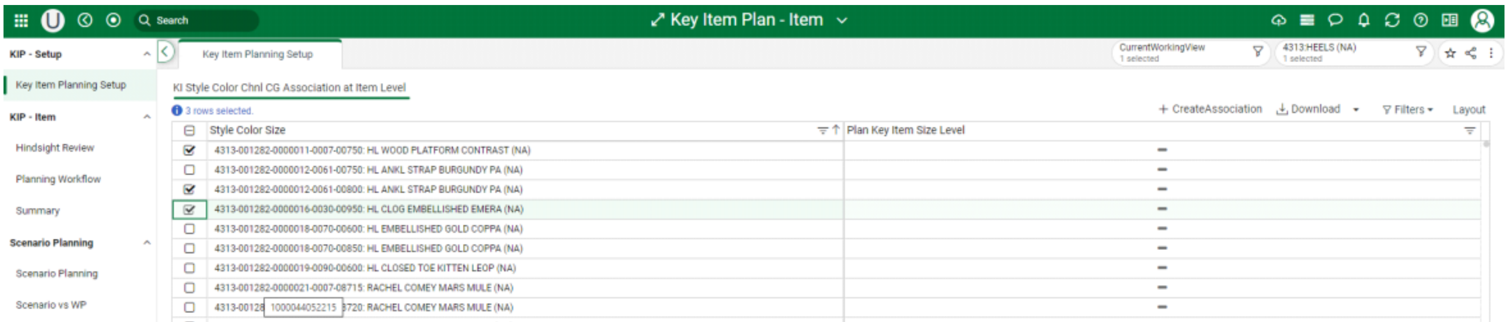
Page Group	Page	Description
KIP - Setup		
	Key Item Planning Setup	This page is used to identify which style color size(s) should be plannable as Key Items in this Key Item Size Level Workspace.
KIP - Item		
	Hindsight Review	This page will allow you to look at all historical time periods for key metrics: 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 KIIPL	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.***



Seeding

Tuesday, July 23, 2024 1:34 PM

Seeding

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

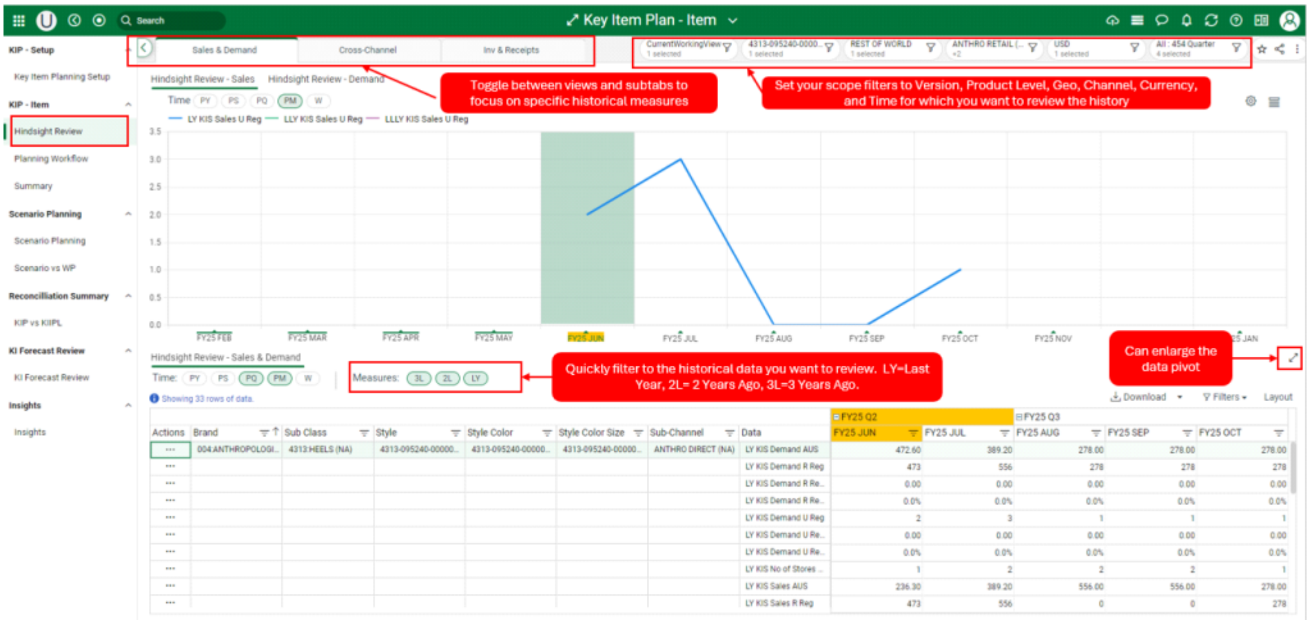
When you are building a new Key Item Plan, seeding it with data from the past or from a like plan will save time and improve accuracy by inheriting key data instead of building it from scratch. You will inherit seasonality curves, key metrics, and ratios from the selected time frame. It cre ates the 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 fu ture plan. *Which past year do you think next year will be most like?*

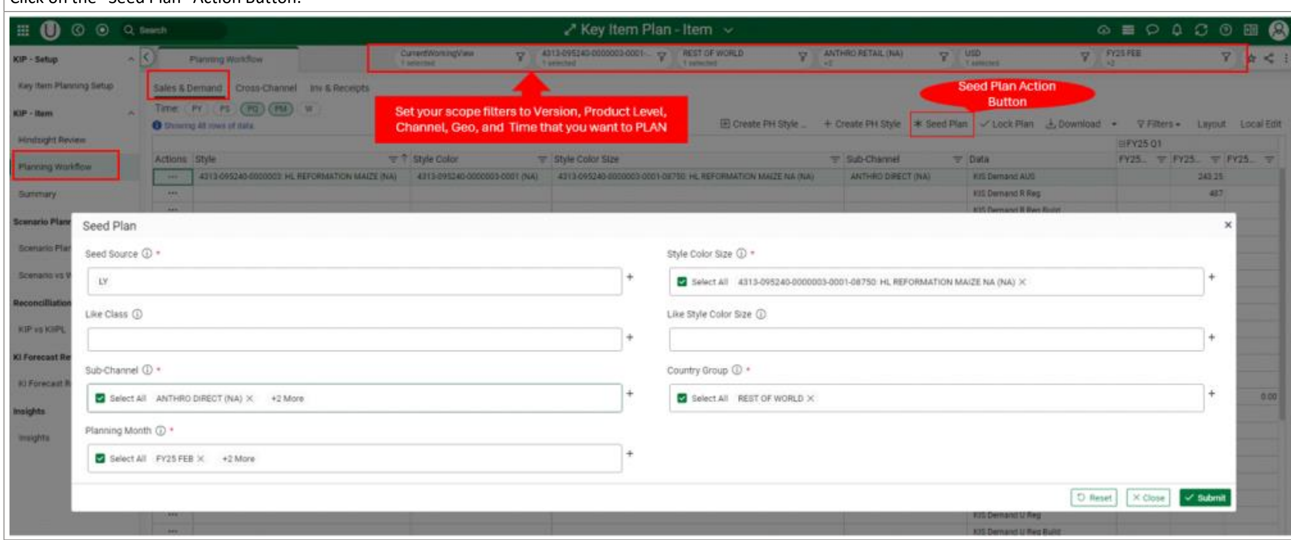


Seeding Workflow

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

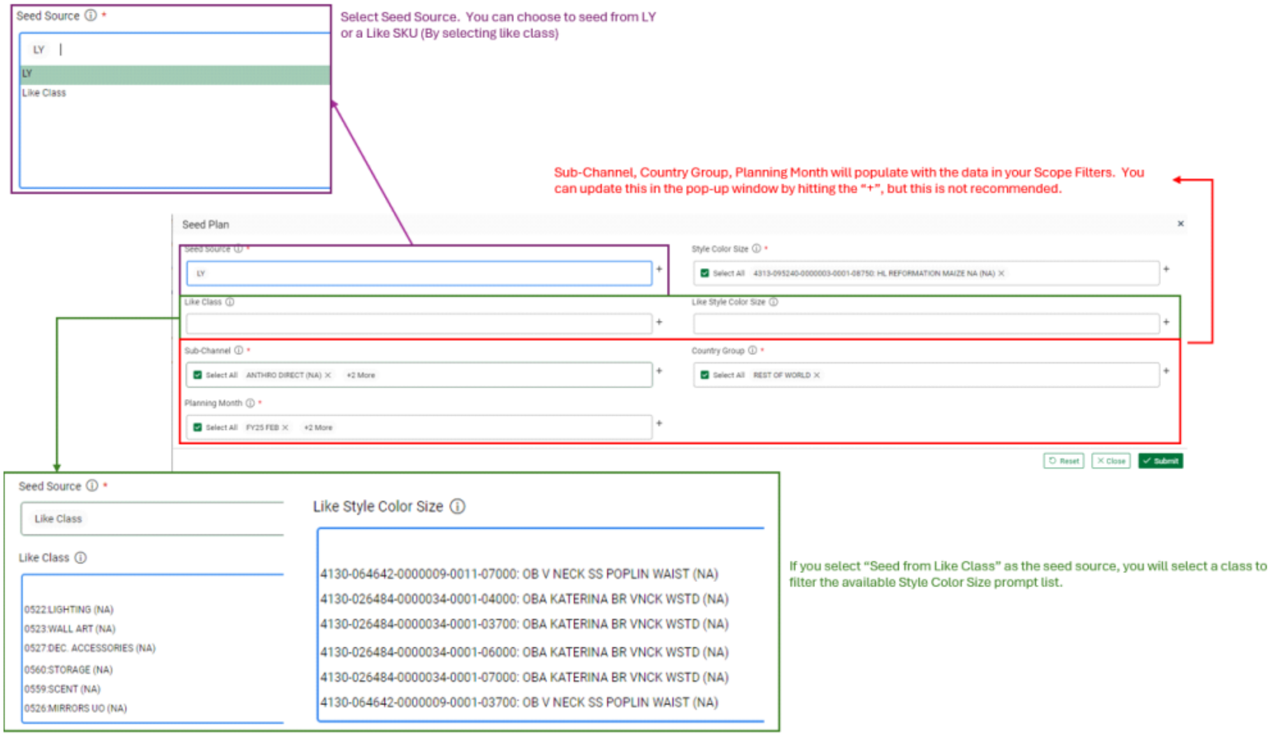
Update your Scope Filters to the time frame you are going to seed with data.

Click on the "Seed Plan" Action Button.

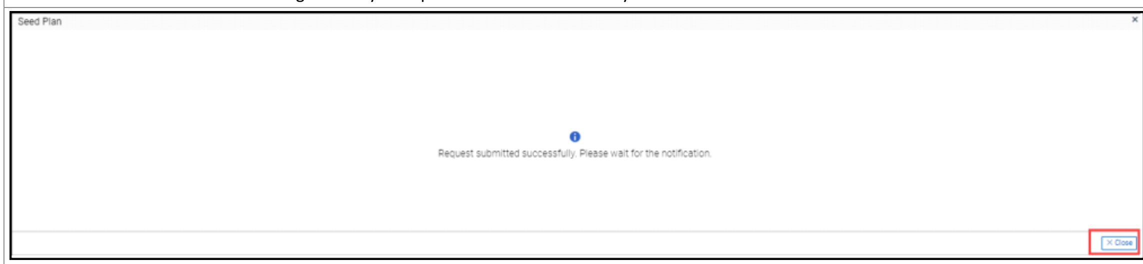


Fill out parameters in the “Seed Plan” Action Button Pop Up

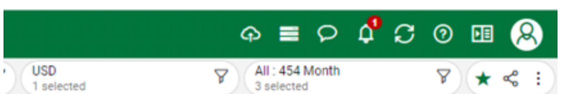
Best Practice: **Filter in your Scope Filters!** Only update the seed source in the Pop-Up window. Let the other parameters populate from your scope filters. This prevents confusion and user error.



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 contin ue to work in o9.



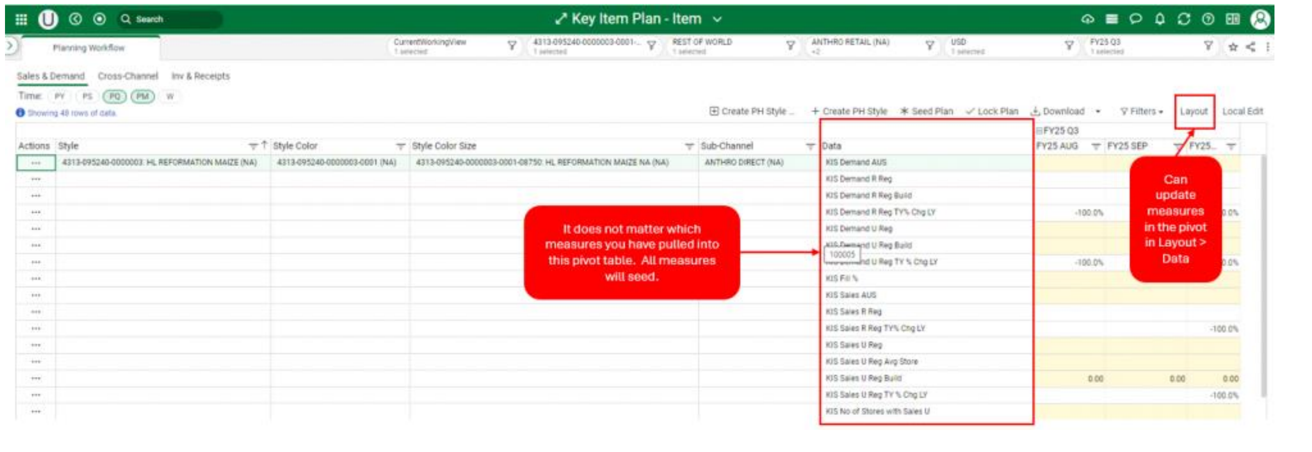
Refresh o9 to see updated data.

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

Tips & Tricks - FAQ 1

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

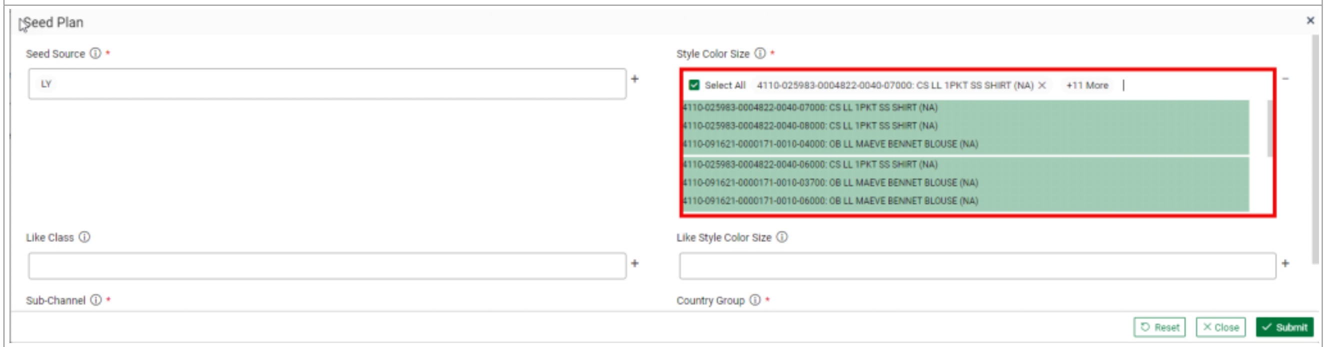
No! All seeding measures will seed no matter what measures you have pulled into the Pivot Table in Key Item Plan - Item Workspace > KIP - Item > Planning Workflow > Sales & Demand View. The only measures that do not seed are RTV & Inv Adj.



Tips & Tricks - FAQ 2

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

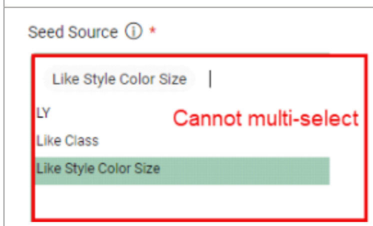
Multiple SKU's may be seeded at one time by selecting multiple SKU's in your Seed Plan Action Button Parameters.
This is true for parent/child relationships at any level of the hierarchy (e.g., all classes in a department, departments in a division, divisions in a brand, etc.)



Tips & Tricks - FAQ 3

Can I seed a plan with the LY of a "Like SKU"?

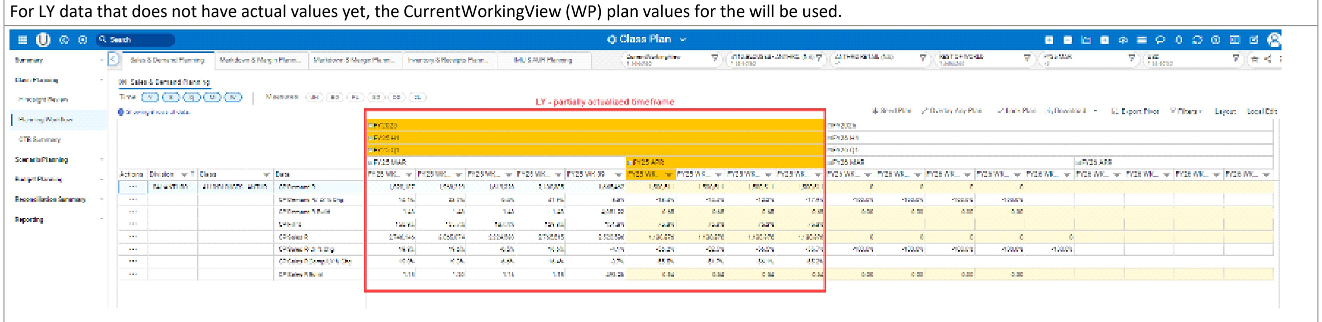
No. When seeding from a like SKU, it is seeding from the plan time frame (WP). For example, if you seed a style/color/size it will copy the WP data from the selected style color size.
The correct workflow is to seed the Like SKU from its own history before using it to seed a SKU without its own history.



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.

Placeholders

Thursday, August 08, 2024 2:47 PM

Creating Placeholders

This process is used to placeholders in key item planning.

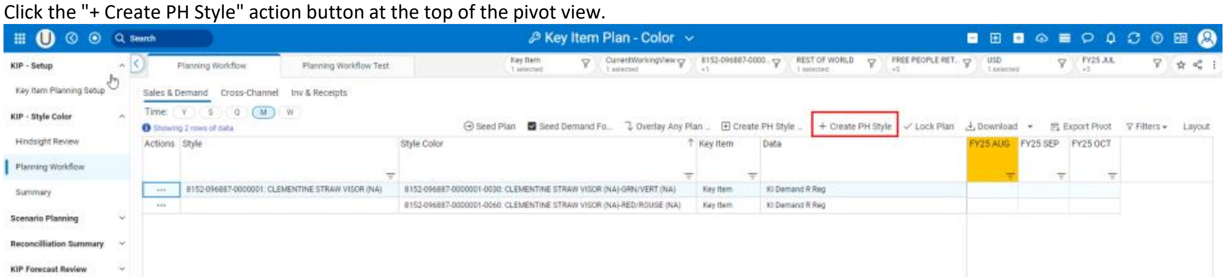
You can create a placeholder style or style color.

Creating a Placeholder Style

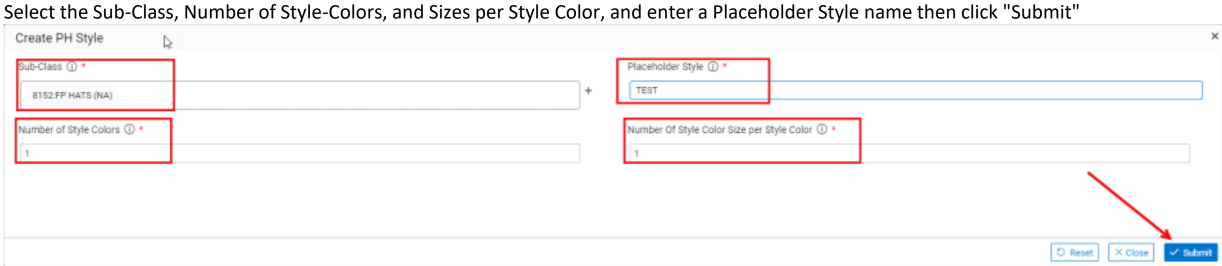
If you would like to create a Placeholder Style in Key Item Plan - Color

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

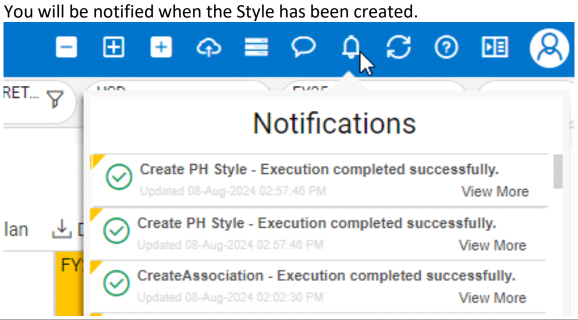
Click the "+ Create PH Style" action button at the top of the pivot view.



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

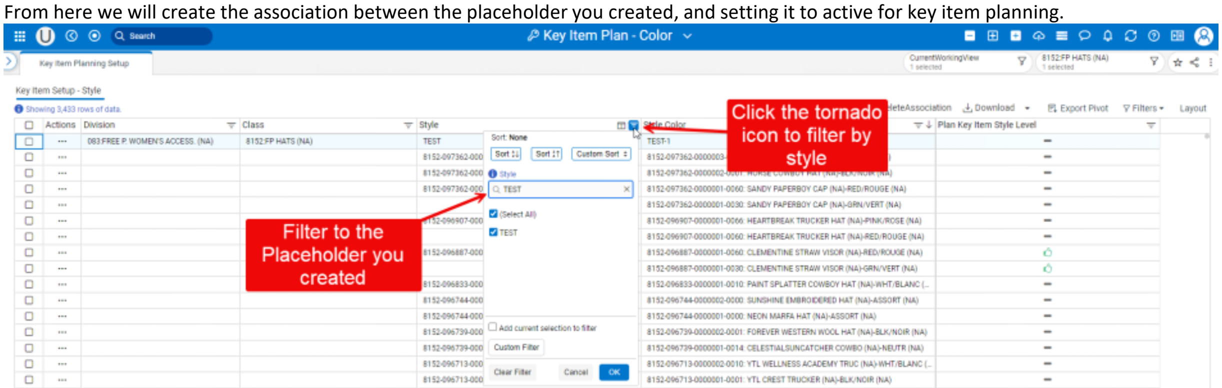


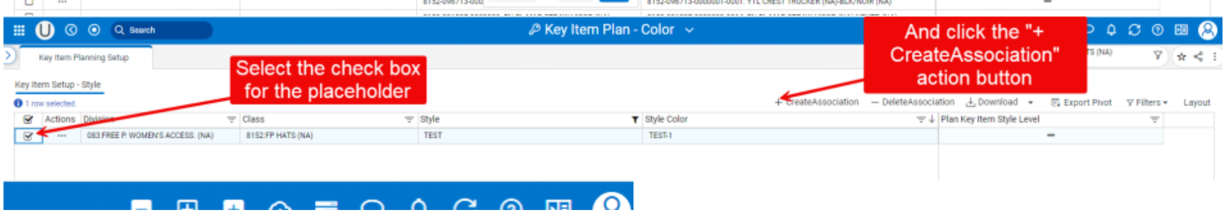
You will be notified when the Style has been created.

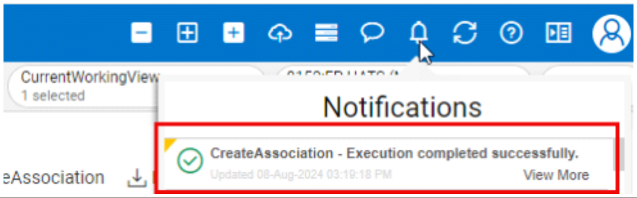


Next navigate to **Key Item Plan – Color > KIP – Setup > Key Item Planning Setup**

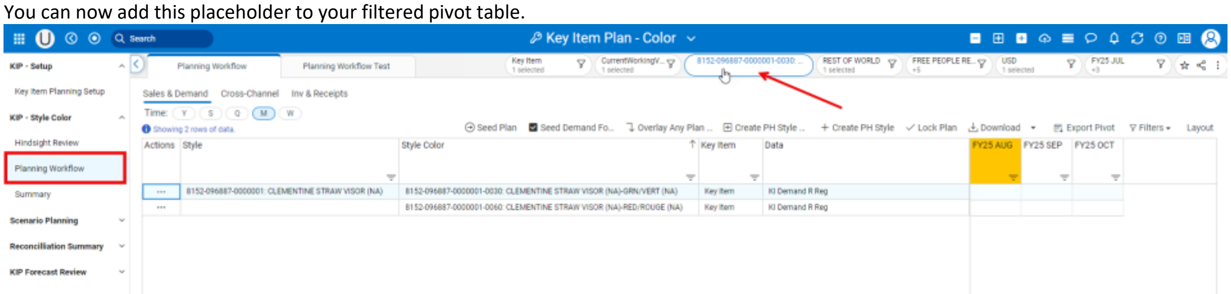
From here we will create the association between the placeholder you created, and setting it to active for key item planning.

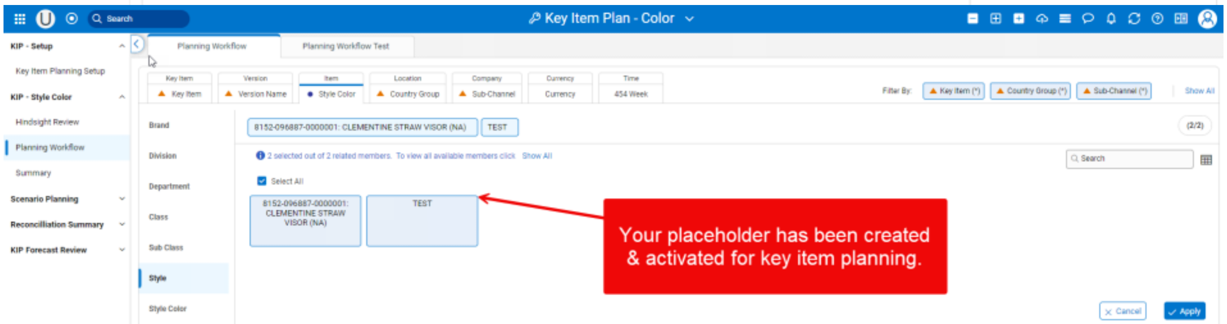






Now navigate back to **Key Item Plan – Color > KIP – Style Color > Planning Workflow**
You can now add this placeholder to your filtered pivot table.

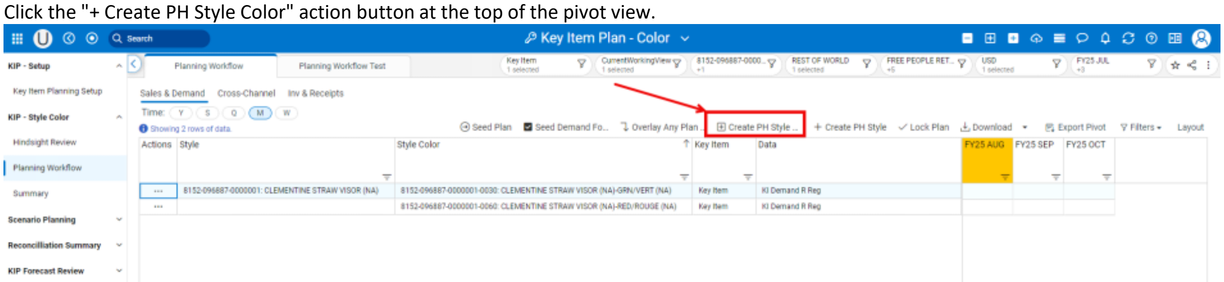




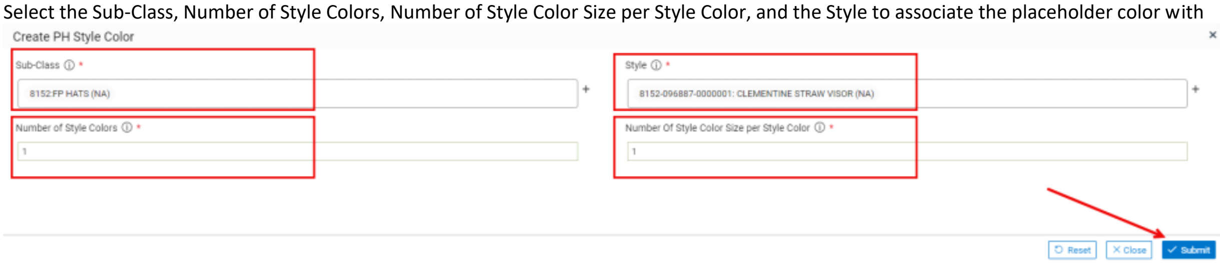
Creating a Placeholder Style Color

If you would like to create a Placeholder Style Color

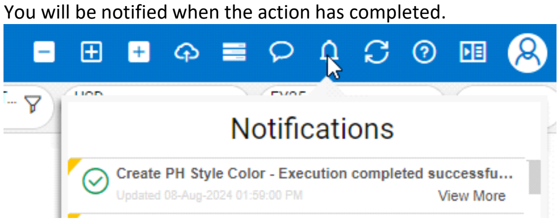
Navigate to **Key Item Plan – Color > KIP – Style Color > Planning Workflow**
Click the "+ Create PH Style Color" action button at the top of the pivot view.



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

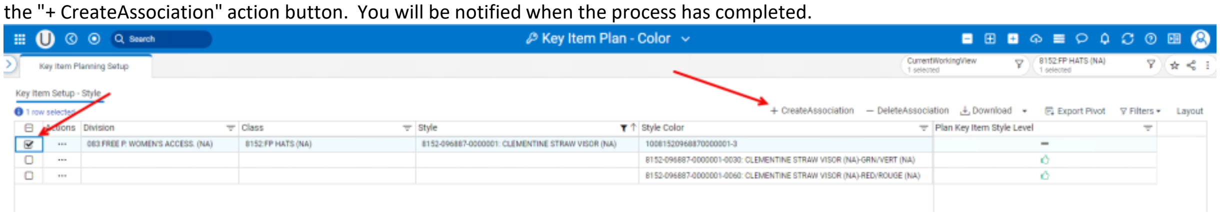


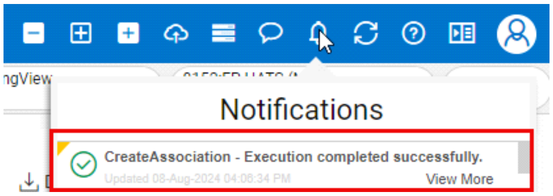
You will be notified when the action has completed.



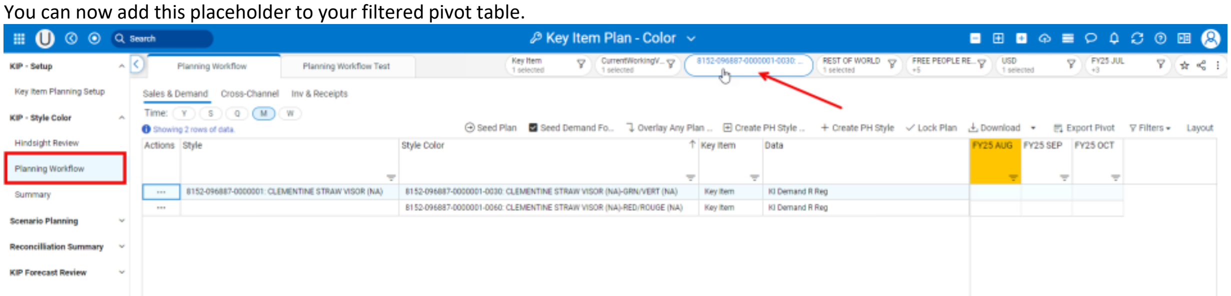
Next navigate to **Key Item Plan – Color > KIP – Setup > Key Item Planning Setup**
From here we will create the association between the placeholder you created, and setting it to active for key item planning. Click the check box for the placeholder and select

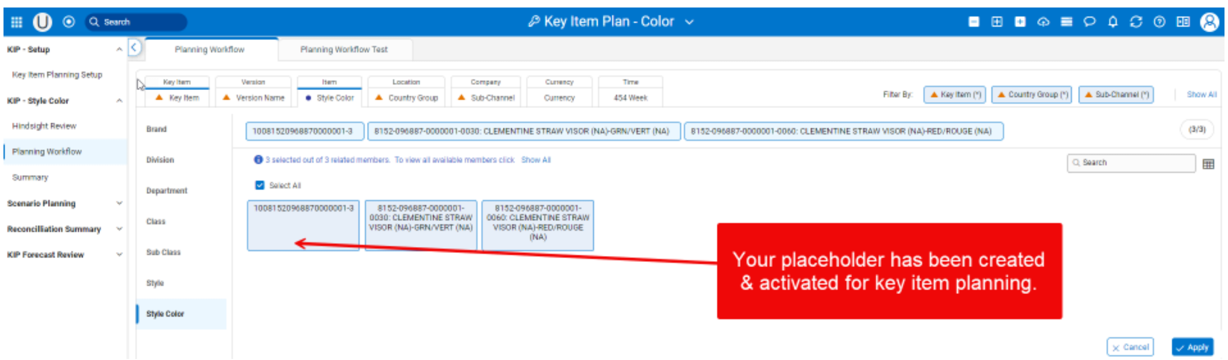
the "+ CreateAssociation" action button. You will be notified when the process has completed.





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

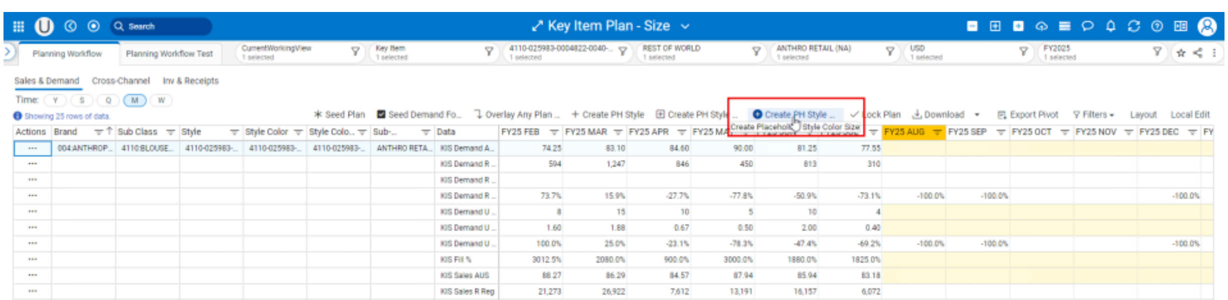




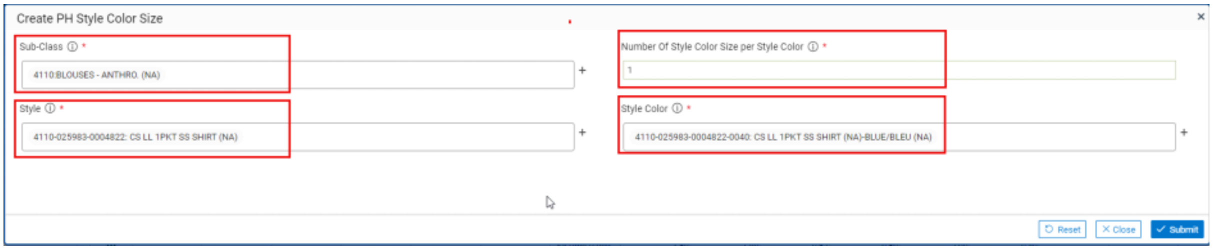
Creating a Placeholder Style Color Size

If you would like to create a Placeholder Style Color

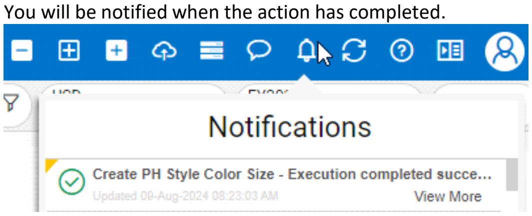
Navigate to **Key Item Plan – Size > KIP – Item > Planning Workflow**
Click the "+ Create PH Style Color Size" action button at the top of the pivot view.



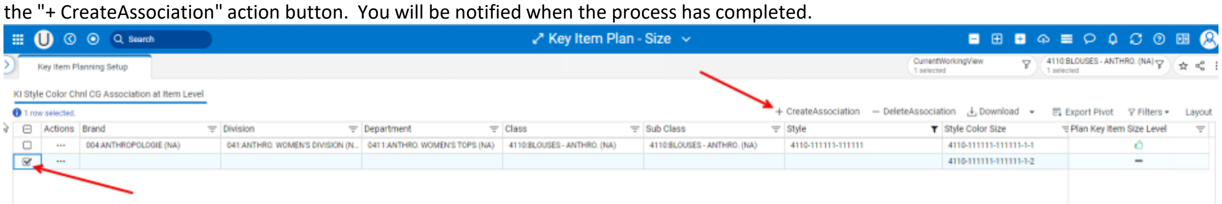
Select the Sub-Class, Style, Style Color, and number of Style Color Sizes to create.

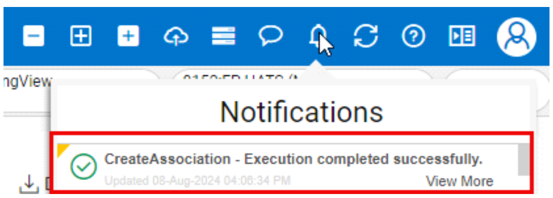


You will be notified when the action has completed.

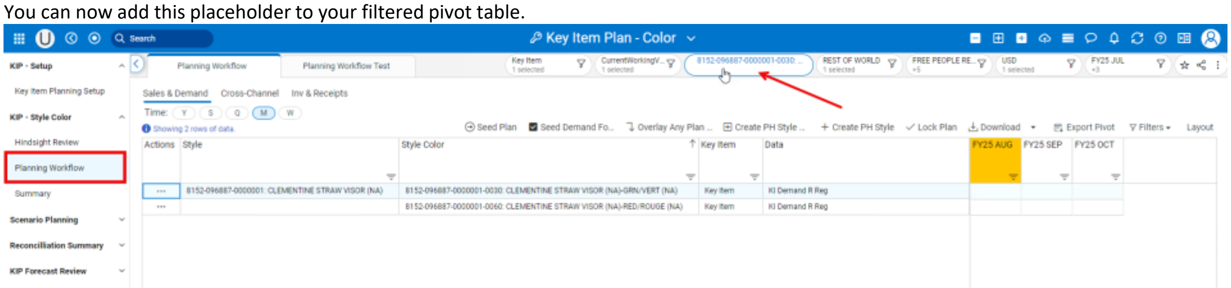


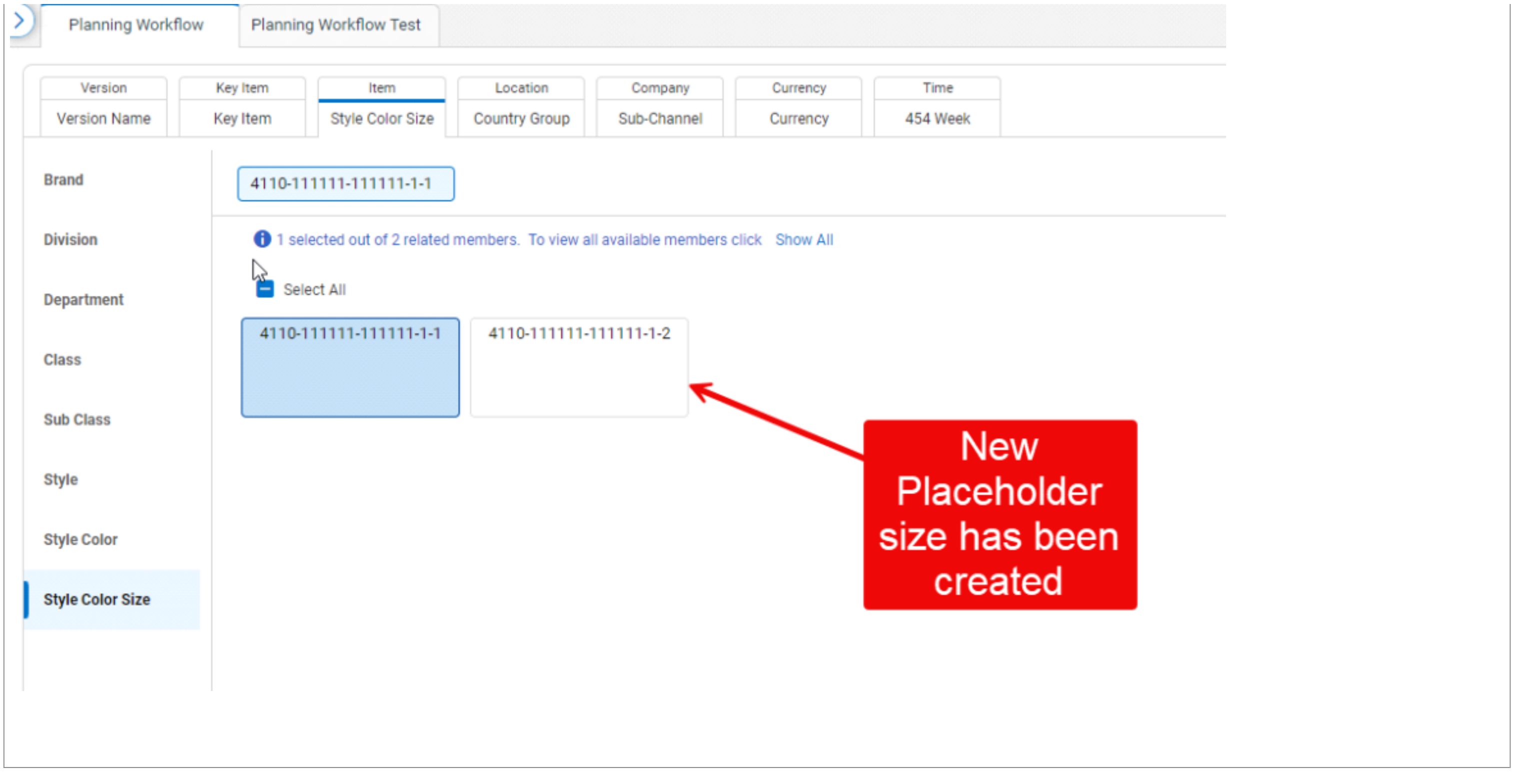
Next navigate to **Key Item Plan – Size > KIP – Setup > Key Item Planning Setup**
From here we will create the association between the placeholder you created, and setting it to active for key item planning. Click the check box for the placeholder and select the "+ CreateAssociation" action button. You will be notified when the process has completed.





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




Planning Workflow
Planning Workflow Test
Version
Version Name
Key Item
Key Item
Item
Style Color Size
Location
Country Group
Company
Sub-Channel
Currency
Currency
Time
454 Week
Brand
Division
Department
Class
Sub Class
Style
Style Color
Style Color Size
4110-111111-111111-1-1
1 selected out of 2 related members. To view all available members click Show All
Select All
4110-111111-111111-1-1
4110-111111-111111-1-2
New Placeholder size has been created

Deleting Placeholders

Thursday, August 08, 2024 2:47 PM

Deleting Placeholders

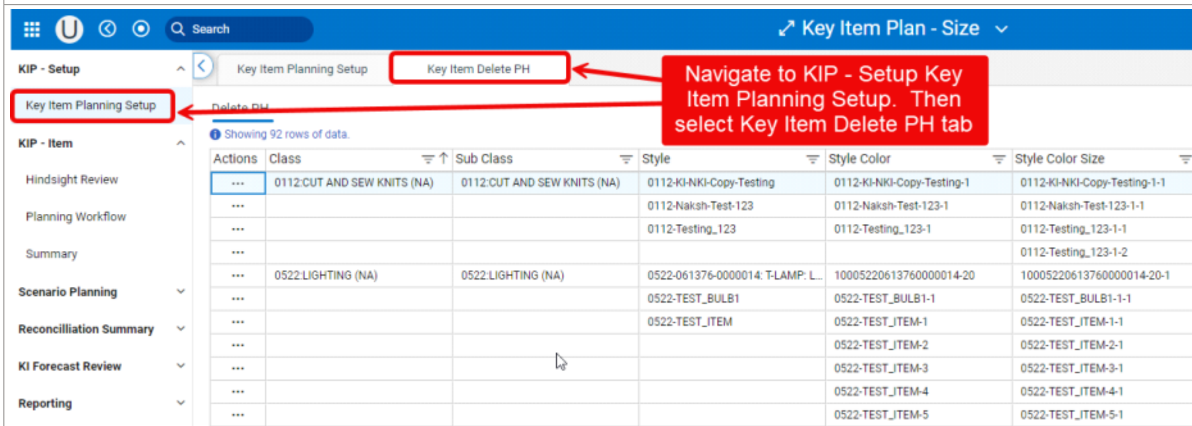
This process is used to delete placeholders in key item planning.

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**



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.

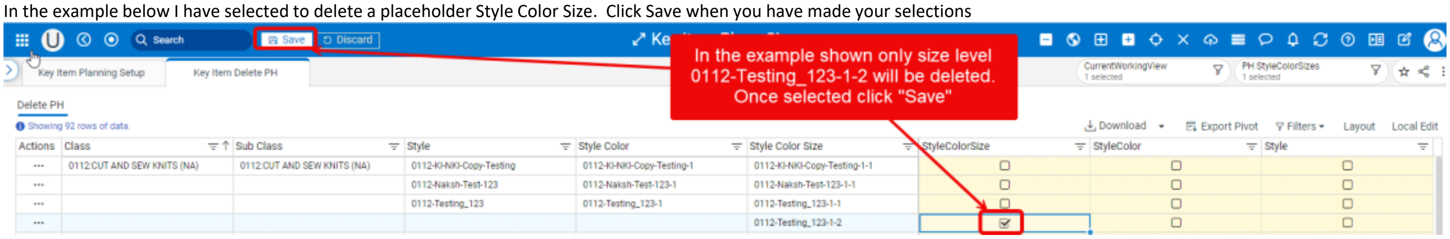
Deleting Placeholder Style Color

- 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(s0 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



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 Whlsl 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:			RETAIL
KI BOP 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 Sales U Reg		
+	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 Whlsl U		
+	KI Transfer U	could be a negative	
KI EOP U Reg			
MOVEMENT CHANNEL:			MOVEMENT
KI BOP 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 Sales U Reg		
+	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 Whlsl 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 provided 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 this 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

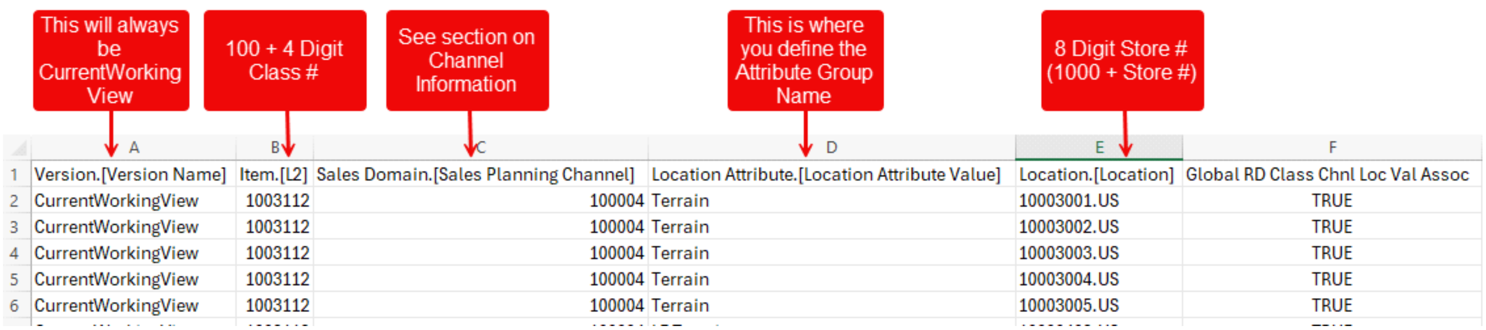
Channel Information

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

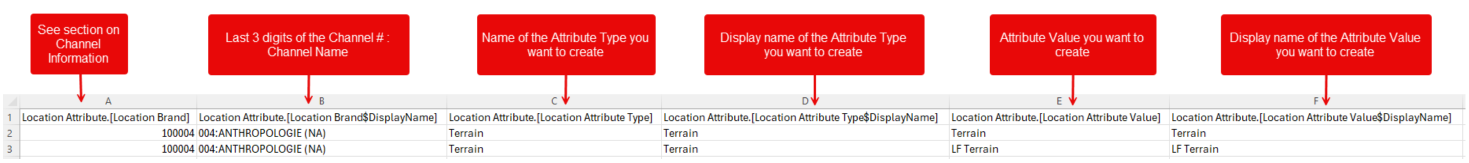
The first file you will need to fill out



	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

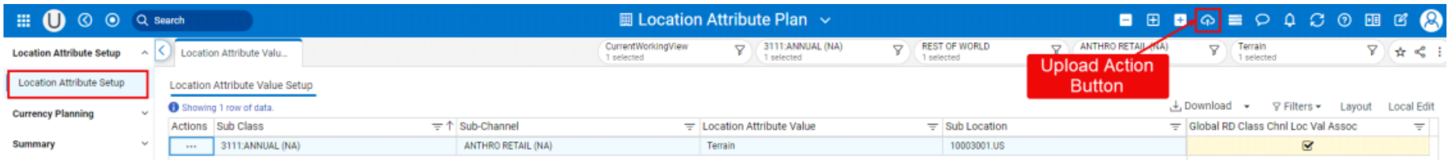
The second file you will need to fill out



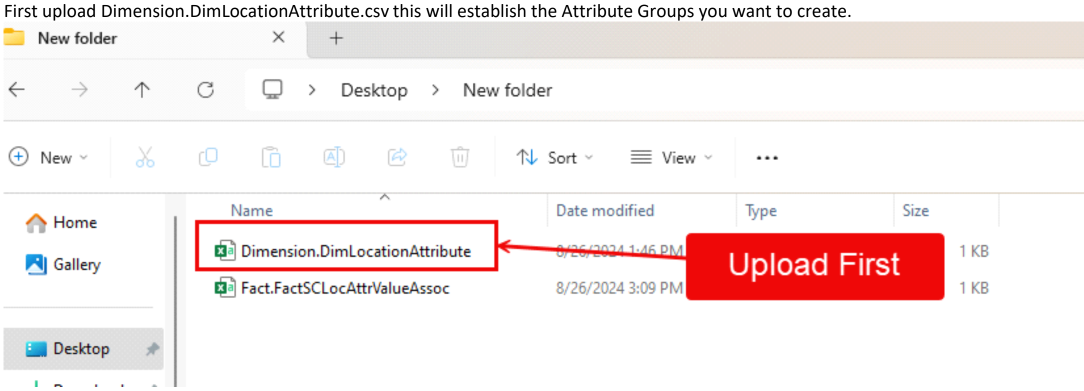
	A	B	C	D	E	F
1	Location Attribute.[Location Brand]	Location Attribute.[Location Brand$DisplayName]	Location Attribute.[Location Attribute Type]	Location Attribute.[Location Attribute Type$DisplayName]	Location Attribute.[Location Attribute Value]	Location Attribute.[Location Attribute Value$DisplayName]
2	100004	004:ANTHROPOLOGIE (NA)	Terrain	Terrain	Terrain	Terrain
3	100004	004:ANTHROPOLOGIE (NA)	Terrain	Terrain	LF Terrain	LF Terrain

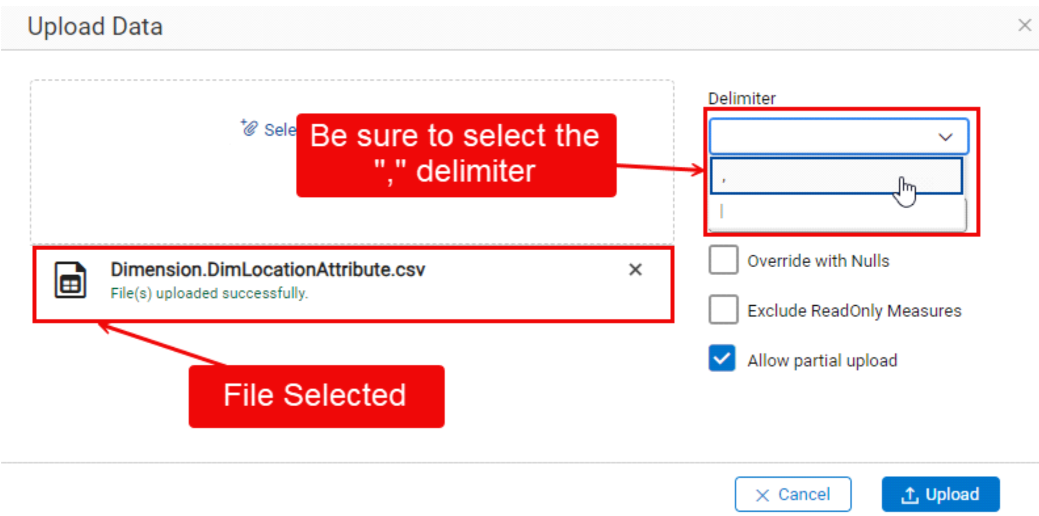
Attribute File Upload

You will need to upload two files to create Location Attribute Groups & Associate Stores with them

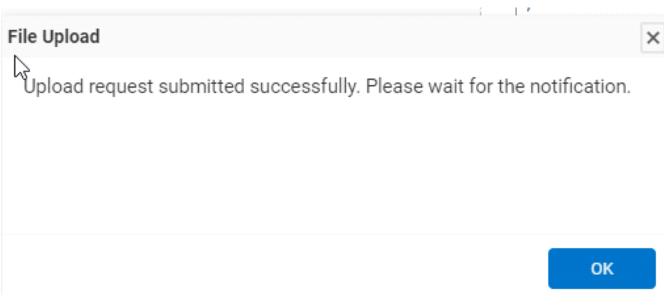


First upload Dimension.DimLocationAttribute.csv this will establish the Attribute Groups you want to create.

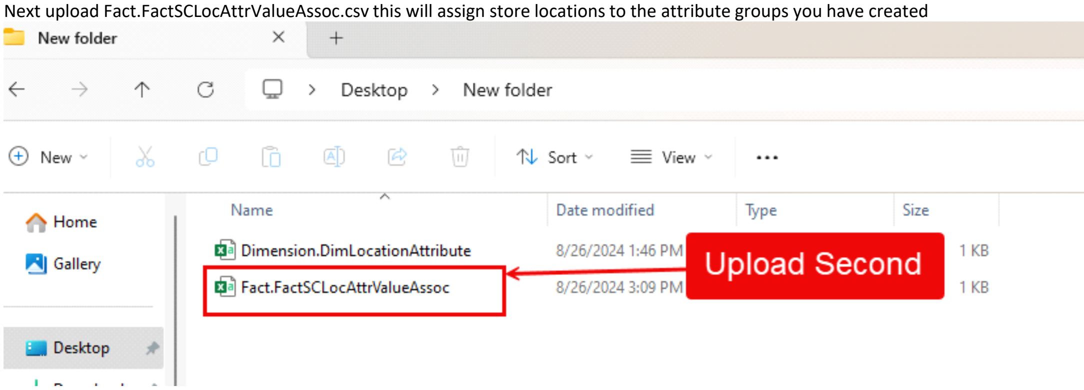


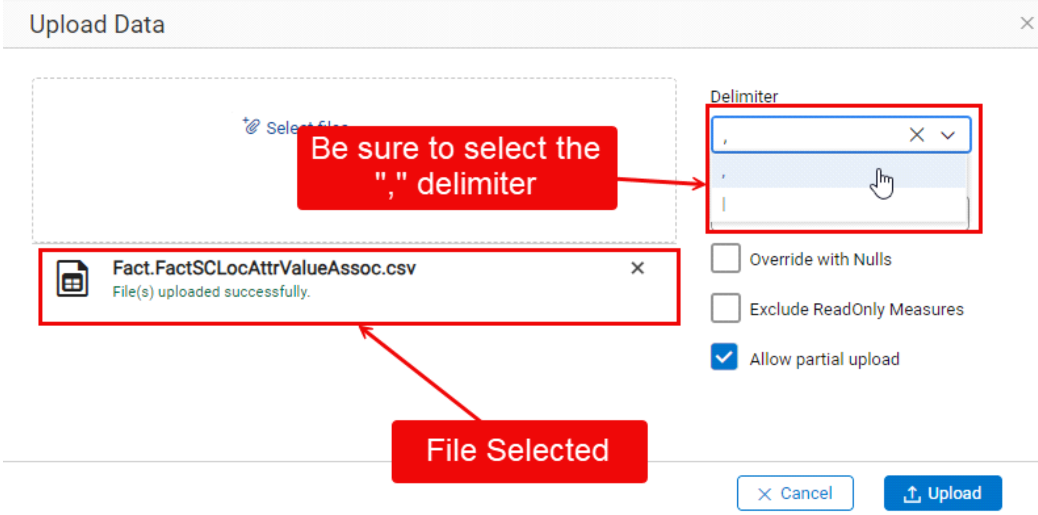


Once you have clicked "Upload" you will receive the message box shown below.

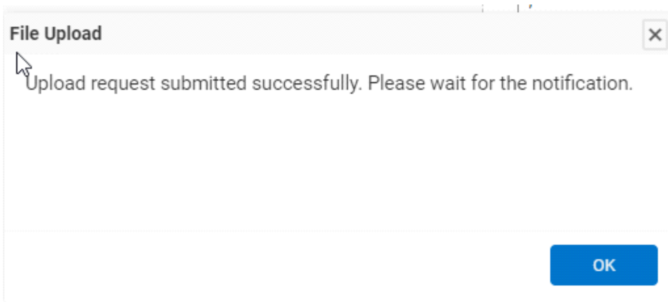


Next upload Fact.FactSCLocAttrValueAssoc.csv this will assign store locations to the attribute groups you have created

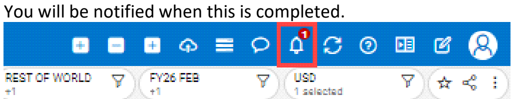




Once you have clicked "Upload" you will receive the message box shown below.



You will be notified when this is completed.



Attribute File Upload (Overnight Note)

Once you have these uploaded it does require an overnight batch run before you are able to see them I the Tenant.

Attribute Location Updates

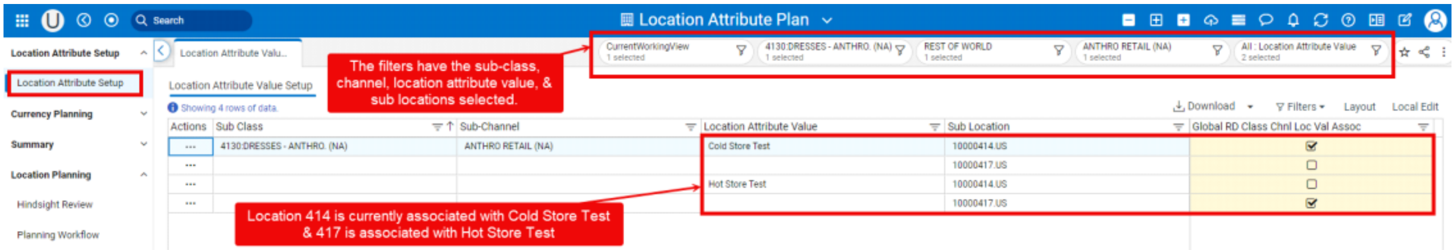
Location Attribute Location Updates

Key Notes:

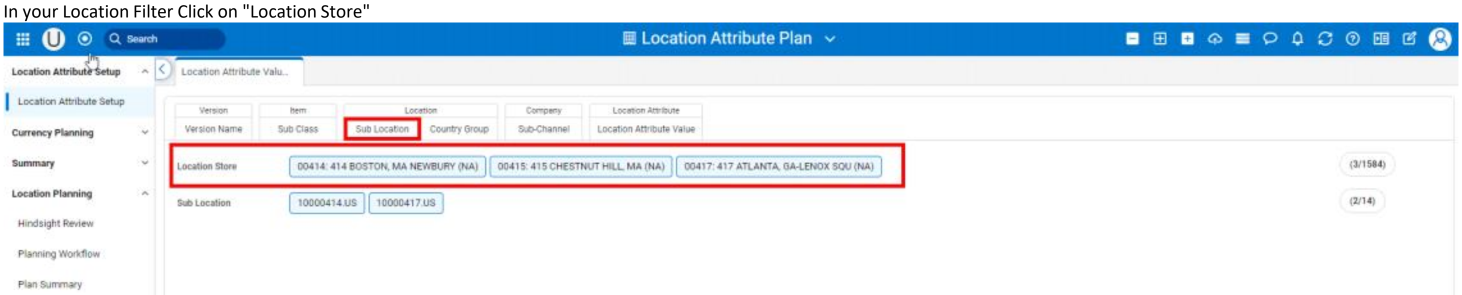
• To update the locations associated with an Attribute Group there are a few easy steps

To update locations associated with an Attribute

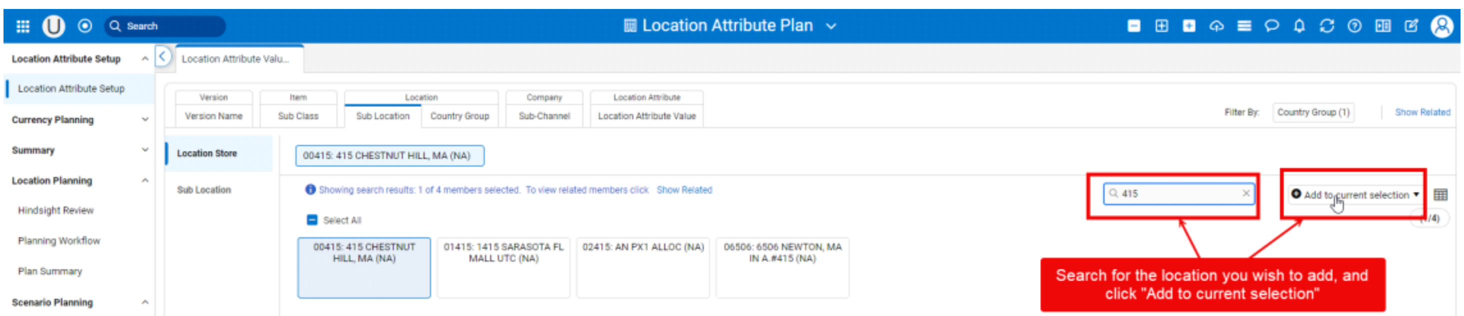
Below in Location Attribute Setup click on your Filters



In your Location Filter Click on "Location Store"

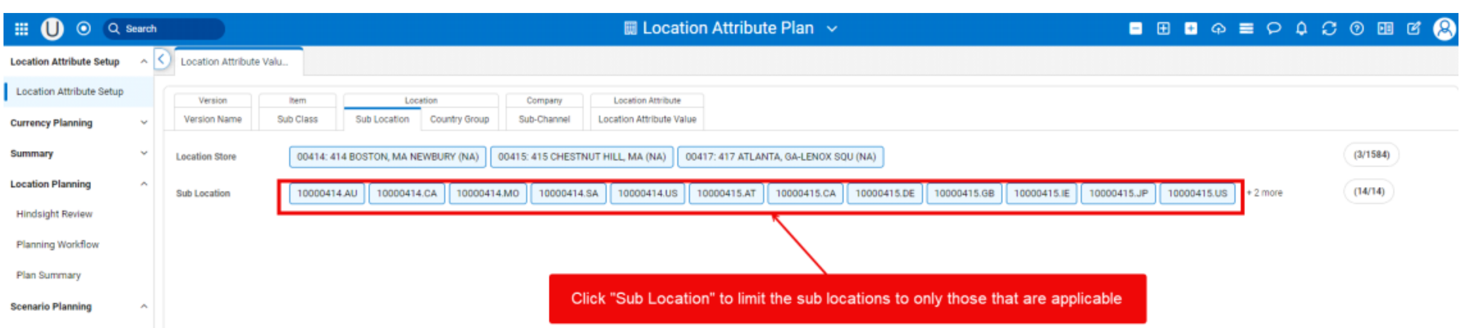


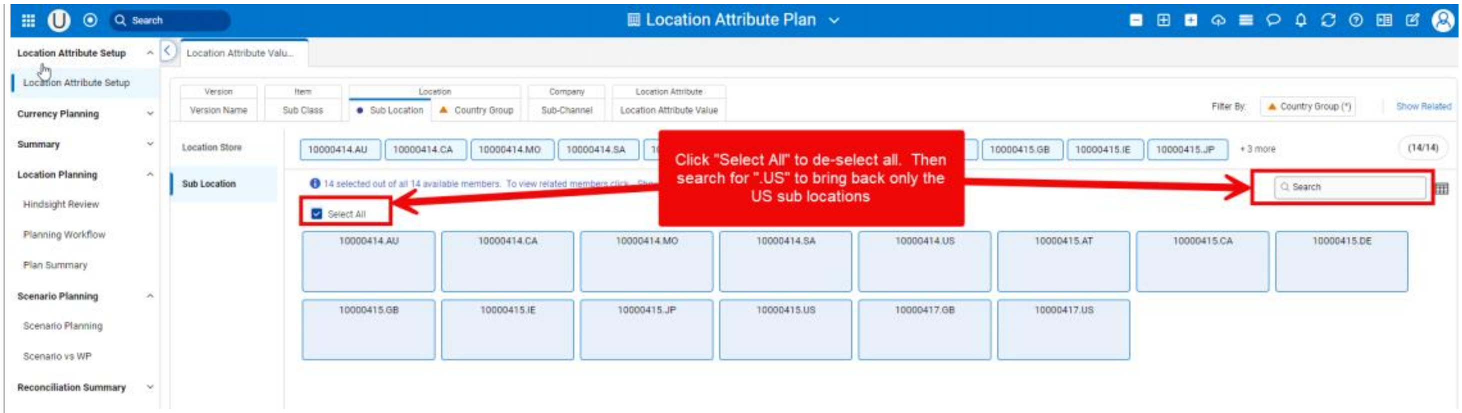
You can search by store number to add locations to your view

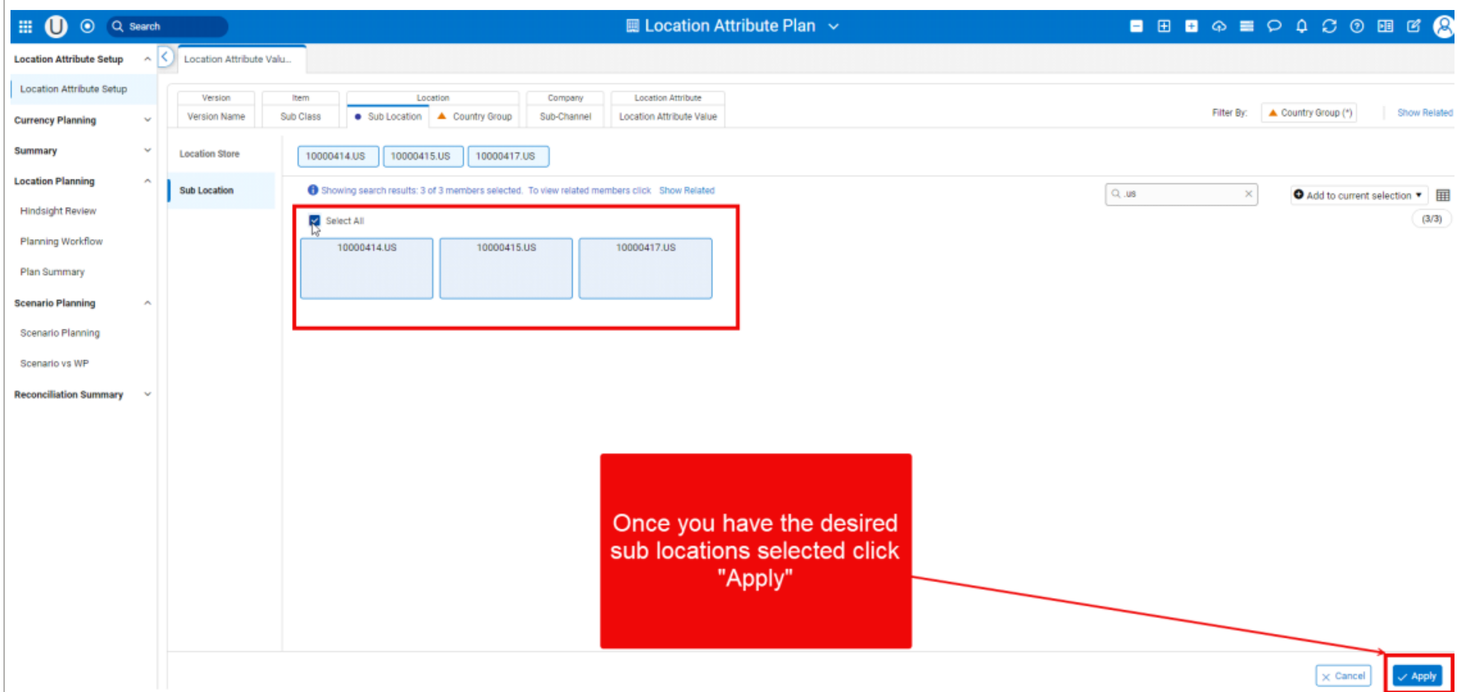


Filtering out sub-locations

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

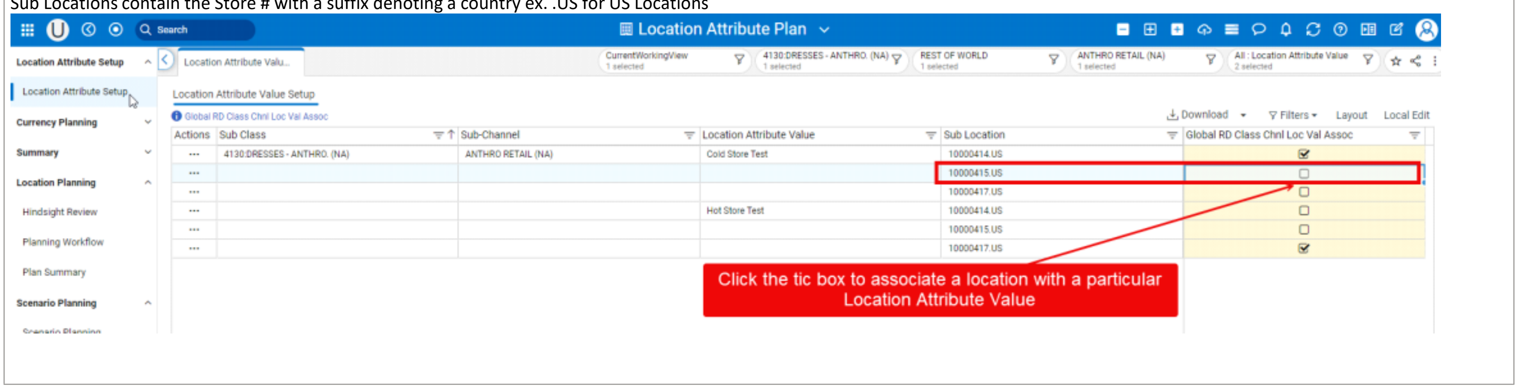






Updating the Location Attribute's for Locations

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

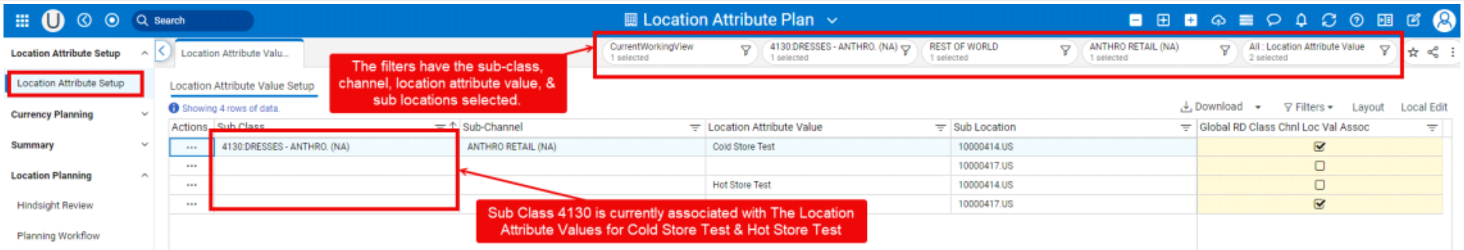


Attribute Class Updates

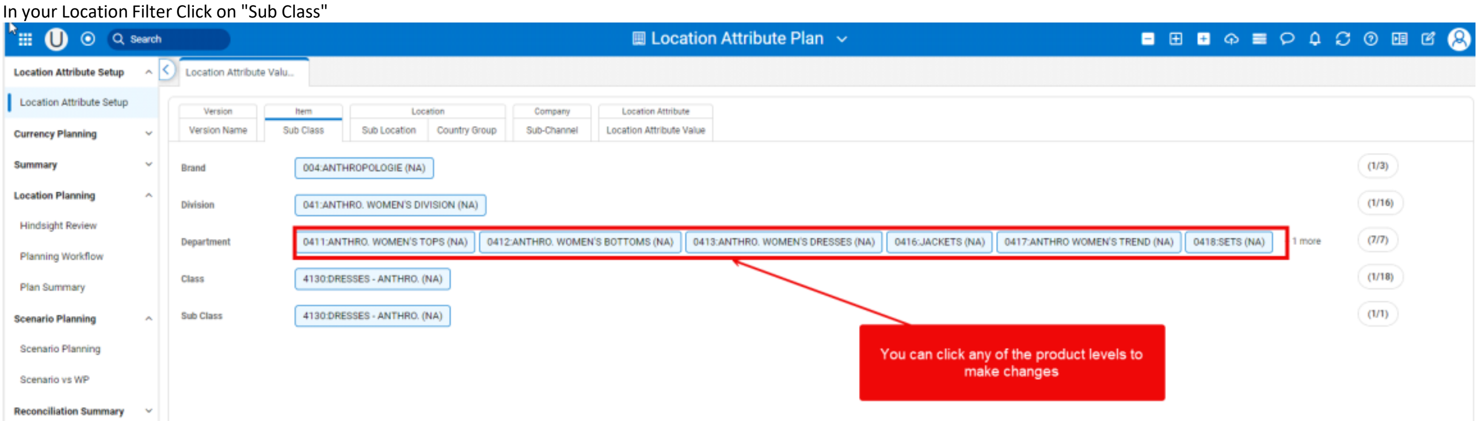
Location Attribute Product Updates
Key Notes:
• To update the products associated with an Attribute Group there are a few easy steps

To update products associated with an Attribute

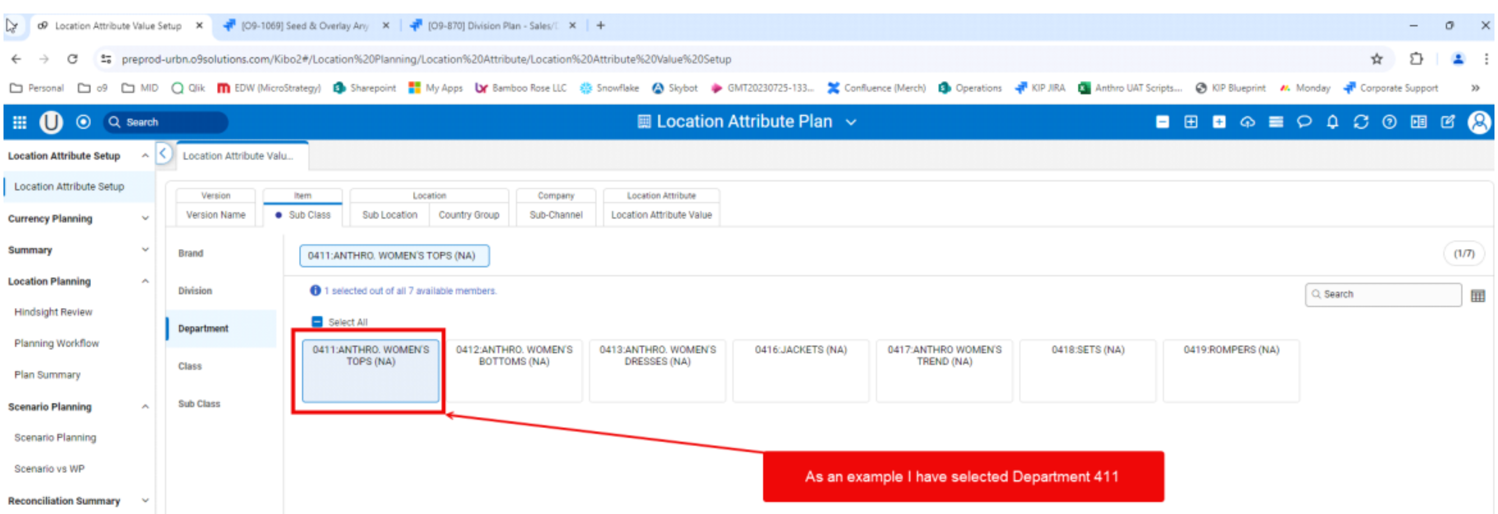
Below in Location Attribute Setup click on your Filters

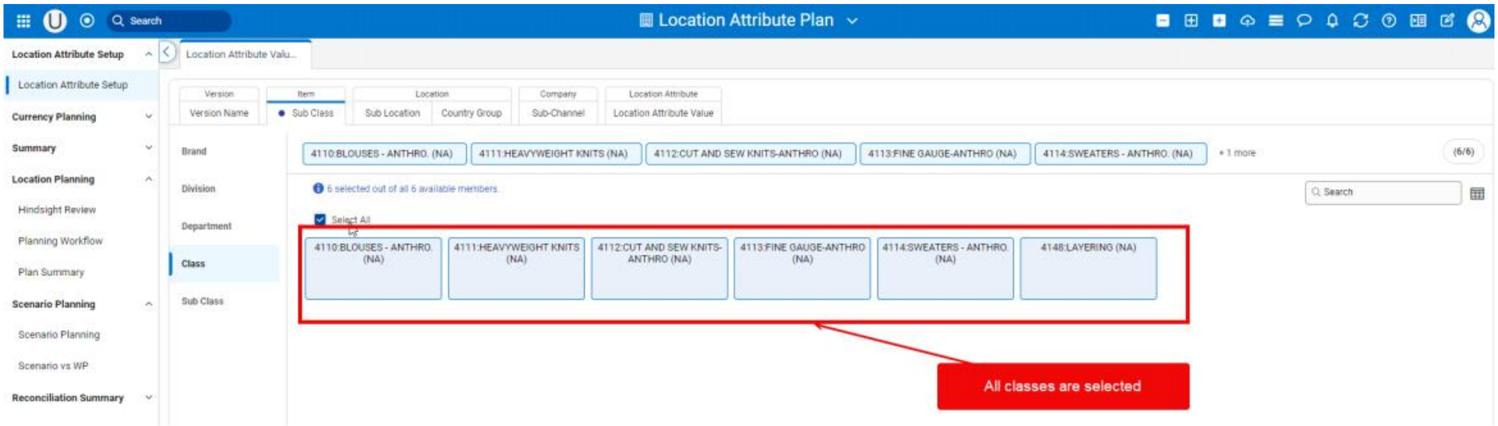


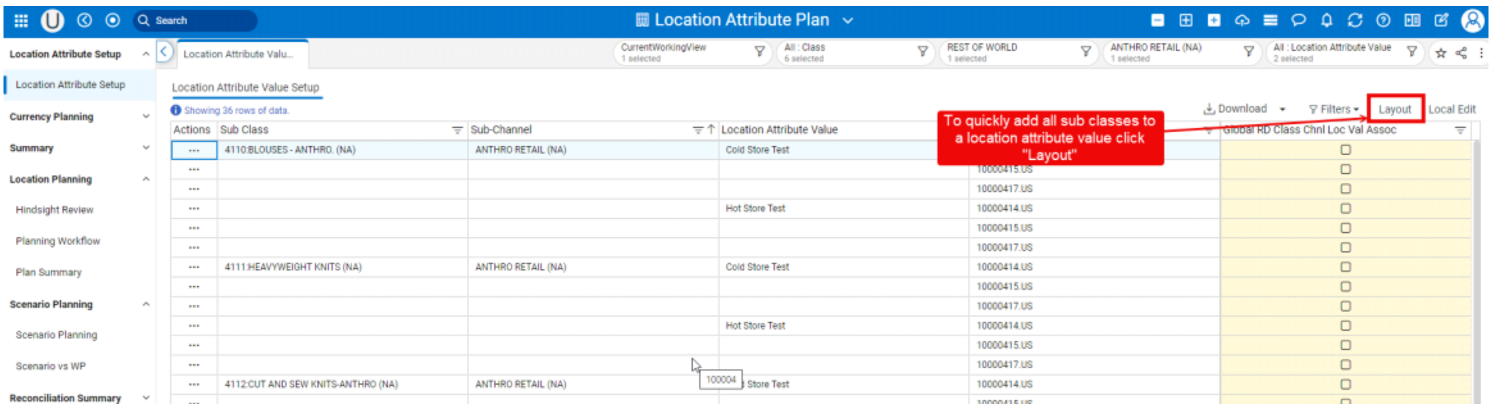
In your Location Filter Click on "Sub Class"

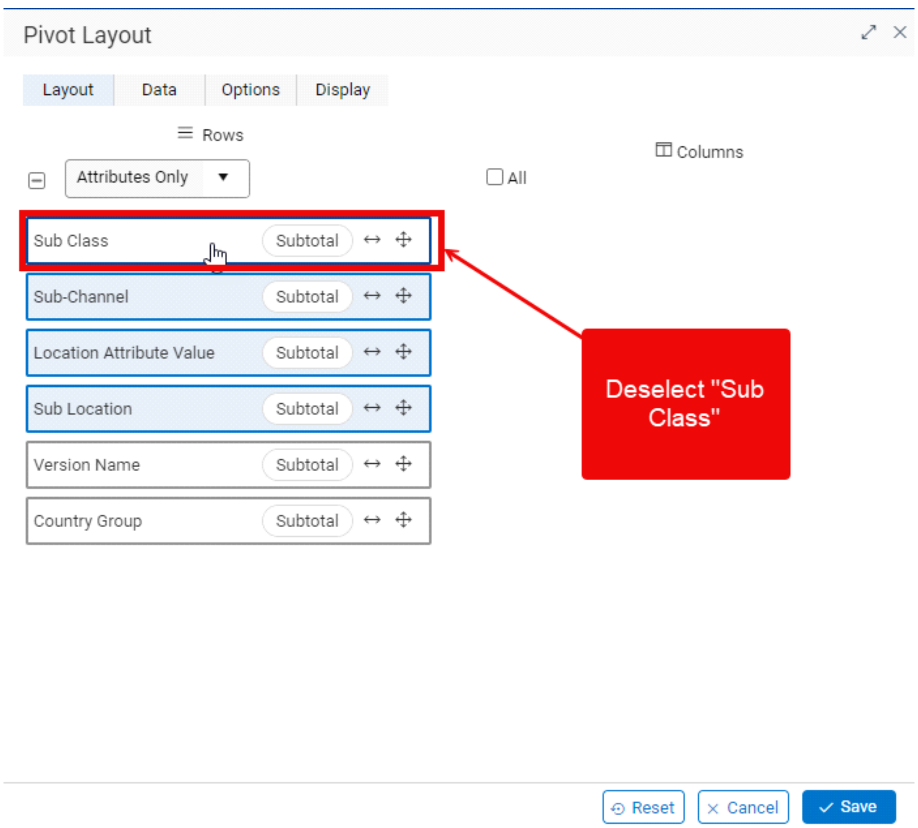


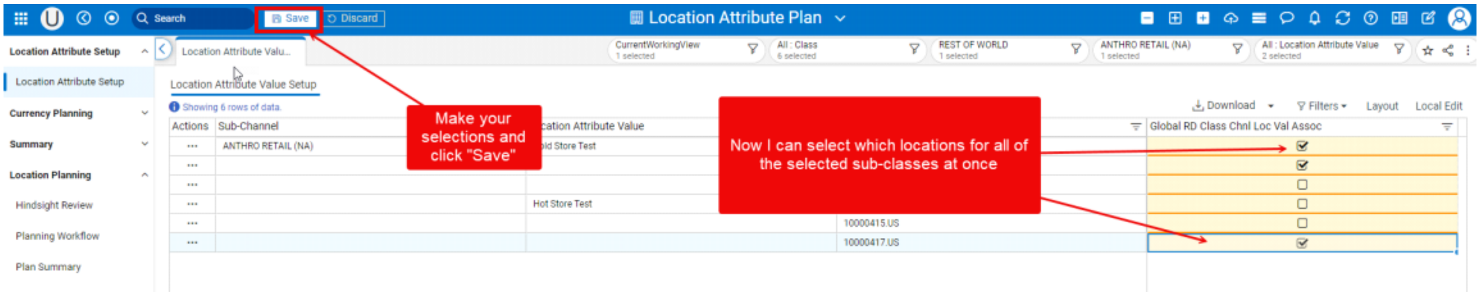
You can search by store number to add locations to your view

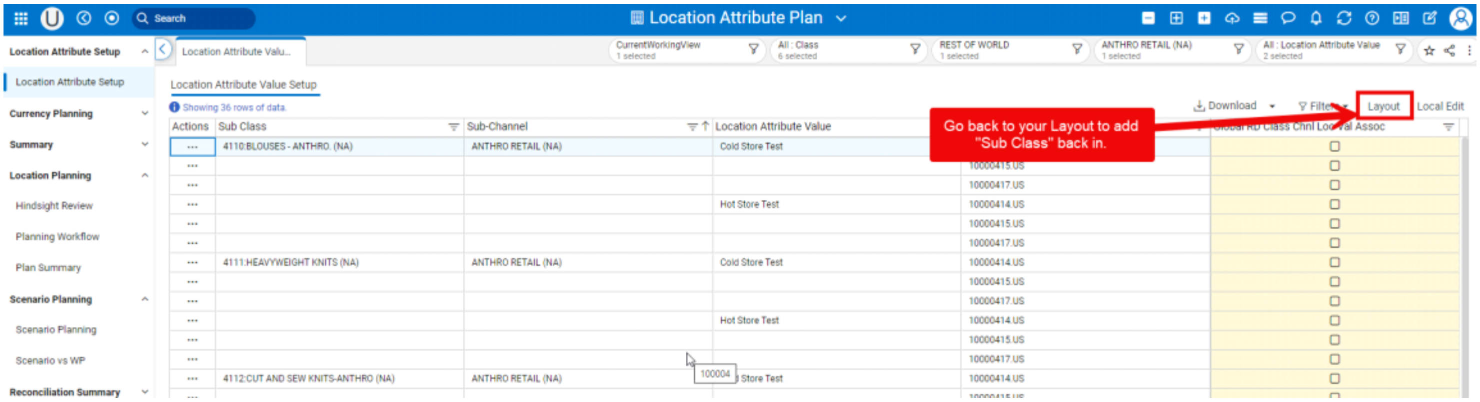


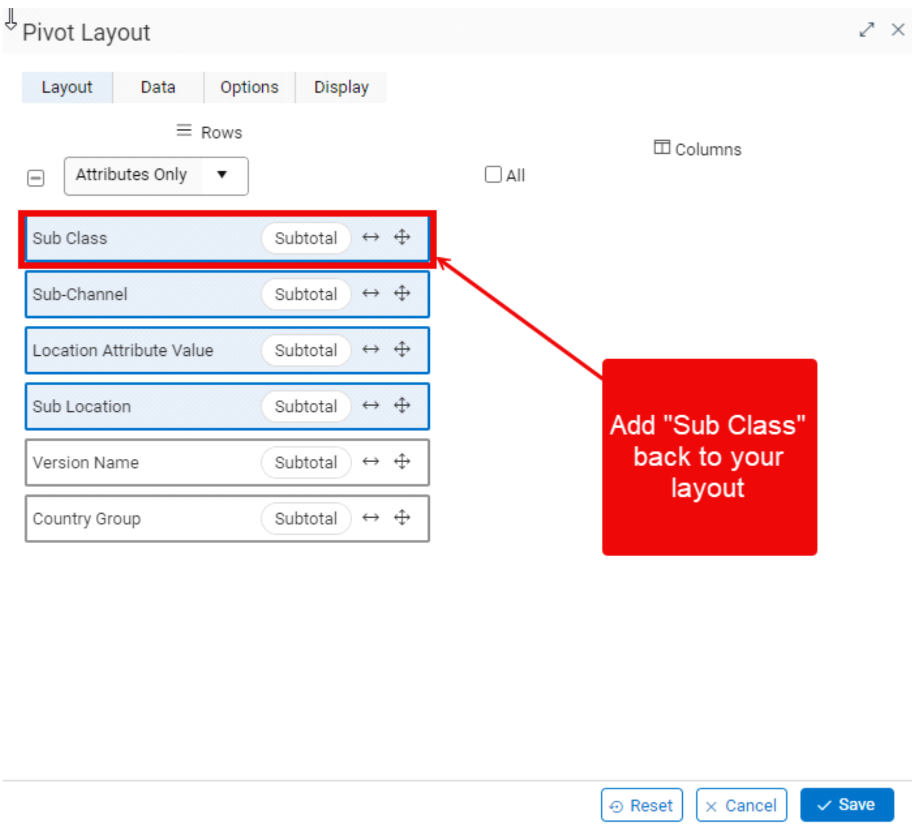

Location Attribute Plan
Location Attribute Setup
Location Attribute Valu...
Version
Version Name
Item
Sub Class
Location
Sub Location
Country Group
Company
Sub-Channel
Location Attribute
Location Attribute Value
Brand
Division
Department
Class
Sub Class
6 selected out of all 6 available members.
Select All
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)
All classes are selected

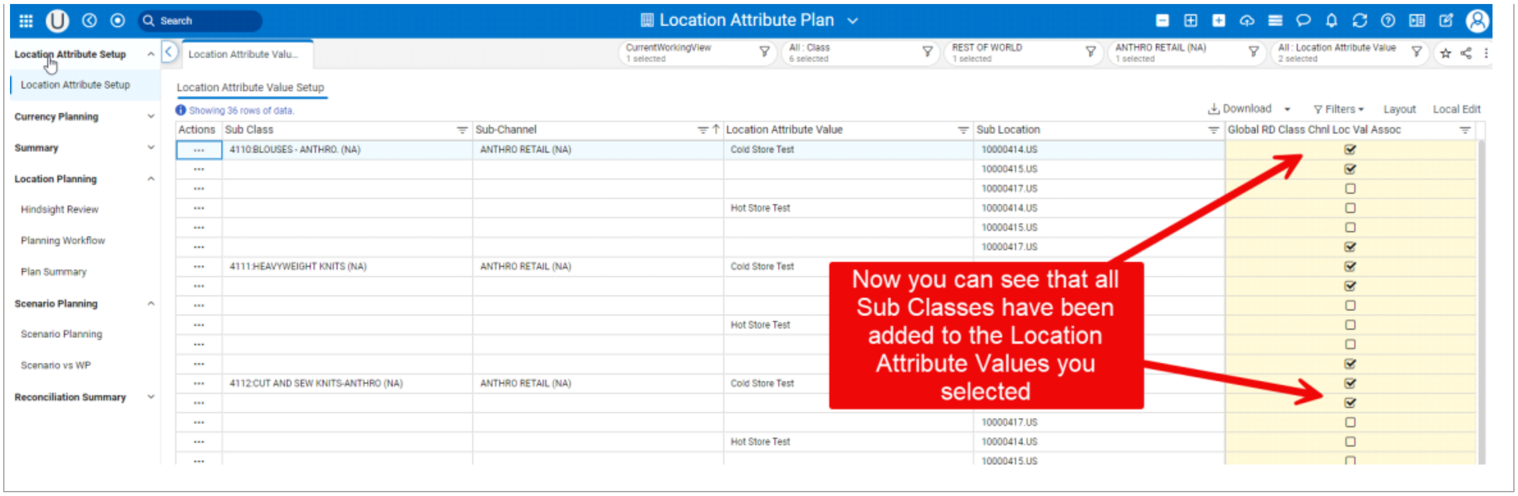

Location Attribute Plan
Location Attribute Value Setup
Showing 36 rows of data.
Download
Filters
Layout
Local Edit
To quickly add all sub classes to a location attribute value click "Layout"
Actions
Sub Class
Sub-Channel
Location Attribute Value
Global RD Class Chnl Loc Val Assoc
4110:BLOUSES - ANTHRO. (NA)
ANTHRO RETAIL (NA)
Cold Store Test
Hot Store Test
4111:HEAVYWEIGHT KNITS (NA)
4112:CUT AND SEW KNITS-ANTHRO (NA)


Pivot Layout
Layout
Data
Options
Display
Rows
Columns
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
Make your selections and click "Save"
Now I can select which locations for all of the selected sub-classes at once
Global RD Class Chnl Loc Val Assoc


Location Attribute Plan
Location Attribute Value Setup
Go back to your Layout to add "Sub Class" back in.
Layout
Sub Class
Sub-Channel
Location Attribute Value


Pivot Layout
Layout
Data
Options
Display
Rows
Columns
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


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

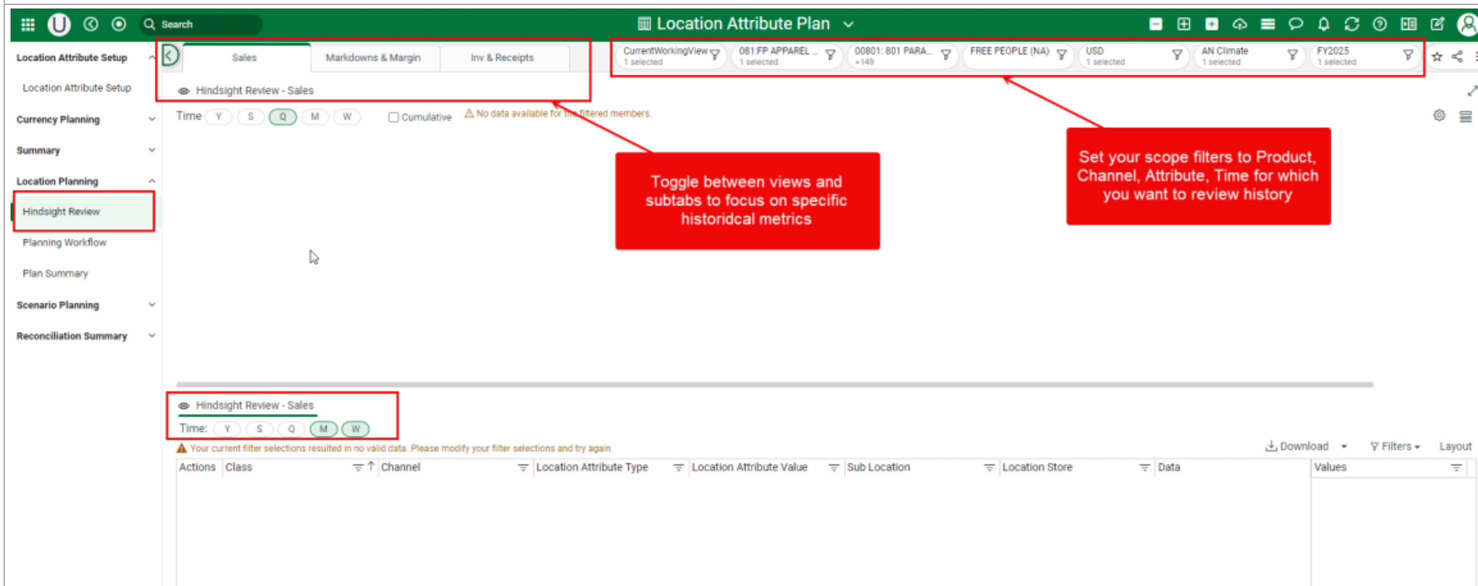
When you are building a new Merchandise Financial Plan, seeding it with data from the past or from a like plan will save time and improve accuracy by inheriting key data instead of building it from scratch. You will inherit seasonality curves, key metrics, and ratios from the selected time frame. It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

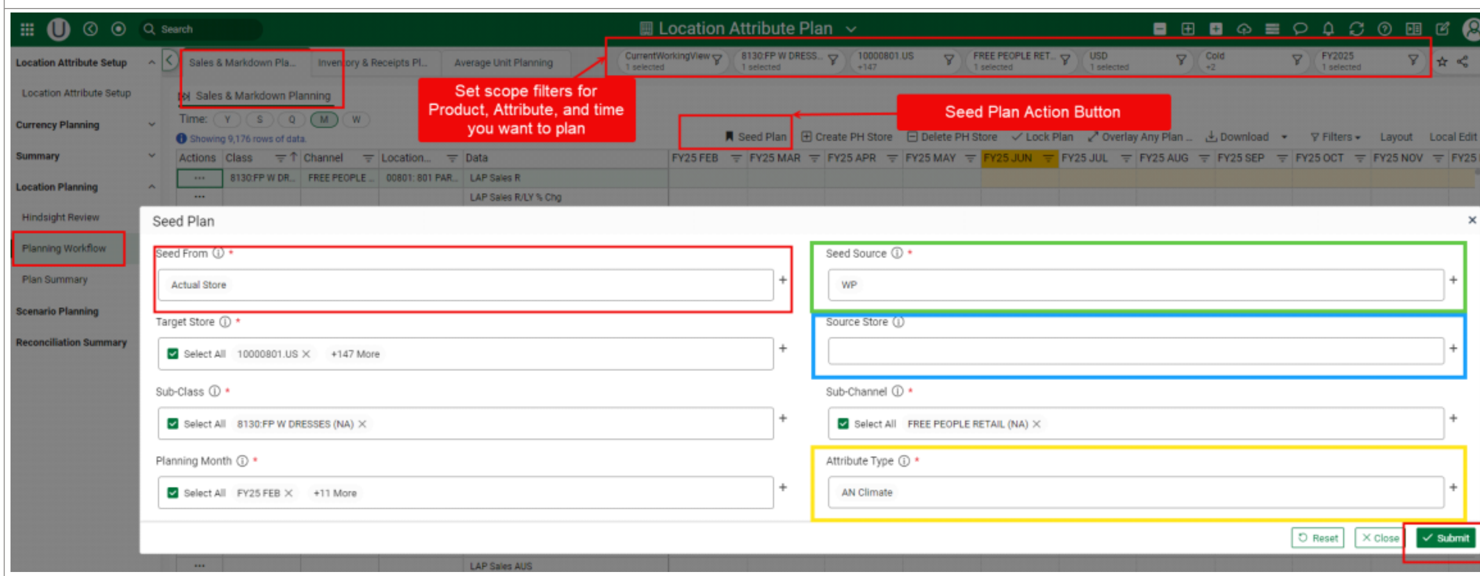


Seeding Workflow

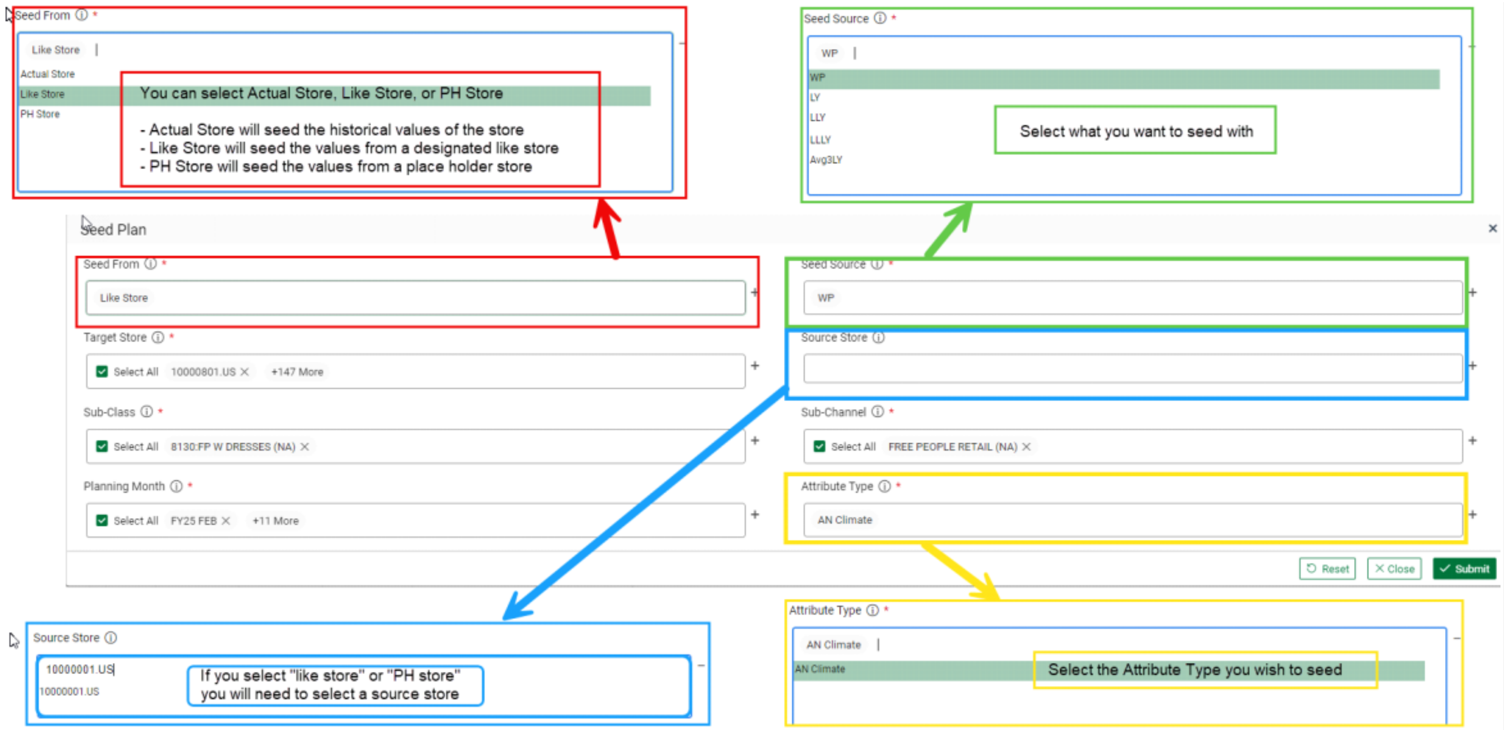
Navigate to **Location Attribute Plan Workspace > Attribute Planning Page Group > Planning Workflow Page > Sales & Demand Planning View** or **Attribute Plan Workspace > Attribute Planning Page Group > PlanSummary**

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

Click on the "Seed Plan" Action Button.

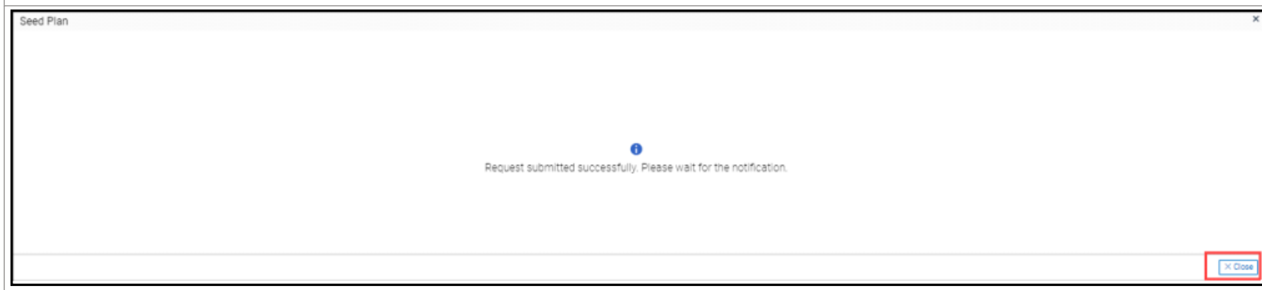


Fill out parameters in the "Seed Plan" Action Button Pop Up

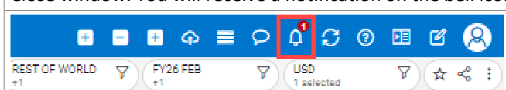


*** Note: if you choose to seed from Like Store, there is a metric 'LAP Like Store' that will tell you the store # you selected to seed for the particular intersection***

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



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.



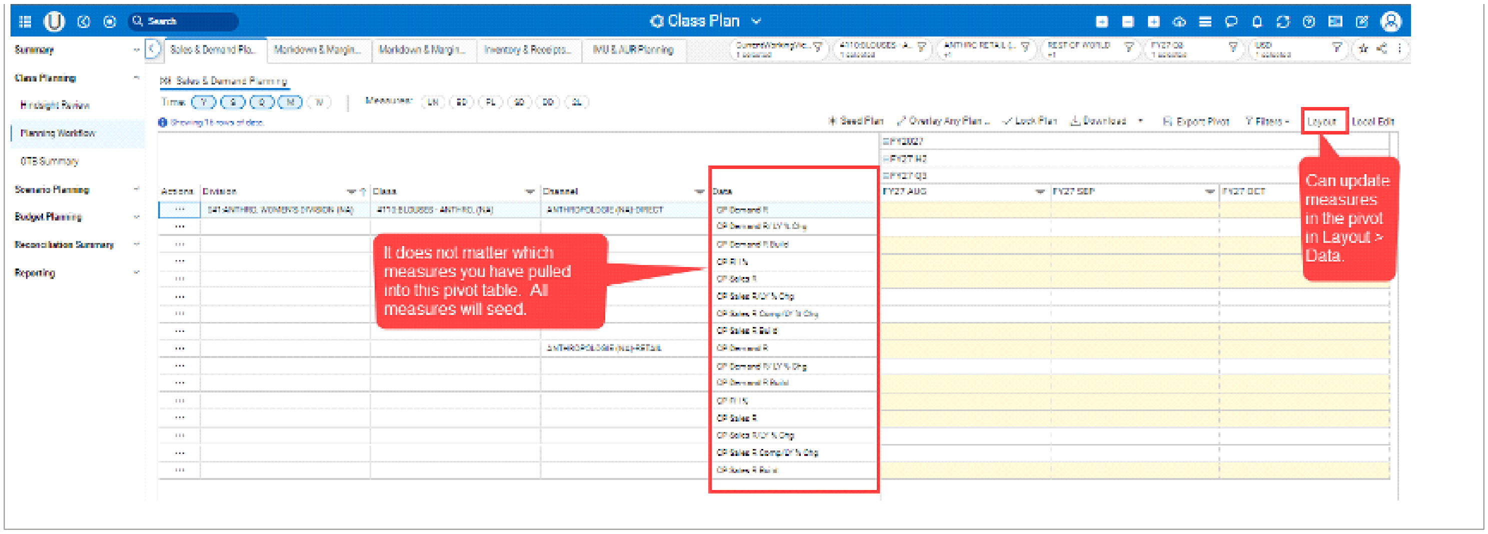
Refresh o9 to see updated data.

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?

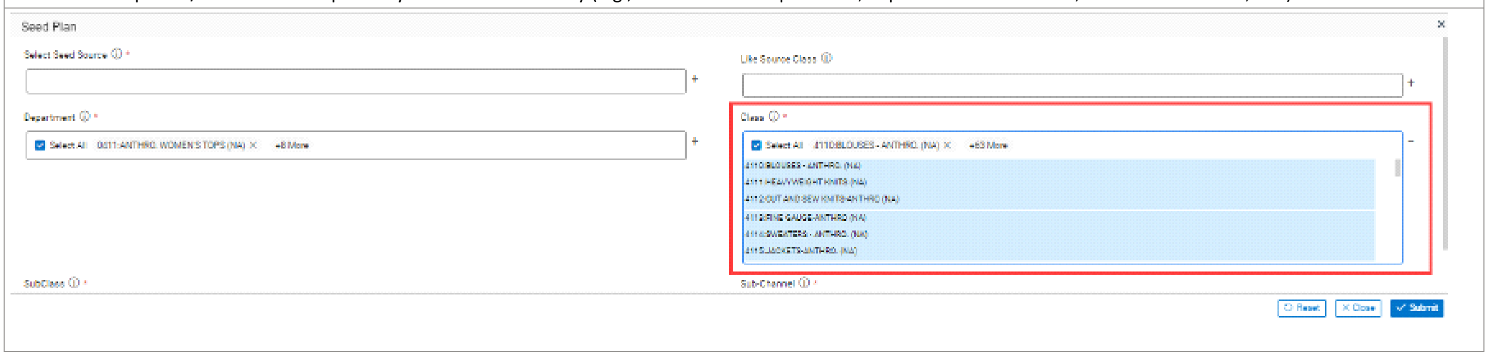
No! All seeding measures will seed no matter what measures you have pulled into the Pivot Table in *Class Plan Workspace > Class Planning Page Group > Planning Workflow Page > Sales & Demand Planning View*. The only measures that do not seed are RTV & Inv Adj.



Tips & Tricks - FAQ 2

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

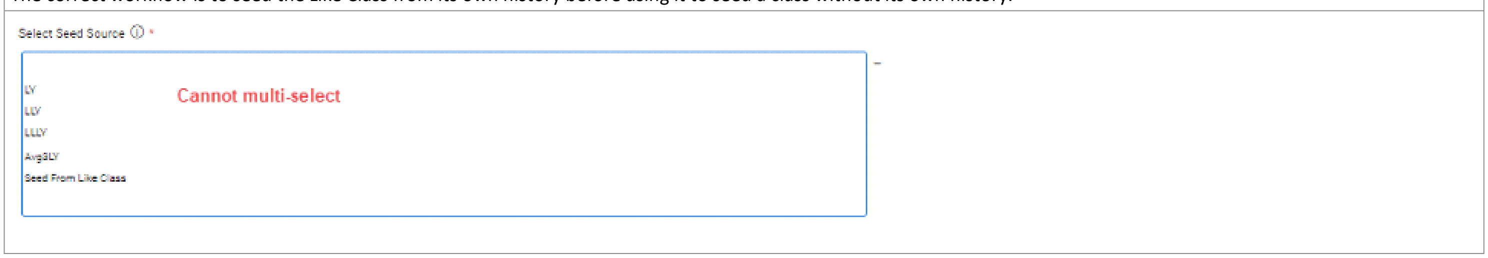
Multiple classes may be seeded at one time by selecting multiple classes in your Seed Plan Action Button Parameters.
This is true for parent/child relationships at any level of the hierarchy (e.g., all classes in a department, departments in a division, divisions in a brand, etc.)



Tips & Tricks - FAQ 3

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

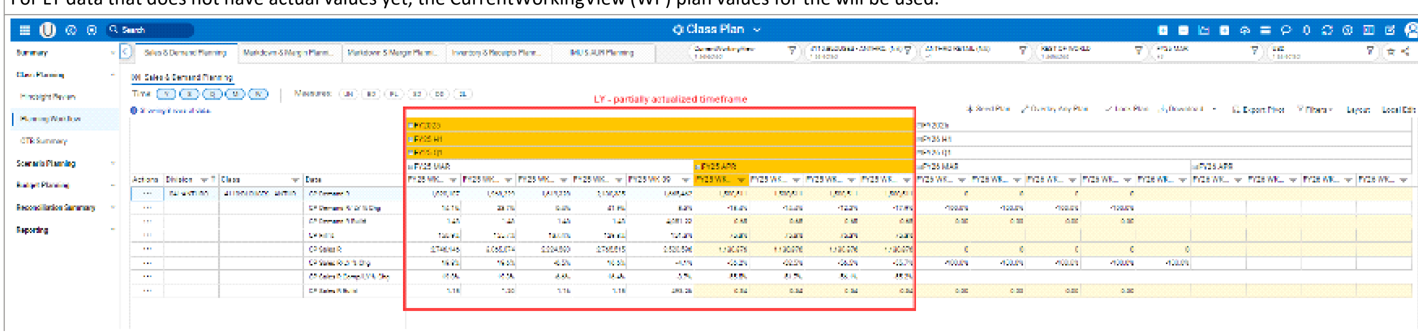
No. When seeding from a like class, it is seeding from the plan time frame (WP). For example, if you seed class 4110 FY26 MAR from 4112, it will copy the data from 4112 FY26 MAR. It is copying the “WP” or “CurrentWorkingView”.
The correct workflow is to seed the Like Class from its own history before 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

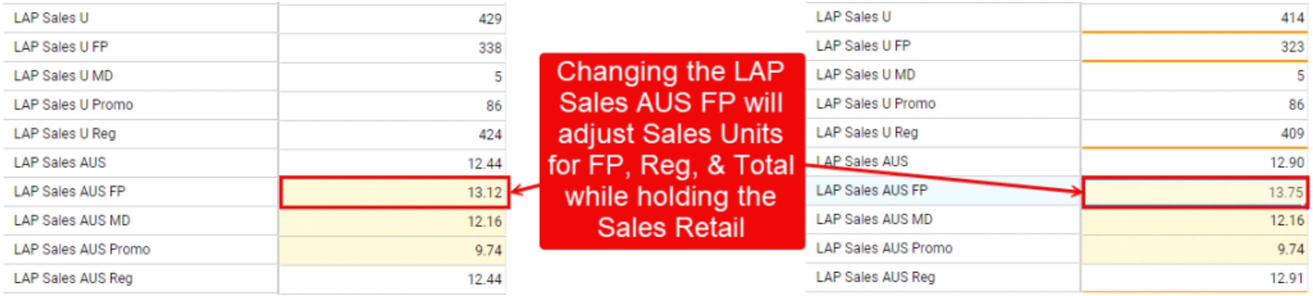
Data	FY25 WK 32
LAP Sales R	5,335
LA vs PL Sales R	0
LAP Sales R/LY % Chg	0.0%
LAP Sales R Build	1.42
LAP Sales R Reg	5,274
LAP Sales R Reg % Sales R	98.9%
LAP Sales R MD	61
LAP Sales R MD % Sales R	1.1%
LAP Sales R FP	4,436
LAP Sales R FP % Sales R	83.2%
LAP Sales R FP % Sales R Reg	84.1%
LAP Sales 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)



Sales AUS Promo (Sales Average Unit Sales Promotional)

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

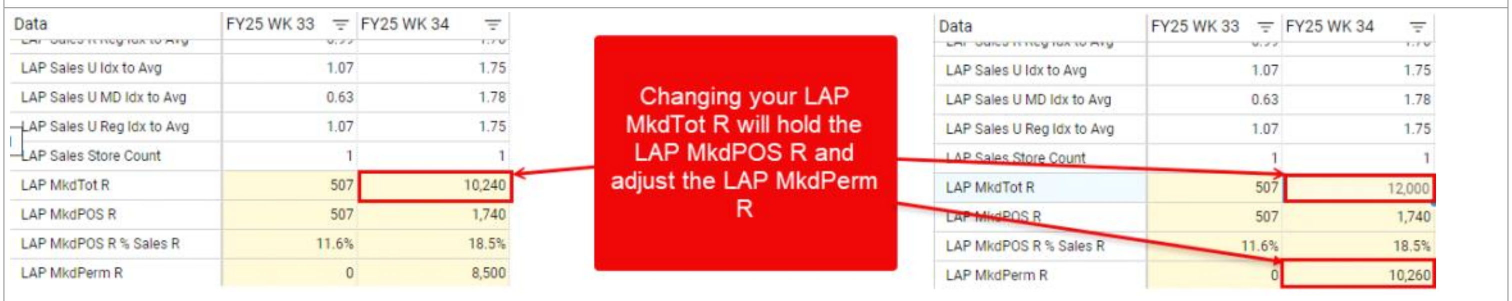
Markdowns

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



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.

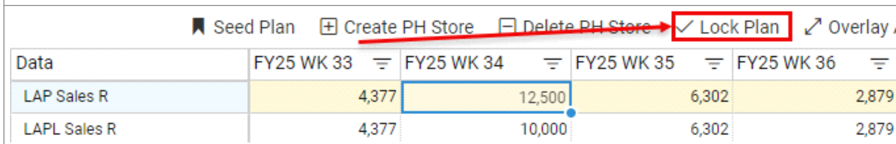
The Approved Plan (LAPL Version) is created by locking the CurrentWorkingView (LAP Version). Values will populate in LAPL after the plan has been locked

One Method of Locking - Action Button:

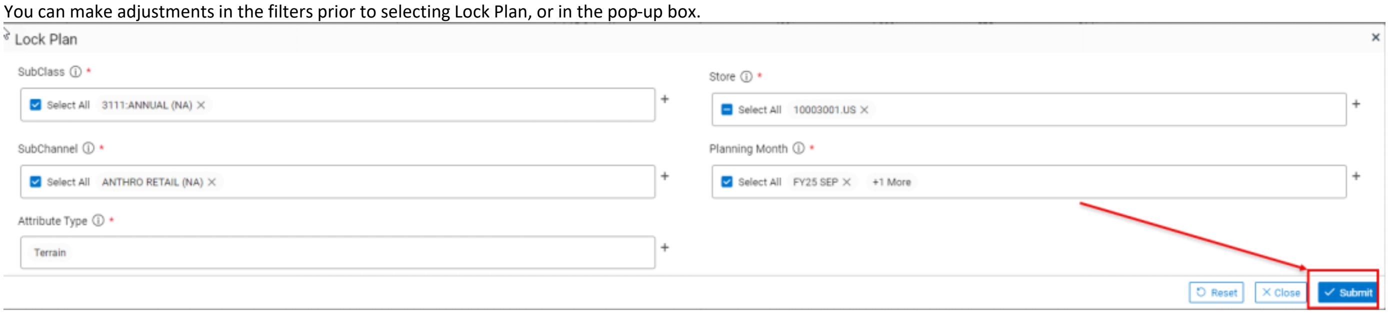
- Use the action button option to lock your Location Attribute Plan

Locking Plan Walkthrough

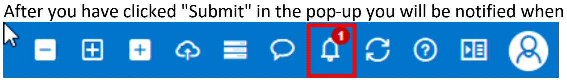
When you are ready to lock your plan click the "Lock Plan" action button.



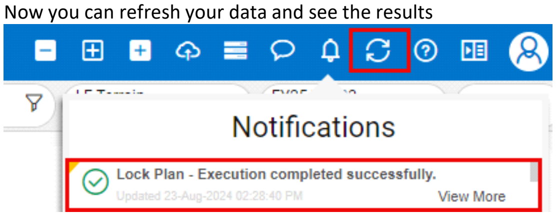
The filters you have selected in your view will populate in the Lock Plan popup, and will automatically be included in the lock.
You can make adjustments in the filters prior to selecting Lock Plan, or in the pop-up box.

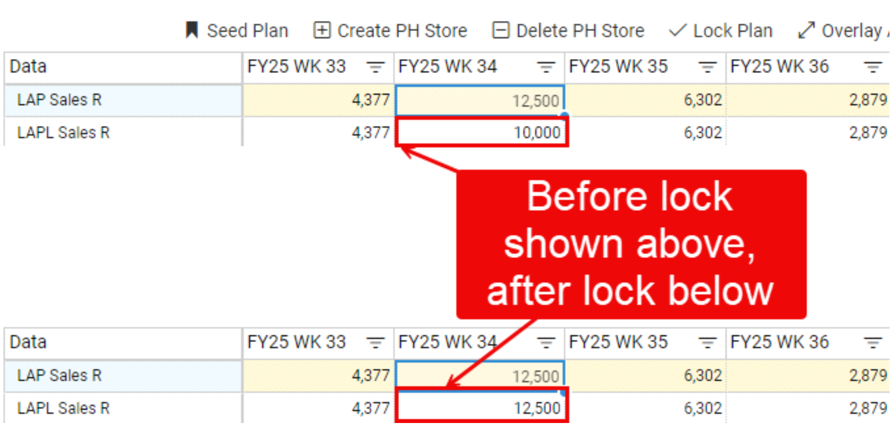


After you have clicked "Submit" in the pop-up you will be notified when the action is completed.



Now you can refresh your data and see the results





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

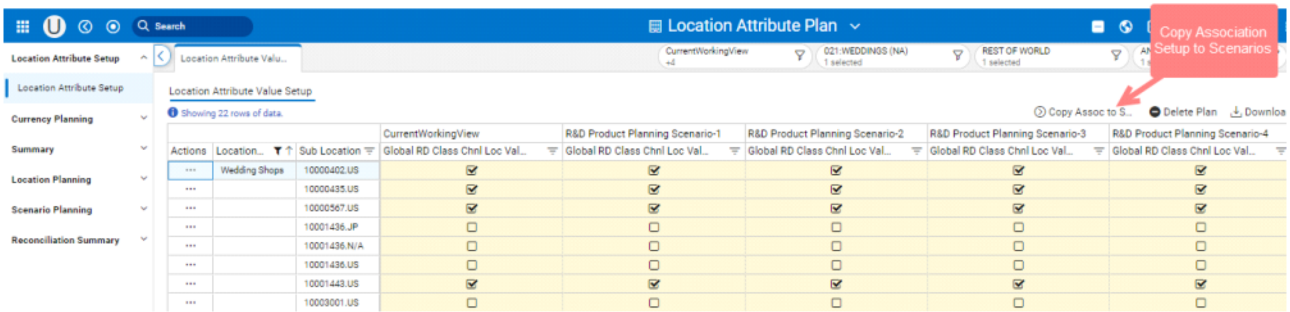
Scenario versions of the plan do not actualize automatically and historical information is not automatically brought in. Both of these steps can be completed prior to planning if desired.

Here are the actions for Scenario Planning:
[Displaying Historical Information (LY,LLY,LLLY,3yrAvg)]
[Actualizing the Scenario]
[Seeding 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.



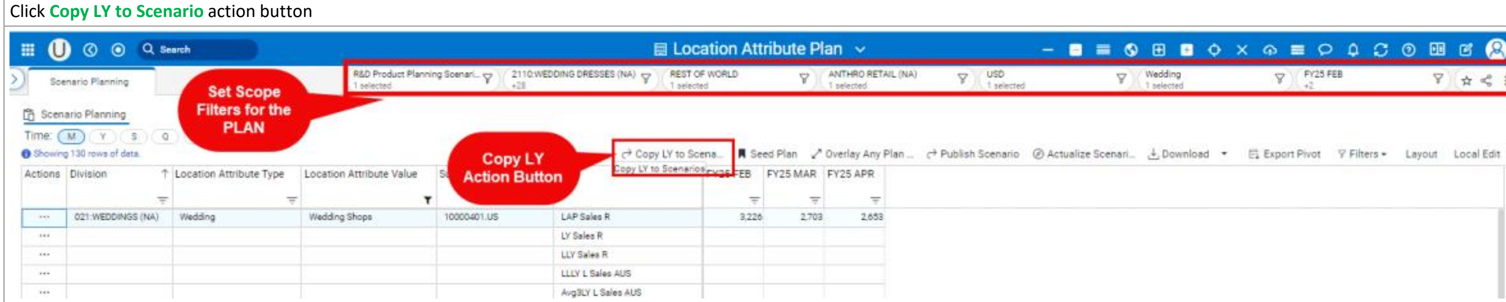
Displaying Historical Information (LY,LLY,LLLY,3yrAvg)

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**

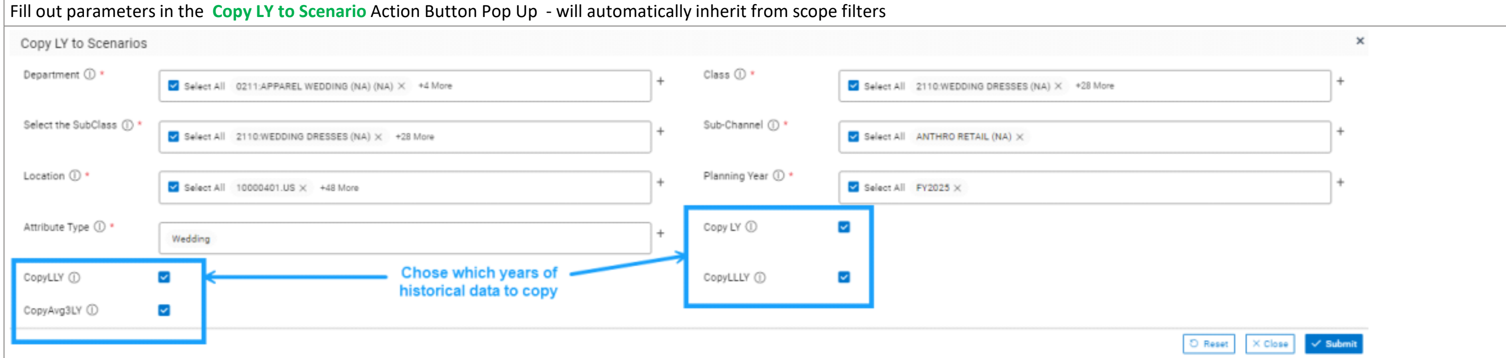
Navigate to the **Class Plan Workspace > Scenario Planning Page Group > Scenario Planning Page**

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

Click **Copy LY to Scenario** action button

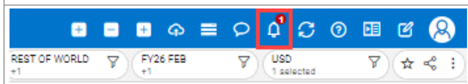


Fill out parameters in the **Copy LY to Scenario** Action Button Pop Up - will automatically inherit from scope filters



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.

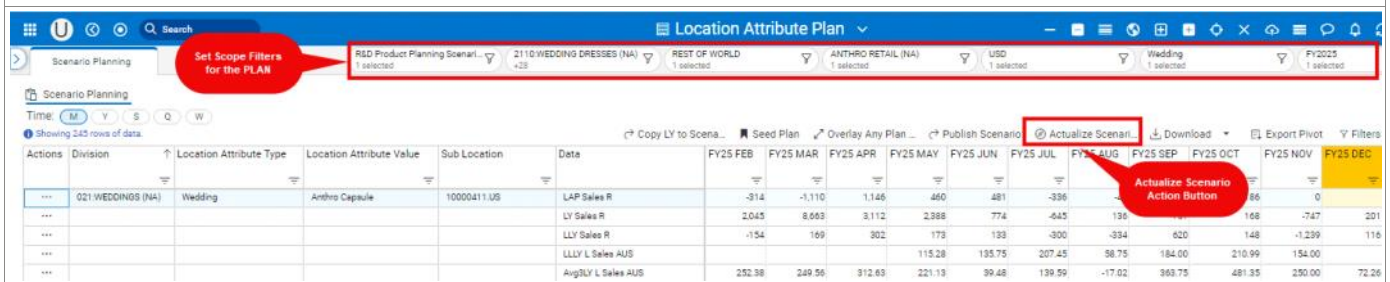
Actualizing the Scenario

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.

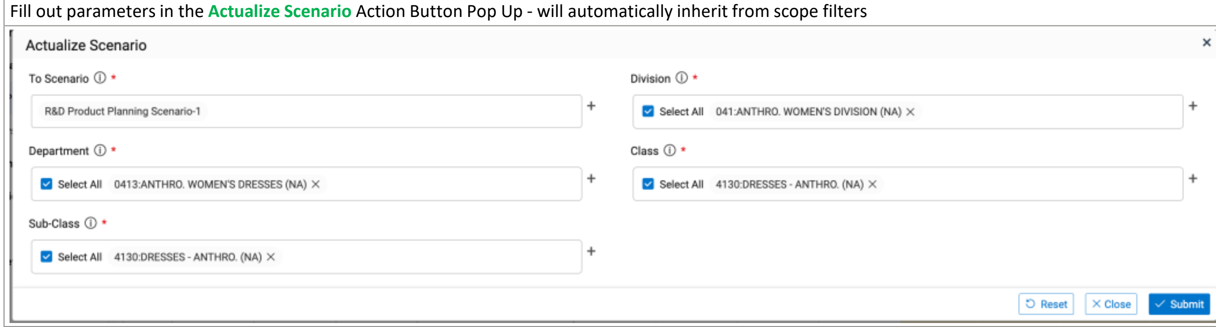
Navigate to the **Location Attribute Plan Workspace > Scenario Planning Page Group > Scenario Planning Page**

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

Click **Actualize Scenario** action button

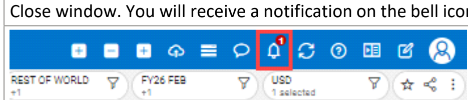


Fill out parameters in the Actualize Scenario Action Button Pop Up - will automatically inherit from scope filters



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.

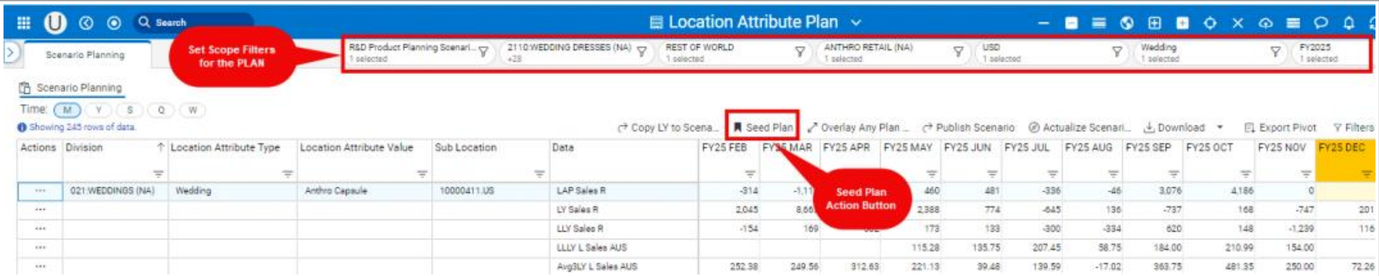
Seeding the plan

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

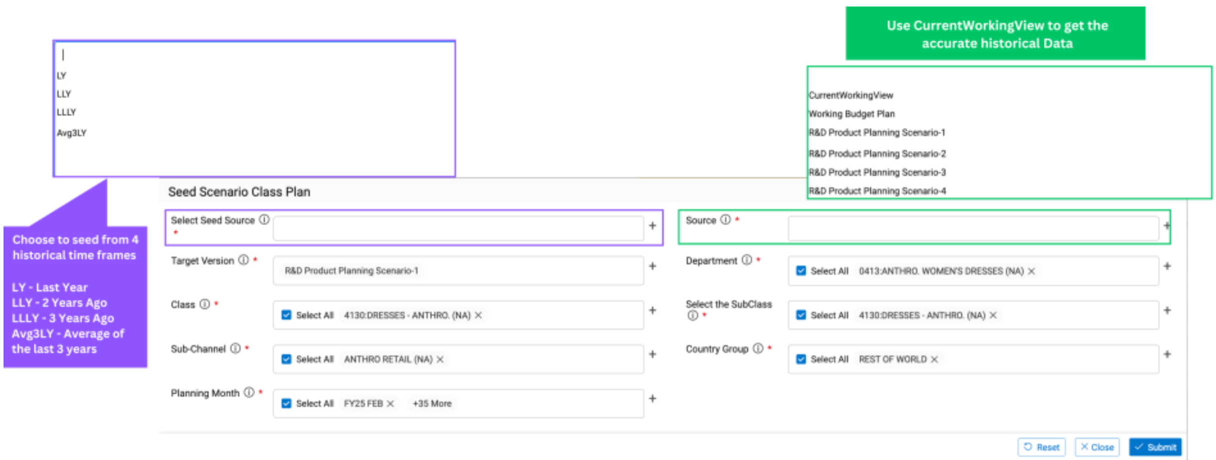
Navigate to the **Location Attribute Plan Workspace > Scenario Planning Page Group > Scenario Planning Page**

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

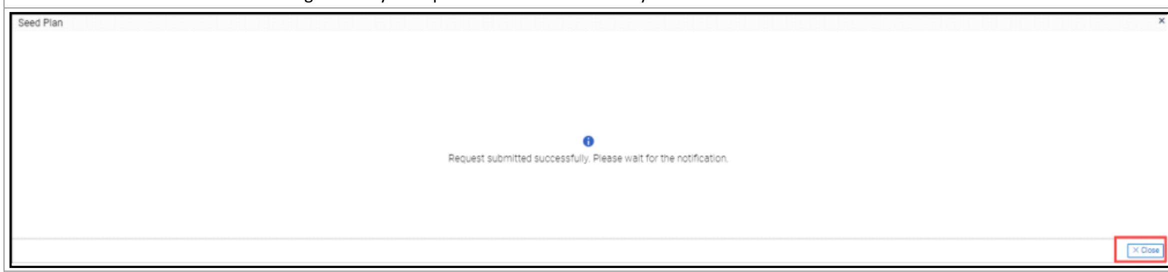
Click **Seed Plan** action button



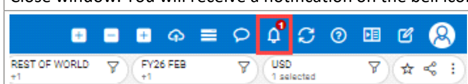
Fill out parameters in the **Seed Plan** Action Button Pop Up - will automatically inherit from scope filters



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

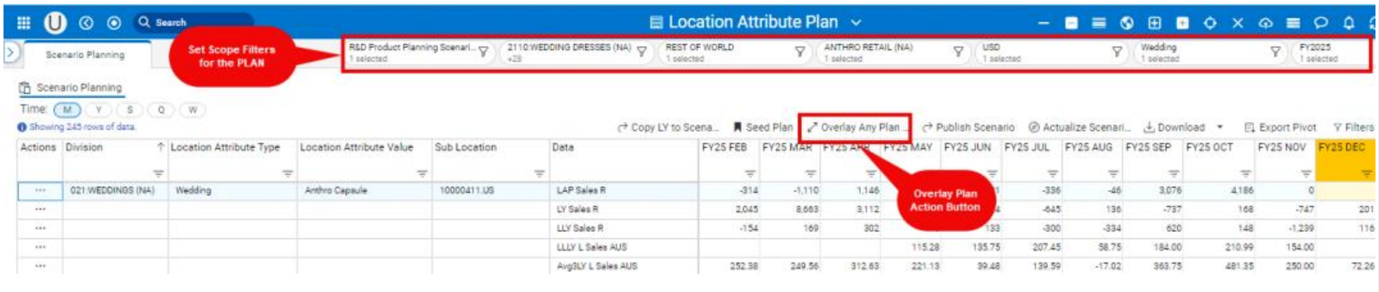
Use the Overlay action button to copy an existing plan into your scenario version. The plans that can be copied in are:

1. 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

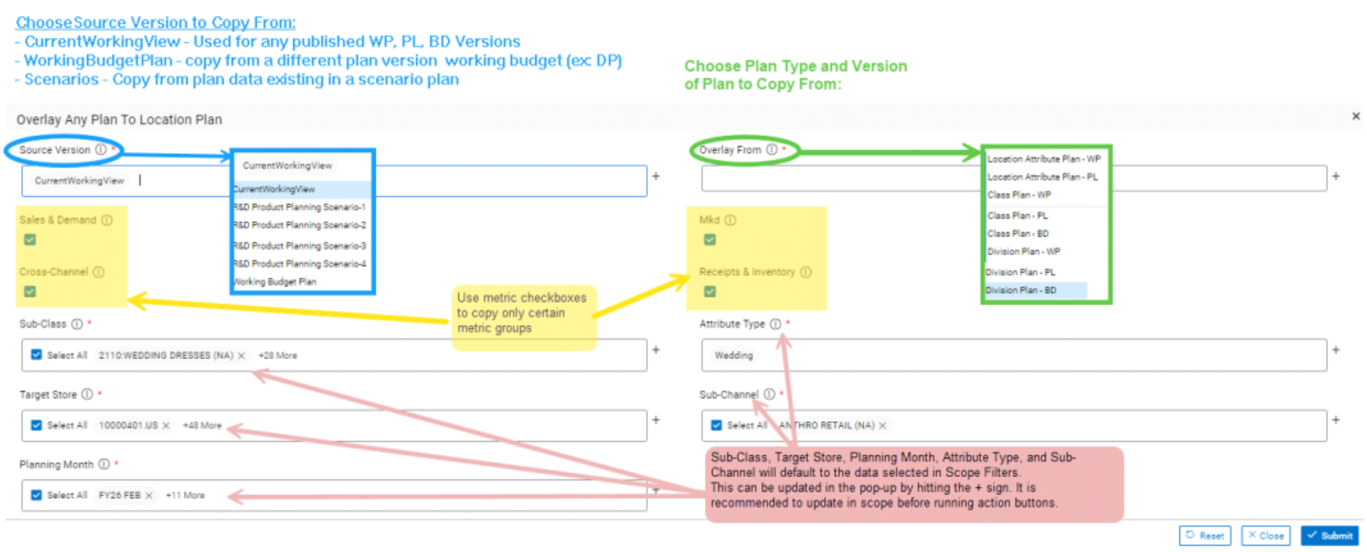
Navigate to the **Location Attribute Plan Workspace > Scenario Planning Page Group > Scenario Planning Page**

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

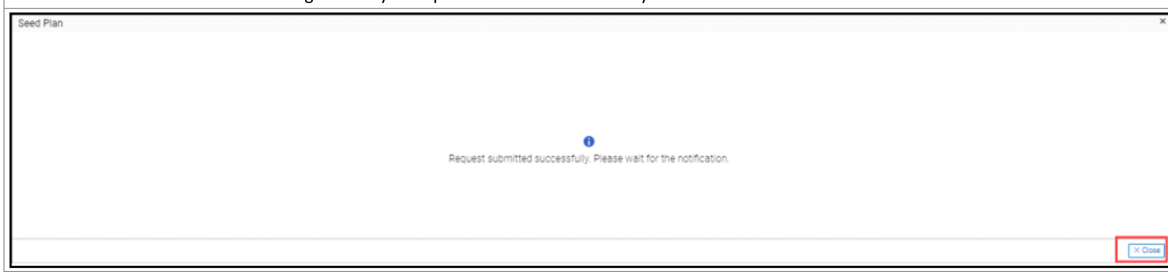
Click **Overlay Any Plan** action button



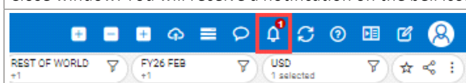
Fill out parameters in the **Overlay Any Plan** Action Button Pop Up - will automatically inherit from scope filters



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 overlayed the values should match the source plan.

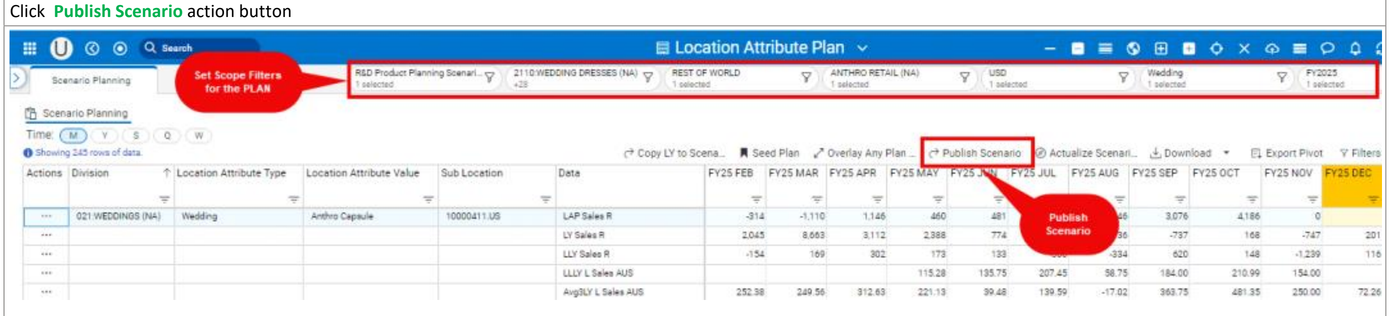
Publish the Plan

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

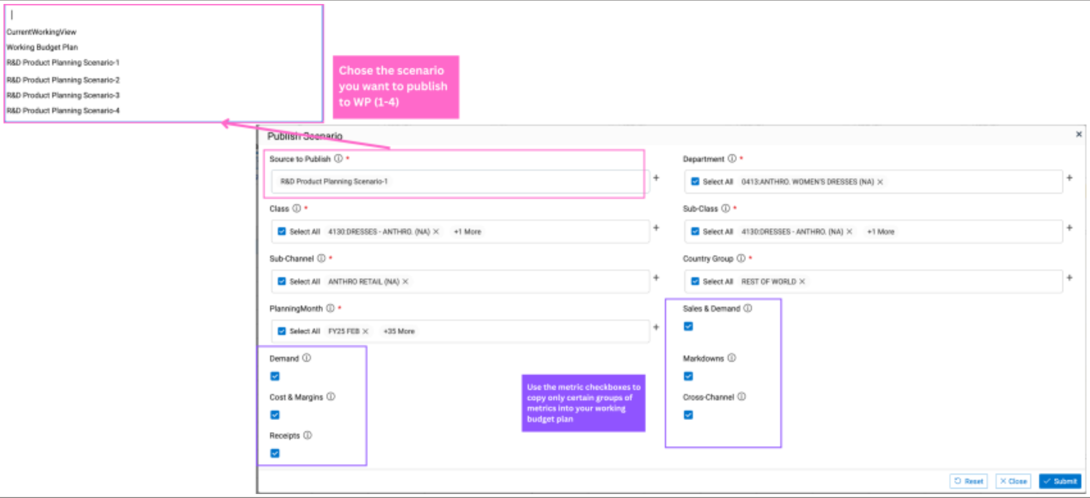
Navigate to the **Location Attribute Plan Workspace > Scenario Planning Page Group > Scenario Planning Page**

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

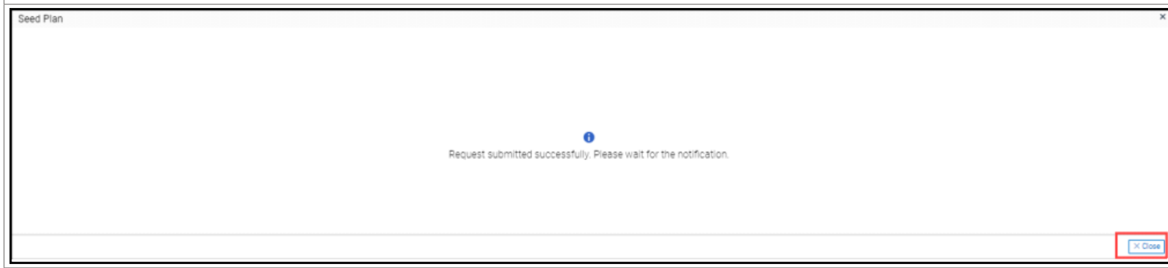
Click **Publish Scenario** action button



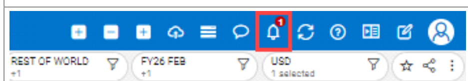
Fill out parameters in the **Publish Scenario** Action Button Pop Up - will automatically inherit from scope filters



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.



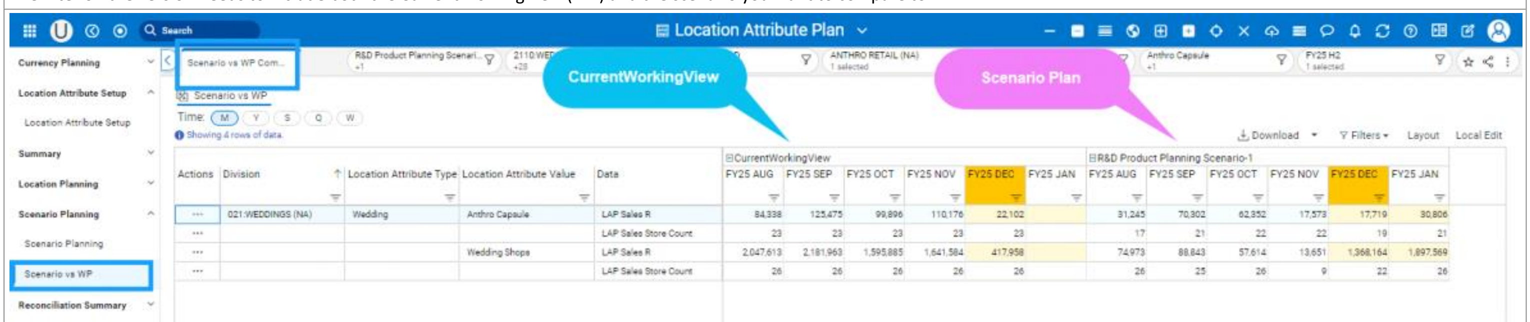
Refresh o9 to see updated data.

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



Placeholders

Creating Placeholders

Creating Placeholders

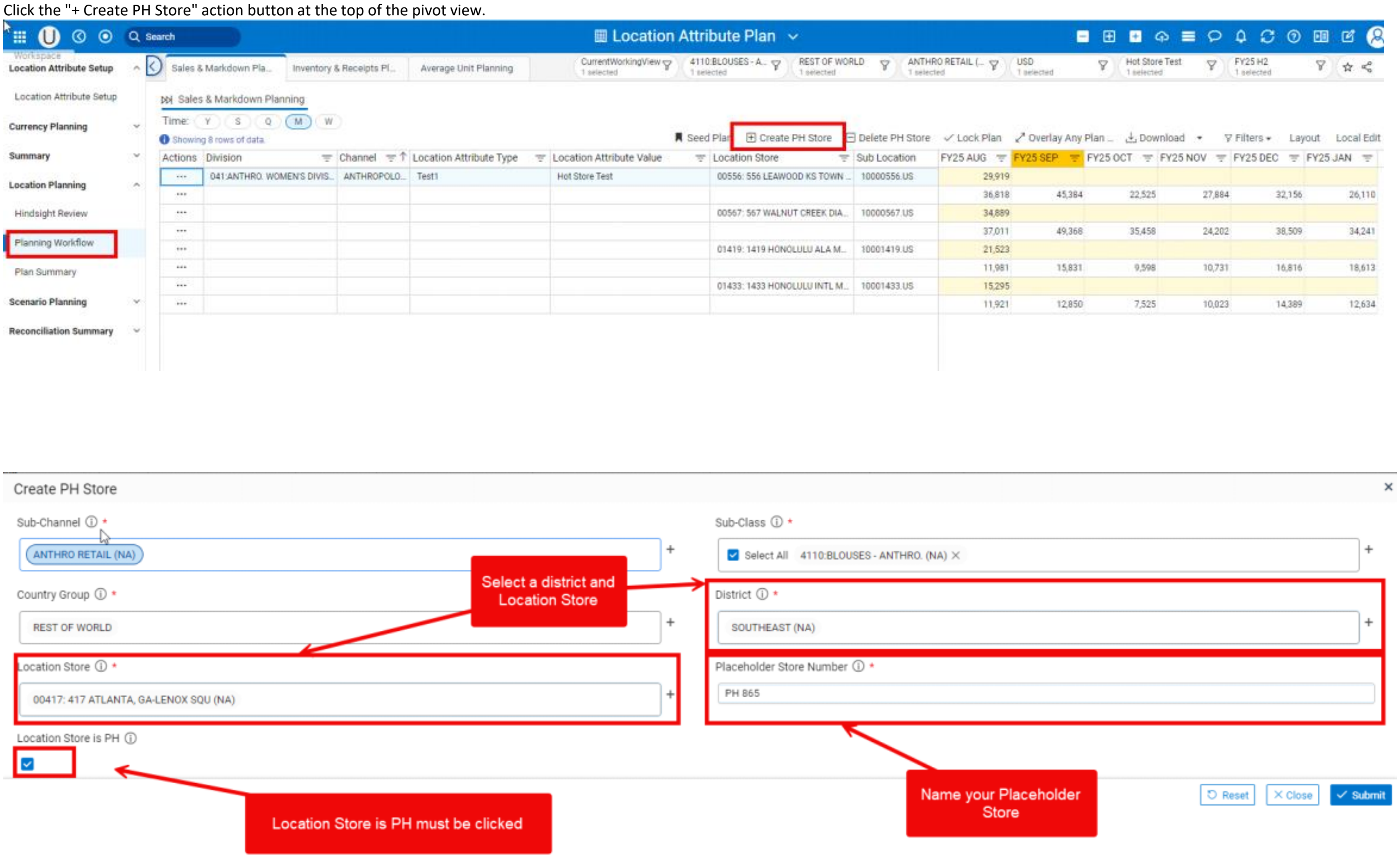
This process is used to create placeholder store in Location Attribute Planning

Creating a Placeholder Store

If you would like to create a Placeholder Store

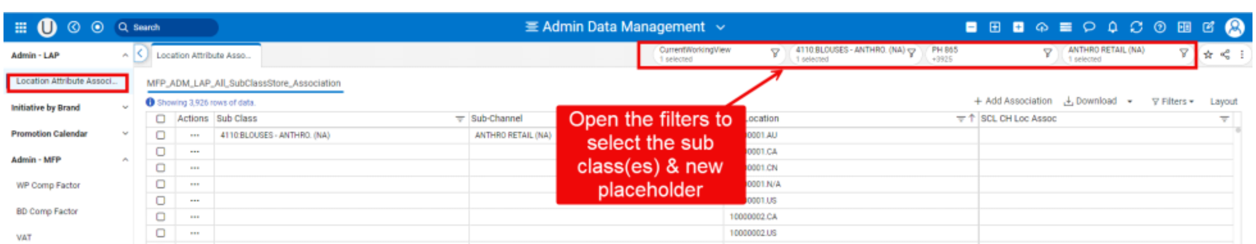
Navigate to **Location Attribute Plan > Location Planning > Planning Workflow**

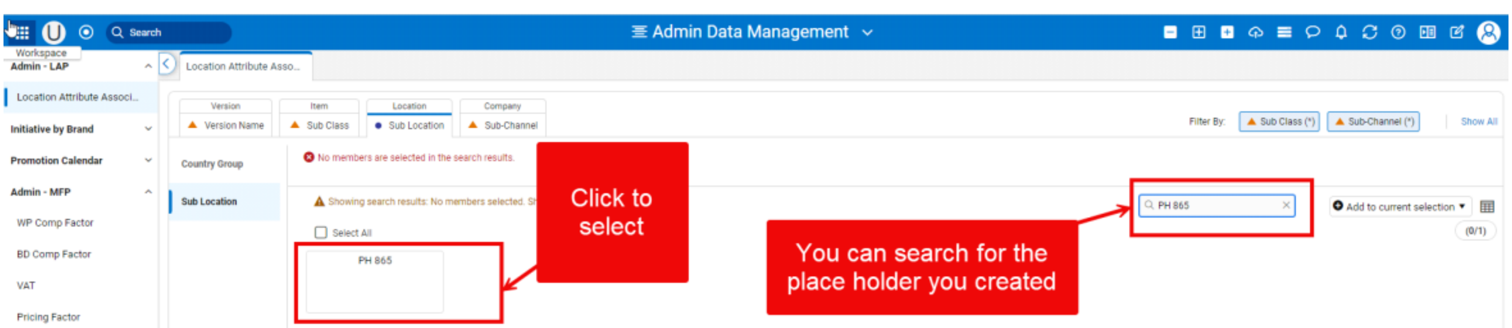
Click the "+ Create PH Store" action button at the top of the pivot view.

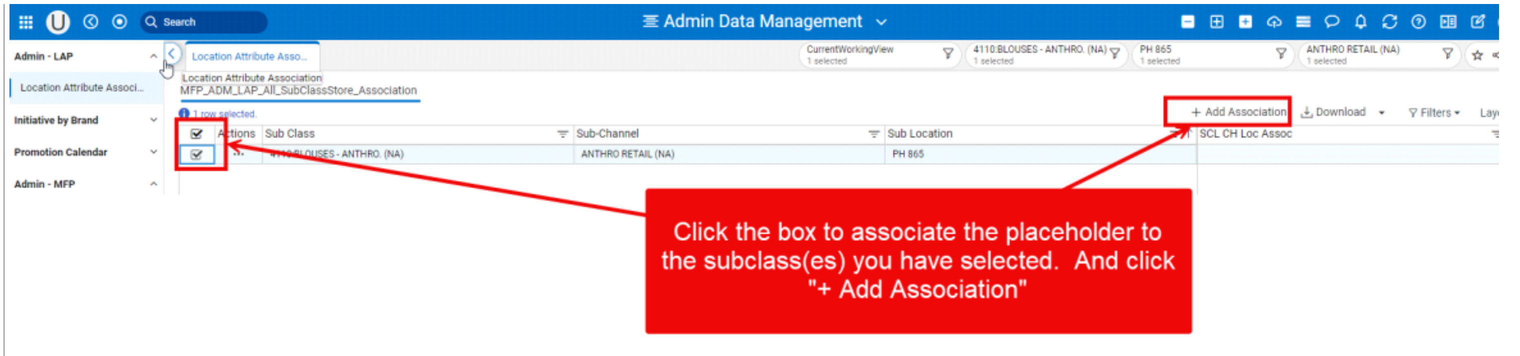


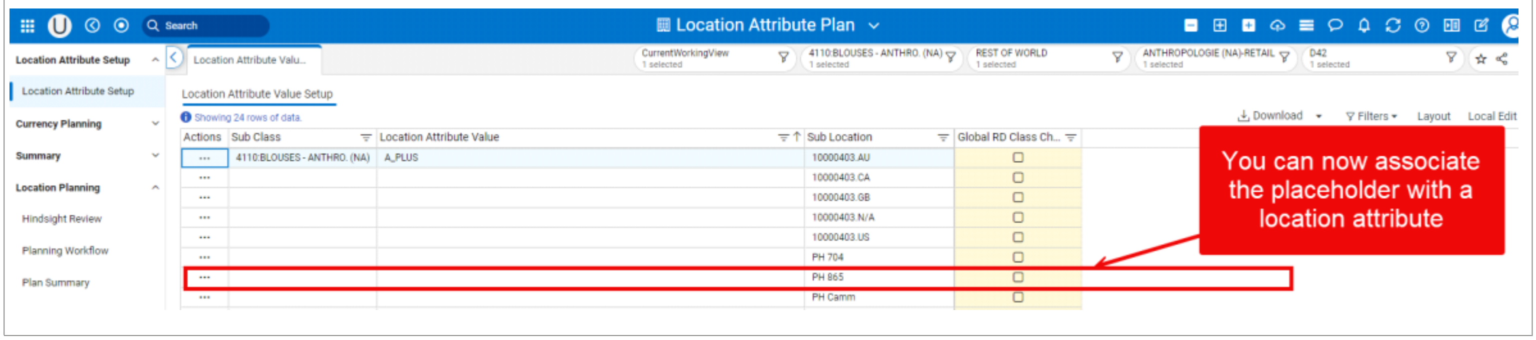
Once you have created your new placeholder you will need to associate it to the products you want to plan.

Navigate to Admin Data Management > Admin - LAP > Location Attribute Association






Click the box to associate the placeholder to the subclass(es) you have selected. And click "+ Add Association"


You can now associate the placeholder with a location attribute

Deleting Placeholders

Deleting Placeholders

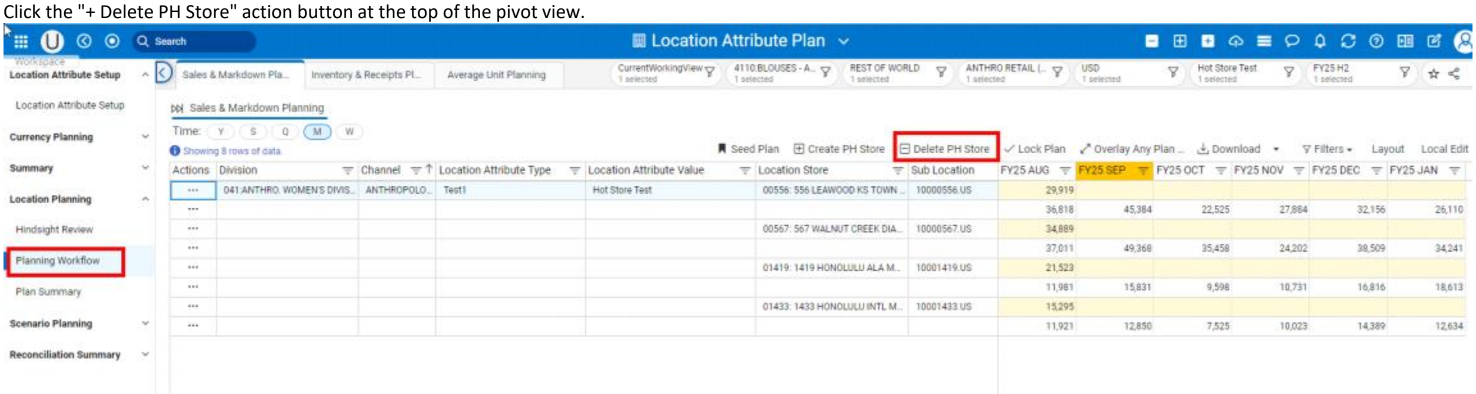
This process is used to delete placeholder store in Location Attribute Planning

Deleting a Placeholder Store

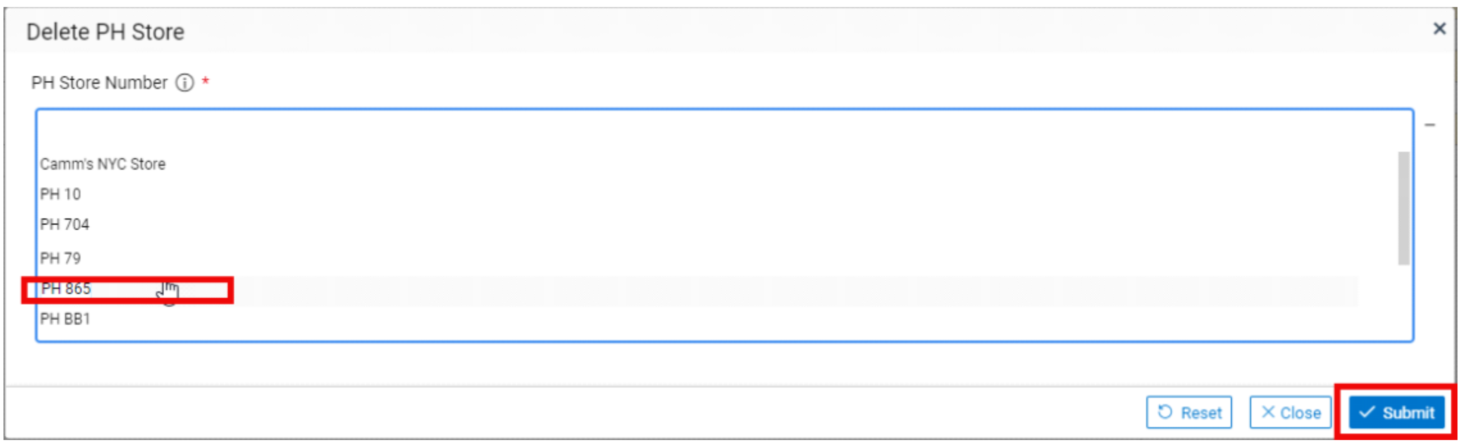
If you would like to delete a Placeholder Store

Navigate to **Location Attribute Plan > Location Planning > Planning Workflow**

Click the "+ Delete PH Store" action button at the top of the pivot view.



Select the Place Holder you want to delete and click "Submit"



Weekly Budget Process

Tuesday, June 11, 2024 12:01 PM

EU Process

Monday 23 September 2024 13:26

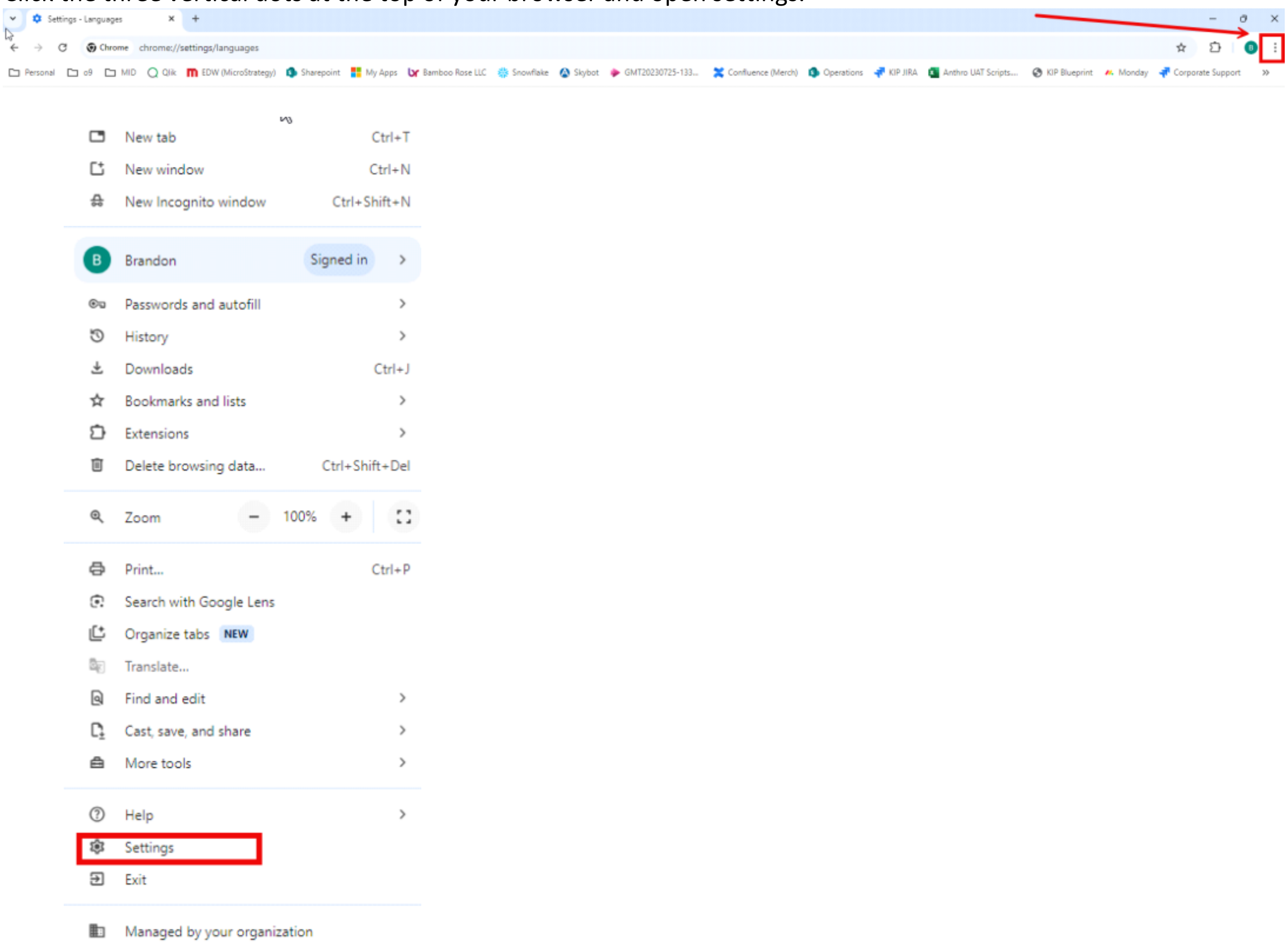
AN EU Timing

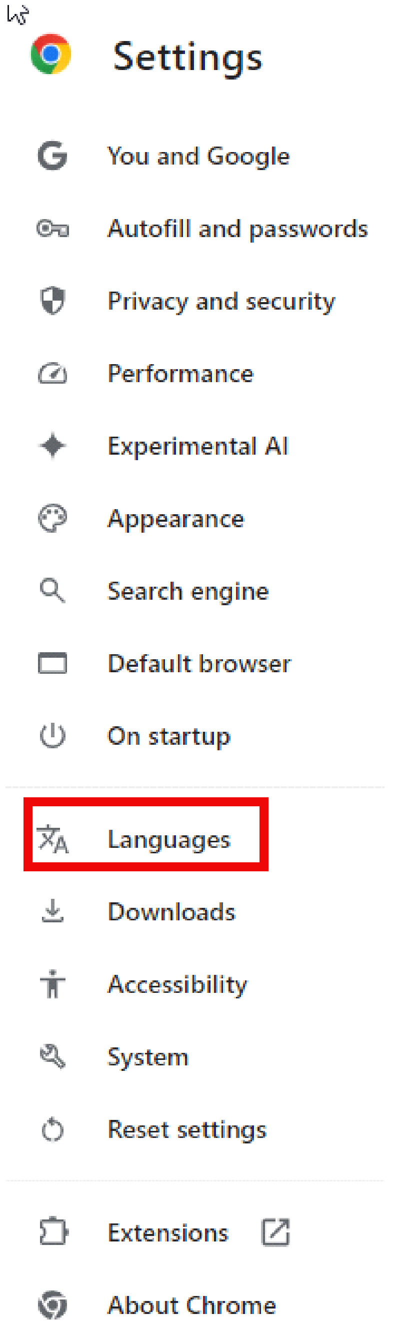
Monday 23 September 2024 13:29

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?

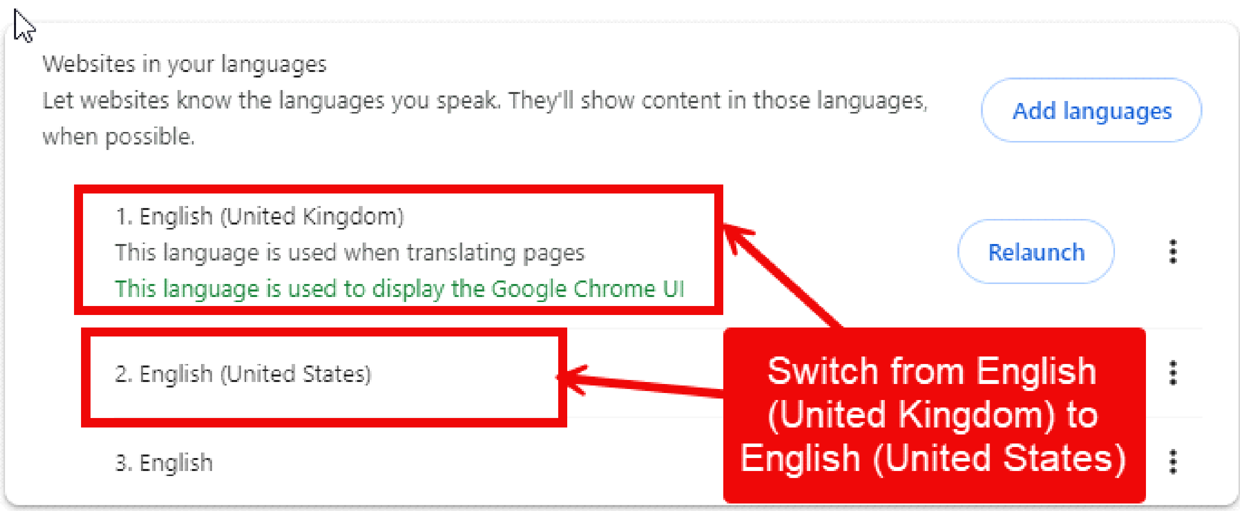
Language Settings

Monday, October 21, 2024 8:08 AM

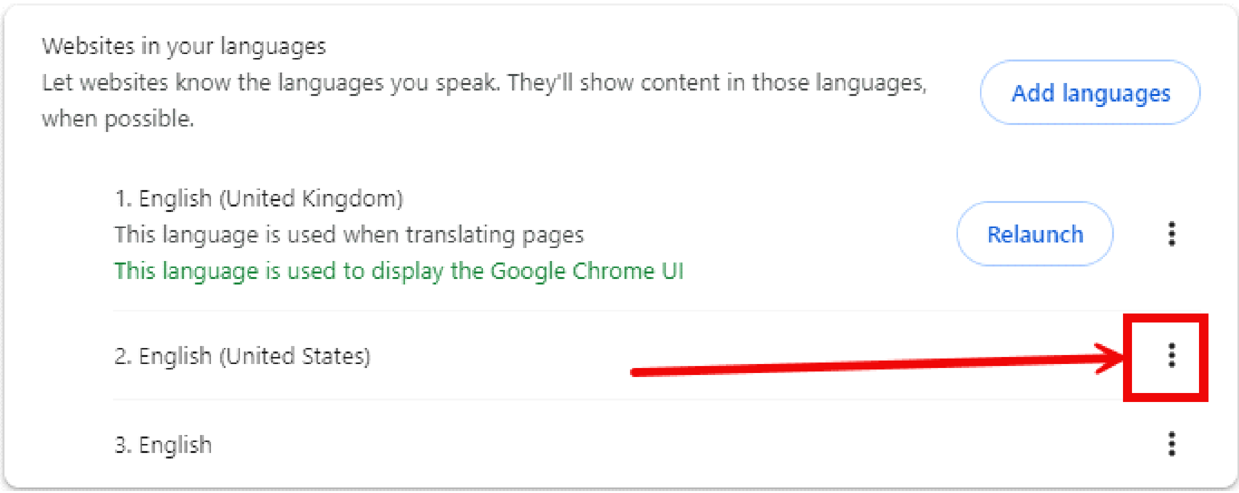
Browser Language Settings
Purpose and Overview:
If you are seeing "BU" plan instead of "Class Plan" follow these steps
Click the three vertical dots at the top of your browser and open settings.  Click "Languages"



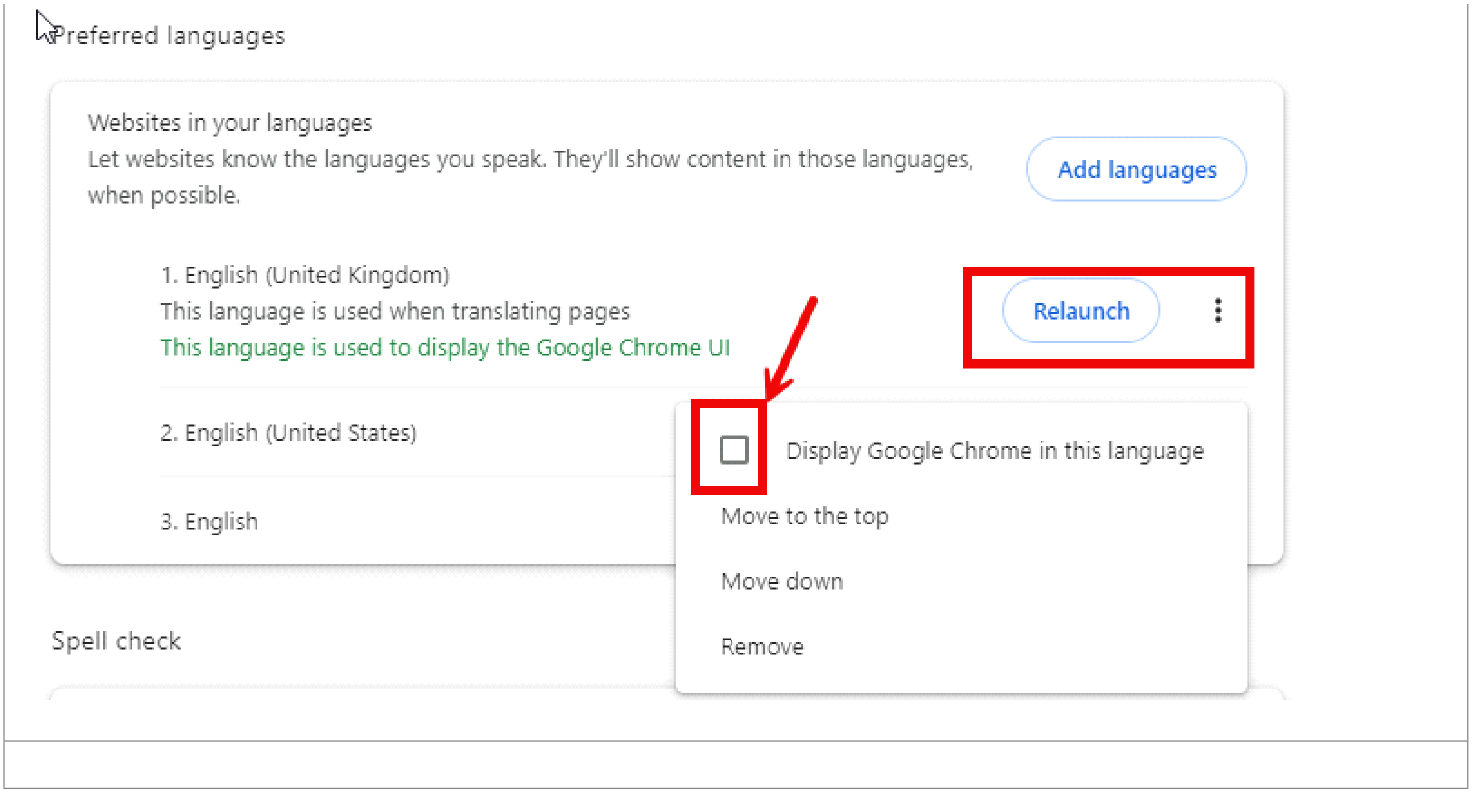
If not added then click "Add languages" and add English (United States)



Click the three vertical dots next to English (United States)



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
Display Google Chrome in this language
Move to the top
Move down
Remove
Spell check

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

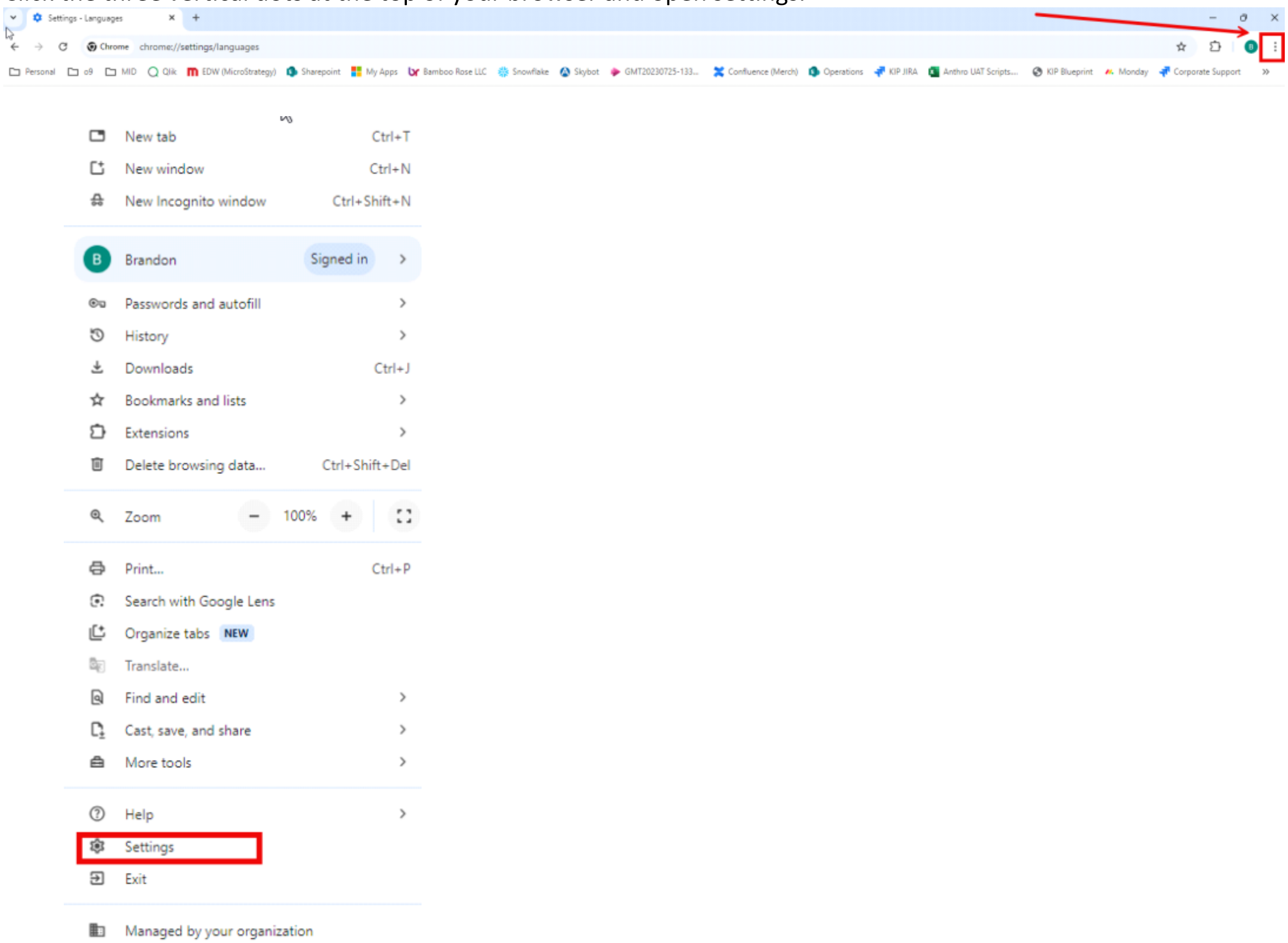
Monday, October 21, 2024 8:08 AM

Browser Language Settings

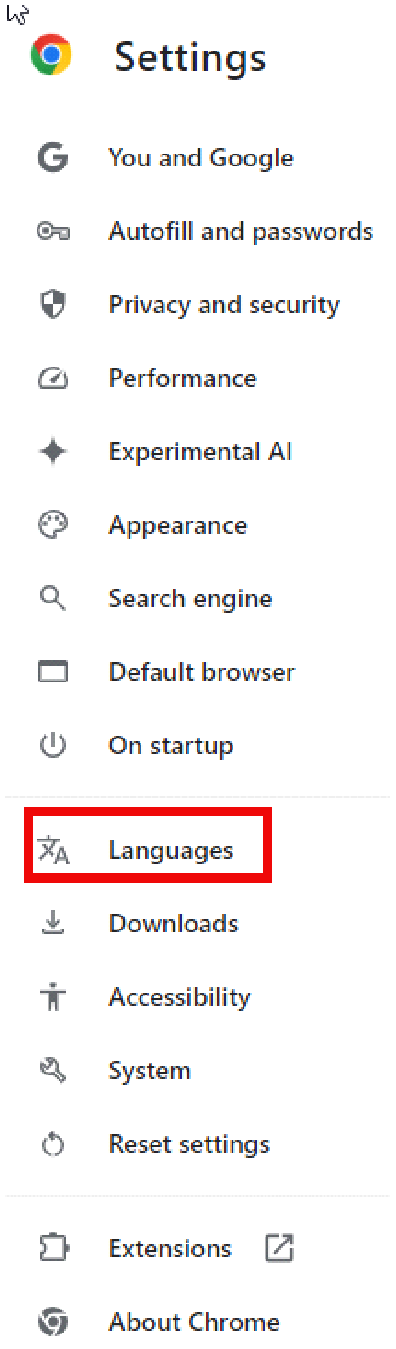
Purpose and Overview:

If you are seeing "BU" plan instead of "Class Plan" follow these steps

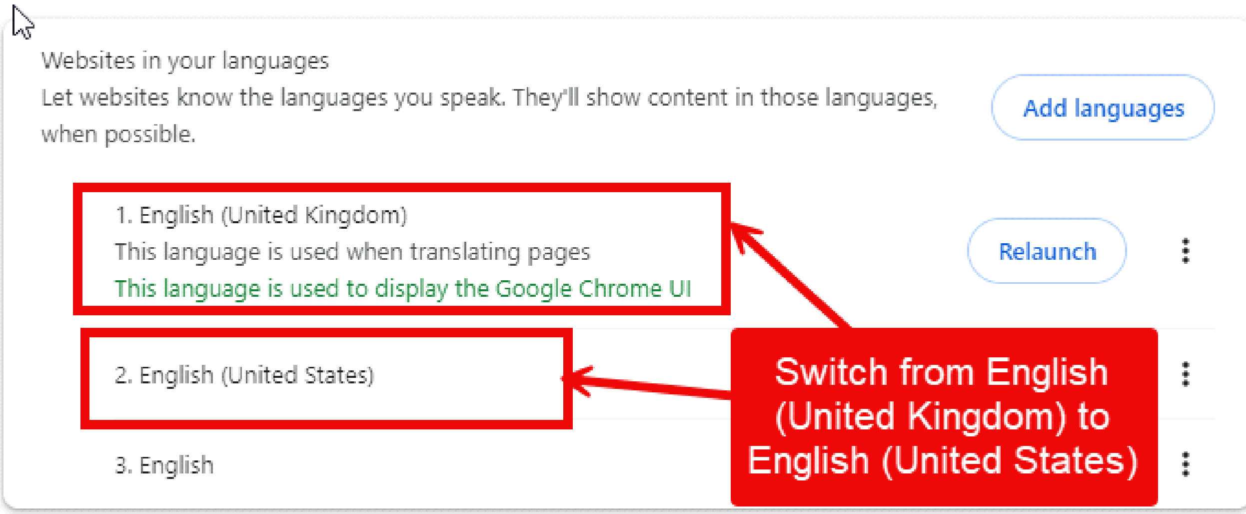
Click the three vertical dots at the top of your browser and open settings.



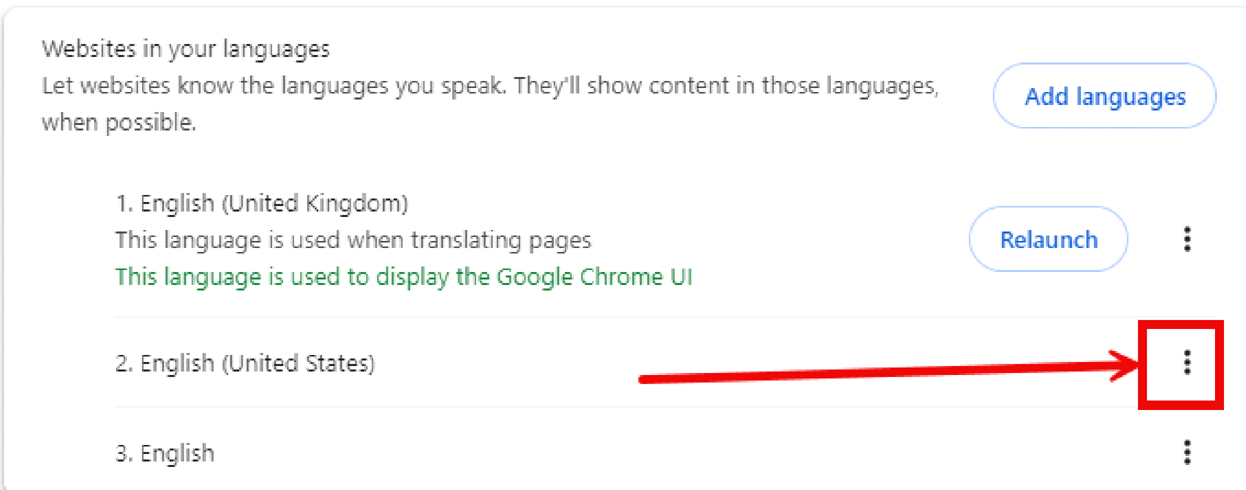
Click "Languages"



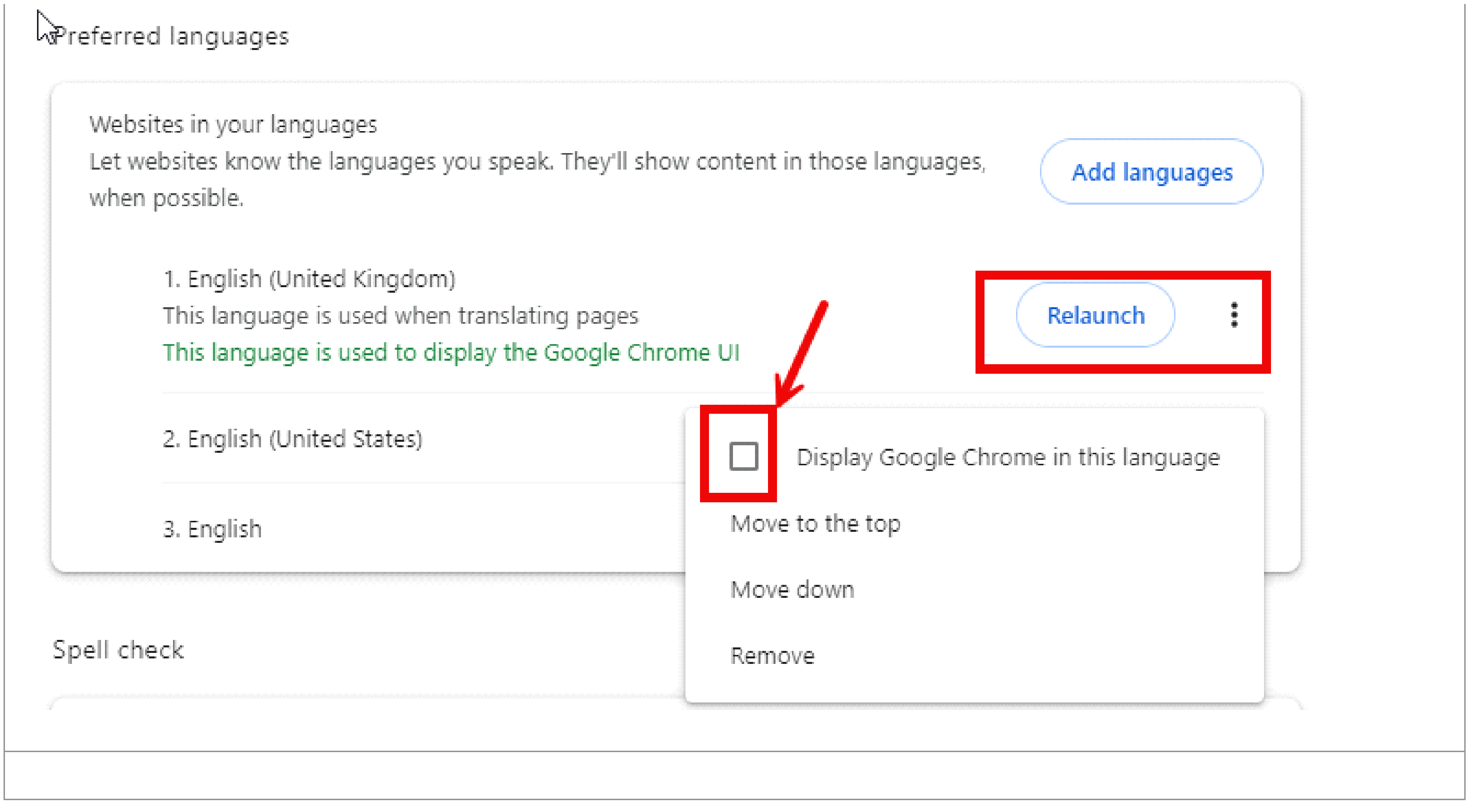
If not added then click "Add languages" and add English (United States)



Click the three vertical dots next to English (United States)



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
Display Google Chrome in this language
Move to the top
Move down
Remove
Spell check

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.

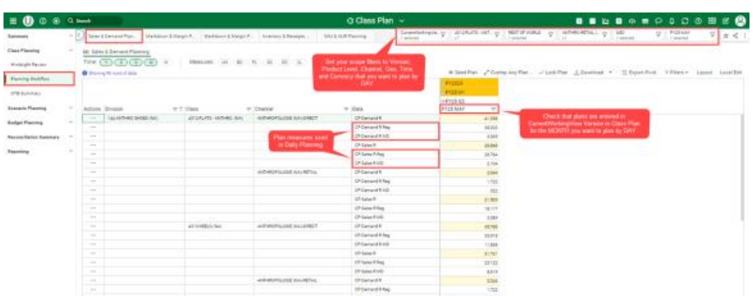
Seeding Workflow:

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:

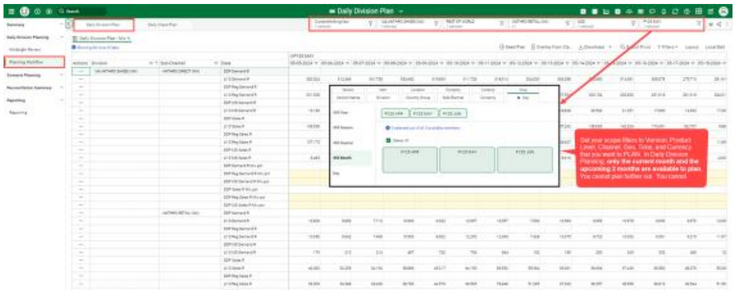
Step1: Review Class Plan data by navigating from the **Class Plan Workspace > Class Planning Page Group > Planning Workflow Page > Sales & Demand Planning View.** Confirm that plans are entered for the division and month you are going to plan by day.
A plan must first exist for the month before it can be broken down by day.



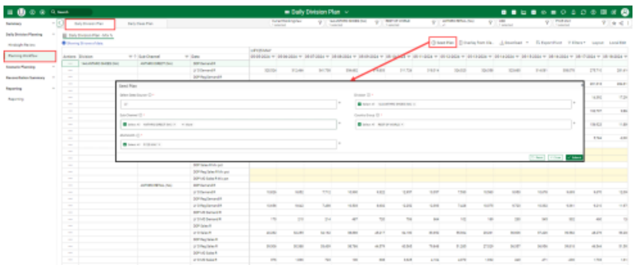
Seeding:

Step 2: Navigate to **Daily Division Plan Workspace > Daily Division Planning Page Group > Planning Workflow Page > Daily Division Plan View.**

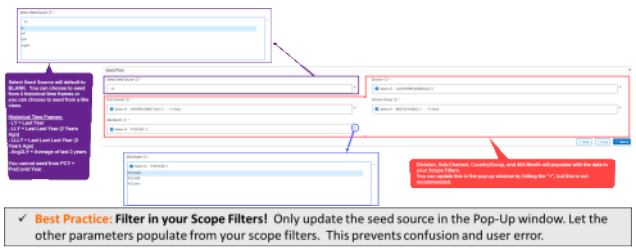
Step 3: Update your Scope Filters to the time frame you are planning. This year Daily Division Plan (DDP) measures will be blank because you have not yet seeded this time frame with data. In the time parameter in scope filters, you can only select from current month, next month, or next next month.



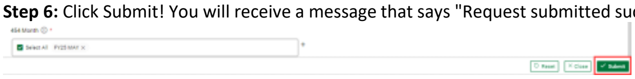
Step 4: Click on the "Seed Plan" Action Button.



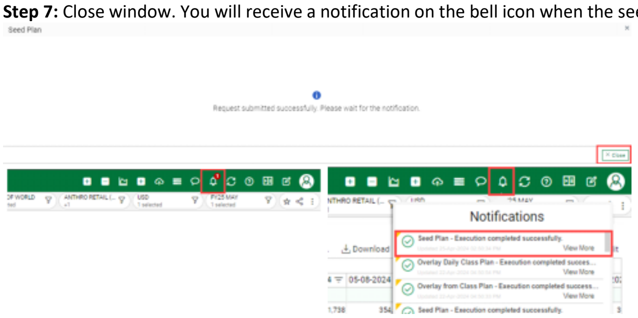
Step 5: Fill out parameters in the "Seed Plan" Action Button Pop Up.



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.



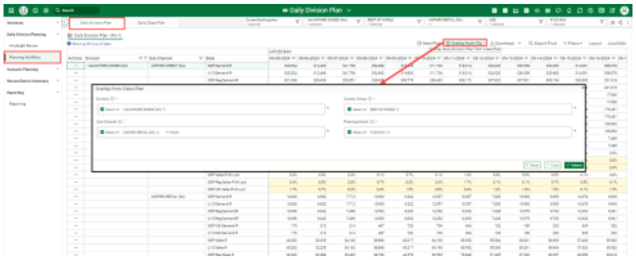
Step 8: Refresh o9 to see updated data.

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.

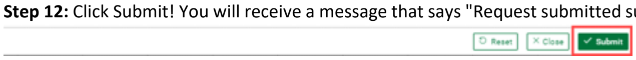
This button will copy the Class Plan Division Total to the Daily Division Plan. The ratio by day will hold from seeding, but the value will update to match the plan.



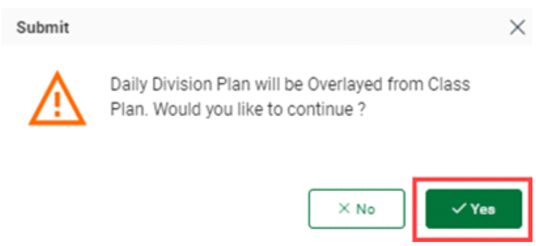
Step 11: Fill out parameters in the "Overlay from Class Plan" Action Button Pop Up.

✓ **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.

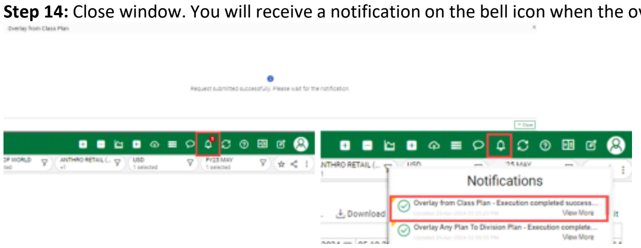
Step 12: Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."



Step 13: You will receive a message asking if you want to continue with the overlay. Select "Yes".

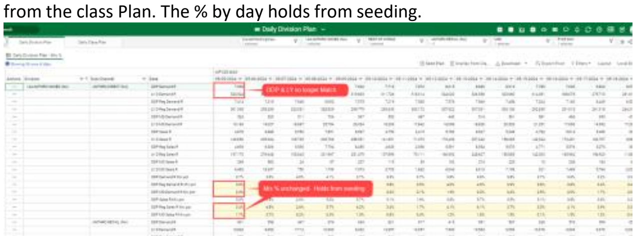


Step 14: Close window. You will receive a notification on the bell icon when the overlay is complete. In the meantime, you can continue to work in o9.

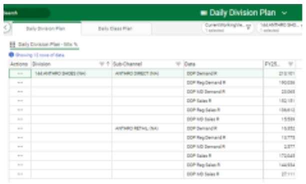


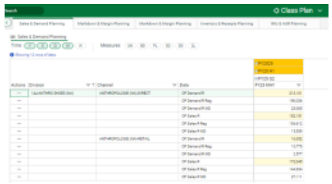
Step 15: Refresh o9 to see the updated data.

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).



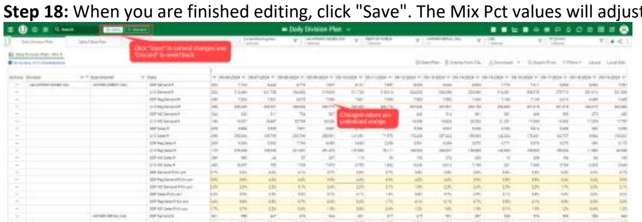


Update % by day

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.

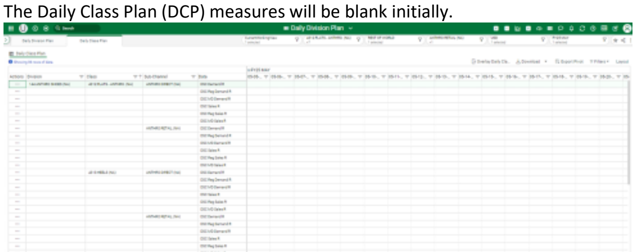
Step 18: When you are finished editing, click "Save". The Mix Pct values will adjust to still total 100% for the month. The DDP values will recalculate based on the updated Mix Pct vlaues.



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.

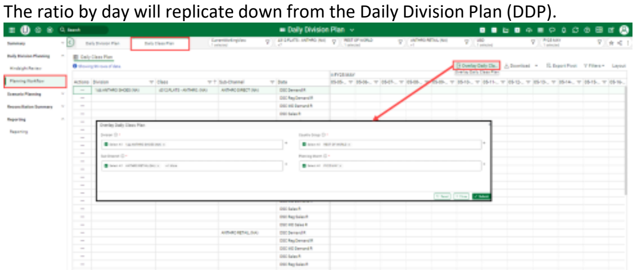
The Daily Class Plan (DCP) measures will be blank initially.



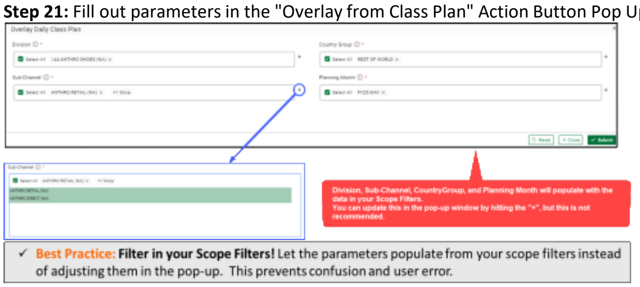
Step 20: Click on the "Overlay from Class Plan" Action Button.

This button will copy the CurrentWorkingView Class Plan to the Daily Class Plan.

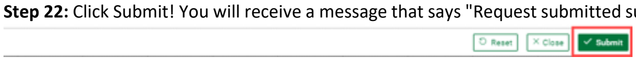
The ratio by day will replicate down from the Daily Division Plan (DDP).



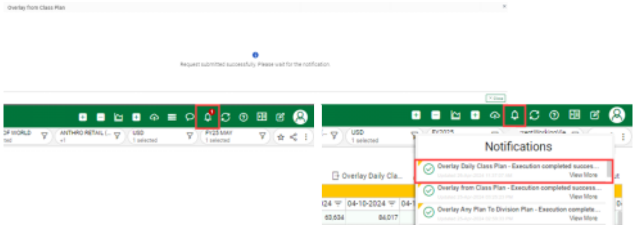
Step 21: Fill out parameters in the "Overlay from Class Plan" Action Button Pop Up.



Step 22: Click Submit! You will receive a message that says "Request submitted successfully. Please wait for the notification."

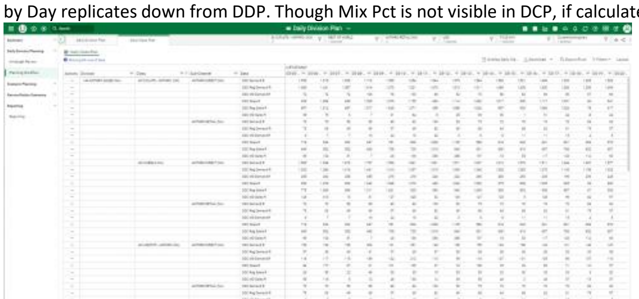


Step 23: Close window. You will receive a notification on the bell icon when the overlay is complete. In the meantime, you can continue to work in o9.

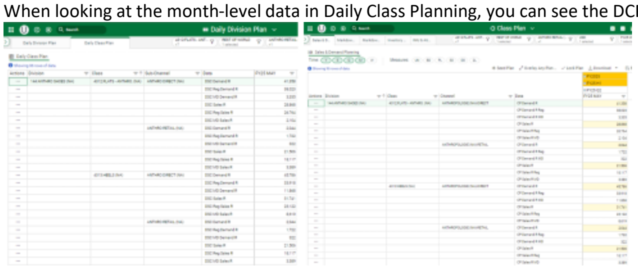


Step 24: Refresh o9 to see updated data.

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.



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).



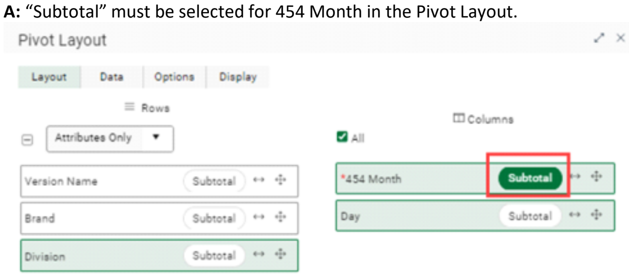
Daily Plans are now complete!

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?

A: "Subtotal" must be selected for 454 Month in the Pivot Layout.



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 updated 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
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LLY FWOS R 1
LLLY FWOS 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) editibility & 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	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. 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.
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	Added the following metrics: * 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	Added the following metadata metrics to Attribute Plan - OTB and Attribute Plan - Planning Workflow - Sales & Demand • 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 Added the following metrics to Attribute Plan - OTB and Attribute Plan - Planning Workflow - Markdown & Margin • 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	Added the CP EOP R Reg Comp/LY % Chg metric to the Class Plan > Planning Workflow > Inventory & Receipts > Reg & MD workspace. Added the following list of metrics to the Class Plan > Scenario Planning workspace: 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

		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
O9-843	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.
O9-854	Add comparison metrics for CP PL to TY & LY	Created two new comparison metrics: PL CP EOP R Comp/LY % Chg & PL CP Sales R Comp/LY % Chg Updated the display name for the following metrics: PL CP Sales R Comp/LY Comp % Chg & PL CP EOP R Comp/LY Comp % Chg
O9-855	Add comparison metrics for CP BD to TY & LY	Created two new comparison metrics: BD CP EOP R Comp/LY % Chg & BD CP Sales R Comp/LY % Chg Updated the display name for the following metrics: BD CP Sales R Comp/LY Comp % Chg & BD CP EOP R Comp/LY Comp % Chg
O9-860	UI Updates - Week of 7/22/2024	Added the following metrics to Division Plan Reconciliation: • LY EOP U Reg • DP vs PL EOP Reg • DP vs PL EOP MD The following updates were made to the UI: • 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

08/31/2024

Tuesday, August 27, 2024 12:32 PM

- 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	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. Added the following Class Plan measures to the Class Plan Scenario Planning and Scenario vs WP pivot views: • 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 Added the following Division Plan measures and historical measures to Division Plan - Planning Workflow - Markdown & Margin Planning: • 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	Added the below PL measure to the Class Plan > Planning Workflow > Inventory & Receipts Planning > Adjustments & Transfers Planning and Class Plan > OTB Summary pivots: - 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 Added the following measures to the Class Plan > Planning Workflow > Inventory & Receipts Planning pivot: - TY Receipt R Daily - Total OO C Daily - Total OO U Daily - Total OO Daily 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.
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 • 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) ○ Color_Code ○ Color_Name ○ Vendor_Style_Number 9/19/24 - Requested by Anthropologie during KIP TB • 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 ○ KI Sales U Reg Build *Monthly* ○ KI Demand U Reg Build *Monthly* • 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. ○ 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	Added Sales R Build metric to Planning Workflow - Inventory & Receipts pivot in Class Plan, Division Plan, and Location Attribute Plan. Added the following metrics to Class Plan - Planning Workflow - Reg & MD Inventory Planning pivot • 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 Added the following metric to Class Plan - Planning Workflow - Mkd & Margin pivot • 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	Added these metrics to Open to Buy summary as a UI update KI Receipt R / CP Receipt R % KI EOP U Reg / CP EOP U Reg % KI Sales R Reg / CP Sales R Reg % KIS Receipt R / CP Receipt R % KIS EOP U Reg / CP EOP U Reg % KIS Sales R Reg / CP Sales R Reg %
Improvement	Location Attribute Plan - Update LAPL translations	Updated Location Attribute PL metrics names. All metrics beginning with ‘LAPL’ were updated to begin with ‘PL LA’

10/26/2024

Monday, October 28, 2024 12:49 PM

<table>
<tr><th>Type</th><th>Summary</th><th>Business Description</th></tr>
<tr><td>Improvement</td><td>Add Comment to Cell in UI Pivot</td><td>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.

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.</td></tr>
<tr><td>Improvement</td><td>Key Item Plan - Create Daily OO and Receipt U metrics</td><td>Planning Workflow → Inv & Receipt Views, Summary views and Scenario Planning
Created new metrics in Key Item and Key Item Size for:
TY OO U Daily
TY Receipt U Daily</td></tr>
<tr><td>Improvement</td><td>Ability to delete a placeholder in Key Item Planning</td><td>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.</td></tr>
<tr><td>Improvement</td><td>Location Attribute Plan Monthly Build</td><td>Created a monthly LAP Sales R Build measures that properly calculates and adjusts Sales R at the Month level.

Renamed the currently weekly Sales R Build metric to be ‘Sales R Build Weekly’.</td></tr>
<tr><td>Bug</td><td>Location Attribute Plan - Scenario Planning Views Set Up</td><td>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.</td></tr>
<tr><td>Improvement</td><td>Key Item Plan - Create KI % Total Style Metrics</td><td>In Key Item Planning for Color & Size create the following metrics
% 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
% 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
% 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
% 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</td></tr>
<tr><td>Improvement</td><td>UI Updates in Prod - 10/26/24 Release</td><td>In LAP Hindsighting tab :
Added Plan Summary view which that includes sales & inventory/receipts metrics all in one pivot vs living on separate tabs
In LAP Plan Summary
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
Deleted DNU LA Sales R1 from view
Added FWOS and WOS metrics
LAP Plan Summary
Added all metrics available in Planning Workflow tabs to the Plan Summary tab.
Updated translation for LAP Sales R Build to have Weekly included.</td></tr>
<tr><td>Bug</td><td>Class Plan RTV R & U not matching EDW</td><td>A mechanism for actualizing RTV R & U is needed.</td></tr>
<tr><td>Improvement</td><td>Location Attribute Plan - Remove WBP from LAP Setup View</td><td>Working Budget Plan has been removed in the ‘Location Attribute Setup’ view</td></tr>
</table>

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	New % to Total Class Input Penetration metrics were added to the Planning Workflow > Sales & Demand Planning and Inventory & Receipts views. Note that these are available except for the LLY, LLLY, AVG3LY penetration metrics for EOP & receipts. The work for the new split view which will include the above metrics is in progress.
Attribute Plan	Improvement	Attribute Plan - New Metrics Requests	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: LY AUR LLY AUR LLLY AUR Avg3LY AUR
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	Added the following metrics to Class Plan - Inventory & Receipts Planning - EOP Validation view: 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 Added the following metrics to the Class Plan - Inventory & Receipts - Reg & MD Inventory Planning view: LY Sales R Promo LY Sales U Promo LY Sales U MD LY EOP U MD
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	Added the below action buttons to the Key Item Color and Key Item Size OTB Summary and Dynamic Time Summary views: • 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 Added conditional formatting to the KI & KIS WOS U Reg measure with the following rules: • < 1 Week = no formatting • >= 1 Week and < 2 Weeks = yellow highlight • >= 2 Weeks = red highlight

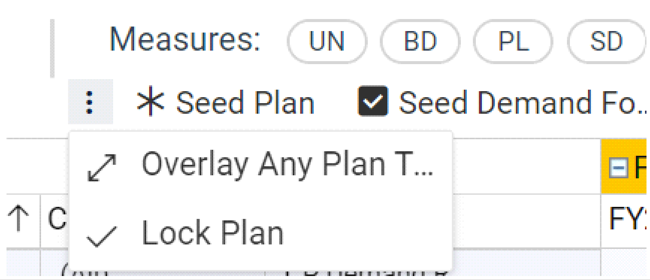
Key Item Plan	Improvement	KIP - Create new metric - ST%	Create new metric below in both KI and KIS workspaces: KI ST % = KI Sales U Reg/(KI Sales U Reg + KI EOP U Reg) Add to both OTB Summary tabs once created.
Key Item Plan	Bug	Key Item Plan - Change Aggregation for Backorders	Changed the aggregation 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	Formatted the WSSI view like OTB summary so that the key rows are Grey: • CP Sales R • CP EOP R • CP MkdTot R • CP MkdTot R % Sales R • CP Receipt R In **Reg & MD inventory planning** could we add: • 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 Add Total OO R to the WSSI view in • PAP • DP • CP Add country group to be in the OTB Summary layout options Change the WSSI defaults to have the below when you click on factory settings: • Open by default with Retail and Direct Add to **OTB Summary** • 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	We would like to add the following metrics to the EU Class Planning > Open to Buy Summary View Page DP Sales R DP MkdTot R DP IMU% COGS DP PL Sales R DP PL MkdTot R DP PL IMU % COGS (Note that these Division Plan metrics will only be accurate when viewing the OTB subtotaled at Division).
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	Added the following metrics to the Division Plan > OTB Summary view: 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

			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

12/08/2024

Monday, December 9, 2024 4:12 PM

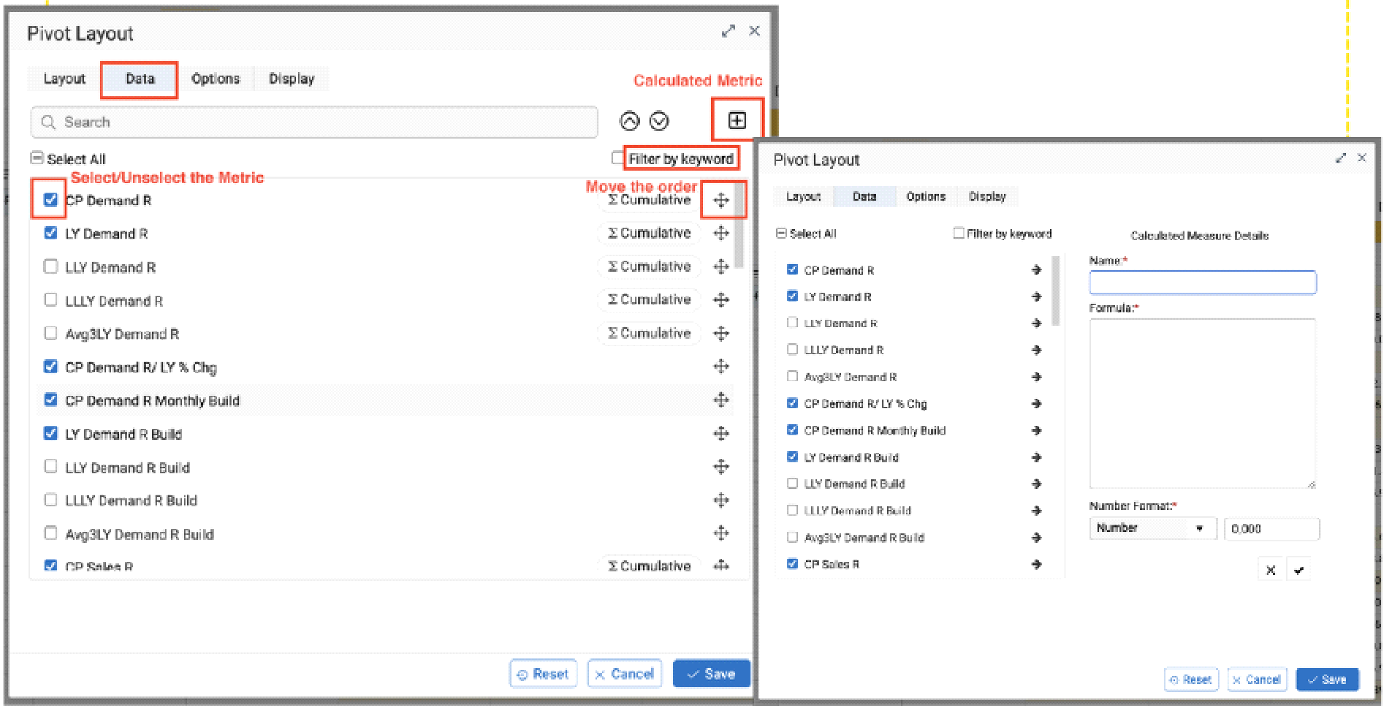
Module	Type	Summary	Business Description
Key Item Plan	Improvement	Key Item Plan - Adjusted Recommended Receipt	Added a new metric for Recommended Receipt that rounds up to take minimum order quantity and pack size into consideration. Pack Qty was also added as an editable metric for this calculation to occur. This new metrics were added to the Inventory & Receipt and OTB Summary views for Key Item Color and Key Item Size.
Key Item Plan	Improvement	Key Item Planning - Expand Presentation Fields	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: 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 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 KI Total Presentation A Grade = KI No of Stores with EOP A Grade * KI Min Presentation U Per Store A Grade KI Total Presentation B Grade = KI No of Stores with EOP B Grade * KI Min Presentation U Per Store B Grade KI Total Presentation C Grade = KI No of Stores with EOP C Grade * KI Min Presentation U Per Store C Grade KI Total Presentation = KI Total Presentation A Grade + KI Total Presentation B Grade + KI Total Presentation C Grade
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	Created new Comp comparison metrics in Class Plan, Division Plan, and Brand Plan that use the following logic: In actualized periods, the metric displays TY Sales R Comp compared to LY Sales R Comp In planning periods, the metric displays TY Sales R Comp compared to LY Sales R These measures were added to the Sales & Demand and OTB Summary views in each plan type.
Division / Class / Product Attribute / Location Attribute Plan	Improvement	Create new EOP WOS R and EOP WOS U Metrics	Created the below measures in the Class Plan, Division Plan, Attribute Plan, and Location Attribute Plan workspaces: 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
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: • 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. 

O9 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



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)

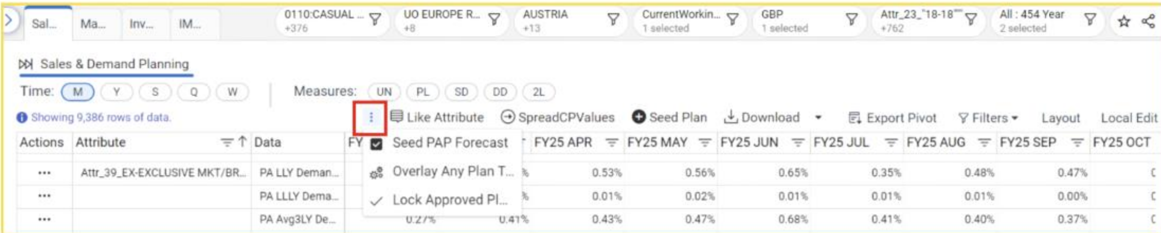
12/21/2024

Monday, December 23, 2024 11:46 AM

<table>
<tr><th>Module</th><th>Type</th><th>Summary</th><th>Business Description</th></tr>
<tr><td>Attribute Plan</td><td>Improvement</td><td>Attribute Plan - Plan Summary - New UO View</td><td>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.</td></tr>
<tr><td>Attribute Plan</td><td>Improvement</td><td>Attribute Plan - Spread CP Action Button/PA CP Measure Agg Logic Update</td><td>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.</td></tr>
<tr><td>Attribute Plan</td><td>Improvement</td><td>Attribute Plan - LY Data not showing for Planned Periods</td><td>Added a process to move non-actualized period data from the current FY into the LY metrics of the next year.</td></tr>
<tr><td>Attribute Plan</td><td>Improvement</td><td>Attribute Plan - Copy CP Actuals to PA CP metrics in Nightly Batch</td><td>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.</td></tr>
<tr><td>MFP EU</td><td>Improvement</td><td>EU UI Updates - 12/21/24 Prod Release</td><td>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
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
Added the CP Trns Dir to Franchise R metric to the Class Plan WSSI view.</td></tr>
<tr><td>Key Item Plan</td><td>Improvement</td><td>Key Item Plan - Seed Plan - Add Measure Groups to AB</td><td>The ability to seed key item plans for either selected metric groups or all.
• Receipts & Inventory
• Sales & Demand
• Cross Channel
This will reflect the functionality that exists in the Overlay action button</td></tr>
<tr><td></td><td></td><td></td><td></td></tr>
</table>

O9 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.



01/11/2025

Monday, January 13, 2025 4:26 PM

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.

O9 Tips and Tricks

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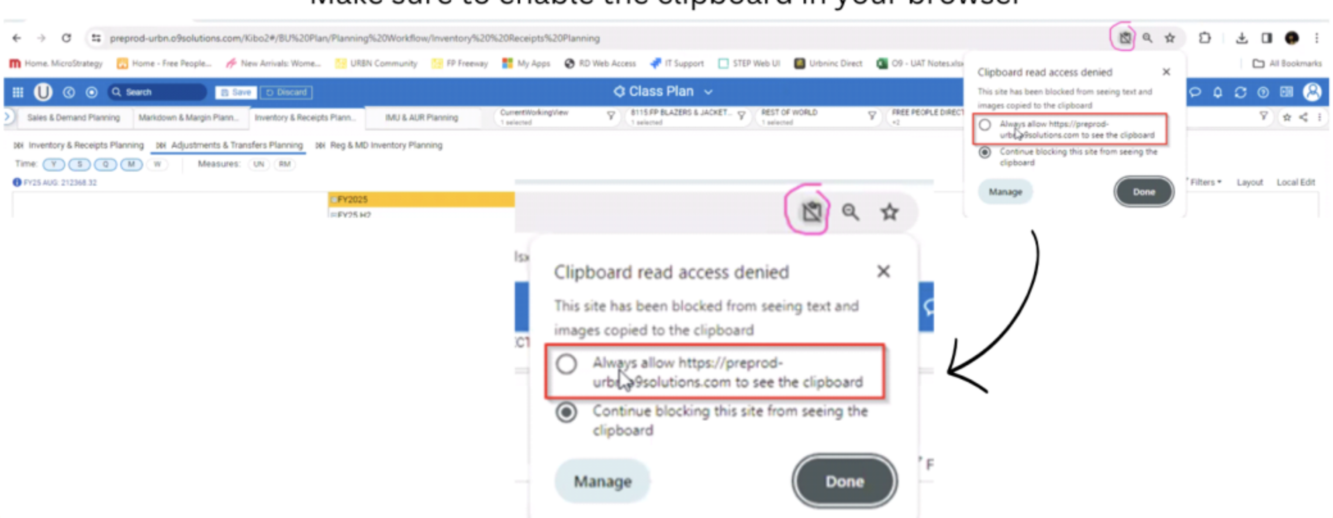
- k - to one decimal point. 1.5k = 1,500
- m - must be whole number. 2m = 2,000,000
- b - must be whole number. 2b = 2,000,000,000
- t - must be whole number. 2t = 2,000,000,000,000

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



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

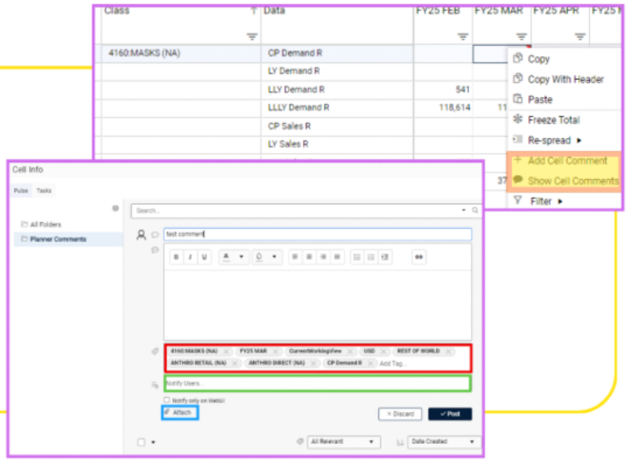
Module	Type	Summary	Business Description
Key Item Plan	Improve ment	Add coordinate group to style color for Key Item Planning	Ability to plan coordinate groups at color level in key item planning
Key Item Plan	Improve ment	Key Item Plan Size - Add new field for Size Name	We have added the size description and size code to the filters in Key Item Size
Class Plan	Improve ment	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 • 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	Improve ment	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	Improve ment	UI Updates in Prod - 02/08/2025	Added the following metrics to Class Plan > Budget Planning view • CP Receipt U • LY Receipt U • CP AUR • LY AUR

O9 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?

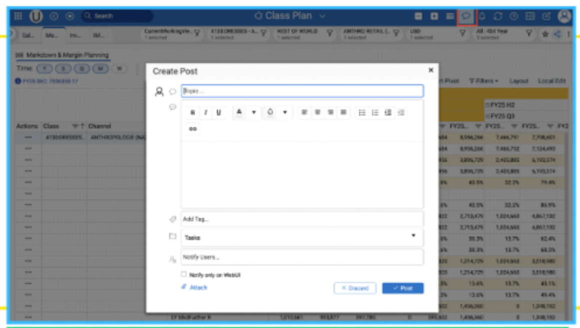
How to create a Comment

- 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



How to create a Post

- Click the word bubble icon in the toolbar
- Users can notify team members on insights and attach reference documents



How to create a Task

- Click the task list (3 lines) icon in the toolbar
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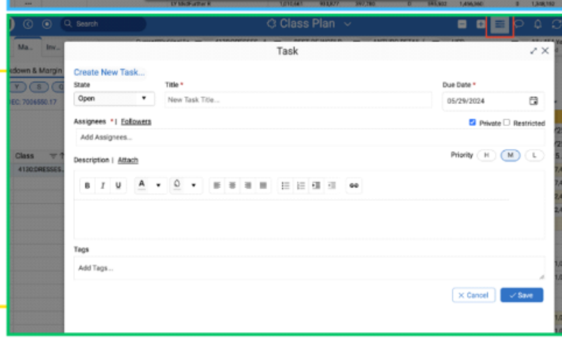


The **My Views** workspace will allow you to manage all **comments**, **posts**, and **tasks** that you created or were tagged in.

- 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)

02/22/2025

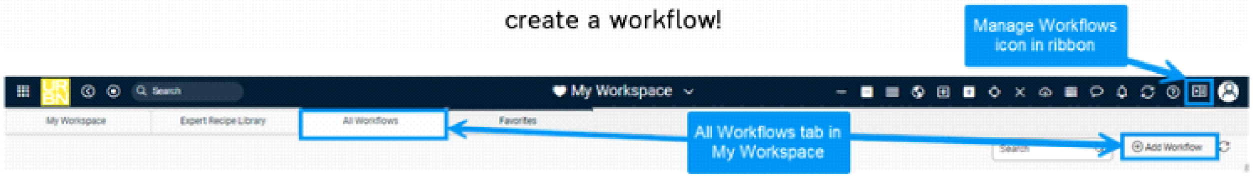
Monday, February 24, 2025 11:23 AM

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 • 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

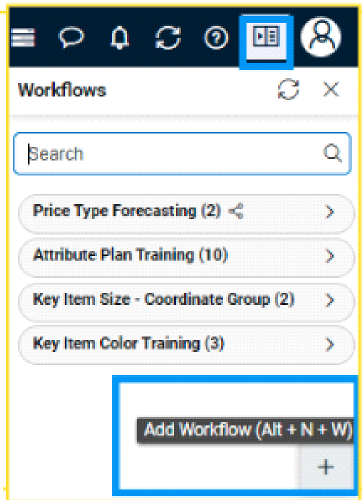
Did you know that you can create a workflow of commonly used favorite views? This allows you to quickly navigate between the different pages / tabs / views to complete a full planning workflow.

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.

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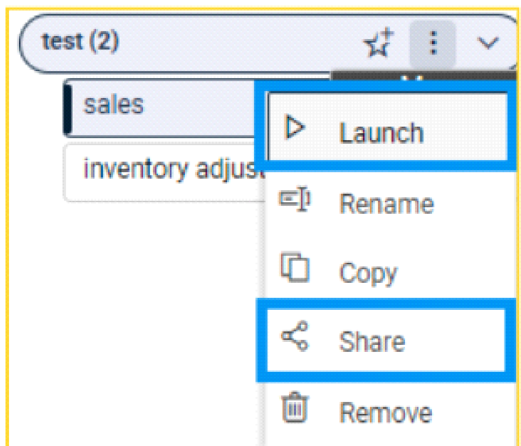
- You can also **share** your workflows with other users in the system!



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.

O9 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

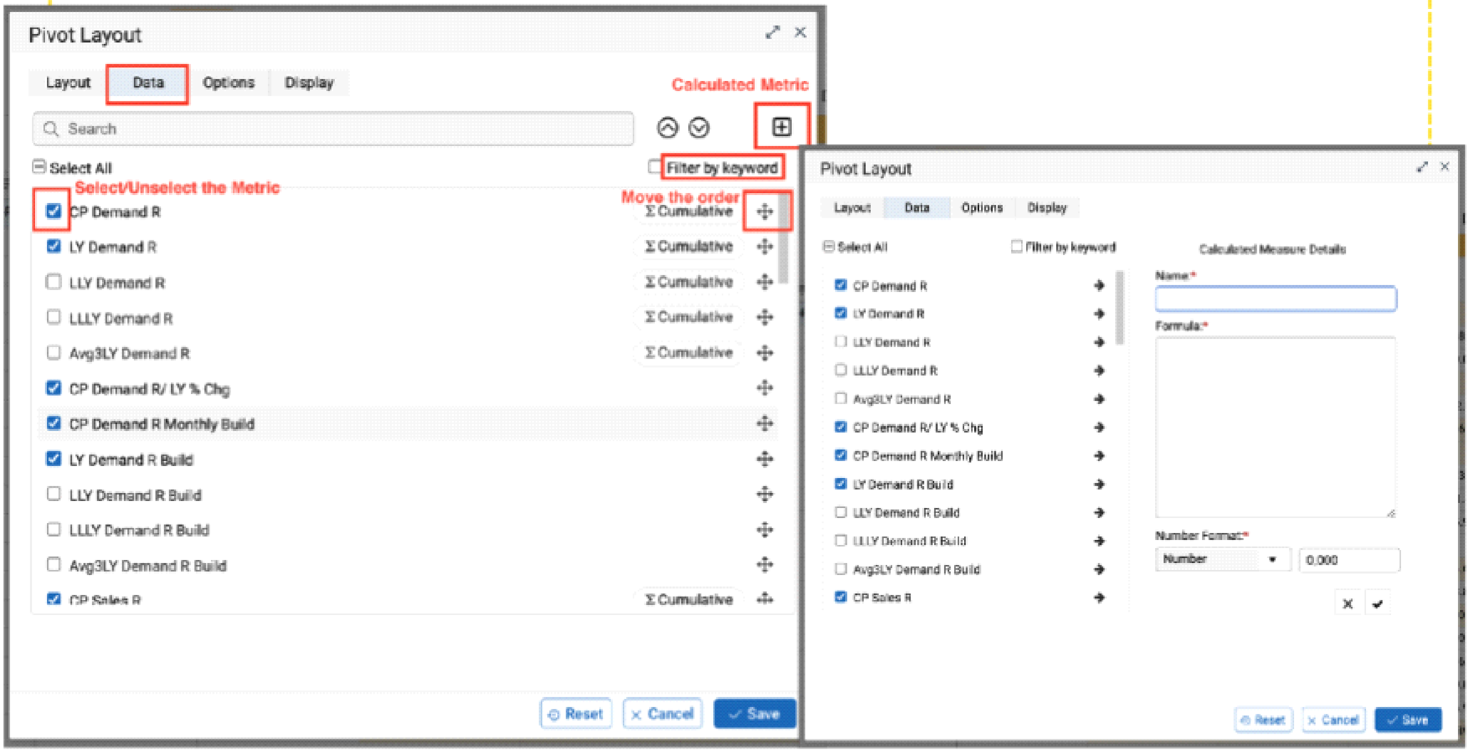
Calculated Metric Creation

Wednesday, February 19, 2025 3:17 PM

O9 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



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).

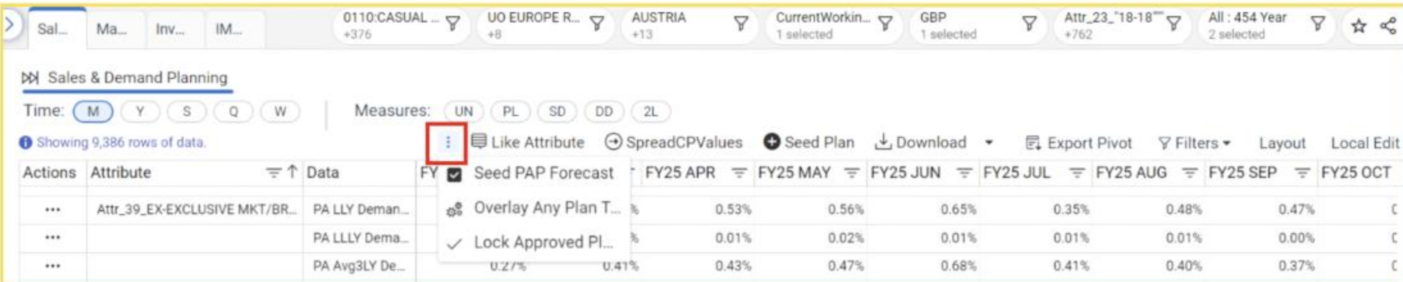
Example - Instead of entering CP Sales R/LY Sales R, enter SAFEDIVIDE(CP Sales R, LY Sales R)

Hidden Action Buttons

Wednesday, February 19, 2025 3:19 PM

O9 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.



Number Shortcuts

Wednesday, February 19, 2025 3:30 PM

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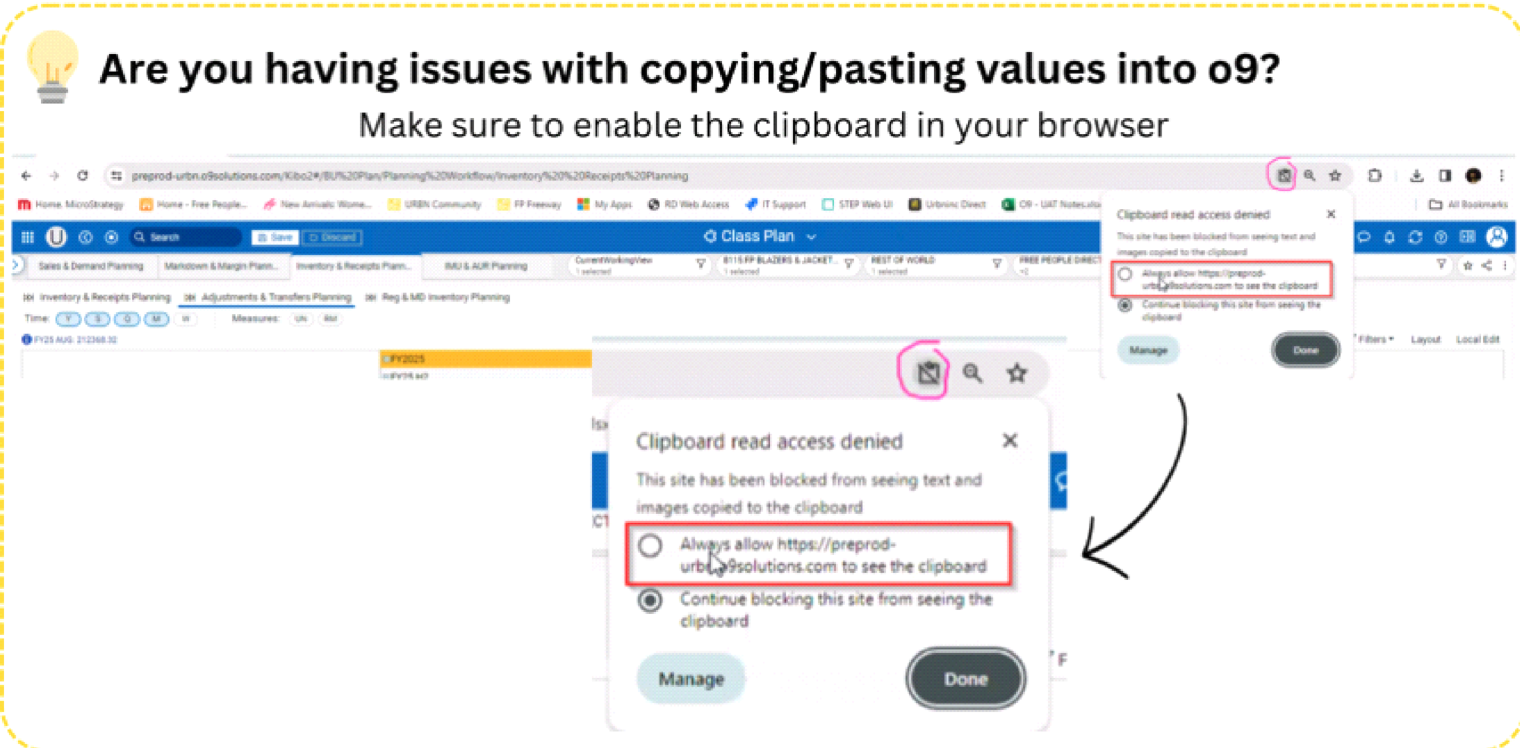
Copy/Paste

Wednesday, February 19, 2025 3:31 PM



Collaboration Features

Wednesday, February 19, 2025 3:32 PM

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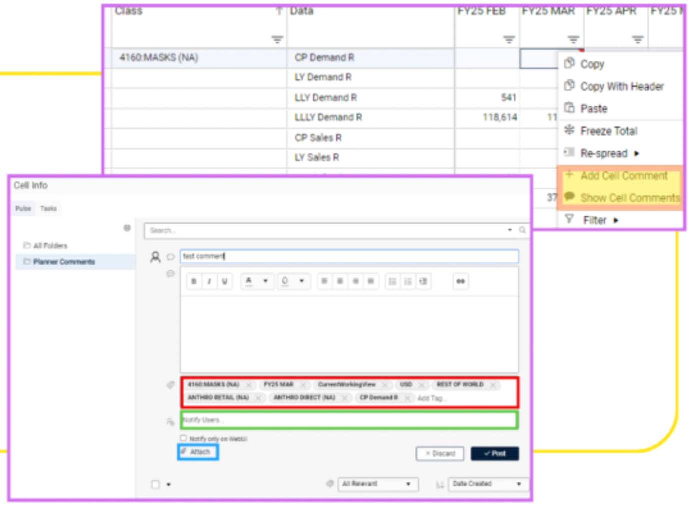

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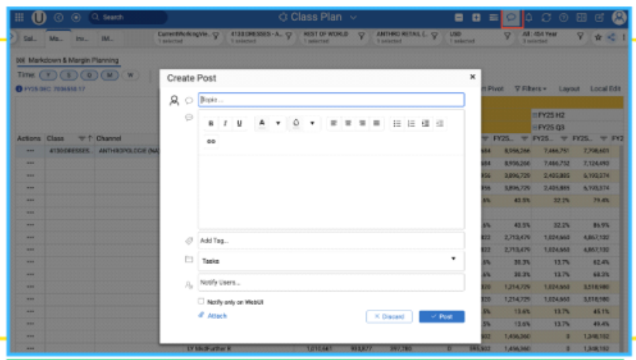

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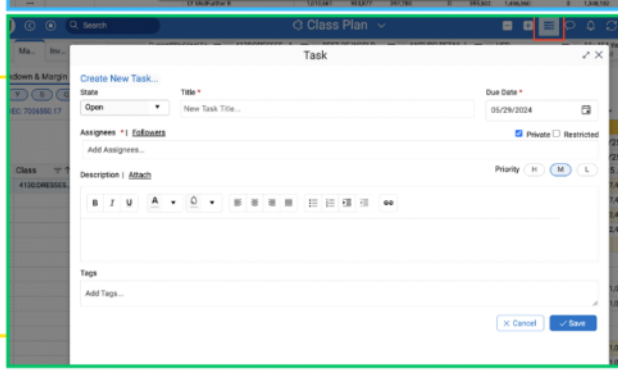

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Managing Workflows

Monday, February 24, 2025 11:19 AM

09 Tips and Tricks

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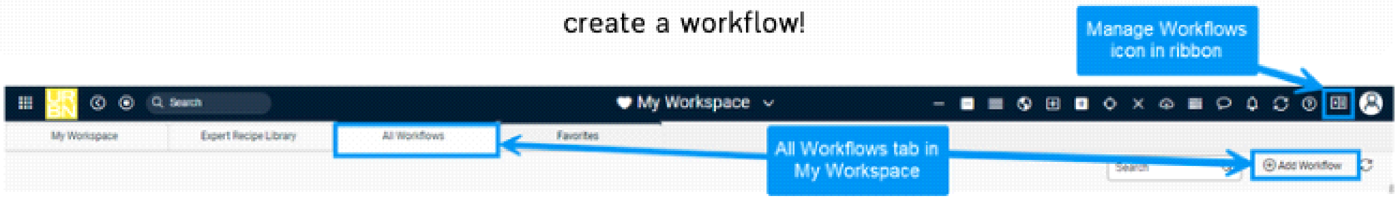

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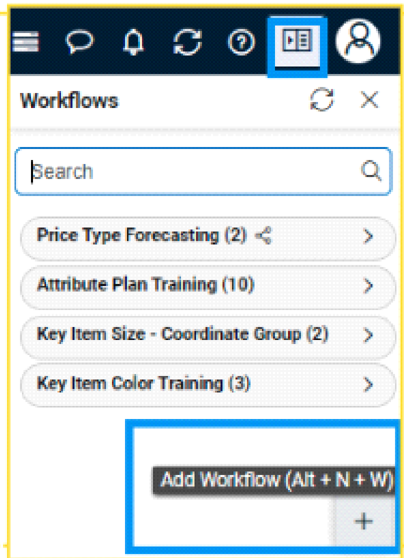

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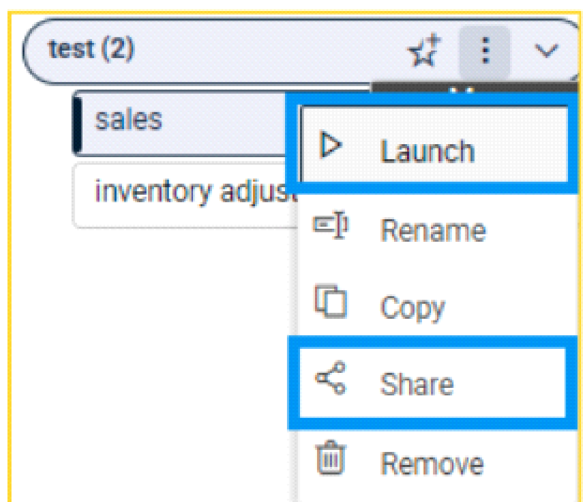

On Order Report Mismatch

Tuesday, March 11, 2025 9:28 AM

O9 Tips and Tricks

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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		
	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

Wednesday, February 12, 2025 4:20 PM

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

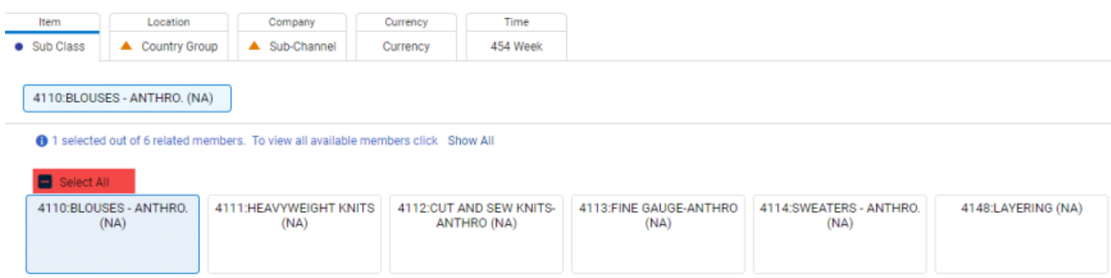
UI

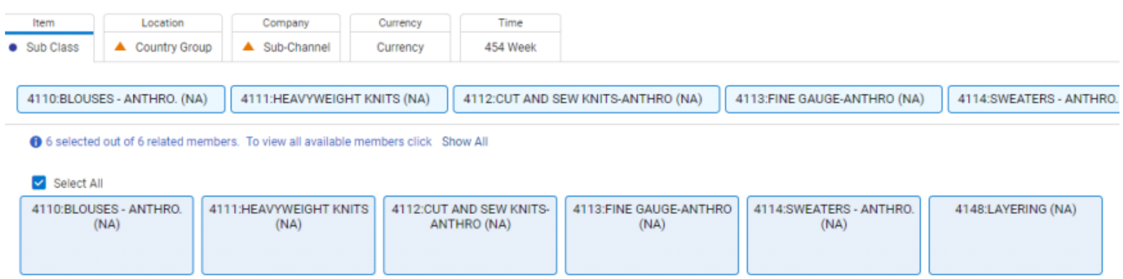
- Re-enter the Same Value in Editable Measure
- 'Set as Null' Option Introduced for Bulk Edit
- Autofit Height for Column Header
  - In Layout under the Display Tab you can select to Auto-Adjust the Column Header Height
    - 

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
  - 



- 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 AUG	⊟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
4,058,585	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