

Oracle® Retail Macro Space Management
Planner Module User Guide
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Primary Author:

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Oracle Retail Macro Space Management, Planner Module User Guide, Release 14.1

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Preface

This guide describes the Macro Space Management user interface. It provides step-by-step instructions to complete most tasks that can be performed through the user interface.

Audience

This User Guide is for users and administrators of Oracle Retail Macro Space Management. This includes merchandisers, buyers, business analysts, and administrative personnel.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at

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Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit

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Related Documents

For more information, see the following documents:

- *Oracle Retail Macro Space Management Release Notes*
- *Oracle Retail Macro Space Management Administration Module User Guide*
- *Oracle Retail Macro Space Management Configuration Module User Guide*
- *Oracle Retail Macro Space Management Data Importer User Guide*
- *Oracle Retail Macro Space Management Fixture Studio User Guide*
- *Oracle Retail Macro Space Management Product Studio User Guide*
- *Oracle Retail Macro Space Management Report Designer User Guide*
- *Oracle Retail Macro Space Management Merchandiser User Guide*
- *Oracle Retail Macro Space Management Planner User Guide*
- *Oracle Retail In-Store Space Collaboration Release Notes*
- *Oracle Retail In-Store Space Collaboration User Guide*
- *Oracle Retail In-Store Space Collaboration Mobile User Guide*
- *Oracle Retail Macro Space Planning Installation Guide*
- *Oracle Retail Macro Space Planning Data Model*
- *Oracle Retail Macro Space Planning Security Guide*

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When contacting Customer Support, please provide the following:

- Product version and program/ module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 14.1) or a later patch release (for example, 14.1.1). If you are installing the base release or additional patch releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch releases can contain critical information related to the base release, as well as information about code changes since the base release.

Improved Process for Oracle Retail Documentation Corrections

To more quickly address critical corrections to Oracle Retail documentation content, Oracle Retail documentation may be republished whenever a critical correction is needed. For critical corrections, the republication of an Oracle Retail document may at times **not** be attached to a numbered software release; instead, the Oracle Retail document will simply be replaced on the Oracle Technology Network Web site, or, in the case of Data Models, to the applicable My Oracle Support Documentation container where they reside.

This process will prevent delays in making critical corrections available to customers. For the customer, it means that before you begin installation, you must verify that you have the most recent version of the Oracle Retail documentation set. Oracle Retail documentation is available on the Oracle Technology Network at the following URL:

<http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html>

An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number E123456-02 is an updated version of a document with part number E123456-01.

If a more recent version of a document is available, that version supersedes all previous versions.

Oracle Retail Documentation on the Oracle Technology Network

Documentation is packaged with each Oracle Retail product release. Oracle Retail product documentation is also available on the following Web site:

<http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html>

(Data Model documents are not available through Oracle Technology Network. These documents are packaged with released code, or you can obtain them through My Oracle Support.)

Documentation should be available on this Web site within a month after a product release.

Conventions

Navigate: This is a navigate statement. It tells you how to get to the start of the procedure and ends with a screen shot of the starting point and the statement “the Window Name window opens.”

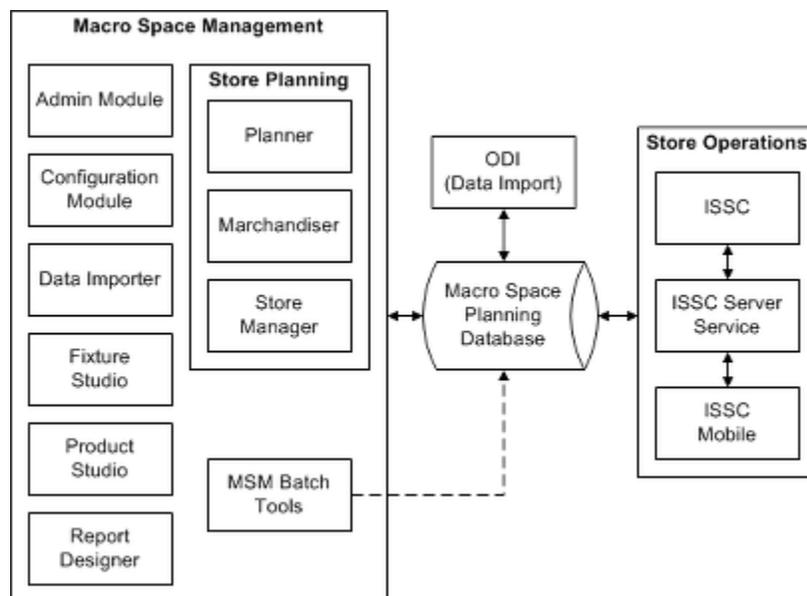
This is a code sample

It is used to display examples of code

Overview of Macro Space Planning

Overview of Macro Space Planning

The Macro Space Planning Application (which includes the Planner and Merchandiser modules) is described in the diagram below.



Macro Space Planning

Macro Space Planning consists of two applications sharing a common database: Macro Space Management and In-Store Space Collaboration. Macro Space Management is intended for use at headquarters and has functionality not replicated in In-Store Space Collaboration. In-Store Space Collaboration is designed to be portable and can be used (via the Internet) at stores within a retail organization. ISSC also has an extension - ISSC Mobile.

Macro Space Management

Macro Space Management consists of two sorts of modules: store planning modules and support modules.

1. Store Planning Modules

Store Planning can be carried out in Planner (AutoCAD environment) or Merchandiser (Virtual Reality environment). Store Manager, used to administer the store hierarchy, can be accessed from either Planner or Merchandiser.

2. Support Modules

The support modules are used for three main purposes: to configure Macro Space Management, to configure the varying libraries of information and to operate batch processes.

- Configuring Macro Space Management is carried out using the Administration module for global changes and the Configuration module for local, user specific changes.
- Libraries of information maintained include the fixture and gondola libraries (Fixture Studio), product library (Product Studio) and the planogram library (planogram design within the Merchandiser module).
- Batch tools include Data importer (for bulk import of data) and Report Designer (configuring planogram reports for bulk output)

In-Store Space Collaboration

In-Store Space Collaboration uses a common database with Macro Space Management. ISSC is more portable than MSM and is often deployed to stores to allow store managers to become involved in the store planning process. It can also be used to ensure compliance with store plans. It has an extension - ISSC Mobile. ISSC Mobile is designed for use by store associates allowing them to identify changes in fixturing and merchandise in the store the associate works in.

Differences between Planner and Merchandiser Modules

Although the Planner and Merchandiser modules can both be used to develop floor plans, they have different capabilities. In general Planner is used for 'Macro' planning, while Merchandiser can be used for 'Micro' planning. The differences between the modules are briefly outlined below.

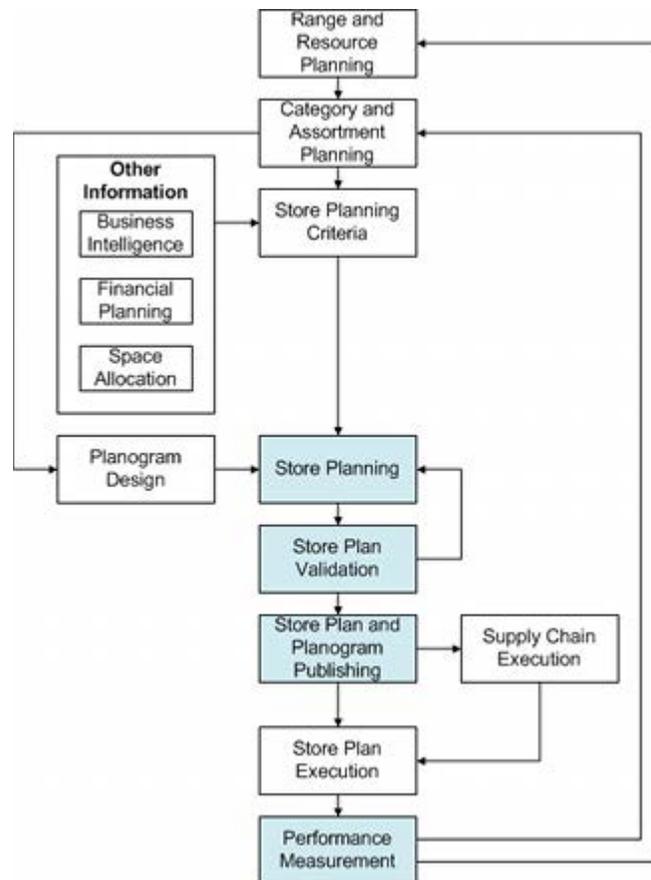
	Planner	Merchandiser
Zones	<ul style="list-style-type: none"> ▪ Can be added, edited and deleted. 	<ul style="list-style-type: none"> ▪ Can be viewed 'read only'
Fixtures and Gondolas	<ul style="list-style-type: none"> ▪ Can be accurately positioned using standard AutoCAD functionality. ▪ Shelves generally not shown ▪ Position of signage shown, but no text/images available. 	<ul style="list-style-type: none"> ▪ Can be positioned accurately, but not as easily as in Planner. ▪ Can work with additional detail for equipment - shelves and pegs for instance. ▪ Can see writing/images on signage
Products	<ul style="list-style-type: none"> ▪ Can only be displayed as placeholders - no information on quantity or position given. 	<ul style="list-style-type: none"> ▪ Can be shown as display styles on fixtures or shelves - giving full information on quantity and position. ▪ Can be associated with images - giving a photorealistic appearance.
Planograms	<ul style="list-style-type: none"> ▪ Can only be seen as placeholders - with no information available on quantity or position of shelves or merchandise. 	<ul style="list-style-type: none"> ▪ Planograms can be seen with full detail including position and quantity of shelves and merchandise.
Key Performance Indicators	<ul style="list-style-type: none"> ▪ Can be used for zones and fixtures. 	<ul style="list-style-type: none"> ▪ Can be used for zones, fixtures, shelves and products.
Annotation	<ul style="list-style-type: none"> ▪ Fully configurable annotation. 	<ul style="list-style-type: none"> ▪ Basic text labeling.

	Planner	Merchandiser
Floor Plans	<ul style="list-style-type: none"> Can be prepared for printing with fixtures toggled to 2D form, specified annotation and title blocks. 	<ul style="list-style-type: none"> Snapshots can be taken, but no formal way of outputting floor plans exists.

Retail Operations and the Planner and Merchandiser Modules

Note: The information below is intended for general guidance and should not be interpreted as being a recommended solution.

This section of help gives a high level overview of store planning and how it integrates into the rest of the retail planning process.



Note: Boxes coded in blue are Macro Space Planning operations.

The stages in the retail planning process are broadly as follows:

Range and Resource Planning

This is strategic planning and would include such items as identifying the ranges of products to be placed in the store, staff and service levels, etc. As a general procedure, this would have retail chain wide implications and not be restricted to a single store.

Category and Assortment Planning

Again done at a strategic level, this is the process of breaking down the product ranges into more specific categories then optimizing the products to be offered in each category.

Store Planning Criteria

Following on from the Category and Assortment Planning is the need to set criteria for how the store is to be planned. This may well be a guidance document based on information from sources such as:

- Business Intelligence - for example from syndicated data, market basket analysis or loyalty card programs.
- Financial Planning - criteria on the product mix required to meet profitability criteria.
- Space Allocation - sub-dividing the available space in the store into areas for each department and category.

Planogram Design

Planogram design will also have been carried out, often based on information from category management combined with guidelines on visual merchandising. Planograms can be of two types:

- Individual planograms. These are specific designs that are created or updated as required by the planogram designer.
- Master Planograms: these act as placeholders for categories and sub-categories. There is a mapping between individual and master planograms.

Store Planning

Store planning (more generally called floor planning) can then commence based on the supplied criteria. The planograms placed should meet those criteria. Either master or individual planograms can be placed.

Note: Within Macro Space Planning, store planning is generally called floor planning.

Store Plan Validation

Once planned, the store plan (floor plan) must be validated against a number of criteria. These include:

- Whether planograms have been placed on appropriate fixtures
- Whether the planogram adjacencies will maximize (for example) impulse buying
- Whether financial performance criteria will be met.

If failures occur during validation, the validation process must be halted and the store plan revised.

Store and Planogram Publishing

After the store plan (floor plan) has been validated, the store plan and its associated planograms can be published. This is the signal for the execution processes to commence.

Floor Plan Publishing

Macro Space Management has the capability to publish floor plans using a batch process. This is run by a scheduling tool at regular intervals. The floor plans will be published in a specified form to a pre-defined location.

Planogram Publishing

Macro Space Management also has the capability to publish planogram designs using a batch process. This is run by a scheduling tool at regular intervals. The floor plans will be published in a specified form to a pre-defined location.

- If master planograms have been placed, the planogram publishing process will identify a specific individual planogram associated with the master planogram and publish that individual planogram.
- If just individual planograms have been placed, those individual planograms will be published.

Note: Using master planograms can reduce the frequency that floor plans need to be published.

Supply Chain Execution

In order to execute the store plan, equipment, merchandise, signage and promotional material will be required. These requirements must be put into the supply chain in time for the goods to be delivered to site.

Store Plan Execution

At an appropriate date, the store plan has to be put into effect. Using store labor or sub contractors, equipment, merchandise and signage must be placed or changed as appropriate.

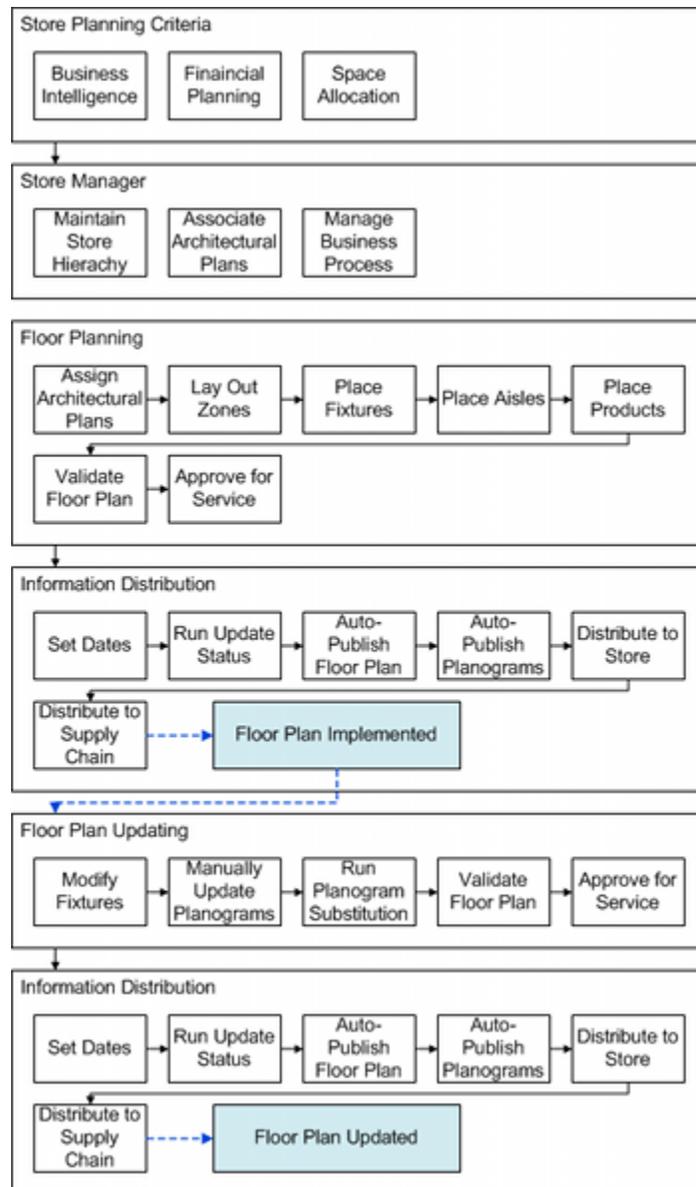
Performance Measurement

At an appropriate time, the performance of the store should be examined by means of reports and KPIs. This information can be fed back into the Range and Resource Planning and Category and Assortment Planning in time for the next cycle of store planning.

Overview of Store Planning

Note: The information below is intended for general guidance and should not be interpreted as being a recommended solution.

This section of help gives a high level overview of the store planning process.



Store Planning Criteria

The process starts with store planning criteria for other parts of the retail organization. These may include:

- Business Intelligence - for example from syndicated data, market basket analysis or loyalty card programs.
- Financial Planning - criteria on the product mix required to meet profitability criteria.
- Space Allocation - sub-dividing the available space in the store into areas for each department and category.

This information serves as a set of criteria and constraints that a floor plan must meet before it is released for service.

Store Manager

Store Manager is used for the administration of the store planning process. These include:

- **Maintaining the Store Hierarchy**
Maintaining the store hierarchy includes adding, editing and deleting stores, floors, revision and floor plans as required.
- **Associating Architectural Plans**
Architectural plans are used as underlays for floor plans in order to show the position of walls, doors, windows, lighting and services. Associating architectural plans is a two-part process, with the second step required when a floor plan is open.
- **Managing Business Processes**
Stores, Floors, Revision and floor plans all go through different stages in their business life cycle. For example a store may be at the design stage, in service, closed for refurbishment or sold and out of service.

Floor Planning

If a new floor plan is to be created, the general stages are as follows:

Note: Precise details of departmental areas, number and types of fixtures and products, performance targets, etc will often be specified in the store planning criteria.

- **Assign Architectural Plan**
An architectural plan should already have been associated with the parent floor for the floor plan in Store Manager. This can now be assigned to this specific floor plan.
- **Lay Out Zones**
- The next stage is to lay out the zones within the floor plan. These can be used to indicate the positions and areas of departments, sub-departments, aisles, etc. This can only be done in the Planner module. Zones come in several broad types:
 - Internal Area: There is only one zone of this type in a floor plan. It is used to indicate the maximum extents and area used for retail purposes.
 - Department: This type is used to indicate the departments within a retail outlet. Any floor plan that is to be viewed in In-Store Space Collaboration must have zones of this type for it to open.
 - Other: This type is often used to indicate sub-departments within a main department, aisles, etc.
- **Place Fixtures**
- The fixturing can then be laid out. Fixtures can either be placed individually or a gondola runs. Fixture placement is generally done in the Planner module because of the ability to place the fixtures with great accuracy. After the fixturing has been placed, it is often Bay Numbered - this makes it easier for users to identify a specific fixture within a floor plan.
- **Place Aisles**
- The next stage is to draw the aisles. These can only be placed in the Planner model and allow the aisle to be identified. The direction the aisle is drawn also serves to identify the predominant traffic direction. This can be used when placing multi-bay planograms that have been designed to be viewed in a specific sequence.
- **Place Products**

- After the fixtures and aisles are in place, products can be placed. 'Big ticket' items can be placed as individual products, but the majority of merchandise is placed in the form of planograms.
- **Validate Floor Plan**
- After the floor plan has been created, it is next validated to see the layout is optimum. Validation can be done using reports and KPIs. Because of the visual nature of KPIs these often allow validation to be completed in the least possible time. Validation can include:
 - Whether planograms have been placed on appropriate fixtures.
 - Whether the planogram adjacencies will maximize (for example) impulse buying.
 - Whether financial performance criteria will be met.
- If necessary amendments can be made to the floor plan and the new arrangement revalidated.
- **Approve for Service**
- The final stage is to approve the floor plan for service. This is done in Store Manager by setting the status to Authorized. This enables the Publish and Effective (Current) dates to be set. Macro Space Management batch tools can then be used to automatically change the floor plan status and publish the floor plan and its associated planograms.

Information Distribution

When the floor plan has been approved for service, the next stage is to distribute the information at the pertinent time.

- **Set Dates**
- When the floor plan has been approved and set to Authorized status, the Publish and Effective Dates are set.
 - The Publish Date is when information is distributed in preparation for putting the floor plan into service. This date is set far enough in advance of the implementation date that all preparations for putting the floor plan into service (including ordering equipment and merchandise) can be put in hand.
 - The Effective Date is when the floor plan will be put into service (made current). This date will usually be integrated with the retailers strategic planning so that the change is made in coordination with promotional and advertising campaigns, etc.
- **Run Update Status**
- UpdateStatus.exe is a small Macro Space Management utility that can automatically change the status of floor plan. It is generally set to run as a batch process on a nightly schedule. When the Publish Date has been met or exceeded, Update Status will change the status of the floor plan from Authorized to Published. In most implementations this also sets the floor plan to read only status. This prevents further changes to the floor plan unless an administrator deliberately overrides this.
- **Auto-Publish Floor Plan**
- Another Macro Space Management application can be scheduled to publish the floor plan on the Publish Date. A copy of the specified floor plan (typically in DWF or PDF format) will be sent to a pre-defined location. From there the retail chain can make arrangements to distribute the information to the store - typically by e-mail.
- **Auto-Publish Planograms**

- A further Macro Space Management application can be scheduled to publish the planograms on the Publish Date. A copy of the specified floor plan (typically in PDF or Word format) will be sent to a pre-defined location. From there the retail chain can make arrangements to distribute the information to the store - typically by e-mail.
- **Distribute to Supply Chain**
- In parallel with publishing the information, information needs to be sent to the supply chain for the equipment, merchandise, signage and promotional material needed. This is generally achieved by running reports on the floor plan to identify the types and quantities required, then creating the appropriate purchase orders.
- **Run Update Status**
- UpdateStatus.exe executes as a batch process on a nightly schedule. When the Effective Date has been met or exceeded, Update Status will change the status of the floor plan from Published to Current. In most implementations this also maintains the floor plan at read only status. This prevents further changes to the floor plan unless an administrator deliberately overrides this.
- Simultaneously with update status changing the status of this floor plan to Current, any pre-existing Current floor plan for this specific floor will have its status changed to Historical. This indicates it has been superseded by a more recent version.
- **Implementing the Floor Plan**
- On the Effective Date, the store will know to put the changes into effect. This means setting out the fixturing, populating it with merchandise and setting up the signage and promotional material. This will require careful planning and allocation of labor.

Floor Plan Updating

Once a floor plan has been put into service, it will probably be subject to a series of updates. These may vary from changing a number of the planograms on the end caps through to remodeling a substantial part of the store. A typical procedure is described below:

- **Modify Fixtures**
- The fixtures are modified as required. Typical examples include adding or removing display bins from an aisle or changing the widths of several aisles.
- **Manually Update Planograms**
- If the fixturing has been changed, it may be necessary to manually populate the modified fixtures with the appropriate planograms.
- **Run Planogram Substitutions**
- Planogram substitutions are an automated way of changing the specified planograms in one or more stores. This can be done in several forms including:
 - One to One Substitutions: A planogram is swapped out for one of identical size.
 - One to Many Substitutions: A large planogram is swapped out for several smaller ones.
 - Many to One Substitutions: Several smaller planograms are swapped out and replaced by a single large one.
- There are a number of reasons for planogram substitutions. The more common ones include:
 - Space Trading: Reducing the space assigned to a poorly performing category and increasing the space available to a better performing one.
 - Seasonal Changes: Swapping out seasonal goods; for example changing Halloween products for Christmas ones.

- Special Offers: Swapping out standard planograms for planograms containing products in modified packaging for the special offer.
- **Validate Floor Plan**
 - After the floor plan has been created, it is next validated to see the layout is optimum. Validation can be done using reports and KPIs and would be similar to the exercise carried out when the floor plan was first created.

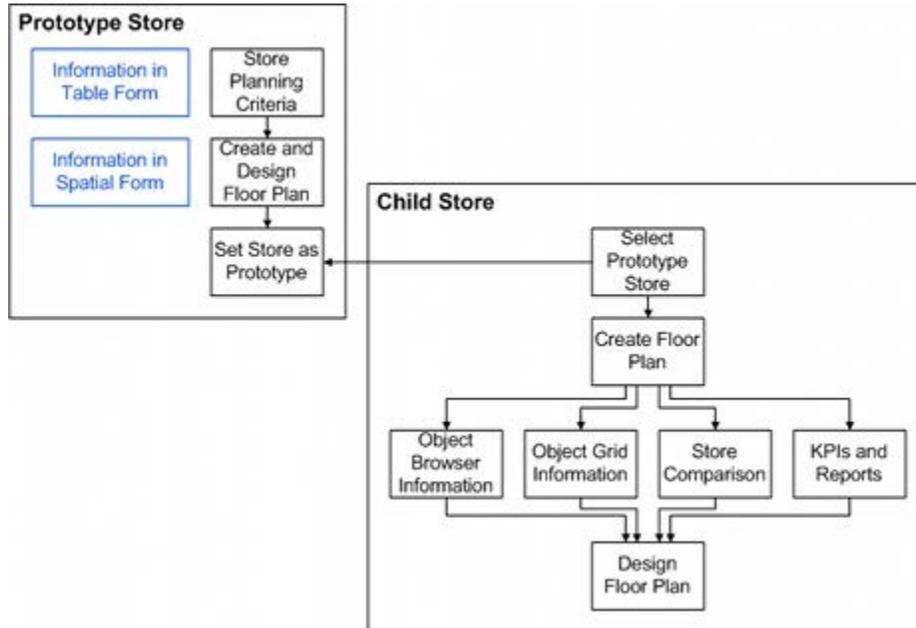
Information Distribution

When the revised floor plan has been approved for service, the next stage is to distribute the information at the pertinent time. This follows the same procedure as implementing the original floor plan.

Using Prototype Stores

Overview of Prototype Stores

One useful concept in Macro Space Management is that of Prototype Stores.



Prototype Stores are exemplars of a store that has an idealized layout. They may be actual stores that are performing better than average. Alternatively they may be 'paper' stores that have been designed as guidance for real store layouts. The process is as follows:

1. Store Planning Criteria

Store planning criteria are received in tabular form. This will be information on departmental areas, numbers and types of fixtures and products, suggested product adjacencies, etc.

2. Create and Design Prototype Store

The planning criteria are then used to design the prototype store. This results in the tabular information in the planning criteria being transformed into a series of spatial relationships where departments, equipment and merchandise are placed relative to each other. After the store plan has been optimized by means of reports and KPIs, it is ready for use as a reference.

3. Set Store as a Prototype

The store can then be designated as a prototype by checking the **Set as Prototype** check box in the General tab of the **Add/Edit Store** dialog box in Store Manager.

4. Select Prototype Store and Create Floor Plan

The child store is then associated with its prototype store by selecting the prototype store from the list of those available in the **Add/Edit Store** dialog box in Store Manager. This information is now set in the **File Properties** dialog box. Any floor plans now created can potentially reference the information held on the prototype store in the database. This information is:

- Information in the Properties Window of the Object Browser: The Custom SQL supplied with Macro space Planning can be modified to show the quantities in the Prototype and Child stores for comparison purposes.
- Information in the Object Grid: The information supplied in the object grid can be customized (Custom SQL) to show only equipment and merchandise in the Prototype Store.
- The Store Comparison tool: This compares the quantities of equipment, merchandise categories and planograms in the prototype and its child and specifies differences between the two.
- KPI's and Reports: These can be customized to the client's requirements and can be used to look at specific aspects of the floor plan.

5. Design Floor Plan

Using the Prototype Store, the child floor plan can then be designed. A typical use of the functionality would be to take a prototype store of 30,000 ft² and create a child plan of similar area but different physical layout containing broadly similar department sizes and equipment/merchandise placements.

Note: Information in the Object Browser and Object Grid is controlled by SQL statements in the **Custom SQL** table in the database. Modifying this SQL can change the information appearing to customer specific requirements. The code in the application has the ability to use specific tags in the Custom SQL such as {Fileid}. This allows the code to execute the SQL statement with the File ID (FIL_ID) of the currently open floor plan in the 'where' clause.

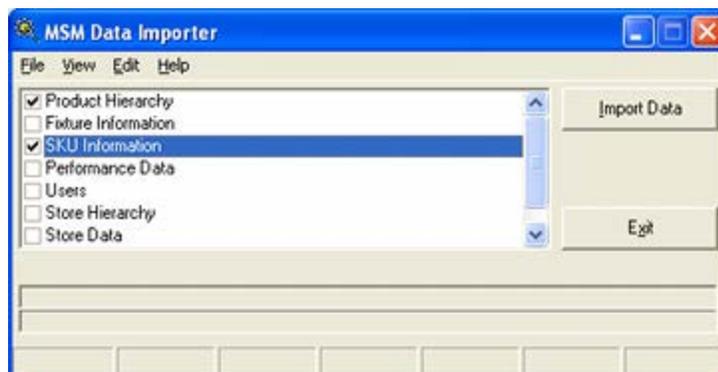
MSM Batch Processes

There are certain processes in the store planning process that can be automated and run on a regular schedule using a scheduling tool. These are:

- Data Importer
- ODI Planogram Importer
- Automated Calculations
- Update Status
- Floor Plan Processing
- Floor Plan Publishing
- Planogram Publishing

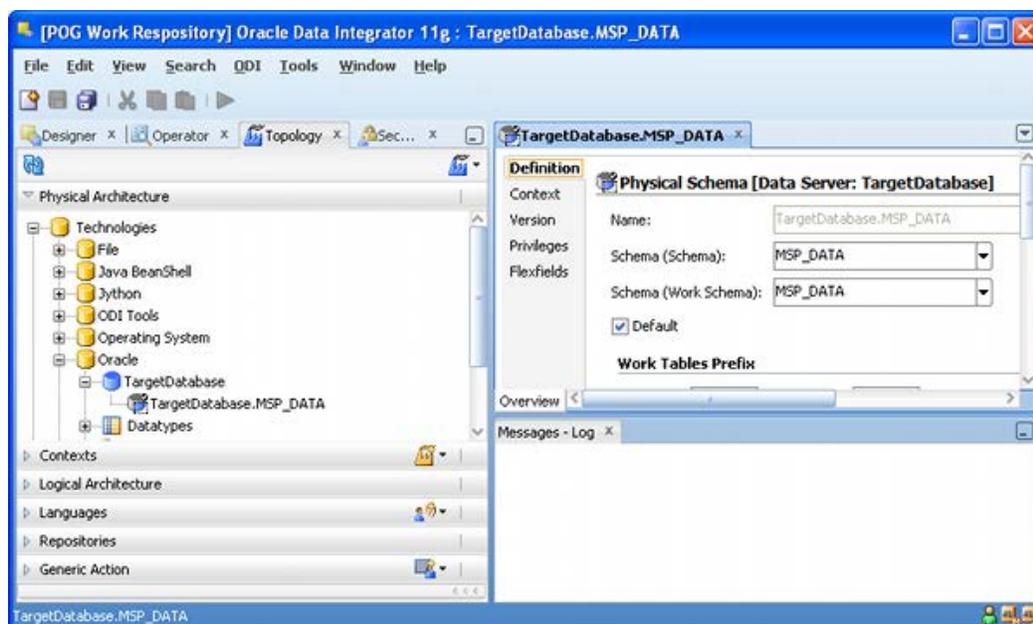
Batch Processes

Data Importer



Data Importer is a Macro Space Management (MSM) module that allows imports of data into the MSM database to be configured and executed. In principle any table (including custom information) can be imported into the database and used for reporting purposes.

ODI Planogram Importer



Oracle Data Integrator (ODI) is another Oracle application. It can be configured to import planogram definitions. This requires an XML file to be configured by the retailer in a very specific format. This XML file can then be imported into the MSM database by ODI.

Automated Calculations

MSM provided a series of automated calculations that can be used to ensure the information in the database is current before reports are generated. These calculations are:

- Allocated Areas: Allocating floor area to fixture to take into account the aisles around them when generating performance data.
- Aisle Adjacency: Identifying which fixtures are associated with an aisle.

- Fixture Adjacency: Identifying which fixtures are to the left, right above or below each other.
- Product Adjacency: Identifying which products are to the left right or on the same fixture.
- Face Planes: Calculating the frontal area of each product for performance metrics.
- Space Measurement: Calculating the volume of each product for performance metrics.

Update Status

Update Status is a small MSM utility that is capable of changing the status of a store or floor plan. This allows dates for actions to be pre-set then automatically executed. This utility is typically used by retailers to trigger ordering of the equipment and merchandise required to execute a store plan change.

Floor Plan Processing

Floor Plan processing enables the user to update a Planner floor plan prior to publishing by carrying out items such as synchronization, refreshing annotation or updating calculations.

Floor Plan Publishing

Floor Plan Publishing enables the user to automatically generate an electronic copy of the floor plan and deposit it in a specified directory. From there the retailer can disseminate the information to the store.

Planogram Publishing

Planogram Publishing enables the user to automatically generate an electronic copy of the planograms that will be changed during a reset of a floor plan and deposit it them a specified directory. From there the retailer can disseminate the information to the store.

Custom SQL

Administrators

This information is for DBAs and Administrators only. Standard users cannot access the database and modify the requisite tables. It is given to indicate that information in a number of parts of Macro Space Planning can be customized to meet specific requirements.

Definition of Custom SQL

The code used in Macro Space Planning has the ability to update SQL statements so they are specific to the currently active floor plan, etc, when it executes them. This is an addition to Standard SQL and is done by the use of placeholders such as {Fileid} for File ID.

- In Standard SQL, a simple statement would be `Select PRODUCT_NAME from PRODUCT where FIL_ID = 123`
- Custom SQL is of the form `Select PRODUCT_NAME from PRODUCT where FIL_ID = {Fileid}`

When the code references the Custom SQL it identifies the placeholder and substitutes the File ID of 123 from the currently active floor plan for {Fileid}. This enables the application to return a specific sub-set of results for the currently active floor plan, etc.

In the screen shot below, a Quick Report is being used in a floor plan to identify the planograms that can be placed. The fields that appear can all be customized by a DBA or Administrator with the correct permissions in the database. For example, if the planograms have User Defined Attributes (UDAs) associated with them, key UDA's could be displayed in the Quick Report. Similarly, if this floor plan is associated with a prototype store, quantities of planograms in the currently active floor plan could be compared with those in the prototype store.

POG CODE	DESCRIPTION	GROUP NAME	LENGTH (FT)	DEPTH (IN)	HEIGHT (IN)	BAYS	INSTANCES
0000019	1 Bay Mixed Cola	Carbonated Drinks	3	24	72	1	1
0000015	1 Bay Bottled Pepsi	Carbonated Drinks	3	24	72	1	1
0000014	1 Bay Bottled Coke	Carbonated Drinks	3	24	72	1	1
0000056	4 Bay Mixed Soups	Tinned Soup	12	24	72	4	1
0000004	1 Bay White Wine	Wines	3	24	72	1	1
0000003	1 Bay Red Wine	Wines	3	24	72	1	1
0000037	1 Bay Specialty Beer	Beers, Ciders and Lagers	3	24	72	1	1
0000011	2 Bay Mixed Spirits	Spirits	6	24	72	2	1

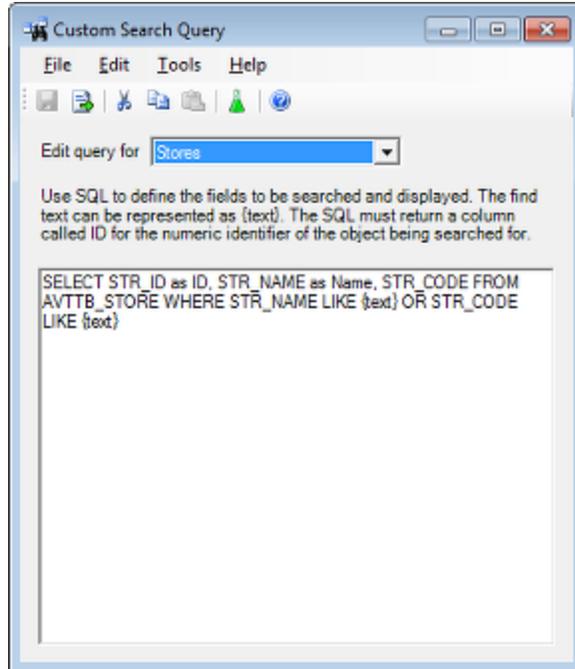
Where Custom SQL Can Be Used

Custom SQL can be used in the following ways:

- To populate data into the Properties and Summary Windows in the Object Browser.
- To populate data into the Object Grid and to specify the filters and sort criteria available.
- To populate data into some of the Find dialog boxes.
- To specify some of the data for annotation in Planner.
- To specify data that can be referenced by Title Blocks.
- To specify the data that will appear in Quick Reports.

Where Custom SQL is Stored

The primary repository for Custom SQL is in the **Custom SQL** table in the database; although other tables come into use. The Custom SQL itself is stored in the CSQ_SQL field. This can be edited to change the table referenced and fields displayed. Some custom SQL can be modified by using the **Custom Query dialog box** accessed from the General menu in the Administration module.

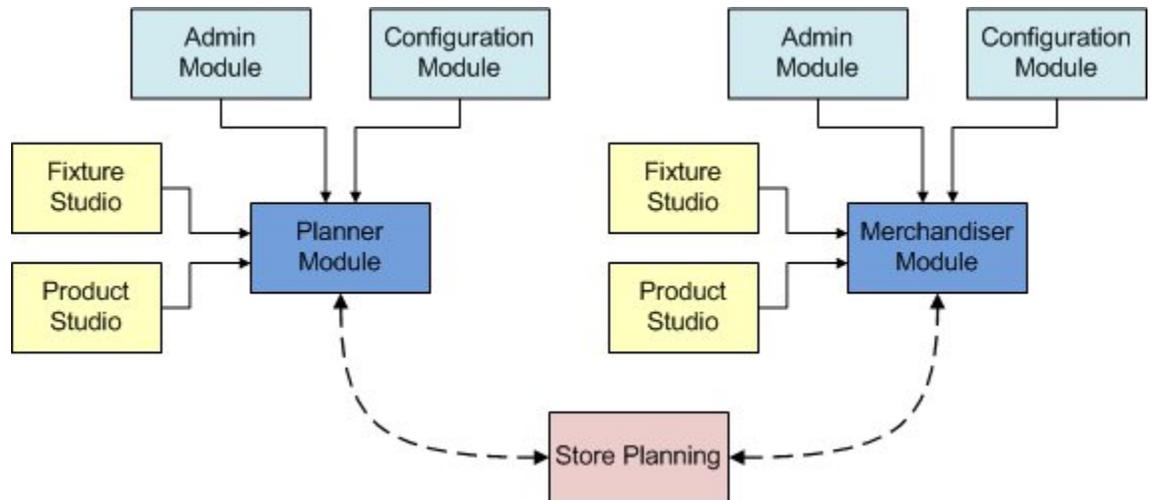


Note: See the *Oracle Retail Macro Space Planning Data Model* for more information.

Overview of Other MSM Modules

A number of other modules affect the behavior of equipment and merchandise in the Planner and Merchandiser modules. These are described briefly below - for more information see the help files for the respective modules.

Note: Users will need the appropriate privileges to access these modules.



Administration Module

Access to the Administration module is generally carefully restricted. The settings made have a global effect for all users of the Planner and Merchandiser modules. Examples include:

Option	Description	Planner	Merch
Floor Plan Publishing	How floor plans are published (made available to stores for implementation)	X	X
Planogram Publishing	How planograms are published (made available to stores for implementation)	X	X
Statuses	The statuses available to show how far a store, item of equipment, item of merchandise, etc, is through its business life cycle.	X	X
Annotation (Text Styles)	How annotation for zones, fixtures, products and planograms draws	X	
Zones	The hierarchy of available zones to place in a floor plan	X	
Ranges	The list of temperature ranges that can be assigned to equipment and merchandise. This affects equipment and merchandise when display styles are used.		X
Styles	The list of styles that can be assigned to equipment and merchandise. This affects equipment and merchandise when display styles are used.		X
Planogram Substitution	How to automatically substitute one planogram for another in floor plans	X	X
Data Security	What access rights users have for specific objects such as stores or planograms.	X	X
Title Blocks	How a 'frame' of information is added to the floor plan before it is published. Information in the title block can include store name, floor plan designer's name, date of implementation, etc.	X	

Configuration Module

The Configuration Module can be called from the file menu of either the Planner or Merchandiser modules. Only four tabs will be available (the full range only being available if called from the Administration module). These four tabs affect the behavior of the Planner and Merchandiser modules on a user by user basis - the settings do not have a global effect. Examples include:

Option	Description	Planner	Merch
Zones Tab	<ul style="list-style-type: none"> ▪ How zones are drawn when being added to the floor plan. ▪ How zones are highlighted in the floor plan. 	X X	
Fixturing tab	<ul style="list-style-type: none"> ▪ How the Add Fixture dialog box functions ▪ How Connection Points function ▪ Highlighting of Fixtures 	X X X	X
Merchandising Tab	<ul style="list-style-type: none"> ▪ Selection Method for Fixtures ▪ Highlighting of Products ▪ Checking Planogram Placement Validity 	X X X	X
Merchandiser tab	<ul style="list-style-type: none"> ▪ Appearance of buildings, equipment and merchandise 		X

Fixture Studio

Fixture Studio is another Macro Space Planning module. It is used to configure the Fixture and Gondola Hierarchies, together with Fixtures and Gondolas themselves. Settings in Fixture Studio affect the behavior of Equipment in the Planner and Merchandiser modules. Examples include:

Option	Description	Planner	Merch
Insertion height	The height at which equipment is inserted in the floor plan - a fixture will generally be inserted at floor level, a hanging sign 10 feet above it.	X	X
Connection Points	Datum's by which one item of equipment aligns itself with another. In Planner, this is only Fixtures; in Merchandiser it is fixtures and shelves.	X	X
Associated Equipment	This is used to specify whether one item of equipment can accept another - for example whether a fixture will accept shelves.		X
Temperature Range	Compared to the temperature range on the display style being placed to determine if it is compatible with the equipment it is being placed on.		X
Style	Compared to the style of the display style to determine if the display style can be placed on a specific fixture or shelf.		X
Merchandisable Areas	Determines the volume that merchandise can take up on a fixture or shelf.		X

Product Studio

Product Studio is another Macro Space Planning module. It is used to hold information on the products available for placement in floor plans. This product information can either be imported from another database or entered manually. Settings in Product Studio affect the behavior of merchandise in the Planner and Merchandiser modules. Examples include:

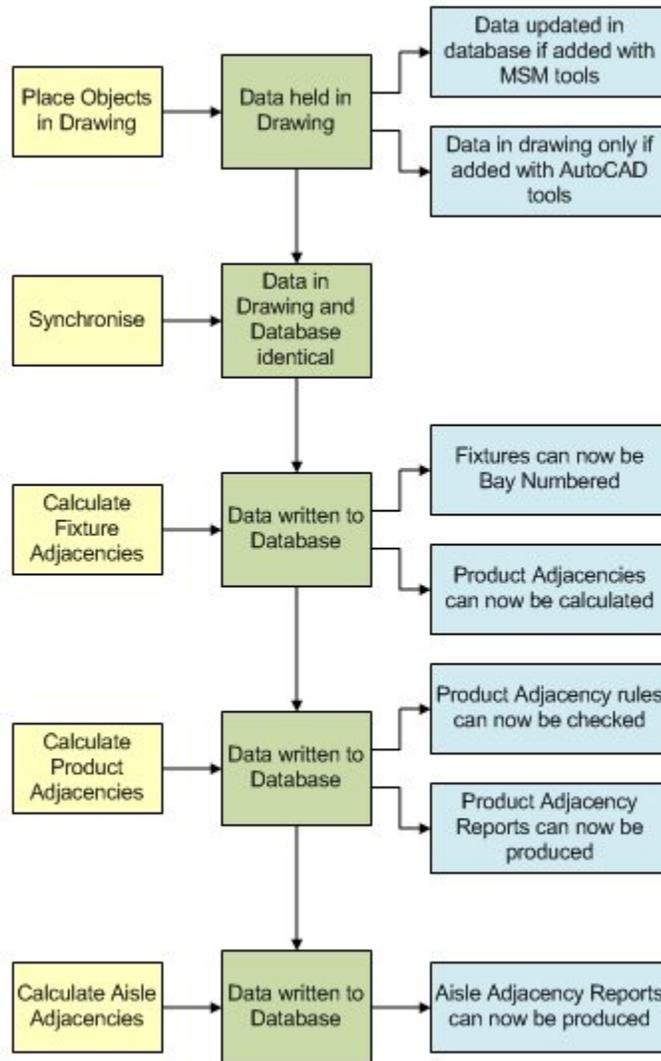
Option	Description	Planner	Merch
Product Colors	The colors products for merchandiser at different levels in the hierarchy can be configured	X	X
Publish, Effective and Expiry Dates	These specify the dates an item of merchandise is available between and what date information will be published to users.	X	X
Temperature Range	Compared to the temperature range on the parent fixture or shelf to determine if the display style can be placed.		X
Style	Compared to the style on the parent fixture or shelf to determine if the display style can be placed.		X
Product Dimensions	The size of a specific display style - this will determine the number of items that can be inserted on a fixture or shelf.		X
Peg Holes	Specifies the datum point by which a display style hangs from a product or rail.		X
Images	Associates an image with a display style that can subsequently be displayed in a floor plan.		X

About Synchronization and Adjacencies

When fixtures, fittings and gondolas are placed on the drawing using MSM tools, they are also sent as data to the Macro Space Management central database. If fixtures in the drawing are modified with AutoCAD tools, this will change the drawing, but may not necessarily update the central database. The process of making sure the AutoCAD drawing and the Macro Space Management Central database hold the same information is known as synchronization. There are three forms of synchronization:

- **Manual Synchronization**
Manual synchronization is synchronization carried out by the user by invoking the functionality from the menu bar or Retail toolbar.
- **Dynamic Synchronization**
Dynamic Synchronization can be turned on or off by the user. If turned on, many of the changes made by AutoCAD tools are simultaneously written back to the database.
- **Auto-Synchronization**
Auto-Synchronization is used when changes have been made to the database by work carried out in the Merchandiser module, in In-Store Space Collaboration or by Batch tools. If active, when a floor plan is subsequently opened in Planner, the required updates will be made to the floor plan. Dependent on settings; confirmation may be required from the user first.

Whether a user will need to manually perform synchronization before calculating adjacencies will depend on the synchronization operations chosen. The example below shows the process for when dynamic and auto-synchronization are off.



After the drawing has been synchronized with the central database, the Adjacency calculations can be run.

Fixture Adjacency calculations establish the physical relationship of one fixture to another.

These relationships are used for both bay numbering and as the basis for subsequent Product Adjacency calculations.

Product Adjacency calculations establish the relationship of one type of product to another. They cannot be run until the Fixture Adjacencies have been calculated.

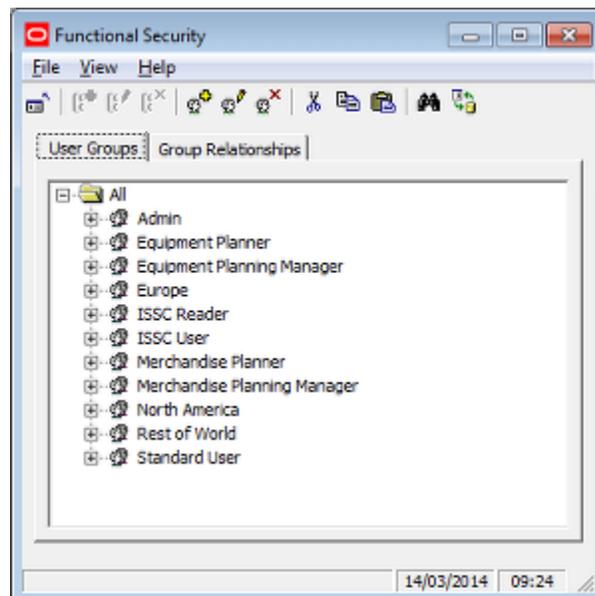
Logging In

How Passwords and Privileges are Configured

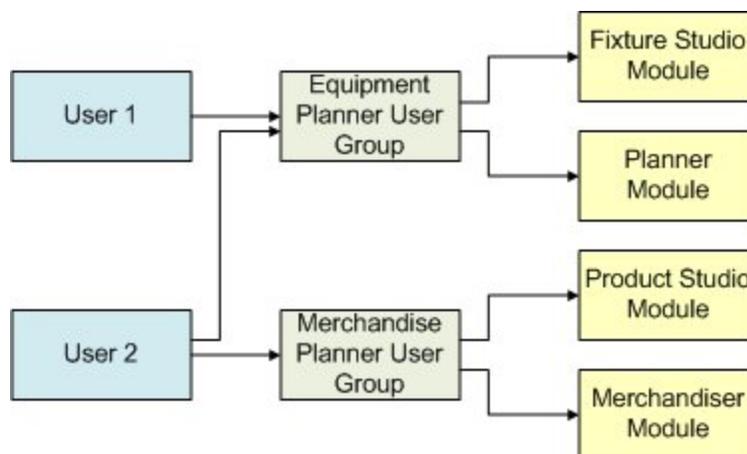
Passwords and privileges are configured in Macro Space Management's Administration module.

Note: Access to the Administration Module is normally restricted to a limited number of users. This is because the Administration Module can be used to set a wide variety of parameters affecting how Macro Space Planning operates.

Access rights to the Macro Space Management modules are set using the Functional Security option.



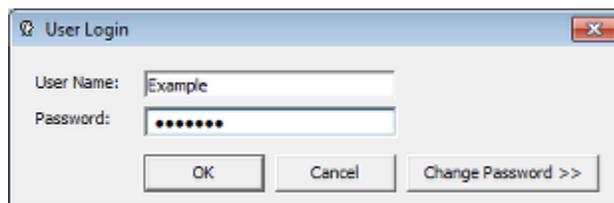
Users are assigned to User Groups in the User Groups Tab. Which modules a User Group can access is specified in the Group Relationships tab. A user's privileges thus depend on what user groups they are assigned to.



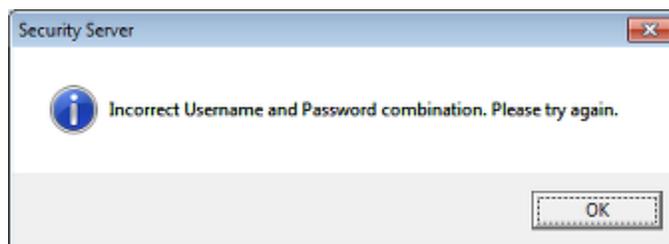
In the above example, User 1 is only a member of the Equipment Planner user group. Accordingly, their access is restricted to the Fixture Studio and Planner modules. User 2 is a member of the Equipment Planner and Merchandiser Planner user groups. They have wider access and can use the Fixture Studio, Planner, Product Studio and Merchandiser modules.

Logging in to Macro Space Management Modules

When a user first attempts to access a Macro Space Management module, the **Log In dialog box** will appear.



This requires the user to enter a User Name and Password. If these are correct, the user will be able to access the desired module. After the initial log in, information will be held in **Security Server**. Users will therefore be able to access all other Macro Space Management modules they have permissions for without the need to log in again. If the user enters an incorrect user name or password, a warning will result.

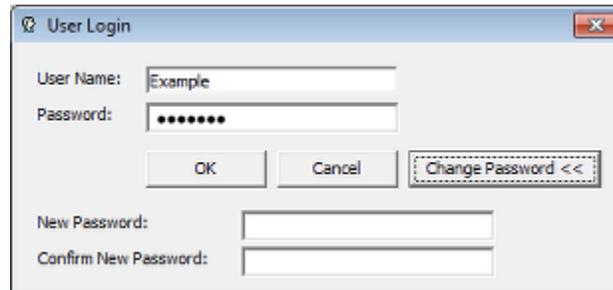


If the user attempts to log into a module for which they do not have permissions for, a warning will appear and the log in attempt will be terminated.

Note: The permissions for which modules can be accessed are configured in the Administration module.

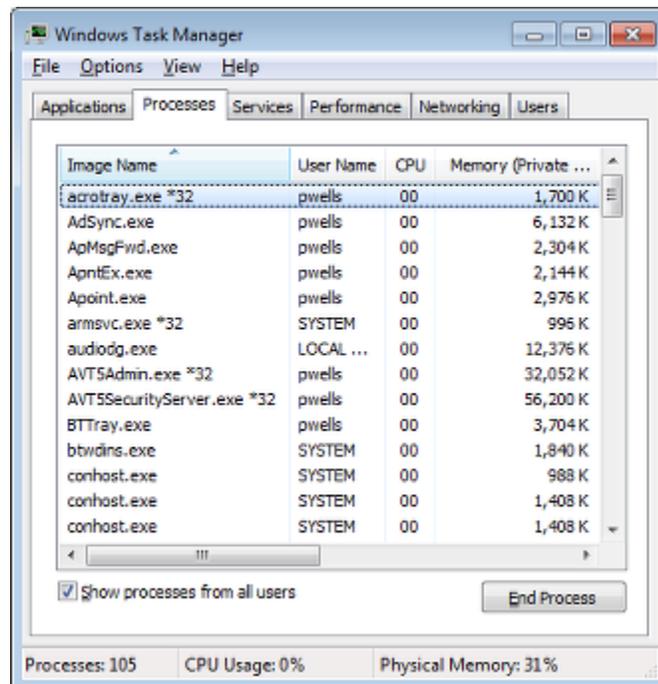
Password Changes

Macro Space Management can be configured to require password changes at specified intervals. If one of these intervals has been exceeded, the user will be asked to change their password the next time they log in. This can be done by means of the **Change Password >>>** option on the **Log In dialog box**. This will reveal another part of the dialog box where the changed password can be entered and confirmed.

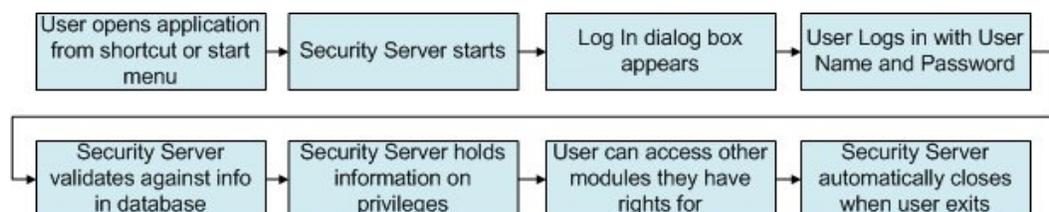


Security Server

Security Server is a Macro Space Management process that runs in the background and is normally not visible to users. When running, it can be seen in the Processes tab of Windows Task Manager as the **AVT5SecurityServer.exe *32** process.



How Security Server operates is shown in the following flowchart.



1. The user opens a Macro Space Management module from a shortcut or the Windows start menu.
2. Security server starts but remains in the background.
3. The Log In dialog box appears.
4. The user types their user name and password into the Log In dialog box.
5. Security Server validates the user name and password against the information held in the database. If they are correct and the user has sufficient privileges, the Macro Space Management module opens.
6. Security Server holds information on what other privileges the user has in Macro Space Management.
7. If the user attempts to access other modules, Security Server will check the information it holds and allow or deny access as required. This means that a user only has to log into Macro Space Management once per session.
8. When the user exits the last Macro Space Management module, Security Server also closes.

Security Server and Application Errors

On occasion a Macro Space Management module might encounter a significant error and automatically close. Because the closure was not user initiated, Security Server does not close but remains open in the background. If the module that unexpectedly closed is reopened, Security Server will contain information incompatible with the restart and further application errors will result.

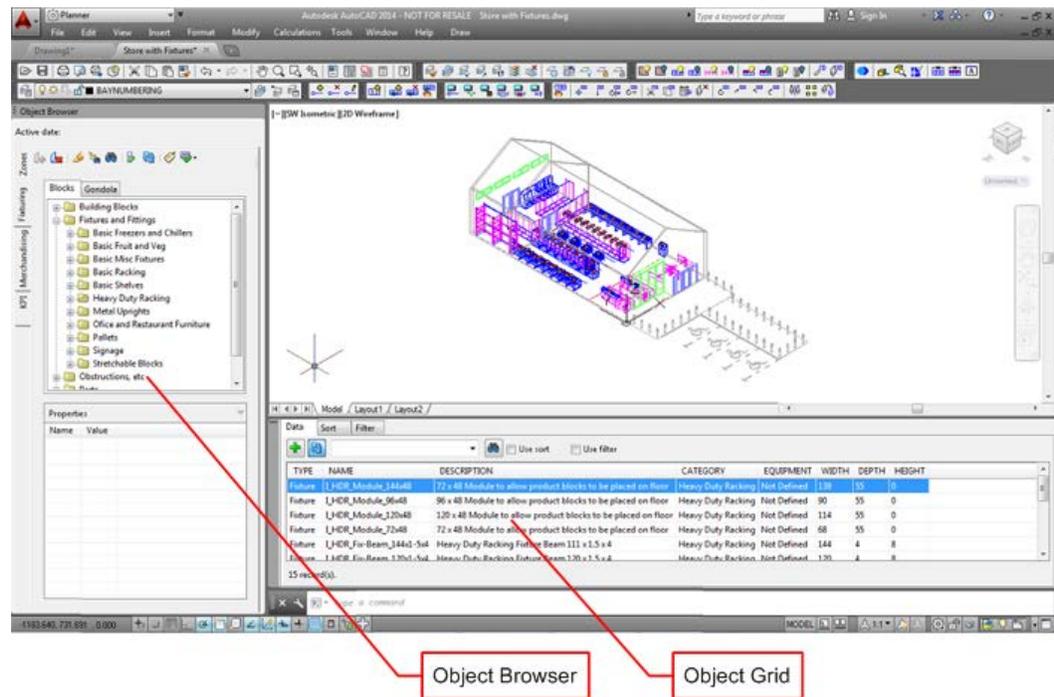
In the event of a Macro Space Management module failing unexpectedly, carry out the following actions:

1. Save the information in any other Macro Space Management modules that are open and close those modules.
2. Open Windows Task Manager, select the Processes tab, highlight the AVT5SecurityServer.exe *32 process and click End Task.
3. When Security Server has closed, the required Macro Space Management modules can be restarted.

Object Browser

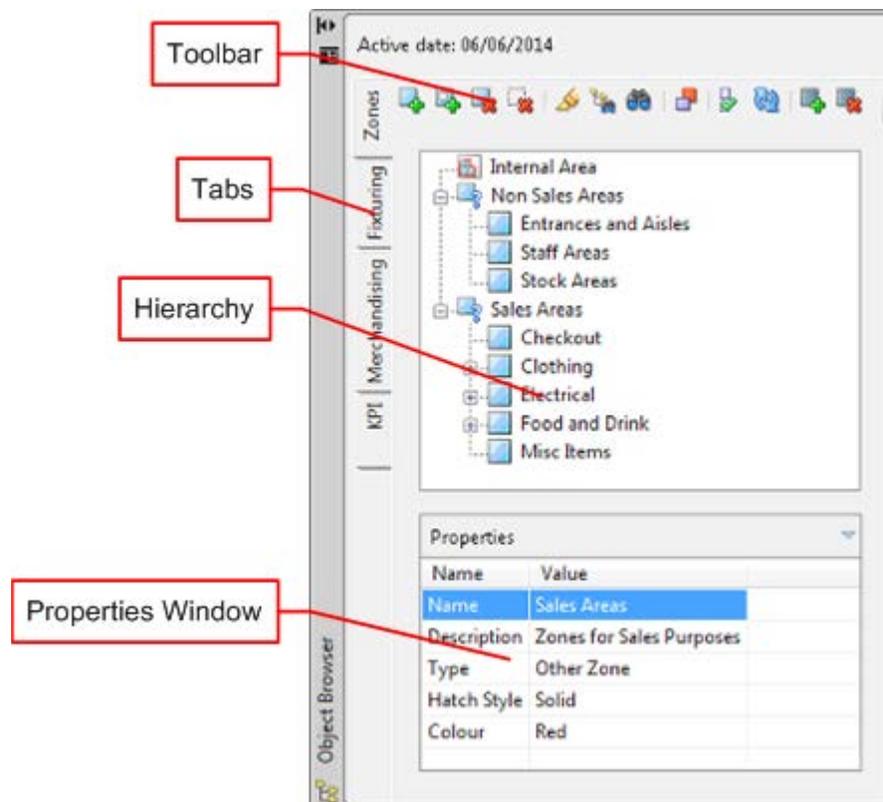
About the Object Browser

The **Object Browser** offers Macro Space Management users a single point of access to the Zone, Fixture, Product, and Planogram libraries and the Key Performance Indicators (KPI's). It is found in both the Planner and Merchandiser environments but is slightly different in each application. This section of help is specific to the Object Browser in Merchandiser. The Object Browser can also be used in conjunction with the Object Grid - see the section on the Object Grid for more information.



The **Object Browser** can be turned off by clicking on the 'x' in the upper right corner. It can be opened by selecting the Show Object Browser option on the View drop down menu.

The **Object Browser** has a series of parts. These are described below.



The **Active Date** is used as a filter to ensure that equipment and merchandise that are placed in the floor plan are going to be physically available at the time the floor plan is anticipated going into service.

Tabs allow the Object Browser to be switched from one function to another.

At present, the Object Browser can be used to added, edit, and delete Zones, Fixtures, and Merchandise. It can also be used to display and hide KPIs.

Each tab has the same general components.

A **Toolbar** at the top allows various functions to be accessed. These typically allow adding, editing, and deleting of the required objects, together with searching, filtering and refreshing options.

The Fixturing and Merchandising Tabs have **Sub-Tabs**.

In Fixturing, the user can click on one or other button to select Fixturing or Gondola operations.

In Merchandising, the user can use the buttons to switch between planograms and products.

Each tab has a series of Information Windows. These vary from tab to tab but can include:

- Hierarchical trees: These give information on what objects can be added, edited, or deleted in the drawing. In the Zones Tab for example, the hierarchical tree allows the user to select different types of zones.
- The Properties window: This gives details of the selected object.
- The Summary window: This gives totals of types of objects placed in the drawing.
- The Preview window: This shows a low resolution image of the selected object.
- In the fixturing tab for example, this would be an image of the selected fixture.

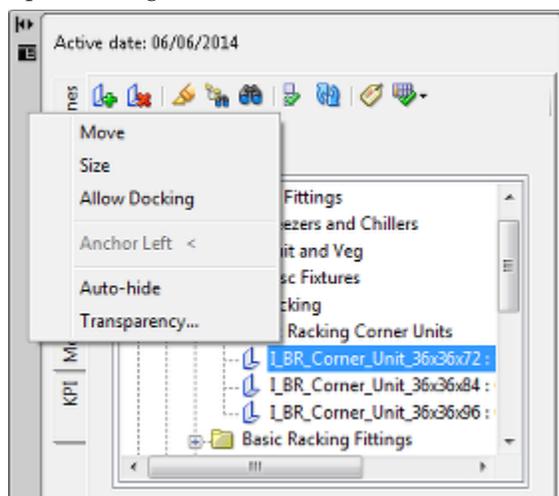
The Information windows can be opened or closed by clicking on the **Splitter Bars**.

The Refresh Option

All toolbars have a Refresh option. Clicking Refresh will update the application with the latest information from the database. This means that if information has been updated in another module (for example the Administration module) since the application was opened Planner (or Merchandiser) will be updated to match. For example, if the zone definitions have been updated in the Administration Module after Planner was opened, clicking Refresh will bring the updated information into Planner.

Repositioning the Object Browser

Right clicking on the left border of the Object Browser brings up a number of options for repositioning it.



For example unchecking the **Allow Docking** option allows the Object Browser to be floated and moved to any desired position

The Active Date

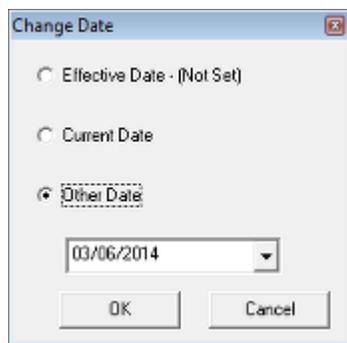
The Active Date can be seen at the top of the Object Browser. It can be used as a filter to ensure that equipment and merchandise being placed in the floor plan will be physically available at the time the floor plan is anticipated as going into service. This is done by comparing the Effective Dates for equipment and merchandise with the Active Date. Any equipment or merchandise with an Effective Date (the date at which it comes into service) after the Active Date for the floor plan will not be available for placement as they will not be physically available when the floor plan is implemented.

Setting the Active Date

The Active Date can be set in one of two ways: from the Object Browser or in Store Manager.

Setting from the Object Browser

To set from the Object Browser, double click on the Active Date. This will bring up the Active Date dialog box.

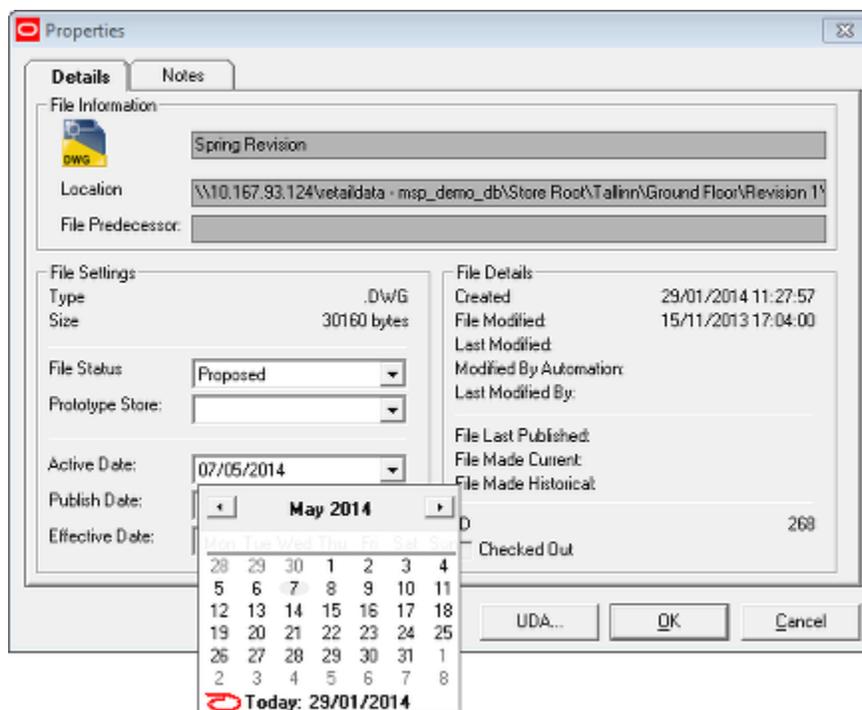


The Active Date can then be set by means of the radio button:

- If an Effective Date has been set for the Floor Plan in Store Manager, selecting that radio button will import that date.
- Selecting the Current Date radio button will set the data to Today's date.
- Selecting the Other Date radio button allows the user to select a date of their choice.

Setting in Store Manager

If setting in Store Manager, navigate to the pertinent floor plan in the list of files, right click and select Properties. This will bring up the File Properties dialog box. The Active Date can then be set using the calendar control.



The Zones Tab

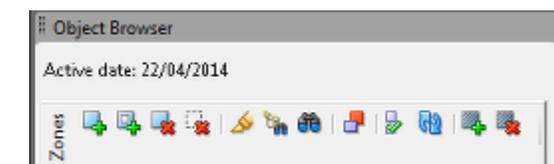
Overview of the Zones Tab

Macro Space Management uses Zones to assign space to different departments and non-sales areas. The zone types available to your business are customized within the Administration Module. Zones can also be used to help user's select fixtures or merchandise.

The Zones tab is divided into three sections:

- The Toolbar – provides controls to add, modify, and delete zones from a store plan.
- The Zones Window – shows a hierarchy of a available zones.
- The Properties Window – when a Zone is selected from the hierarchy, its properties are visible in this window.

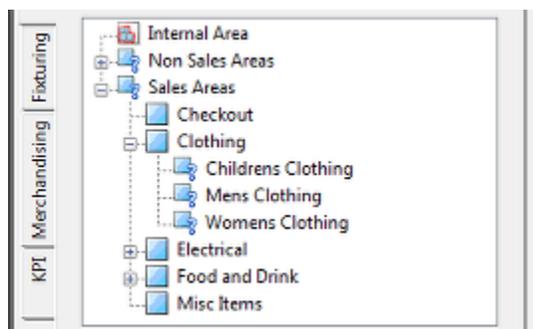
Toolbar



Icon	Description
	Add Zone
	Add Hole
	Delete all Zones of that type
	Delete selected Zone or Hole Boundary
	Highlight Zone in Floor Plan
	Highlight Selected Zone in Tree
	Find Zone in Hierarchy
	Detect Clashes
	Options
	Refresh
	Add Hatch
	Remove Hatch

The Hierarchy Window

The hierarchy window displays the zone hierarchy. This hierarchy is defined in the Administration module and shows all the zones that can be added to a store plan.



The hierarchy can be expanded using the plus control next to each item on the hierarchy. It can also be collapsed by using the minus control next to each item. The type of zone in the hierarchy is indicated by the icon.

Icon	Description
	Internal Area Zone
	Department Zone
	Other Zone Type

The Properties Window

The Properties window displays information for the zone that has been selected in the zone hierarchy. The content of this window is by modifying the Custom SQL in the database. This allows an implementer to specify the information that appears in the window.

Note: See the *Oracle Retail Macro Space Planning Data Model* for information on Custom SQL.



Note: See the *Oracle Retail Macro Space Planning Data Model* for information on Custom SQL.

The Fixturing Tab

Overview of the Fixturing Tab

The Fixturing tab allows users to add fixtures, fittings, gondolas and other equipment to the store plan. It is divided in to five parts as follows:

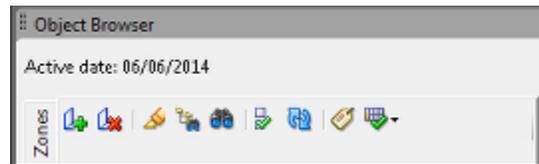
- The toolbar – provides controls that allow users to add, edit, and delete fixtures and gondolas
- The Fixtures window – shows a hierarchy of available blocks and gondolas
- The Properties window – after selecting a block from the hierarchy, this window shows the details for the selected block. The content of this window is customizable.

A fourth option - the Fixtures Summary Window – shows details of the zones based on the currently active floor plan. This is now called from the **View** menu but can be docked in the Object Browser if required.

The **Fixturing Tab Toolbar** in the Object Browser enables the user to control all aspects of adding, editing and deleting fixtures and gondolas within the Planner and Merchandiser environments.

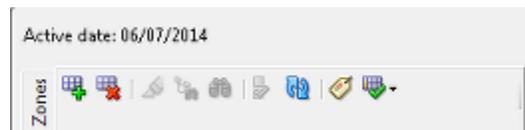
Clicking on the Switch Buttons will determine whether the Fixturing or Gondola options are active.

Fixturing Toolbar



Icon	Option	Description
	Add Fixture	Add a fixture to a floor plan. This will cause the Add Fixture dialog box to appear.
	Delete Fixture	Deletes any selected fixtures in the currently active floor plan.
	Highlight Fixture in Floor Plan	If selected, selecting a fixture in the Object Browser Fixture Hierarchy will cause the pertinent fixture to be highlighted in the floor plan. The exact nature of the highlighting will depend on selections made in the Fixturing Tab of the Configuration Module.
	Highlight selected item in tree	If selected, selecting a fixture in the floor plan will cause the pertinent fixture to be highlighted in the Object Browser Fixture Hierarchy.
	Find	This option brings up the Find dialog box, allowing users to search for objects in the Fixture Hierarchy.
	Options	This option brings up the Fixturing Tab of the Configuration module, allowing users to customize their settings.
	Refresh	This option refreshes the Object Browser with the latest information on fixtures and gondolas in the database.
	Show Attributes	This option shows the fixture attributes for any selected fixtures. Fixture attributes are customizable items of information assigned to specific fixtures.
	Promotional Fixtures	This option allows the user to assign or remove the Promotional Attribute and to highlight fixtures with the promotional attribute.

Gondola Toolbar



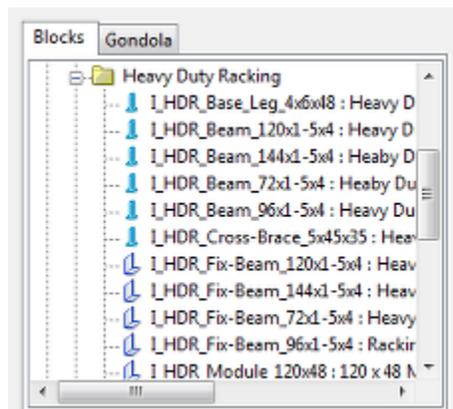
Icon	Option	Description
	Add Fixture	This option is grayed out and unavailable in Merchandiser.
	Delete Fixture	This option is grayed out and unavailable on the Gondola toolbar.
	Highlight Fixture in Floor Plan	This option is grayed out and unavailable on the Gondola toolbar.
	Highlight selected item in tree	This option is grayed out and unavailable on the Gondola toolbar.

Icon	Option	Description
	Find	This option is grayed out and unavailable on the Gondola toolbar.
	Options	This option is grayed out and unavailable on the Gondola toolbar.
	Refresh	This option refreshes the Object Browser with the latest information on fixtures and gondolas in the database.
	Show Attributes	This option shows the fixture attributes for any selected fixtures. Fixture attributes are customizable items of information assigned to specific fixtures.
	Promotional Fixtures	This option allows the user to assign or remove the Promotional Attribute and to highlight fixtures with the promotional attribute. This option has no effect in the merchandiser module.

The Hierarchy Window

The Hierarchy window displays both the block and the gondola hierarchies. To toggle between the hierarchies use the Blocks or Gondolas buttons respectively. The hierarchies are defined in the Fixture Studio environment and show all the fixtures and gondolas that can be added to a store plan.

The hierarchy can be expanded using the plus control next to each item on the hierarchy. It can also be collapsed by using the minus control next to each item. An item in the hierarchy can be highlighted by clicking on the name of the block or gondola.



The icons preceding the fixture name identify the type of equipment - equipment of similar types will have the same icon.

The Properties Window

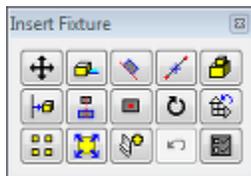
The Properties window displays information for the block that has been selected in the blocks hierarchy. The content of this window is by modifying the Custom SQL in the database. This allows an implementer to specify the information that appears in the window.

Note: See the *Oracle Retail Macro Space Planning Data Model* for information on Custom SQL.

Properties	
Name	Value
Type	Fitting
Name	I_HDR_Beam_96x1-5x4
Description	Heavy Duty Racking Beam 96 x 1.5 x
Category	Heavy Duty Racking
Equipment Type	Not Defined
Level	Undefined
Insertion	2-ML
Size	96x4x8
Manufacturer	-
Material	Metallic Blue
Layer Alias	FITTINGS-FITTING

Placing Fixtures and Gondolas

To add a block to the store plan, highlight the required block in the hierarchy. You can then either press the Add Fixture button on the tool bar, or drag and drop the fixture to the store plan drawing. When a block is added the Insert fixture dialog opens.

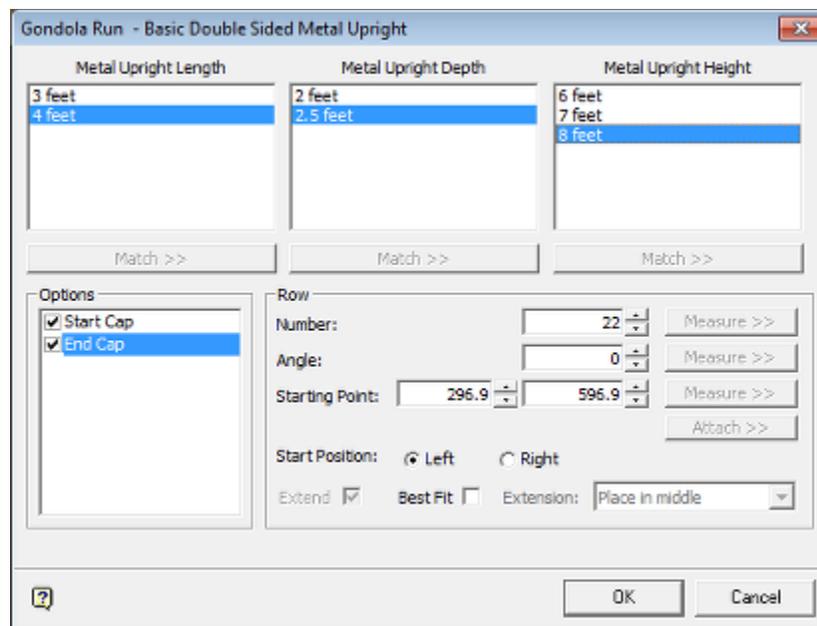


These controls allow blocks to be positioned accurately in the store plan. Pressing the left mouse button places the block in an initial position. Pressing the right mouse button or the <Esc> key finishes placing the block.

Placing Gondolas

To add a gondola to the store plan, highlight the required gondola in the hierarchy. Press the Add Gondola button on the toolbar or drag and drop the gondola to the store plan drawing.

The user is prompted to select a start point for the gondola. Pressing the left mouse button opens the Gondola Run dialog box.



The Gondola Run dialog box allows the user to select the dimensions of the blocks to use in the gondola. It also allows the number of bays or length of the gondola to be set. Once the desired options have been set, pressing the OK button closes the dialog and places all the blocks required for the gondola run in to the store plan.

The Merchandising Tab

The **Merchandising tab** allows users to add product placeholders (products), and planogram placeholders (planograms) to the store plan. A product is any category, sub-category, or SKU that is included in the product hierarchy, i.e. any level in the hierarchy. Planograms are also organized in to a hierarchy of planogram groups. However, you can only place planograms in to the store plan. Planogram groups cannot be placed. Placeholders are markers that can be placed on to fixtures to indicate the product category, sub-category or planogram that will be used.

The Merchandising tab is divided in to 5 parts:

- The toolbar – provides controls that allow products and planograms to be added, edited, and deleted.
- The Merchandise window – shows a hierarchy of available products and planograms.
- The Properties window – shows details for the product that has been selected in the product hierarchy. Similarly, it will show details of a planogram that has been selected in the planogram hierarchy. The content of this window is customizable.
- The Summary window – shows details of products and planograms placed based on the active store plan. The content of this window is customizable.
- The Preview window – shows a sample picture of product display styles selected in the product hierarchy

Note: Product display styles (which show the physical form of the SKU) are only available in Merchandiser.

The **Merchandising Tab Toolbar** in the Object Browser enables the user to control all aspects of adding, editing and deleting products and planograms within the Planner and Merchandiser environments.

Clicking on the Switch Buttons will determine whether the Product or Planogram options are active.

Products Toolbar



Icon	Option	Description
	Add Product	This option is grayed out. Products can be added by dragging and dropping.
	Delete Product	This option is grayed out and unavailable in Merchandiser. Products can be directly deleted in the floor plan.
	Highlight in Store	This option does not operate in Merchandiser.
	Highlight in Tree	If selected, selecting a product in the floor plan will cause the pertinent product to be highlighted in the Object Browser Fixture Hierarchy
	Find	This option brings up the Find dialog box, allowing users to search for objects in the Fixture Hierarchy.
	Options	This option brings up the Merchandising Tab of the Configuration module, allowing users to customize their settings.
	Refresh	This option refreshes the Object Browser with the latest information on products and planograms in the database.

Planogram Toolbar



Icon	Option	Description
	Add Planogram	This option is grayed out. Planograms can be added by dragging and dropping.
	Delete Planogram	This option is grayed out and unavailable in Merchandiser. Planograms can be directly deleted in the floor plan.
	Reverse Planogram Placement Direction	This option is current grayed out.

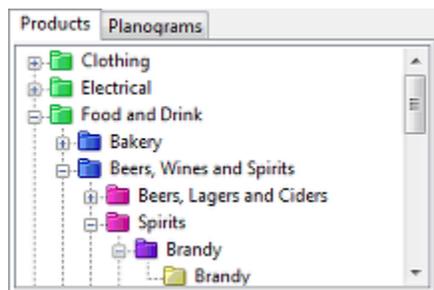
Icon	Option	Description
	Highlight in Store	This option does not operate in Merchandiser.
	Highlight in Tree	If selected, selecting a planogram in the floor plan will cause the pertinent planogram be highlighted in the Object Browser Fixture Hierarchy.
	Find	This option brings up the Find dialog box, allowing users to search for objects in the Fixture Hierarchy.
	Properties	This option brings up the Merchandising Tab of the Configuration module, allowing users to customize their settings.
	Refresh	This option refreshes the Object Browser with the latest information on products and planograms in the database.

The Hierarchy Window

The hierarchy window displays both the product and the planogram hierarchies. To toggle between the hierarchies use the Products or Planograms buttons respectively. The Product hierarchy is defined in the Product Studio module and shows all the products that can be added to a store plan. The Planogram hierarchy can be configured in Merchandiser and shows all the planograms that can be added to a store plan. The hierarchy can be expanded using the plus control next to each item on the hierarchy. It can also collapsed by using the minus control next to each item.

Product Hierarchy

The product hierarchy is show down as far as SKU level. Products at Display Style level are not shown in Planner because they can neither be placed nor seen.



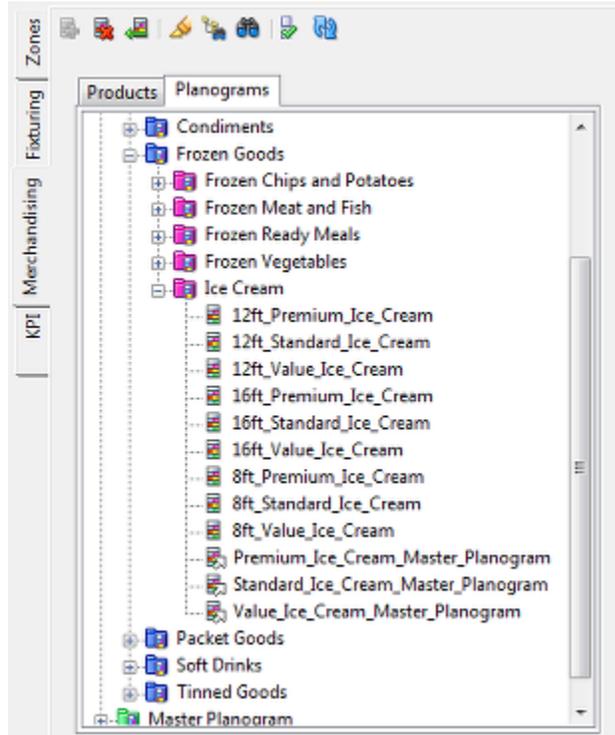
The different colored folders show the different levels in the hierarchy.

Icon	Description
	Product Company
	Product Group
	Product Division
	Product Department
	Product Class
	Product Sub-Class
	Product Item

Icon	Description
	Product SKU

Planogram Hierarchy

Planograms are organized in a hierarchy of planogram groups, with planograms associated with a specific group.



The different colored folders show the different levels in the hierarchy.

Icon	Description
	Planogram Company
	Planogram Group
	Product Division
	Product Department
	Planogram Class
	Planogram Sub-Class
	Planogram

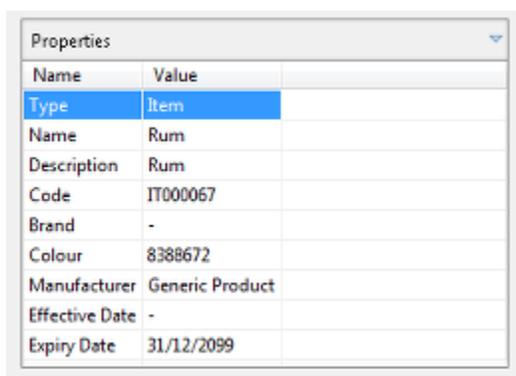
If Master Planograms have been implemented, there will be two different icons to indicate the type of planogram.

Icon	Description
	Individual Planogram
	Master Planogram

The Properties Window

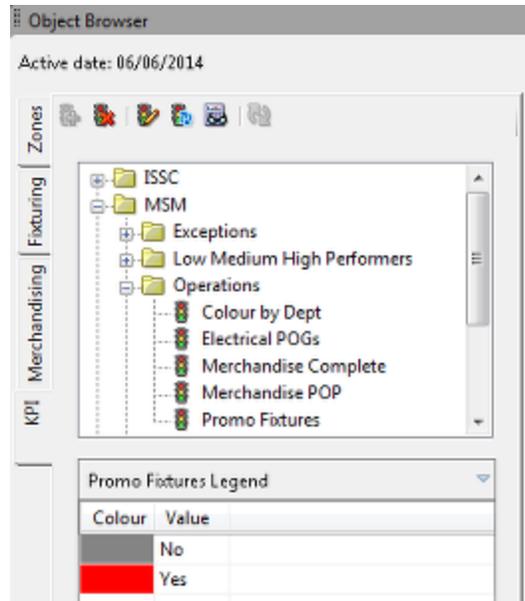
The Properties window displays information for the merchandise that has been selected in the product or planogram hierarchy. The content of this window is by modifying the Custom SQL in the database. This allows an implementer to specify the information that appears in the window.

Note: See the Oracle Retail Macro Space Planning Data Model for information on Custom SQL.



The KPI Tab

The **KPI's tab** of the Object Browser allows users to see performance of a store plan at a glance. The available KPI's are customizable and more can be added by users with access to the Administration Module. The KPI tab is divided into three parts:



- The toolbar – provides controls that allow KPI's to be run and modified.
 - The KPI Hierarchy window – shows a tree of available KPI's.
 - The Legend window – shows the color bands associated with the active KPI.
- When the tab is first opened the Layers and Legend windows are blank. These windows are populated when a KPI is run.

Note: Some KPIs require information such as financial data to be imported into the Macro Space Planning database before they will work correctly.

The **KPI Tab Toolbars** in the Object Browser are used to Add and Edit KPI's. They are also used to Edit and Delete the list of KPI's selected for display in the ViewPorts

Toolbar



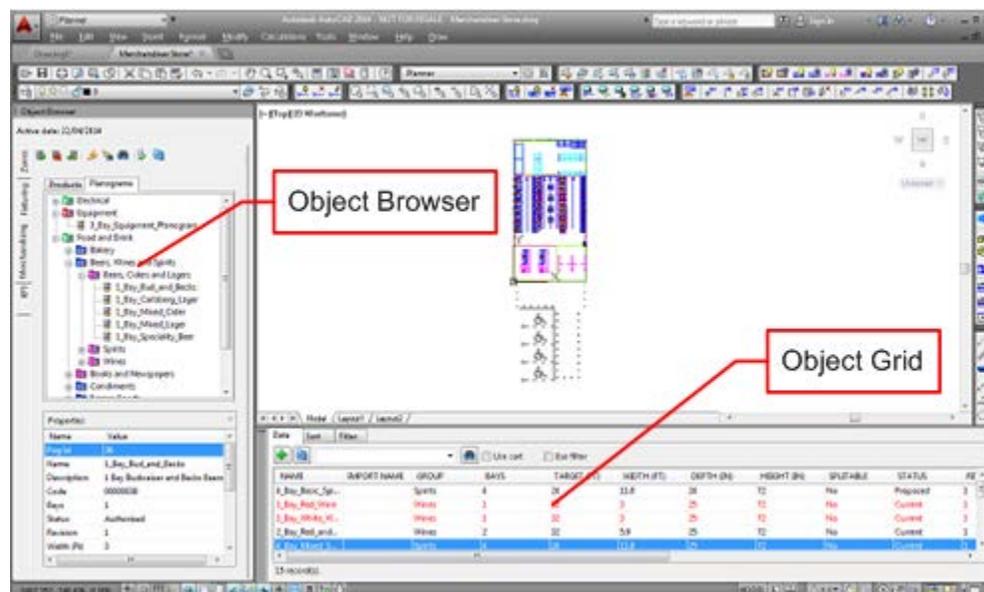
Icon	Description	Purpose
	Add KPI	Apply the currently selected KPI in the hierarchy to the currently active floor plan.
	Remove KPI	Clear the current KPI from the floor plan.
	Edit KPI	Edit the parameters for the currently active KPI.
	Refresh KPI	Refresh the current KPI
	View Data	View the data being used in the currently active KPI.
	Refresh All	Refresh the Object Browser with the latest information from the database.

See the section on KPIs for more information.

Object Grid

About the Object Grid

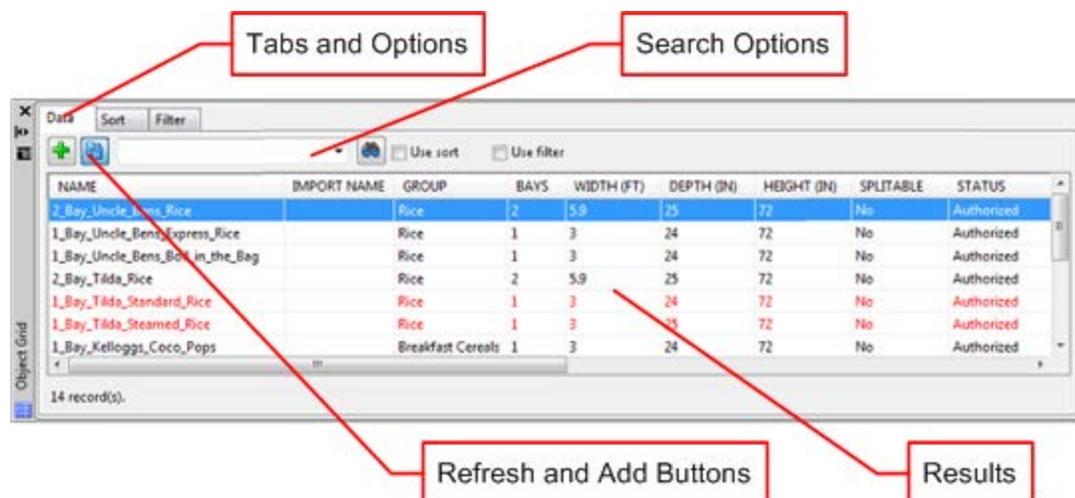
The **Object Grid** provides an alternative to selecting lower level objects in the Object Browser, including Zones, Fixtures, Products and Planograms.



It is used in conjunction with the Object Browser and is available in both the Planner and the Merchandiser environments.

Note: The OBJECT_GRID_DATA_LIMIT system variable is used to set the maximum number of results that will be returned in the Object Grid. The optimum value for this system variable will vary from system to system depending on the performance of that system. The value set will have to be a compromise between execution speed of the query and whether the result set returned is sufficient for the user's needs.

The Object Grid has the following major parts:



Object Grid Options

Tabs and Options

There are three tabs:

- The Data Tab contains a list of all returned results up to the limit set in the OBJECT_GRID_DATA_LIMIT system variable. Results are also constrained by the filters in use.
- The Sort Tab allows the user to select the fields the data will be ordered by and whether the data will be in ascending or descending order.
- The Filter Tab allows the raw data sent to the Object Grid to be filtered to a smaller sub-set before it is displayed in the Object Grid.

For the settings in the filter and sort tabs to be active the appropriate check boxes (just to the right of the tabs) must be selected.

Search Options

Once a result set has been returned, it is possible to search for any value in the results by entering that value into the text box and clicking the Find icon to the right. The results can be stepped through by repeatedly clicking the find icon.

Refresh and Add Buttons

For data to be added to the Object Grid, the refresh button must be toggled on (depressed). Clicking on a node in the appropriate hierarchy will return the results associated with that node. Highlighting a result and clicking the Add button will result in that object being added to the floor plan in Planner. Objects must be 'dragged and dropped' in order to add them to a Merchandiser floor plan.

Determining the Data that Appears in the Object Grid

The data that appears in the Object Grid is determined by the Custom SQL in the AVTTB_CUSTOM_SQL table. System DBAs with access to the database can modify this Custom SQL to change the information that appears.

Note: If the custom SQL includes a column named RGB, then the row will be colored using the value in the column. This will allow certain rows to be highlighted, which could be used indicate high performing products or planograms, or simply indicate which products have already been placed.

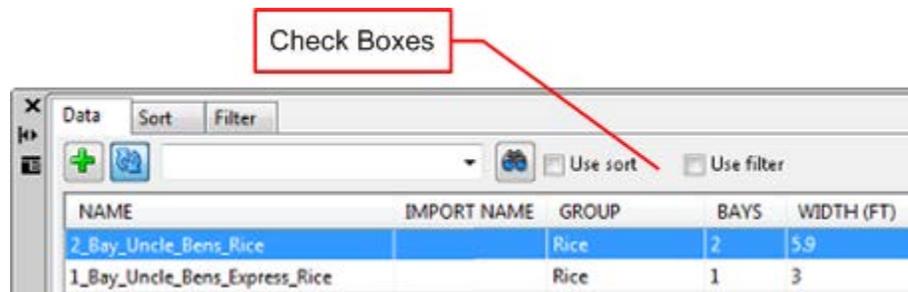
Turning Object Grid Display On or Off

The **Object Grid Display** can be turned off by clicking the close button in the upper right corner. It can be turned back on by using the Object Grid option on the View pull down menu.

Note: The Object Grid can be "dragged and dropped" to different sides of the screen if the Allow Docking option is selected from the right click menu. If Allow Docking is not on, the Object Grid can be positioned at any point on the screen.

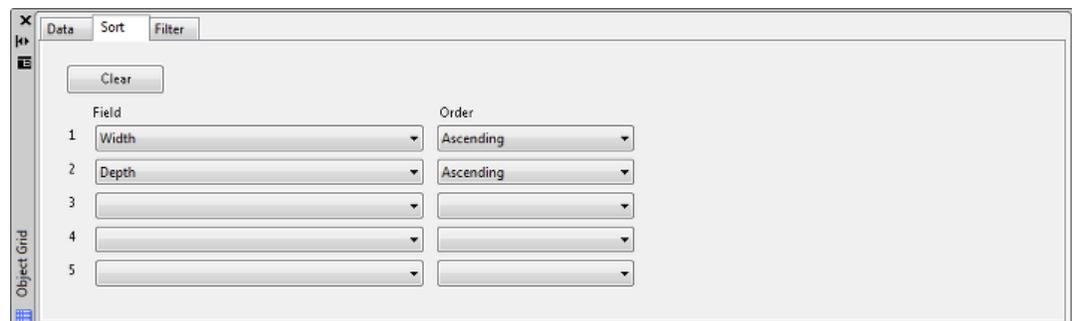
The Object Grid Sort and Filtering Tabs

The **Sort tab** and **Filter tab** allow data to be sorted and filtered accordingly. Settings can be made in either tab but they will not become active unless the pertinent check boxes have been selected in the **Data tab**.



The Sort Tab

The **Sort tab** allows the user to determine which columns will be used to sort the data and the priority with which they will be used. Settings will not take effect unless the **Use Sort** check box in the **Data tab** is ticked.



The selected fields determine both the fields that will be used for sorting. The sequence they are selected in specifies the priority that will be used. The available fields for sorting will match the fields in the Data tab. The order specifies whether data will be shown ascending (A -->Z) or descending (Z-->A).

Note: Data can also be sorted by clicking on the column headers in the Data tab.

Clicking the **Clear** button will remove all settings in the tab.

The Filter Tab

The **Filter Tab** can be used to filter the full list of results down to a more restricted set pertinent to the fixtures being merchandised. Settings will not take effect unless the **Use Filter** check box in the **Data tab** is ticked.

	Field	Operator	Value	Combination
1	Width	>=	144	AND
2	Height	=	72	
3				
4				
5				

- The Field specifies the field that is to be used to filter the data. The sequence they are selected in specifies the priority that will be used.
- The Operator specifies how the value will be used. For example the = sign requires and exact match, the LIKE option uses implied wild cards to match all or part of the value being searched for.
- The Value is the numeric or text value that is to be matched.
- The Combination can be set to AND or OR. If set to AND, all conditions must be met. If set to OR, multiple conditions can be met.

Note: The OR condition applies to all fields set. If four AND fields and one OR field is specified, the OR field will return a set of results independent of the AND fields.

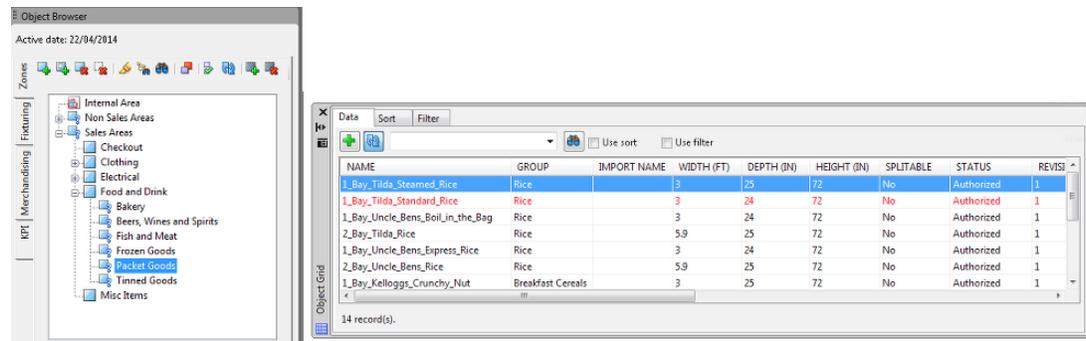
Clicking the **Clear** button will remove all settings in the tab.

Using the Object Grid

The **Object Grid** will behave in different ways depending on which tab of the **Object Browser** is selected. The results returned can be customized by modifying the information in the AVTTB_CUSTOM_SQL table. (This table is only accessible by Administrators with access rights to the database).

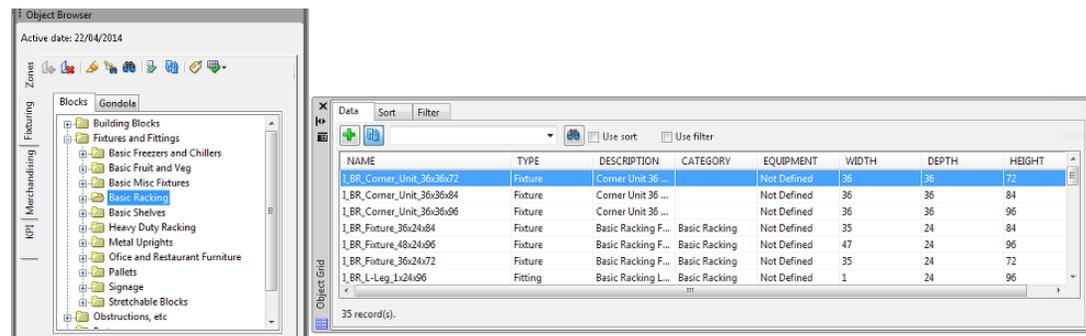
Zones Tab

The Zones Tab gives the opportunity to return lists of products or planograms associated with specific zones. This can serve as a pre-filtering process. In the example below, highlighting the Packet Goods zone in the Object Browser (with the Refresh button toggled on) in the Object Grid has returned all planograms associated with that zone. The Custom SQL for the Object Browser has been configured to show placed planograms in red and non-placed planograms in black.



Fixturing Tab

The Fixturing Tab allows users to select fixtures based on their parent fixture group in the Object Browser. In the example below, the Basic Racking Shelving Fixture Group has been selected in the Object Browser. With the Refresh button on the Object Grid toggled on, this returns all shelves associated with that fixture group (and any child fixture groups).



Note: Gondolas cannot be selected using the Object Grid.

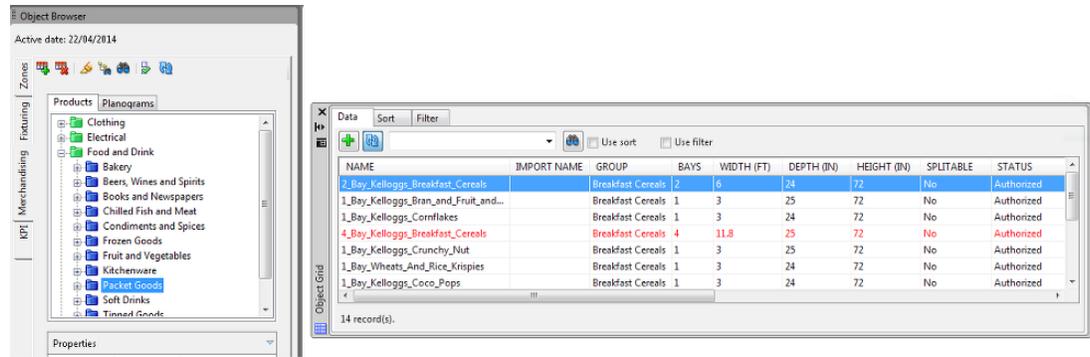
Merchandising Tab

The Merchandising Tab allows users to select products or planograms based on their parent group in the Object Browser. This functionality operates in both the floor plan and the planogram design window - although it operates differently in both. There are two custom SQL statements powering the Object Grid - one for floor plans and one for planogram design. Each piece of Custom SQL can return results for either products or planograms. Many retail chains configure the Custom SQL to return planograms while in the floor plan and products while in the planogram design window. This section of help will discuss that situation.

Returning Planograms for Floor Plans

The general way of setting up the Custom SQL for floor plans is to get it to return results of planograms. This will happen when the appropriate level in is clicked in either the product or planogram hierarchies. Clicking on a group in the planogram hierarchy will return all planograms that are associated with that group or its children. Clicking on a Department, Class or Sub-Class in the product hierarchy will return all planograms associated with that type of product. Clicking at other levels in the product hierarchy (for example Item) will result in an error message.

As with other results in the Object Grid, the precise results returned can be configured by Administrators using the Custom SQL.



Key Performance Indicators

The Object Grid cannot carry out any actions associated with KPIs.

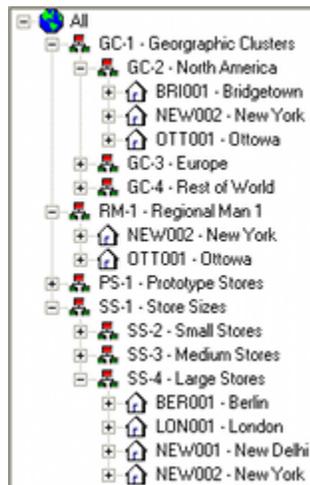
Store Manager Business Processes

Store Manager Business Processes

Store Manager enables Equipment Layout Managers, Merchandise Managers and Store Planners to control the business process flows relating to planning and maintaining the 'bricks and mortar' stores within a retail organization. It can perform the following general functions:

Grouping Together Stores of Common Purpose in the Hierarchy

Stores can be assigned to multiple clusters in the Store Hierarchy. This enables stores with similar characteristics to be grouped together for reporting of control purposes. For example the New York Store could be a member of The North America, Large store and Regional Manager 1 clusters. This enables groups of stores to be selected - for example all stores in North America, or all stores of size over 50,000 square feet.

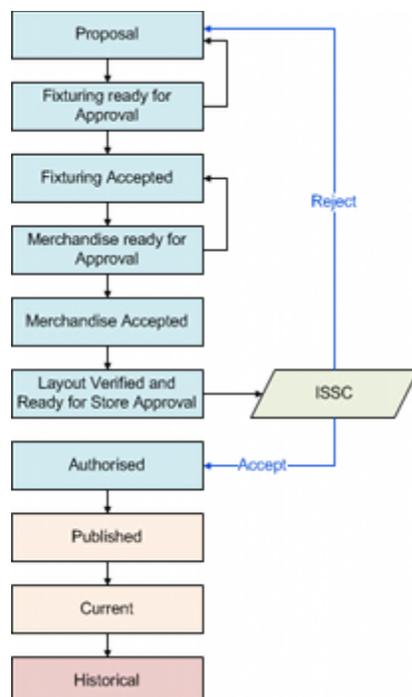


It also allows stores sharing (for example) similar demographic characteristics to be grouped together. For example clusters could be created according to the ethnic mix of the store catchment area. If a 'Hispanic' cluster was created, that would enable all stores with a predominantly Hispanic shopper base to be grouped together. This would allow the product mix going into the stores to be optimized to suit that specific customer base. For example, the stores might have a higher proportion of burritos, enchiladas and fajitas than a store catering to a predominately Asian or Caucasian clientele.

Similarly, stores could be characterized according to the average wealth of the shoppers using them - for example 'Low Income', 'Middle Income' and 'High Income' clusters could be created and stores assigned accordingly. Stores in the 'High Income' cluster would then be selected for planograms containing a higher proportion of 'premium' products than average. Similarly, stores in the 'Low Income' cluster would have planograms with more 'value' products.

Controlling Business Life Cycle

The planning process for any new floor plan can go through a number of stages, several of which will require approval before the floor plan is put into service.



In the above example, it can be seen that the floor plan goes through a number of statuses during the creation process. For example the fixturing is placed then approved by a manager, before the merchandise is placed and approved. It is also possible to use In-Store Space Collaboration (ISSC) to control business flows. ISSC users have the option to Accept or Reject a floor plan. These options will advance or reverse the current status of the floor plan.

The floor will eventually reach Authorised status where dates can be specified for when preparations should be started for putting the floor plan into service (Publishing) and when the floor plan will be put into service (made Current). The floor plan will normally be automatically changed to Published and Current status by a Macro Space Management utility called **Update Status**. (This utility should be set to run at regular intervals by a scheduling tool). The software will also automatically change the status of the floor plan to Historical when it is superseded by a more recent plan.

Batch processes can be used when the floor plan reaches Publish status to auto-generate the pertinent floor plan and planograms.

Communicating Information

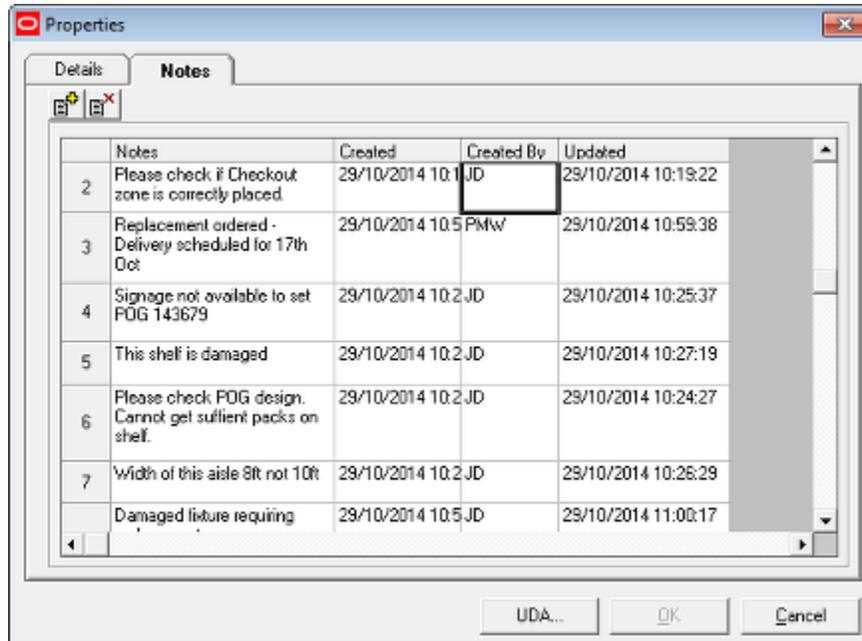
Store Manager can also be used as a medium for communicating information. This is done in several ways.

File Notes

It is possible to attach notes (short lines of text information) to floor plans. This enables store planners in Macro Space Management and In-Store Space Collaboration (who may be based in very different locations) to communicate requests and information to each other. This information can be seen in the Notes tab of the floor plan Properties dialog box. Users in different applications have different capabilities.

- MSM Users can only add File notes, together with reading and deleting existing notes.

- ISSC users can add notes to zones, fixtures, shelves, product and planograms. They can also mark notes as resolved and delete notes.
- ISSC Mobile users can add new notes to zones, fixtures, shelves, product and planograms. They can also add notes to existing notes, continuing a conversation. Finally, they can make notes as resolved.



Publishing a Floor Plan

When a floor plan is Published, a hard or electronic copy can be generated via a batch process. The retailer must use their own systems to disseminate this copy of the floor plan to the store in preparation for putting it into effect. Simultaneously, the retailer must generate a report specifying the equipment, merchandise and signage required to put the floor plan into effect. Orders will then need to be placed so that these items are available when required. Batch processes can be used when the floor plan reaches Publish status to auto-generate the pertinent planograms.

Making a Floor Plan Effective (Current)

When a floor plan is made effective (current), that is the signal for it to be put into service. The retailer should create a report identifying which store plans have achieved Current status and notify the stores accordingly.

Reports and the Macro Space Planning Database

Information generated in Store Manager is stored in the Macro Space Planning database. It will generally require custom reports to disseminate this information to other departments and stores within a retail organization. Example of reports could include:

- Floor plans that have reached a stage in their business life cycle that requires approval before the next stage is commenced.
- Floor plans that have reached published status.
- Bills of material for the equipment in a floor plan
- Lists of products and planograms in a floor plan
- Lists of floor plans that have reached current status and need to be put into service.

- KPIs for the performance of merchandise in a floor plan.

These reports are not supplied with the application. It is the responsibility of the retailer to develop appropriate reports that suit their specific business processes.

Integrating Store Manager into Retail Processes

Every retailer will have their own business processes. This section of the user guide can only cover basic principles in brief detail. It is intended to give new users of the application some insights into how store manager could be used within the existing processes. Users will have to adapt the general principles to suit their specific case.

Identify Need for Floor Plan Change

Typically the need for producing a new floor plan will originate from an external system. For example, a specific category in category management might have seasonal components that require updating. An instance of this might be in the meat department, where the 'Bacon and Sausage' category might be allocated more space in the summer season than in winter due to increased sales because of barbecues in the summer months.

The retailer will have to have some form of system integrating Category Management and Macro Space Planning so that requirements to update floor plans can be communicated from one system to another.

Floor Plan Created in Store Manager

As a result of the identified need, instructions would be given to a store planning manager to create a revised floor plan. The manager in turn would give instructions to a specific floor planner to create a new floor plan (or modify an existing one).

Floor Plan Ready for Approval

When the floor planner has completed the floor plan, a retailer's internal systems would probably require approval. This could be done in many ways - for example a senior manager could be given In-Store Space Collaboration enabling them to view the reports and KPIs before deciding whether to approve or reject the proposed floor plan.

Floor Plan Set to Authorized Status

On the floor plan getting approved, it can be set to Authorized status. This allows two dates to be set:

1. The Publish Date

The Publish Date specifies the date at which the floor plan is to be sent to the store in preparation for implementation. It is also the date at which information on the equipment and merchandise required for the changes need to be sent to supply chain management so that they can be placed on order.

2. The Effective Date

The Effective Date schedules the date at which the floor plan will come into service (becomes Current). It can also serve as advance information for a Workforce Management System as to the amount of labor, etc., required for the changes. This would allow the retailer to plan for labor utilization within the store or arrange for an external merchandise change management organization to come in on the scheduled date.

Update Status Changes Floor Plan Status to Published

Update Status is a small Macro Space Management utility that is typically run every night by means of a scheduling tool. At the appropriate date it will change the status of the floor plan to Published.

Publishing Planogram Designs and Floor Plan

At the same time as the status is changed, other batch tools can be used to publish any pertinent planogram designs in the floor plan and publish the floor plan itself. This information will be put in specified folders on a specific server. The retailer will have to use their reporting systems to identify the quantities of equipment, merchandise and signage needed to make the change. This information will then need to be communicated to the supply chain systems and orders placed.

The retailer will also need to use their systems to distribute the planogram designs and the floor plan to the store, together with information on when the changes are intended to come into effect.

Note: As well as ordering the equipment, merchandise and signage, other preparatory work may be required - for example in ensuring the labor is available to make the changes on the specified date.

Update Status Changes Floor Plan Status to Current

Update Status (run by the scheduling tool) changes the status of the floor plan to current. Retailers can develop a reporting tool to identify all floor plans scheduled to become current within a specified period and confirm that the store has made the necessary preparations to put the changes into effect.

Financial KPIs and Reports

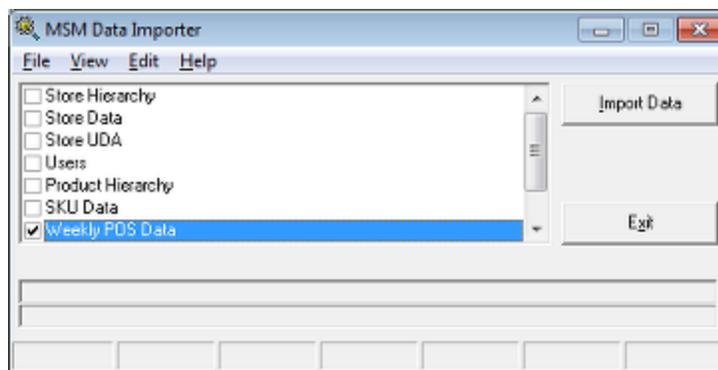
Macro Space Management allows retailers to understand how efficiently they are using space within their bricks and mortar outlets. Running KPIs and reports enables retailers to optimize future floor plans. It also allows information to be fed back into Category Management to optimize future categories and their associated assortments.

Importing Data and Setting up Store Manager

Before commencing use of Store Manager, thought needs to be given as to what data is imported and how data is to be structured within Store Manager.

Importing Data

Macro Space Management has a Data Import module. This enables data to be taken from external databases and imported into the Macro Space Planning central database. Activating this module brings up the MSM Data Importer dialogue box.



This allows the classes of data to be imported to be selected. Data Importer is fully configurable. Oracle’s consultants can configure the exact nature of the data import so that specified data is selected from the designated databases and imported into the required fields within Macro Space Management’s central database.

Configuring the Store Manager Hierarchy

General

Before Macro Space Management can be used, it is necessary to set up a Hierarchical Tree within Store Manager. This structure enables the stores to be arranged in logical groupings by means of Clusters and Sub-clusters. The performance of individual Stores can be compared against selected Prototype Stores, while the performance of one cluster of stores can be compared against another cluster. The structure of this hierarchical tree should be carefully considered as it will affect the quality of information that can be produced using Macro Space Management, and hence determine the effectiveness of Macro Space Management as a tool for improving the profitability of a business.

Planning the Structure

Typical information needed to plan how individual stores should be assigned within the structure includes:

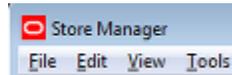
- Store Size
- Store Turnover
- Store Location
- Store Demographics

Criteria can then be developed as to cluster types, and hence whether individual stores should be assigned to single or multiple clusters. For example, a store could be associated with three separate and distinctive clusters. One cluster would enable the store to be compared against those in other regions, one against stores of similar turnover, and the third against stores of similar size. Consideration should also be given to which stores can be designated as Prototypes for comparison purposes. Correctly assigned prototype stores will also allow swift and effective comparison of individual store performance against an exemplar. A correctly planned structure can significantly improve the performance of a retail organization – a poorly planned structure could prevent the full power of Macro Space Management being used.

Overview of Store Manager

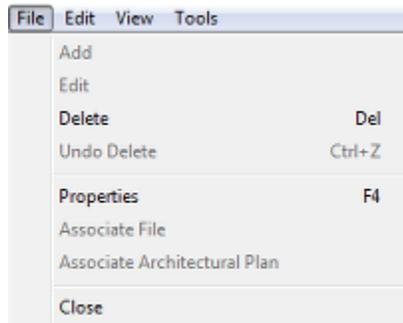
The Store Manager Menu Bar

The **Store Manager Menu bar** contains gives access to four menus:



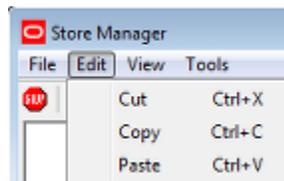
File Menu

The **File** option activates a pull down menu with options primarily concerned with the store hierarchy. Some of these may be grayed out depending on what Store Manager function is being used. This menu can be used to add, edit and delete files and to associate files and architectural plans. If a file is highlighted, it can also be used to call the File Properties dialog box.



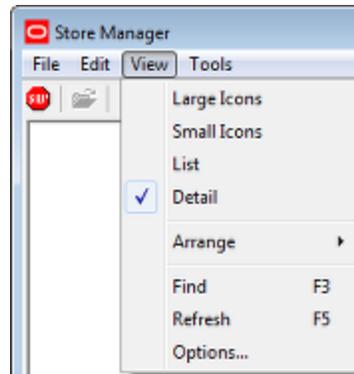
Edit Menu

The **Edit** option activates a menu with options to cut, copy and paste some objects in the hierarchy such as clusters, stores and files. Some of these may be grayed out depending on what item in the hierarchy is selected.



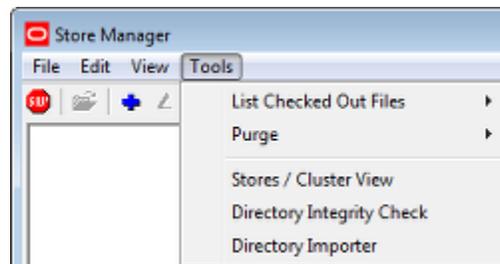
View Menu

The **View** option activates a menu with various options controlling the appearance of Store Manager and the way it displays information.



Tools Menu

The **Tools** option contains a series of options used to check in files, check directory integrity, import files and create hierarchies.

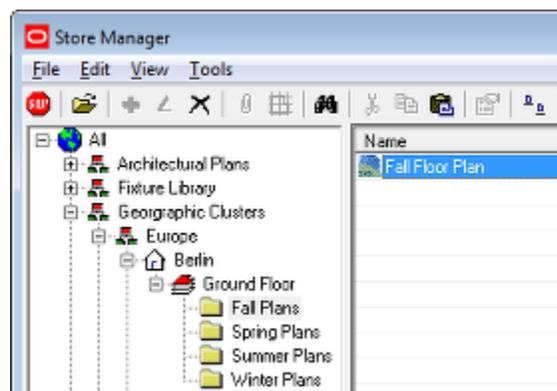


Basic Concepts

This section of help covers some basic concepts helpful to new users.

Hierarchical Structures

A **Hierarchical structure** is one where objects are organized in the form of a tree. The more fundamental data is close to the trunk, while the more dependent data is further out on the branches.



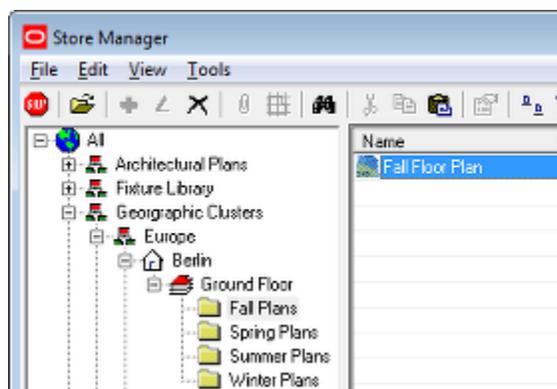
The store manager hierarchy has the following levels:

Level	Description
Root	The top level of the hierarchy

Level	Description
Cluster	Acts as a container for stores. (The arrangement of clusters can be extended by the use of sub clusters.
Store	A physical retail outlet.
Floor	Stores can be assigned multiple floors. A minimum of one floor must be present in each store.
Revision	Revisions hold floor plans of a common purpose. Any example might be the floor plans for a specific season. A floor can have multiple revisions. A minimum of one revision must be present for each floor.
Floor Plan	The lowest level in the hierarchy.

Parent-Child Relationships

Some objects within Store Manager are linked together in such a manner that changes to one object may result in changes to other objects linked to it. Such objects are described as being in a parent-child relationship. The object that has dependent objects associated with it is known as the parent, while the objects that are associated with the parent object are known as the children. In a hierarchical structure, children of one parent can be parents of their own children in turn. When the status of a parent object is changed; it can often result in changes to the status of child objects. Similarly, the status of parent objects can sometimes only be changed when the status of the appropriate child object is correct. When a parent object is deleted, it affects all the associated child objects. Conversely, a child object can often be deleted without affecting the parent.



In the above example, the Ground Floor is a child of the Berlin store, but is a parent several Revisions - including Fall Plans.

Status

Status defines the current standing of an object within the business life cycle. For example, Stores generally have three statuses.

At the beginning of the process, the Store has a **Proposed** status as it is only at the design stage. When the store has been built, its status will change to **Open**. Finally, if the store has reached the end of its useful life, it will be assigned **Closed** status. The status of an object thus changes as Macro Space Management users move through the business cycle.

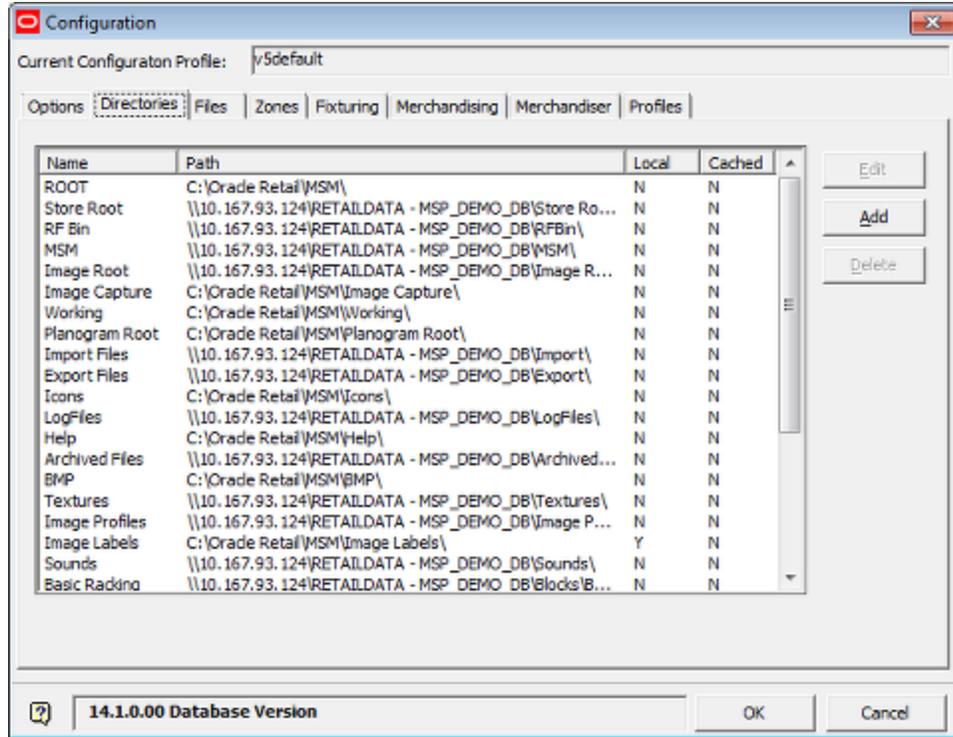
Publish and Effective Dates

Publish and **Effective** dates are associated with the status of a floor plan. The Publish date is the date at which the floor plan is issued to the stores. Floor plans are typically published a number of days or weeks in advance of the time the changes are required. The Effective date is the date at which the published drawing becomes current. Publish and Effective dates can be turned on or off by making changes to the **ENABLE_FILE_TRIGGER_DATES** system variable in the Administration Module. If enabled, Publish and Effective dates can be used to automatically change the status of revisions and drawings by making use of the UpdateStaus.exe file in the C:\Oracle Retail\MSM\Apps Windows folder

Note: UpdateStatus.exe can be set to run on a daily or weekly basis by the Windows task manager or a scheduling tool, allowing some degree of automation of common tasks.

RFBin

The **RFBin** is Macro Space Management's equivalent of the Recycle Bin. Files marked for deletion are sent to the RFBin, but will not be permanently deleted until the **Purge** option is used in the Tools menu. Its location is specified in the Directories tab of the Configuration module. The directories tab can only be accessed when the Configuration Module is opened from within the Administration module.



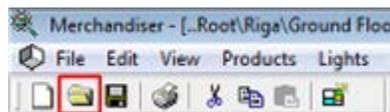
Overview of Store Manager Module

Accessing the Store Manager Module

Store Manager can be accessed from either the Planner or Merchandiser modules. In Planner, Store Manager is accessed by clicking on the Open File option in the standard toolbar. Alternatively, the Open File option can be selected from the File menu.



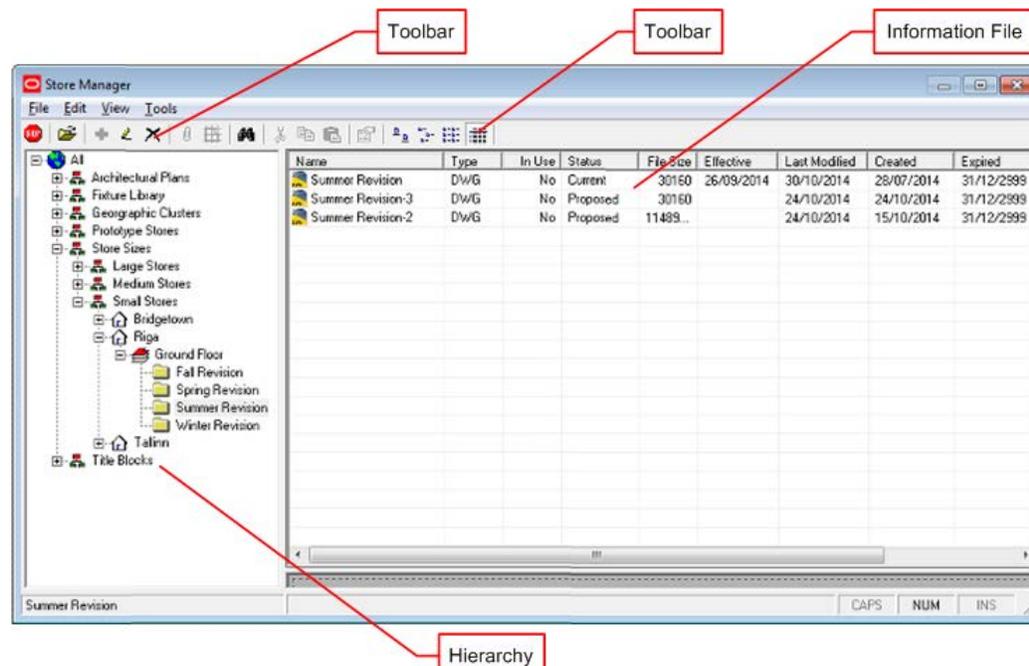
In Merchandiser, Store Manager is accessed by clicking on the Open File option in the standard toolbar. Alternatively, the Open File option can be selected from the File menu.



Overview of Store Manager Module

Macro Space Management contains large amounts of information. This can be as specific as the current contents of a shelf in a single store or as general as the floor plans to be implemented business wide in 6 months time. This mass of information has to be organized and administered. Within Macro Space Management this is achieved by the Store Manager module. Store Manager operates in a similar way to Windows Explorer. It

has been designed to be easy to use and allows information to be grouped in a way that reflects the structure of the organizations.



The menu and tool bars can be seen to the top left of the window. The hierarchical tree of Clusters, Stores, Floors and Revisions can be seen to the left of the window. The files associated with a particular Revision can be seen in the frame to the upper right. A preview of the drawing to be selected can be seen at the bottom.

Using Store Manager you can:

- Assign your retail outlets to logical groupings, allowing comparisons and analysis of sales to be made between individual stores or groups of stores.
- Assign or change floor plans for stores, allowing the effects of differing store layouts or merchandising mixes to be evaluated.
- Carry out routine administration on the files used within Macro Space Management.
- Get reports on the data used within Macro Space Management.
- Interface with external programs allowing import and export of data to and from those programs.

Note: Macro Space Management's sister program, In-Store Space Collaboration, can be used to access and edit drawings held in the central Macro Space Planning database.

The Store Manager Toolbar



The Store Manager toolbar contains a series of options for administering the objects and files in Macro Space Management. Depending on which operation is being carried out, one or more options may be grayed out (unavailable).

Icon	Description
	Close Store Manager
	Open a Drawing
	Add an Item
	Edit an Item
	Delete an Item
	Associate File
	Associate Architectural Plan
	Search
	Cut
	Copy
	Paste
	Properties
	Large icons for files
	Small Icons for files
	List of files
	Details of files

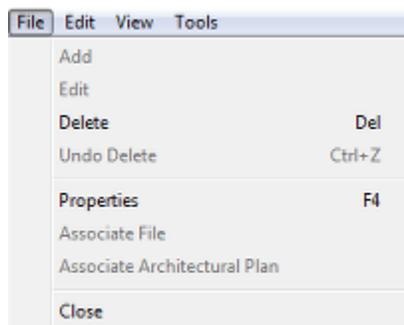
The Store Manager Hierarchy

General Note on Adding, Editing and Deleting Objects

There are three broad ways of invoking the Add, Edit or Delete options.

File Menu

Objects can be added to, edited in or deleted from the hierarchy by highlighting an appropriate object and selecting the pertinent option from the **File** menu.



Toolbar

Objects can be added to, edited in or deleted from the hierarchy by highlighting an appropriate object and selecting the pertinent option from the **Toolbar** menu. Some of these functions may not be active depending on the object selected.



Right Click Menu

Objects can be added to, edited in or deleted from the hierarchy by highlighting an appropriate object right clicking to bring up the **Right Click Menu**.



Deleted Objects

Whether objects are visible after deletion depends on whether the **Show Files Marked for Deletion** option has been selected in the **Options** dialog box accessed from the **View** menu. If selected, objects marked for deletion will show with a black cross.

Name	Type	In Use	Status	File Size
Fall Floor Plan	DWG	No	Proposed	30160
Fall Floor Plan - Old	DWG	No	Proposed	30160

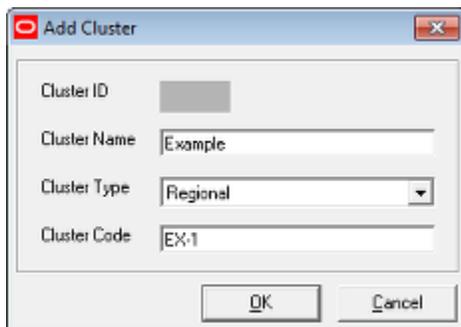
If not selected, the objects marked for deletion will be hidden from view until purged.

Adding, Editing and Deleting Clusters

The Add and Edit dialog boxes are identical but for the title. Only the Add dialog box will be shown in this section, but the descriptions of the fields equally apply to the Edit dialog boxes.

Adding (and Editing) Clusters

To add a Cluster, highlight the Store Root or another cluster and select **Add** from the **File Menu**, **Toolbar** or **Right Click Menu**. The **Add Cluster** dialog box will appear.



Option	Description
Cluster ID	Once the dialog box is saved, this field will populate with the ID from the pertinent table in the database.
Cluster Name	This is the name assigned to the cluster.
Cluster Type	This is assigned from a drop down list. It is normally used as a filter for reporting purposes.

Cluster Code	This is the unique identifying code assigned to the cluster.
---------------------	--

Deleting Clusters

To delete a cluster, highlight it and select **Delete** from the **File Menu**, **Toolbar** or **Right Click Menu**. The cluster is now marked for deletion but will not be permanently removed until purged using the **Purge** option from the **Tools** menu.

Adding, Editing and Deleting Stores

The Add and Edit dialog boxes are identical but for the title. Only the Add dialog box will be shown in this section, but the descriptions of the fields equally apply to the Edit dialog boxes.

Adding (and Editing) Stores

To add a store, highlight the parent cluster and select **Add** from the **File Menu**, **Toolbar** or **Right Click Menu**. The **Add Store** dialog box will appear. There are four tabs.

General Tab

Option	Description
Store ID	Once the dialog box is saved, this field will populate with the ID from the pertinent table in the database.
Store Code	This is the unique code used to identify the store.
Store Name	This is the name of the store.
Directory Name	This is the name of the directory that will be automatically created to hold the files associated with the store. It will be created below the Store Root specified in the Directories Tab of the Configuration Module .

Option	Description
Latitude	This can be entered to identify the position of the store.
Longitude	This can be entered to identify the position of the store.
Status	This is set from a drop down list. It specifies where the store is in its business life cycle.
Opened Date	This is the date the store is scheduled to open. If the store is not at Open status when this date is reached, Update Status will automatically change the status to Open.
Closed Date	This is the date the store is scheduled to close. If the store is not at Closed status when this date is reached, Update Status will automatically change the status to closed.
Store Prototype	This enables the user to specify another store to be used as a prototype for comparison purposes. Available prototypes are set by selecting the Set as Prototype check box.
Set as Prototype	This check box designates the store as a Prototype. If set as a prototype, it cannot have a prototype store assigned to it.

Units Tab

Option	Description
Input Units	
Length:	These are the default length units used for the floor plan.
Area	These are the default area units used for the floor plan.
Display/Output Units	
Length	These are the default length units used for displaying information the floor plan.

Option	Description
Alternative Length	These are the alternative length units used for displaying information for the floor plan.
Area	These are the default area units used for displaying information the floor plan.
Alternative Area	These are the alternative area units used for displaying information for the floor plan.

Address Tab

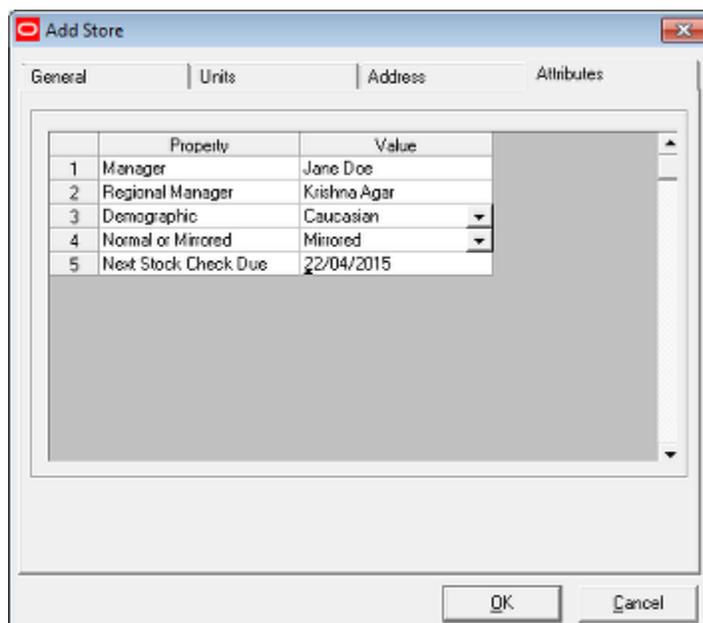
The screenshot shows a dialog box titled "Add Store" with a tabbed interface. The "Address" tab is selected. It contains the following fields:

- Address: A Road
- A City
- A State
- A country
- Post Code: 111
- Area Code: 111
- Telephone: 001-001-23456789

Buttons for "OK" and "Cancel" are located at the bottom right of the dialog.

Option	Description
Address	There are 4 lines available to enter the address of the store.
Post Code	This field holds the post code of the store. This might be used in the UK.
Area Code	This field holds the area code of the store. This might be used in the US.
Telephone	This field holds the telephone number of the store.

Attributes Tab



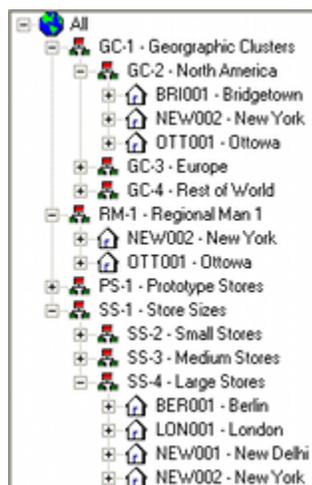
The attributes tab contains the name and value of the User Defined Attributes assigned to the store. The available attributes are configured in the Administration Module and will vary from retailer to retailer. Users can enter their pertinent data in the dialog box.

Deleting Stores

To delete a store, highlight it and select **Delete** from the **File Menu**, **Toolbar** or **Right Click Menu**. The store is now marked for deletion but will not be permanently removed until purged using the **Purge** option from the **Tools** menu. All child objects will be deleted as well.

Adding Stores to Multiple Clusters

Stores can belong to more than one cluster. This enables stores sharing a common characteristic to be grouped together for reporting, control or planning purposes.



In the above example, the New York store is in the following clusters:

- North America

- Large Stores
- Regional Manager 1

This enables New York to be selected along with all stores in North America, all Large Stores or all stores supervised by Regional Manager 1.

Note: Copying a store merely associates it with multiple clusters - it does not duplicate the floor plans associated with the store.

Adding Stores to Multiple Clusters

To add a store to a multiple cluster, highlight the store and chose the **Copy** option from the **Edit** menu, **Toolbar** or **right click menu**. Select the required cluster to copy the store to and use the **Paste** option from the **Edit** menu, **Toolbar** or **right click menu**.

Removing Stores from Multiple Clusters

To remove a store from a cluster, highlight the store then select the **Delete Link** option from the **right click menu**. This will remove the database link between the store and that specific cluster, but it will remain associated with any other clusters it has been copied into.

Adding, Editing and Deleting Floors

Add and Edit Dialog Boxes

The Add and Edit dialog boxes are identical but for the title. Only the Add dialog box will be shown in this section, but the descriptions of the fields equally apply to the Edit dialog boxes.

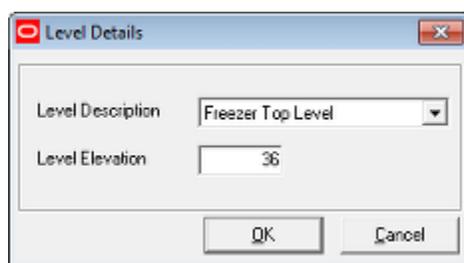
Adding (and Editing) Floors

To add a floor, highlight the parent store and select **Add** from the **File Menu**, **Toolbar** or **Right Click Menu**. The **Add Floor** dialog box will appear.

Option	Description
Floor ID	Once the dialog box is saved, this field will populate with the ID from the pertinent table in the database.
Floor Type	This is the type of floor. It is set from a drop down list which is pre-populated with names like Basement, Ground Floor, and so on. The list of available names can be configured directly in the database.
Description	This is the directly input information on the floor.
Directory	This is the name of the directory that will be automatically created to hold the files associated with the floor. It will be created below the directory for the parent store.
Status	This is set from a drop down list. It specifies where the floor is in its business life cycle.
Allocated Area Tolerance	This is a value that can be entered for reporting purposes. It allows the actual area allocated for retail purposes to be compared with some theoretical value if a report is created.
Elevation	This field can be used to specify the height above ground level for reporting purposes.
Edit Levels	This button can be used to open a dialog box for editing the default levels for items of equipment that are to be placed at levels other than floor level. Examples would be posters and banners. If not activated during the creation of the floor, these levels cannot be edited later.

Level Details Dialog Box

When fixtures and fittings are configured in the fixture studio, they can be set to place at floor level or some other specified height. These other heights are specified in the database as defaults, but it is possible to change those values for a specific floor. This is done by clicking **Edit Levels...** in the Add floor dialog box. This will bring up the Level Details dialog box. The available insertion heights can be selected from the **Level Description** drop down list and values typed into the Level Elevation text box. When all values have been changed as required click **OK**.



Note: This dialog box must be opened from the **Add Floor dialog box** when the floor is created. It will then be available for editing. If it is not opened when the floor is created, no subsequent editing will be possible.

Deleting Floors

To delete a floor, highlight it and select **Delete** from the **File Menu**, **Toolbar** or **Right Click Menu**. The floor is now marked for deletion but will not be permanently removed

until purged using the **Purge** option from the **Tools** menu. All child objects will be deleted as well.

Adding, Editing and Deleting Revisions

The Add and Edit dialog boxes are identical but for the title. Only the Add dialog box will be shown in this section, but the descriptions of the fields equally apply to the Edit dialog boxes.

Adding (and Editing) Revisions

To add a floor, highlight the parent floor and select **Add** from the **File Menu**, **Toolbar** or **Right Click Menu**. The **Add Revision** dialog box will appear.

Option	Description
Revision ID	Once the dialog box is saved, this field will populate with the ID from the pertinent table in the database.
Revision Number	This is a number that can be assigned to the revision.
Revision Description	This is the name of the revision.
Directory	This is the name of the directory that will be automatically created to hold the files associated with the floor. It will be created below the directory for the parent floor.
Status	This is set from a drop down list. It specifies where the revision is in its business life cycle.
Season Description	This drop down list allows the user to select a season from a list of predefined seasons. If set, this can be used (in conjunction with the Custom SQL) to filter data in the Object Grid .
Birth Date	This is the date the revision was created.

Option	Description
Death Date	This is the date the revision went out of service.

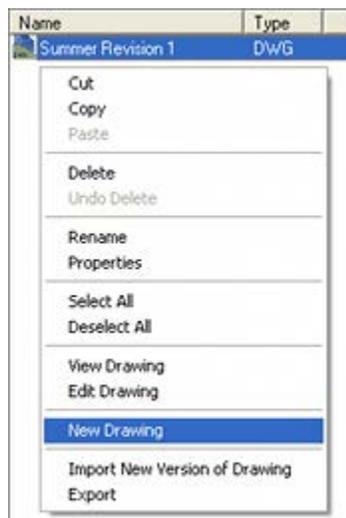
Deleting Revisions

To delete a revision, highlight it and select **Delete** from the **File Menu**, **Toolbar** or **Right Click Menu**. The revision is now marked for deletion but will not be permanently removed until purged using the **Purge** option from the **Tools** menu. All child objects will be deleted as well.

Adding, Editing and Deleting Floor Plans

Adding Floor Plans

If the **Add Proposal Drawing** check box is selected when a new revision is created, a new floor plan will be automatically created in the new revision. To add a new or additional floor plan, go to the right hand pane in Store Manager and bring up the right click menu. Select **New Drawing**. A new floor plan will be created.



When the floor plan is first created, it will be auto-assigned a name - in this example Proposal290.

Name	Type	In Use	Status
Summer Revision 1	DWG	No	Proposed
Proposal290	DWG	No	Proposed

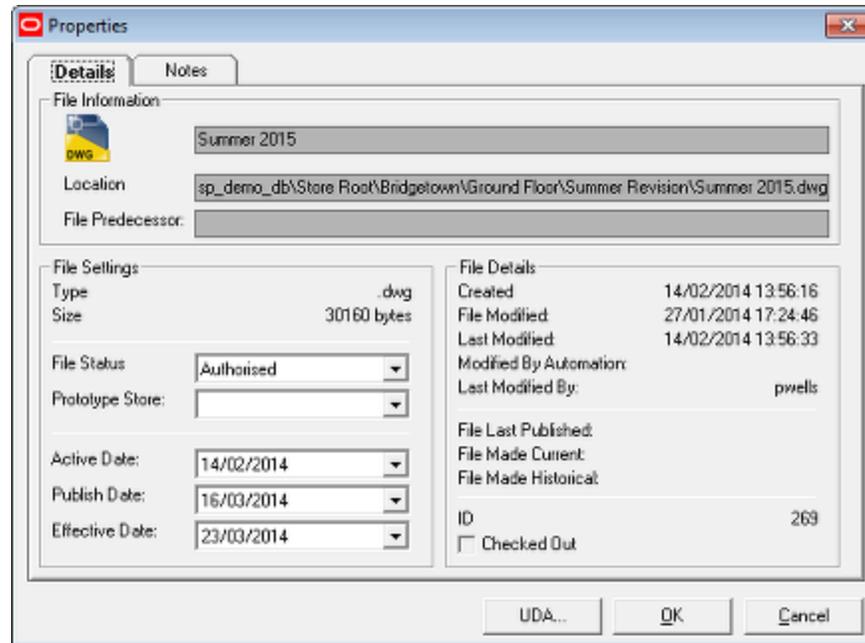
This name can be changed by highlighting it and selecting **Rename** from the right click menu.

Editing Floor Plans

When a floor plan has been added, it can be edited by highlighting it and selecting the **Properties** option on the **Right click** menu. This will bring up the **Properties** dialog box.

Details Tab

The **Details** tab contains information of the floor plan.



File Name is the name assigned to the file - this will typically be the name of the floor plan.

Location is the path to where the physical copy of the DWG file is held. This will be below the **Store Root** specified in the **Directories Tab** of the **Configuration Module**. (This tab is only accessible if the configuration module is opened via the Administration module).

File Predecessor is the name of the file this file was derived from. This will be populated if the file was created automatically as a result of the **Planogram Substitution** process.

Type shows the extension of the file - and hence its type. The DWG extension indicates it is an AutoCAD file.

Size is the physical size of the file.

File Status is where the floor plan is in its business life cycle. See the section on statuses for more information.

Prototype Store is the name of another store which can be used for comparison purposes. After being set up through the **Custom SQL**, it is possible to compare the selected floor plan with the floor plan at Current status in the prototype store. This enables differences to be compared for reporting purposes.

Active Date is the date at which the floor plan is scheduled to come into service. This date can be used as a filter to determine whether equipment of merchandise will be available for placement at the time which the floor plan will be made current (active).

Publish Date will be grayed out and unavailable until the floor plan is at Authorized status. Once set, the publish date is the date at which **Update Status** will automatically change the status of the floor plan to Published. A copy of the floor plan will then be placed in the designated export directory for onward transmission to the store in preparation for putting the floor plan into service. When the Publish Date first appears, it will be set to a default value by the software.

Effective Date will be grayed out and unavailable until the floor plan is at Authorized status. Once set, the effective date is the date at which **Update Status** will automatically change the status of the floor plan to Current. This is the signal (via an appropriate reporting system) for the store to put the floor plan into effect. When the Effective Date first appears, it will be set to a default value by the software.

Created is the date the floor plan was originally created in Store Manager. Alternatively, if the floor plan was imported, this will be the date it was originally created in raw AutoCAD.

File Modified is the date the floor plan was originally created in Store Manager. Alternatively, if the floor plan was imported, this will be the date it was last modified in raw AutoCAD. Once the file has been saved in Planner, the database will hold the date of that save but the File Modified field will continue to show the date it was last modified in raw AutoCAD.

Last Modified is the date the file was last saved by a user in the Planner or Merchandiser modules or in In-Store Space Collaboration.

Modified by Automation is the date the file was last modified by a batch process such as planogram substitution.

Last Modified By is the individual or process that last modified the file.

Note: The **Created**, **File Modified**, **Last Modified** and **Modified by Automation** dates can be used to decide on how to manually synchronize the floor plan if Auto-Synchronization is not enabled: see the section on synchronization.

File Last Published is the date the file was last published as a result of **Update Status** being run.

File Made Current is the date the file was made current - typically as a result of **Update Status** being run.

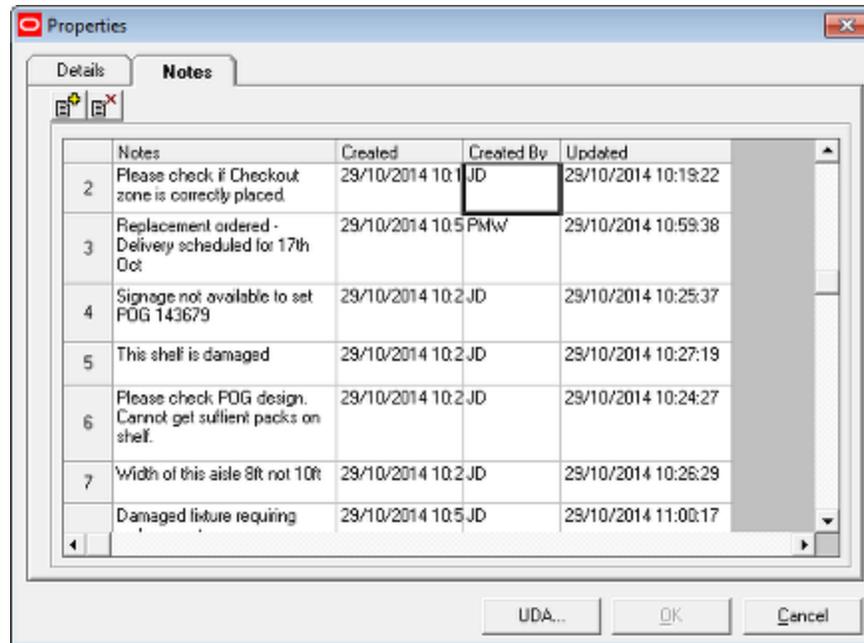
File Made Historical is the date the floor plan was superseded as a current file by another floor plan. This change is made automatically by the software and the date set accordingly.

ID is the value of the **FIL_ID** field in the **AVTTB_FILE** table in the database. This information is provided to assist support personnel in problem solving.

Checked Out indicates whether the file is in use or not.

Notes Tab

The Notes tab holds details of notes created in Macro Space Management, in In-Store Space Collaboration and in ISSC Mobile. These notes are visible in all three applications and serve both to record and communicate data.



Macro Space Management

Macro Space Management users can add or delete notes.

- Notes are added by clicking Add and typing data into the blank line. Notes in MSM only apply to the floor plan itself and cannot be applied to objects within that floor plan.
- Notes are deleted by highlighting them and clicking Delete.
- If the floor plan is at a status that is not Read Only (for example not at Current or Historical status), the notes can be edited. As well as the note text being modified, the Updated date will change.

Notes added in ISSC and ISSC Mobile can also be associated with zones, fixtures, shelves, products and planograms. There is no way of identifying the type of note in the Notes tab.

In-Store Space Collaboration

ISSC users can add notes to the floor plan. They can also add notes to objects in the floor plan such as zones and fixtures. These notes can be read in MSM.

ISSC Mobile

ISSC Mobile users can add notes to zones, fixtures, shelves, products and planograms, but not floor plan notes. They can also add additional notes to an existing note, stating a conversation. These notes can be read in MSM. ISSC mobile users can only add notes to floor plans at Current status.

UDA Option

Clicking the **UDA** button will bring up the Floor Plan User Defined Attributes dialog box. This holds retailer specific information for the floor plan. In the example below, it has been configured to hold information on why the floor plan is being updated.

Property	Value	
Change Type	Seasonal Change	✳
Responsible Planner	John Doe	✳
Planograms Affected	45	
Instruction Line 1	For Fall Revision	
Instruction Line 2	Demographic for store updated	
Instruction Line 3	None	
Comment Line 1	None	
Comment Line 2	None	
Comment Line 3	None	

✳ indicates mandatory field

Ok Cancel

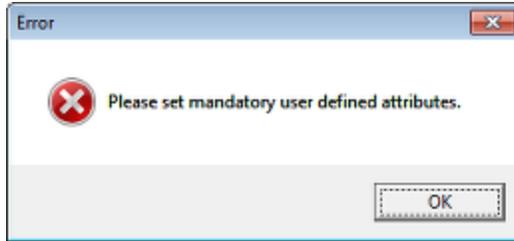
The list of available fields can be configured using the User Defined Attributes option from the General Menu in the Administration module. Users in Store Manager can then set the values for each floor plan. Depending on how each field has been configured in the Administration module, users can enter numeric, text or currency values, select from a drop down list, enter a date from a calendar or select or deselect a check box. Some values can be defined as mandatory when they are configured in the Administration module. These are indicated by a blue asterisk. A mandatory value is not filled will be indicated by a red cross. An example of this as can be seen for the Responsible Planner field in the screen shot below.

Property	Value	
Change Type	Seasonal Change	✳
Responsible Planner		✖
Planograms Affected	45	
Instruction Line 1	For Fall Revision	
Instruction Line 2	Demographic for store updated	
Instruction Line 3	None	
Comment Line 1	None	
Comment Line 2	None	
Comment Line 3	None	

✳ indicates mandatory field

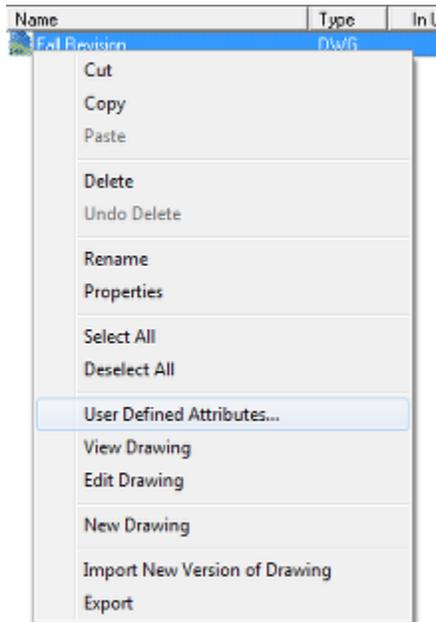
Ok Cancel

If the user attempts to close the User Defined Attributes dialog box without setting a mandatory attribute, a warning will result.



Accessing the File UDA dialog box directly

If required, the File UDA dialog box can be accessed directly from the right click menu in the list pane in Store Manager.



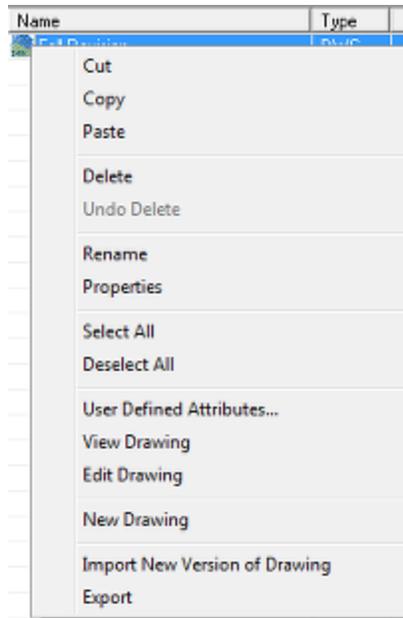
If multiple floor plans have been selected, the File UDA dialog box will display the attributes for the last floor plan selected.

Importing, Exporting and Copying Floor Plans

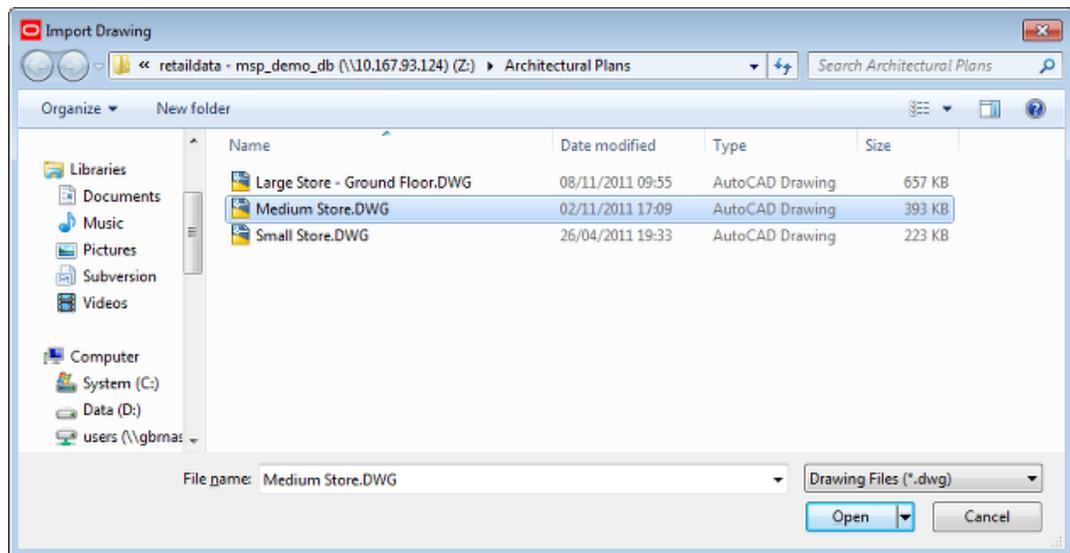
Floor plans can be either imported or copied.

Importing Floor Plans

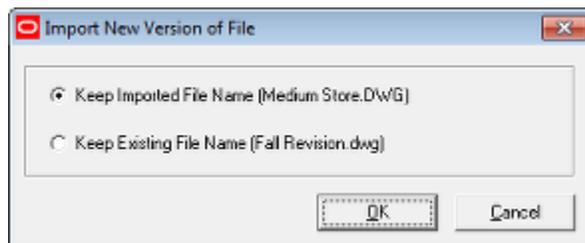
Floor plans can be imported into Store Manager. This is done by highlighting an existing floor plan (this can be a blank) and then selecting the **Import New Version of Drawing** option from the right click menu.



This will bring up the **Import Drawing** dialog box.



This enables users to browse to the Windows folder holding the floor plan and select it. On clicking the **Open** button, the **Import New Version of File** dialog box will appear.

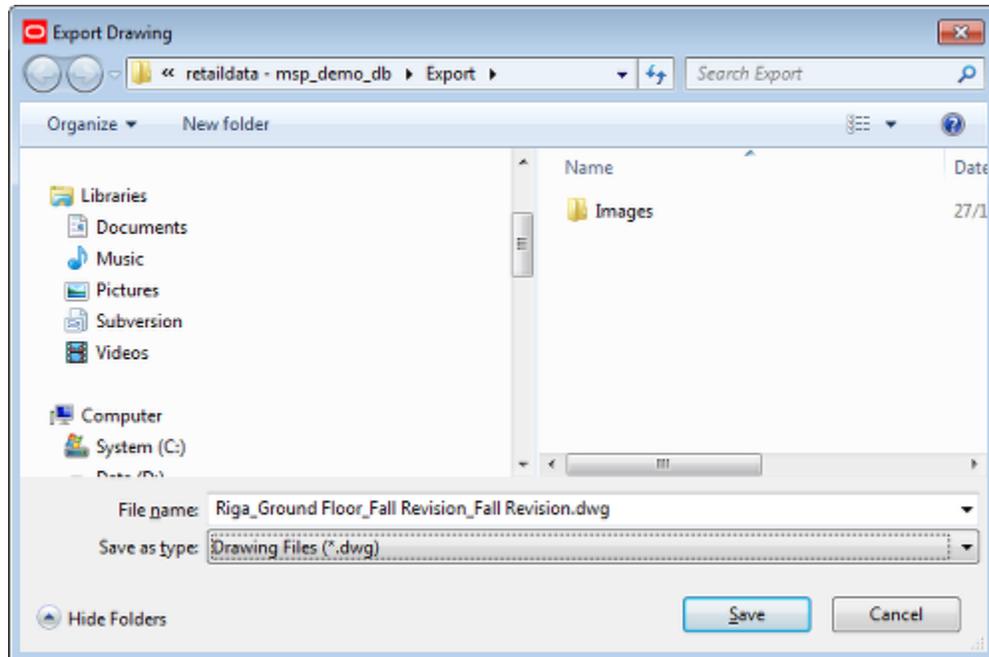


Users can select whether to keep the existing file name or use that of the file to be imported.

Important Note: objects in the imported floor plan will not be written to the MSP database until the file has been synchronized '**Match the Drawing**'. Blocks in the imported floor plan that also exist in Fixture Studio will then be written to the database.

Exporting Floor Plans

Floor plans can be exported from Store Manager by highlighting the pertinent floor plan then selecting **Export** from the right click menu. This will bring up the **Export Drawing** dialog box.



The filename will be a composite of the form: **Store_Name_Floor Name_Revision_Name_File_Name**. After selecting an appropriate directory, the file can be exported by clicking the **Save** button.

Copying Floor Plans

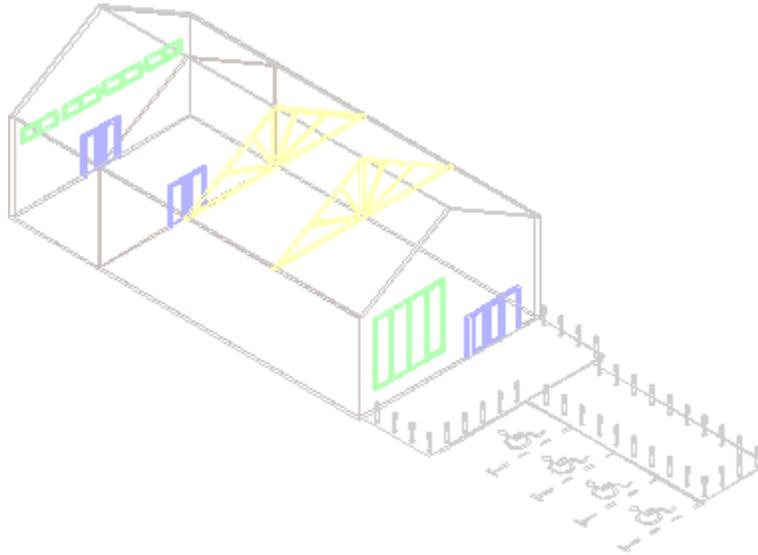
Floor plans can be copied within a revision or from one revision to another. Copying is done by highlighting the required floor plan then selecting the Copy option from the right click menu. After navigating to the required location, the Paste option can be used from the right click menu to place a copy of the file. At the same time and exact copy of all existing information in the database for the original file is created for the copied file.

Note: If copying from one floor to another, any architectural plans associated with the original should be temporarily unchecked. Once the floor plan has been pasted to the revision in the new floor, it can be associated with any architectural plans associated with that floor. The architectural plans can also be re-associated with the old floor plan.

Associating Architectural Plans

Overview of Architectural Plans

Architectural Plans can only be associated with Floors. They contain information on the structure and fabric of the building including the position of walls, doors, electrical systems and other services.



The above screen shot shows a DWG type architectural plan in isometric view. Its outlines show fainter than other objects in the floor plan because it effectively serves as an underlay to the floor plan. This architectural plan shows the structure of the store and allows the zones to be correctly drawn and the fixtures correctly positioned with respect to the walls, doors and windows.

Architectural plans are used in two stages:

1. They must first be associated with a parent floor in Store Manager.
2. After the architectural plan has been associated with a specific floor, it can then be associated with any child floor plan. This is done from the Insert menu in the Planner module once the floor plan has been opened in Planner.

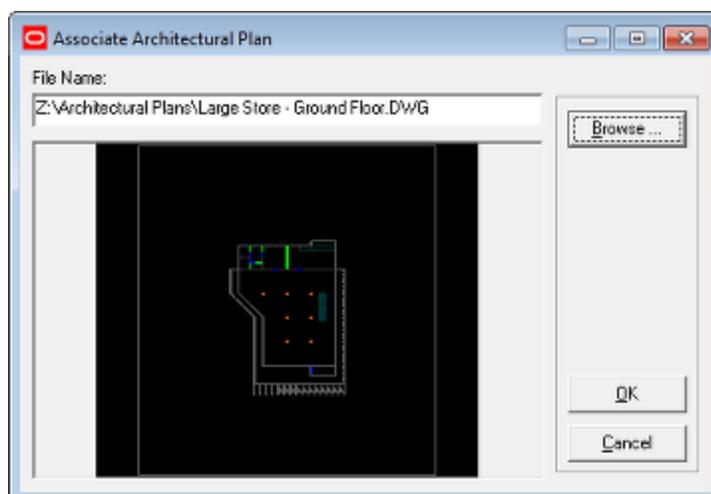
Types of Architectural Plans

Macro Space Planning recognizes two forms of architectural plans:

- DWG files can only be used within the Planner module.
- DWF files can be used both within the Planner module and in In-Store Space Collaboration (ISSC).

Associating an Architectural Plan

Architectural plans can only be associated with floors. Once associated this makes them available for use within any floor plan associated with the parent floor. Architectural Plans can be associated by highlighting the required floor then selecting the Associate Architectural Plan command from the **File menu**, the **Toolbar** or the **right click menu**. This will bring up the Architectural Plan Association dialog box.



1. Browse to the required file
2. Click OK
3. The file will be copied to the specified folder and will become available for use within individual floor plans.

Note: The architectural plan will not appear in an individual floor plan unless it is associated with it using the **Insert** menu in the Planner module once the floor plan has been opened in Planner.

Associating Files

Files can be associated with any level of the store hierarchy except clusters. Any form of file can be associated including:

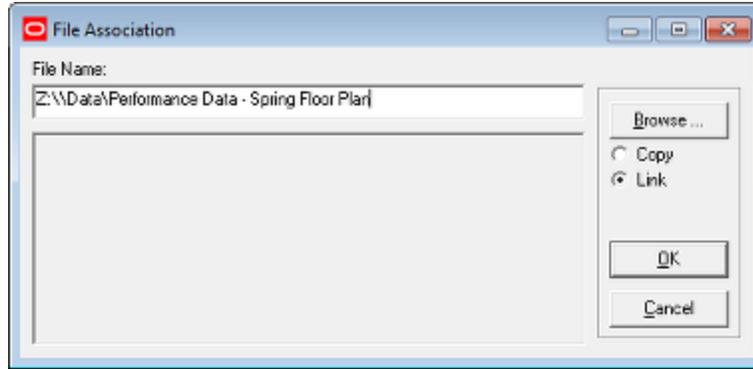
- Word documents
- Excel spreadsheets
- PDF Files

These files can be used for many purposes including:

- Performance reports at store, floor and floor plan level
- Store specific information on suggested improvements to merchandise
- Non-MSP information that will be useful for store planners.

How to Associate Files

Files can be associated by highlighting the required object in the hierarchy and then selecting the Associate File command from the **File menu**, the **Toolbar** or the **right click menu**. This will bring up the File Association dialog box.



1. Browse to the required file.
2. Specify whether the file is to be copied into Store Manager or whether a link is to be created to an external file.
3. Click OK.
4. If the file is copied, a copy will be imported into the appropriate folder in Store Manager.

Name	Type	In Use
Ground Floor		
Tallin Performance Data - Spring	DOC	No

5. If a file is linked, MSP will hold a copy of the path to the file.

Note: If linking to a file, ensure it is available on a network resource or it might not be available to all users.

The advantage of linked files is that the latest version will be available if they are updated by an external program. Copied files will need to be re-imported in order that the latest version is available in Store Manager.

Deleting Associated Files

Deleting associated files may be carried out by highlighting them then selecting the **Delete** command from the **File menu**, the **Toolbar** or the **right click menu**. The file will not be permanently deleted until the **Purge** option is used from the **Tool menu**.

Overview of Statuses

Concept of Statuses

Statuses are used to indicate where an object is in its business life cycle. For example a store will go through a design stage, be built, be opened, be closed for refurbishment, reopen for business and finally be closed as its structure wears out or it is sold. By being able to set statuses in the store hierarchy, store planners can indicate where stores, floors, revision and floor plans are in their business life cycle - and hence control activities based on that information. The example below shows example statuses for a store.

The screenshot shows the 'Edit Store' dialog box with the following fields and values:

Field	Value
Store ID	17
Store Code	BRI001
Store Name	Bridgetown
Directory Name	Bridgetown\
Latitude	0
Longitude	0
Status	Open (dropdown menu open)
Opened Date	Open (dropdown menu open)
Closed Date	Closed (dropdown menu open)
Store Prototype	Small Prototype Store
Set as Prototype	<input type="checkbox"/>

For example, a floor plan may go through a series of stages during the planning processes - these would include laying out the equipment, receiving approval for that layout, laying out the merchandise, receiving approval for that merchandise, authorizing that floor plan to go into service, publishing the floor plan, putting it into service and finally retiring it from service.

Because a large retail organization may have several thousand stores and an even larger number of floor plans, it is standard practice to set up a report identifying which objects have had their statuses changed recently and what actions are required.

Configuring Statuses

Macro Space Planning has a set of default statuses configured. The list of available statuses can be modified using the Status dialog box in the Administration module. This also allows the order statuses are displayed, whether they are reversible, whether files become read only when the status is selected, etc.

Note: See the *Oracle Retail Macro space Management Administration Module User Guide* for more information.

The screenshot shows a window titled 'Status' with a menu bar (File, Edit, View) and a toolbar. Below is a table with columns: Type, Level, Description, Order, Reversible, Read Only, and Selectable. The table is grouped into two sections: 'Floor' and 'Planogram'.

Type	Level	Description	Order	Reversible	Read Only	Selectable
- Floor						
Floor	Proposed	Proposed	1	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Floor	Current	Existing	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Floor	Historic	Closed	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
- Planogram						
Planogram	Proposed	Proposed	1	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Planogram	Authorised	Authorized	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Planogram	Published	Published	2.5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Planogram	Current	Current	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Planogram	Historic	Superseded	4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The status bar at the bottom right shows the date 14/02/2014 and time 16:40.

Users and In-Store Space Collaboration

Users in In-Store Space Collaboration have the ability to indirectly change the status of a floor plan. When closing and saving a floor plan, some users have the option to **Accept** or **Reject** that floor plan. This will result in the present status of that floor plan being changed to a predefined alternative.

Non-Reversible Statuses

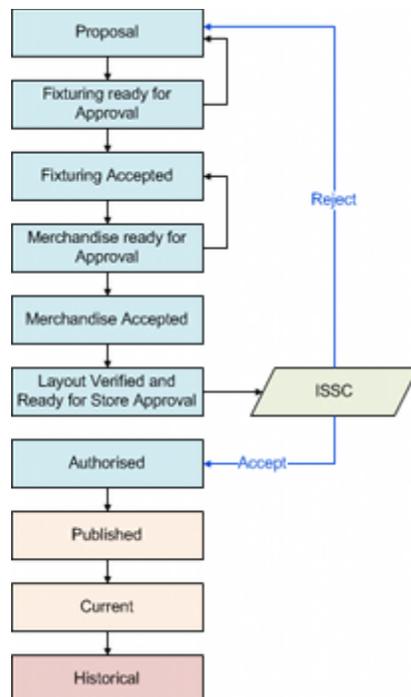
Some statuses are set to be non-reversible - users can select that status, but having selected it cannot then manually reset that status to an earlier one.

Non-Selectable Statuses

Some statuses can be set to not be selectable manually. An example of this is Current status as floor plans are normally automatically changed to that status by the **Update Status** functionality.

Example of Controlling Business Flows with Statuses

The following is a simple example of how statuses can be used to control business flows:



1. The process flow starts with a floor plan at Proposal status.
2. After laying out the fixturing, the store planner changes the status to Fixturing ready for Approval. This alerts his manager.
3. The manager reviews the layout of the fixturing. If they disagree with it, they set the status back to Proposal - causing the store planner to rework the fixturing. If the manager agrees with the layout of the equipment they change the status to Fixturing Accepted.
4. Once the status has been changed to Fixturing Accepted, the store planner places the merchandise. When this is complete, the store planner sets the status to Merchandise ready for Approval.
5. The manager reviews the layout of the merchandise. If they disagree with it, they set the status back to Fixturing Accepted - causing the store planner to rework the products and planograms. If the manager agrees with the layout of the equipment they change the status to Merchandise Accepted.
6. At an appropriate time, the manager then changes the status to Layout Verified and Ready for Store Approval. This makes the floor plan visible in In-Store Space Collaboration.
7. The store manager opens the floor plan in ISSC. They have two choices when saving it. Clicking Reject will change the status back to Proposal, starting the whole planning process again. Clicking Accept will change the status to Authorized. The Publishing and Effective dates will then be set.
8. When the Publish date is reached, the Update Status tool will change the status to Published, causing a copy of the floor plan to be sent to the store in preparation for its implementation.
9. When the Effective date is reached, the Update Status tool will change the status to Current. The store will then be notified to put the plan into effect.
10. When another floor plan for that store becomes current, the existing store plan will be superseded and will be set to Historical status.

Changing the Status of Objects

Changing Statuses

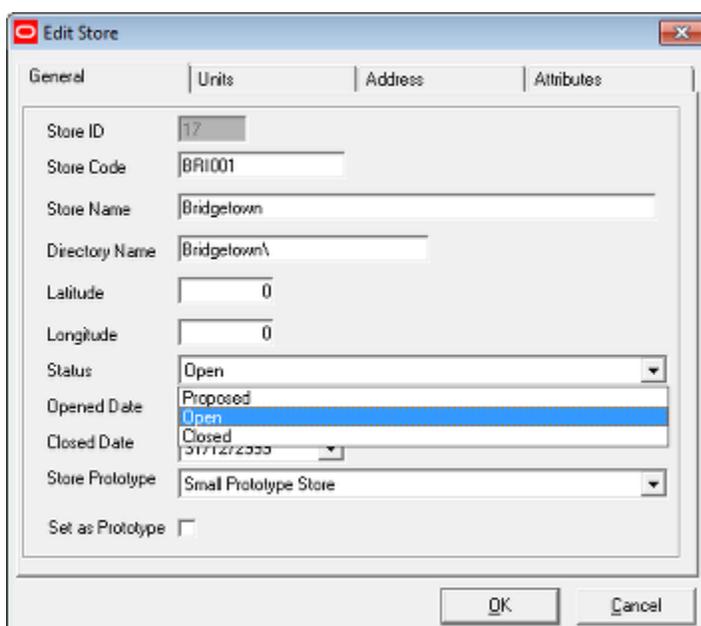
Statuses can be changed by selecting the required store, floor, revision or floor plan in the store hierarchy. It can then be opened for edit using the right click menu or the edit option from the Edit menu on the menu bar or the edit option from the toolbar.

Clusters

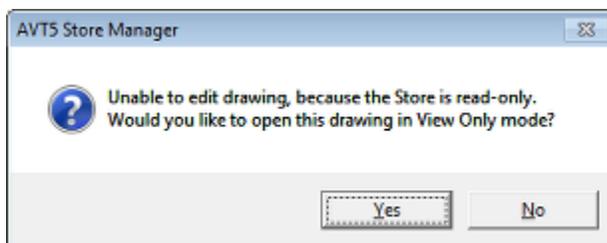
Clusters and sub-clusters are administrative devices for arranging stores in logical groupings. As such they do not have a status.

Stores

Statuses for stores are set using the **Status** drop down list in the Store dialog box.

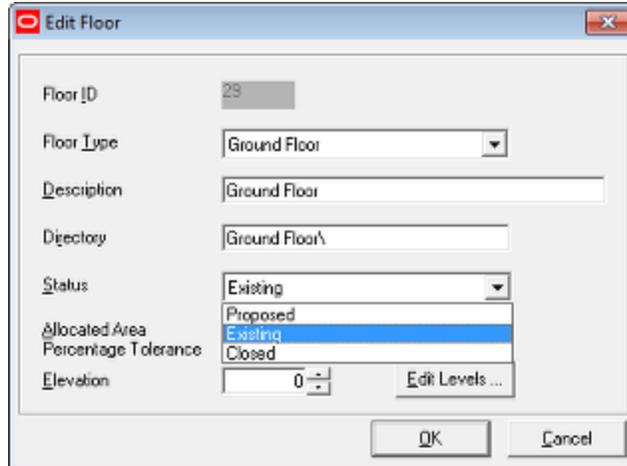


If a store is set to **Closed**, all associated floor plans will be set to **Read Only** status. Any attempt to open those files for editing will result in the appearance of a warning dialog box.

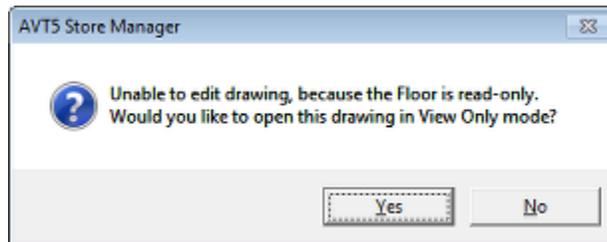


Floors

Statuses for floors are set using the **Status** drop down list in the Floor dialog box.

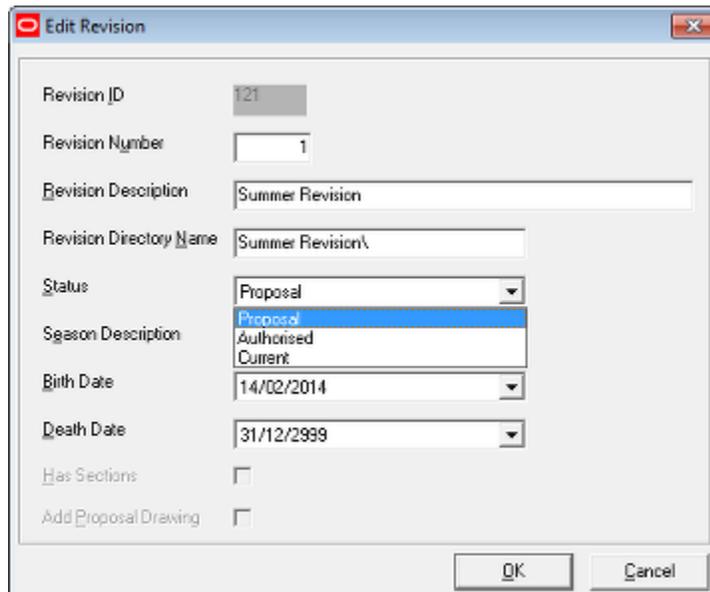


If a floor is set to **Closed**, all associated floor plans will be set to **Read Only** status. Any attempt to open those files for editing will result in the appearance of a warning dialog box.

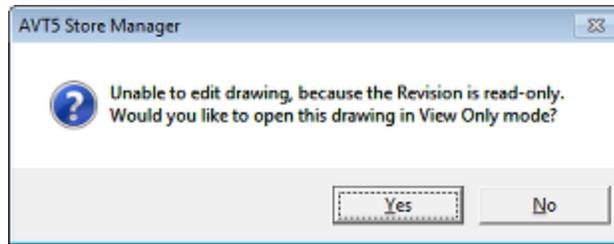


Revisions

Statuses for revisions are set using the **Status** drop down list in the Revision dialog box.

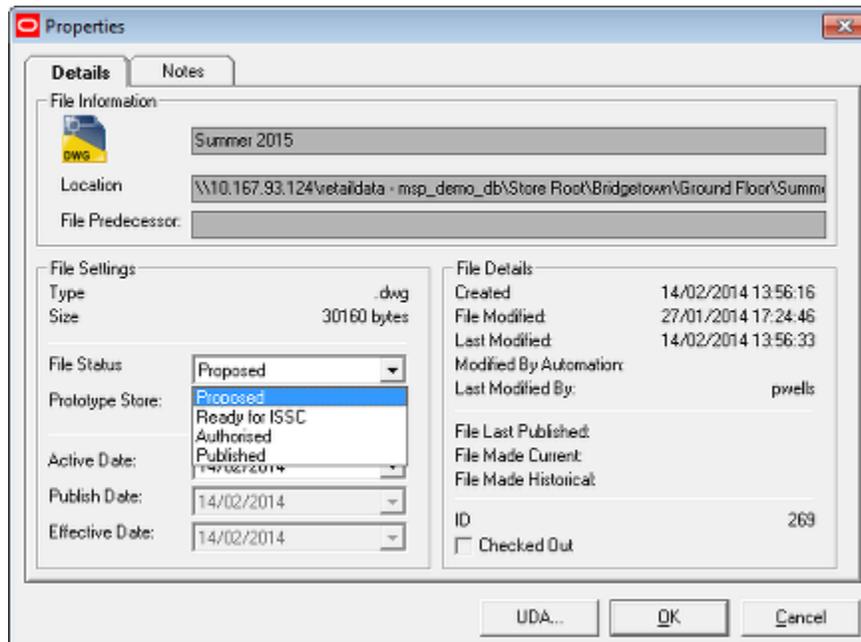


If a revision is set to **Closed**, all associated floor plans will be set to **Read Only** status. Any attempt to open those files for editing will result in the appearance of a warning dialog box.



Files

Statuses for revisions are set using the **Status** drop down list in the File Properties dialog box.



Some statuses for floor plans may not be **reversible** - for example, if the status is set manually to Published, it may not be possible to set it back to an earlier date. Other statuses are not **selectable** - for example it is not generally possible to set the status to Current manually as this is normally done automatically when Update Status is run.

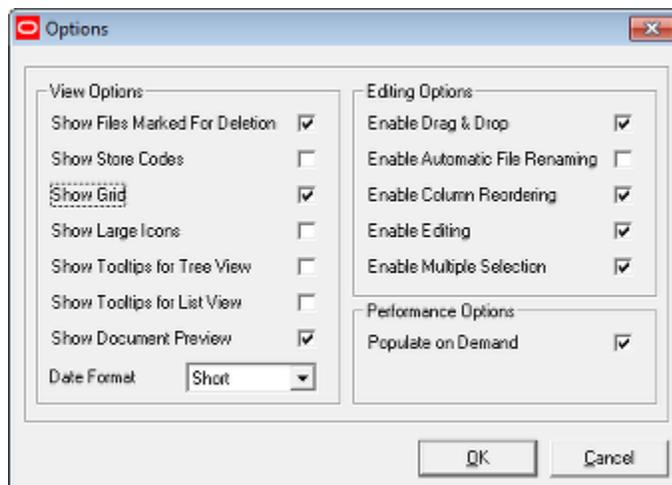
When the floor plan status is set to Authorized, it becomes possible to set up **Publish Date** and **Effective Date**.

- When the Publish Date is reached, if Update Status is run, this will change the status to Published.
- When the Effective Date is reached, if Update Status is run, this will change the status to Current.

Advanced Administration

Customizing Display Options

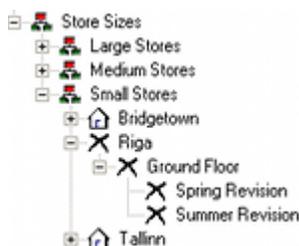
The appearance of some aspects of the Store Manager module can be customized via the Options option on the View pull down menu. This brings up the Options dialogue box.



Display Options

Show Files Marked for Deletion

The Show Files Marked for Deletion option is used to specify whether files marked for deletion are to remain visible or are to be hidden. If the Show files option is chosen, files marked for deletion will be shown with the deleted icon.



Note: Files marked for deletion are not permanently removed from the database until the **Purge** option has been used from the **Tools** menu.

Show Store Codes

This option allows users to specify whether or not the Store Code will be displayed before the Store Name in the store hierarchy.



Show Grid

If active, this option adds a grid to the list of objects displayed in the list view pane on the right hand side of Store Manager.

Show Large Icons

This check box changes the icon size.

Show Tooltips for Tree View

If active, this option displays the store, floor or revision code when the mouse pointer is held over the object within the Store Manager hierarchy.

Show Tooltips for List View

If active, displays the full path when the mouse pointer is held over a file in the list view pane on the right hand side of Store Manager.

Show Document Preview

If active, this option puts a preview of the document at the bottom of the Store Manager Window

Date Format

This option uses a drop down list to select the form the date is displayed in.

Enable Drag and Drop

If enabled, this allows the Store hierarchy to be rearranged by dragging and dropping.

Enable Automatic File Renaming

This option is not currently active.

Enable Column Reordering

If active, this allows the columns in the list view pane on the right hand side of Store Manager to be dragged and dropped to a different order.

Enable Editing

This option is not currently active.

Enable Multiple File Selection

If active, this option allows the user to multi-select files for further operations.

Populate on Demand

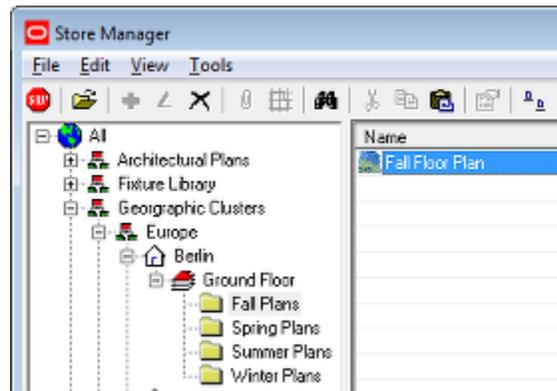
The Populate on Demand Option does not load full information for the store hierarchy until the users opens a specific branch. That branch is then populated with full data as the user opens it. If this option is not selected, all branches of the hierarchy populate as Store Manager is opened.

Windows Folders and the Store Hierarchy

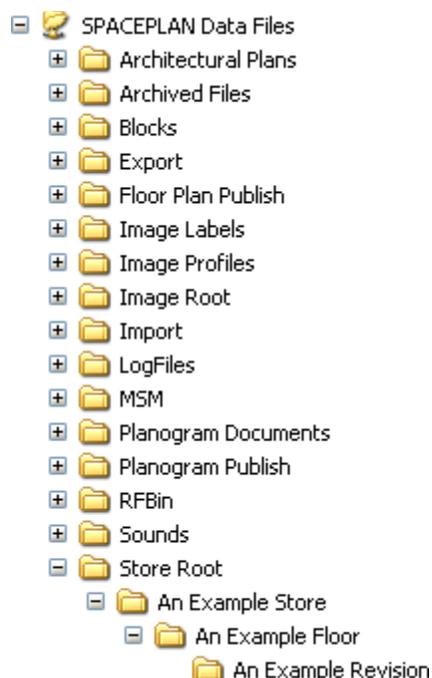
Store Manager has a specified structure. Objects are ordered in this sequence:

1. Clusters
2. Stores
3. Floors
4. Revisions
5. Files

Specific files associated with specific levels on the hierarchy will be in the appropriate folders. For example architectural plans will be associated with floors and floor plans in folders associated with revisions.



Clusters only exist in the Macro Space Planning database. For Stores, Floors and Revisions, Windows folders are created below the Store Root specified in the Directories tab of the Configuration module - this tab can only be accessed if the Configuration module is accessed via the Administration module.



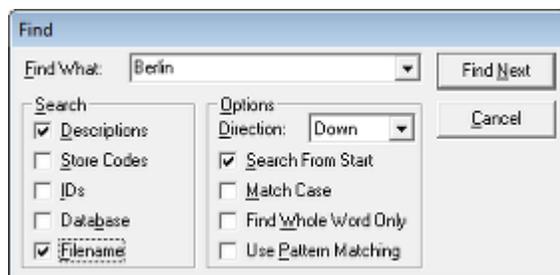
Any physical files associated with specific levels on the hierarchy will be in the appropriate folders. For example Architectural plans will be in folders associated with floors and floor plans in folders associated with revisions.

Searching the Store Hierarchy

The **search facility** can be activated by clicking the search icon on the toolbar.



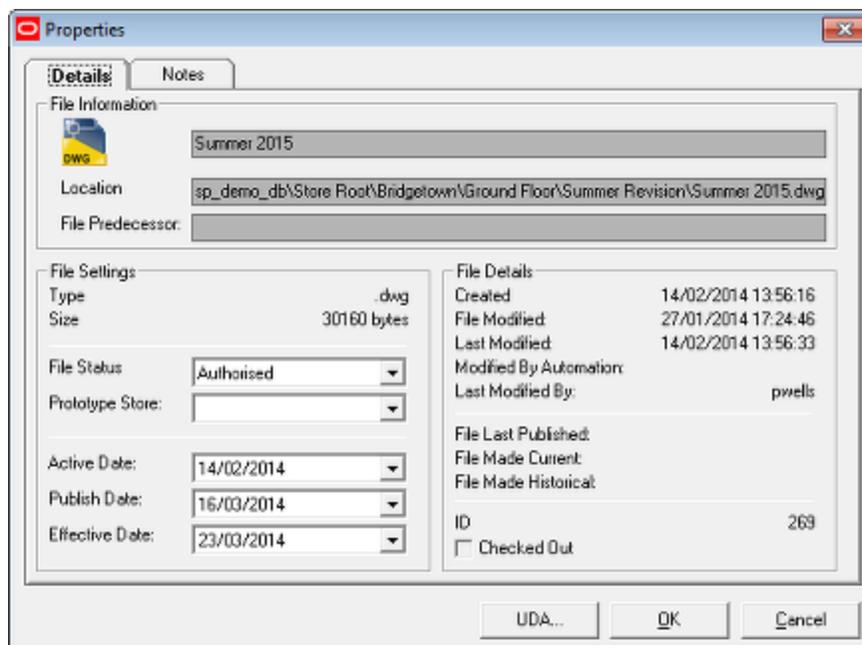
This brings up a dialogue box with a series of options. Select the required options and click on OK.



The search function in Store Manager performs an *in-string* search and does not support wild-cards. It will thus only return exact matches. The search starts from any selected node, and can be set to search up or down from that node.

Significance of Dates in File Properties Dialog Box

The File Properties dialog box that can be accessed from Store Manager contains a series of dates that give information on how and when the file was last modified or processed.



These dates have the following significance:

Option	Description
Created	This is the date the floor plan was originally created in Store Manager. Alternatively, if the floor plan was imported, this will be the date it was originally created in raw AutoCAD.
File Modified	This is the date the floor plan was last modified in raw AutoCAD.
Last Modified	This is the date the file was last saved by a user in the Planner or Merchandiser modules or in In-Store Space Collaboration.
Modified by Automation	This is the date the file was last modified by a batch process such as planogram substitution.

These dates are often used to decide on the correct actions when manually or automatically synchronizing the floor plan.

Note: See the section on synchronization for more information.

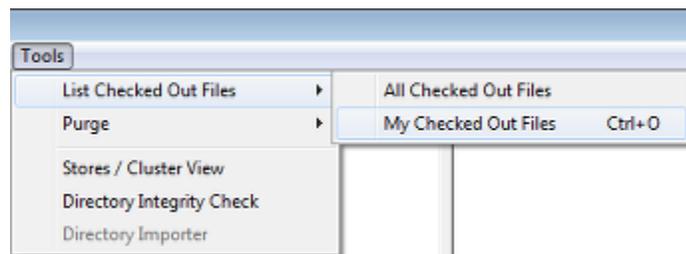
List Checked Out Files

Checked out files are files that the database has flagged as being in use for some reason. These include:

- File is checked out to a user in either Macro Space Management or In-Store Space Collaboration.
- File is checked out to a batch process.
- File has remained checked out due to a software problem.

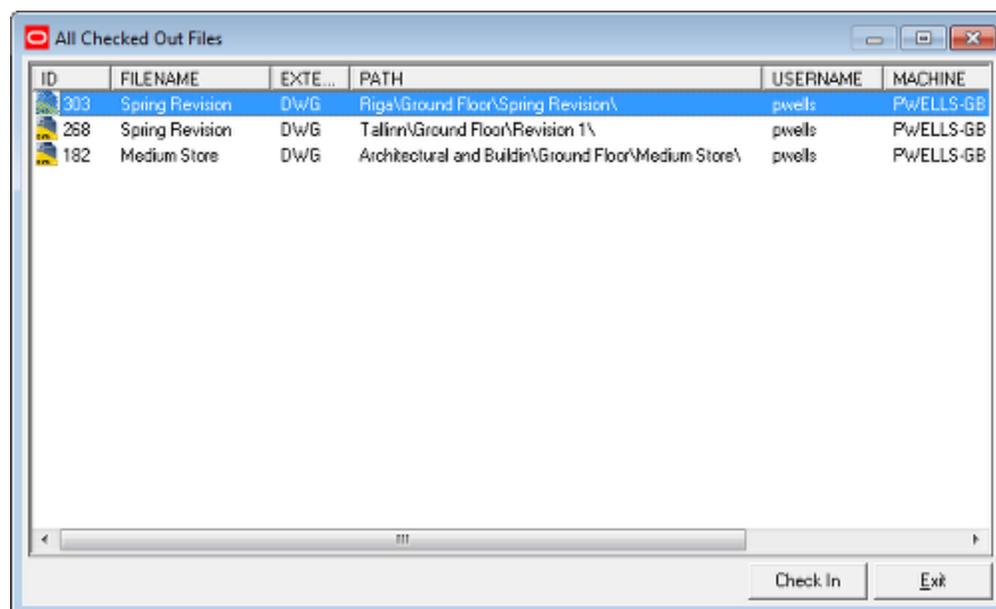
In these instances, users with access to Store Manager can manually check the files back in.

Note: If the file is manually checked back in, all changes since the previous save will be lost.



- Selecting All Checked Out Files lists every file checked out from Store Manager. This option is only available to users in a User Group with the Administrator role.
- Selecting My Checked Out Files lists the files checked out by that particular log in identity. (This can also be accessed by <Ctrl + O>).

After the option has been selected, the user has the option to check files back in by highlighting them then clicking Check In.



Purging from Store Manager

The Purge option allows users to permanently delete several types of object:

- Objects in the Store Manager hierarchy such as clusters, stores, floors, revisions and floor plans.
- Back-up files for AutoCAD (files with a BAK extension)
- Text log files created for Store Manager.

Purging can only be carried out by users belonging to User Groups that have the Administrators role assigned.

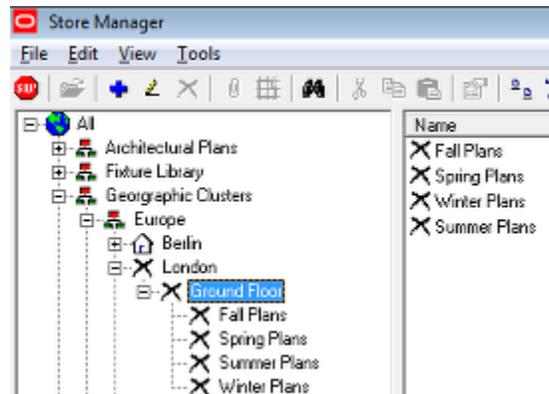
Removing Objects from the Store Manager Hierarchy

Permanent removal of objects from the Store Manager hierarchy is done in two stages.

1. The required object is marked for deletion in the store hierarchy. If the selected object is a DWG file, it will be moved to the RFBin. The location of this folder is specified in the Directories tab of the Configuration Module. (This tab is only accessible when the Configuration module is accessible via the Administration module).
2. The objects are permanently deleted using the Purge option from the Tools menu.

Deleting Objects

Depending on settings in the **Options dialog box** (View menu), objects marked for deletion will either be hidden from view or denoted with the Deleted icon.



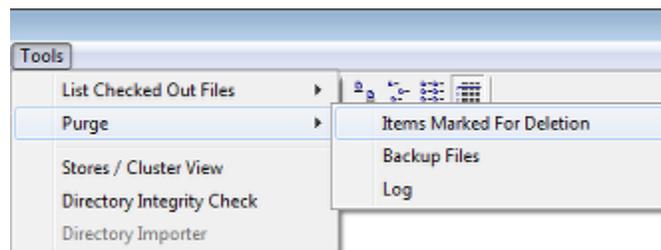
If a top level object (for example a store) is marked for deletion, all child objects will be marked for deletion as well. If the up level object is undeleted, all child objects will have to be manually undeleted.

Purging Objects

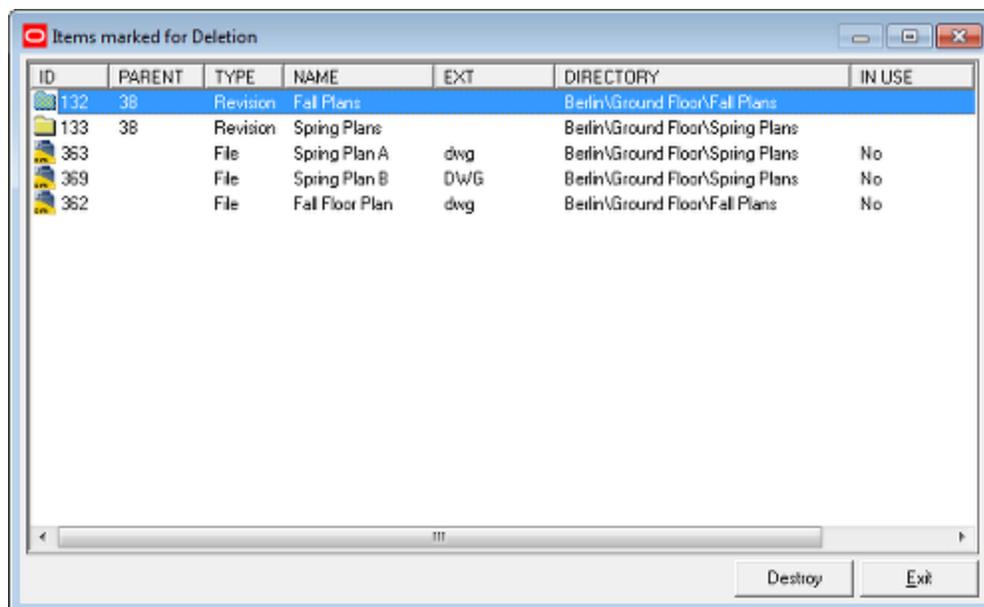
Purging objects results in their permanent removal from the Macro Space Planning database. In the case of the DWG files used for floor plans, these will also be physically deleted from the RFBin - where they were move to when marked for deletion.

Note: Purged DWG floor plans files cannot be recovered, so care should be taken to ensure they are no longer required.

To purge objects, select the **Purge** option from the **Tools** menu.



This will bring up the **Items Marked for Deletion** dialog box



Items marked for deletion are highlighted and then removed by clicking **Destroy**.

Note: The right click menu gives the option to Select All Files, Deselect All Files, Destroy or Undelete files.

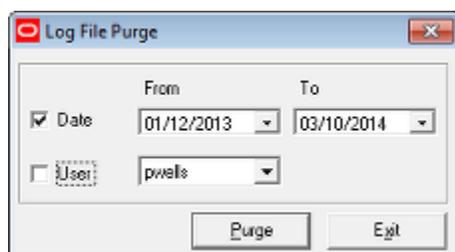
Objects cannot be deleted if they have child objects associated with them. The most common example of this occurring is when an architectural plan is in the list of files to be deleted. All floor plans associated with the architectural plan should be deleted before the architectural plan itself is deleted.

Purging .BAK files

When Planner modifies a file, some settings in Planner can cause it to save a back-up version. This is saved with the file extension .BAK. Because floor plans can be large, these .BAK files can occupy a considerable amount of server or hard disc space. Purging the files frees up this space and may improve performance.

Purging Log Files

Store Manager writes a series of log files when any errors occur. These files accumulate over time. The "purge log files" allows the option of deleting these files; either between a date range, or on the user's computer.



Importing Directories

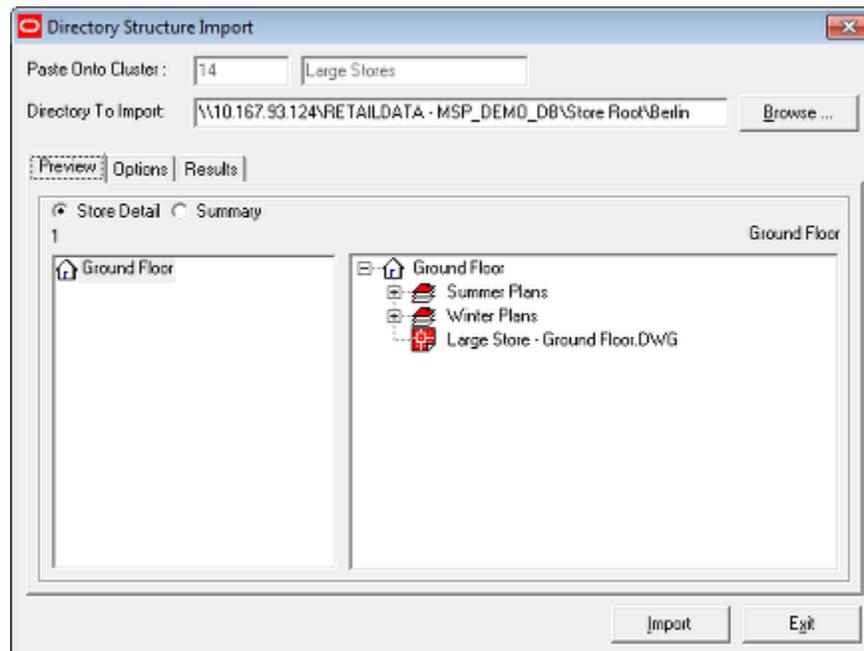
The **Import Directory** option allows files to be imported into the Store Manager file structure and corresponding entries to be made in the database. The import process is as follows:

Preparation

The files to be imported must have a data structure compatible with Store Manager – the files should be in the store/floor/revision/file hierarchy. If there are multiple stores to import, these files should be under a common directory.

Importing

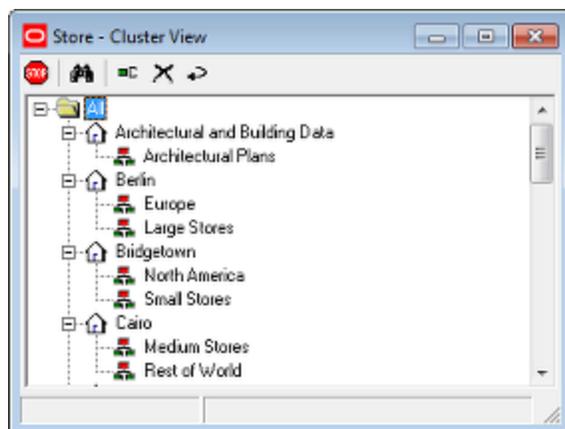
1. A parent cluster should be selected within the Store Manager hierarchy, (or created if required). This parent cluster will be the target for the files to be imported. If any object other than a cluster is selected, this option will be grayed out and unavailable.
2. The Import Directory option should then be selected from the Tools menu. This will bring up a dialogue box called Directory Structure Import. This has three options called Preview, Options and Results.



3. In the Preview tab, use the Browse button to navigate to the require source for the directories to be imported.
4. In the Options tab specify the file extensions to be excluded from the import.
5. Click the Import button to import the in formation.
6. The results can be seen in the Result tab.

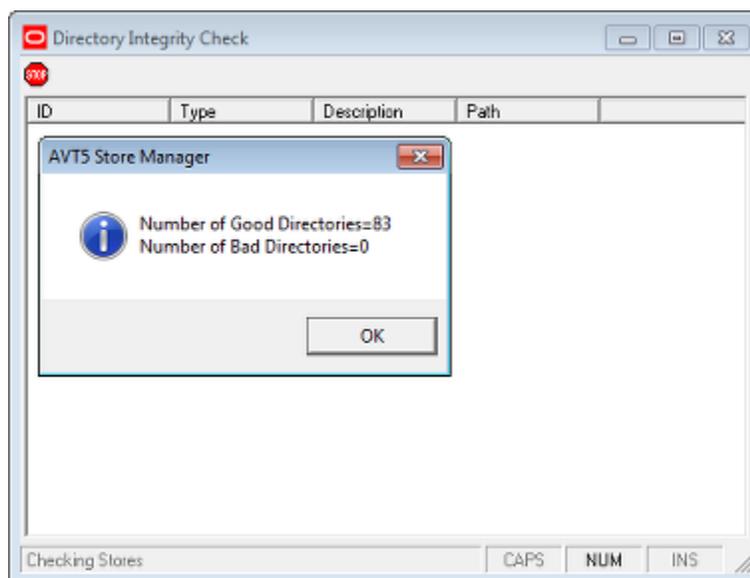
Store/Cluster view

Selecting the **Store/Cluster view** option brings up a window allowing an alternative way of viewing the information held within the hierarchical data structure within Store Manager. Stores are listed in the sequence determined by their unique identification code. The cluster to which the store has been allocated is displayed immediately below the store. Where stores are assigned to multiple clusters, this will be shown. For example the Berlin store belongs to both the Europe and Large Store clusters.



Integrity Check

The **Integrity Check** compares the store directory structure shown in the current display window with that registered in the database. Any errors found are displayed and should be brought to the attention of the Systems Administrator for rectification.



The **ID** column contains a list of the File ID's used by Macro Space Management as references for the files. If a File ID is missing, this means a problem with the directory structure.

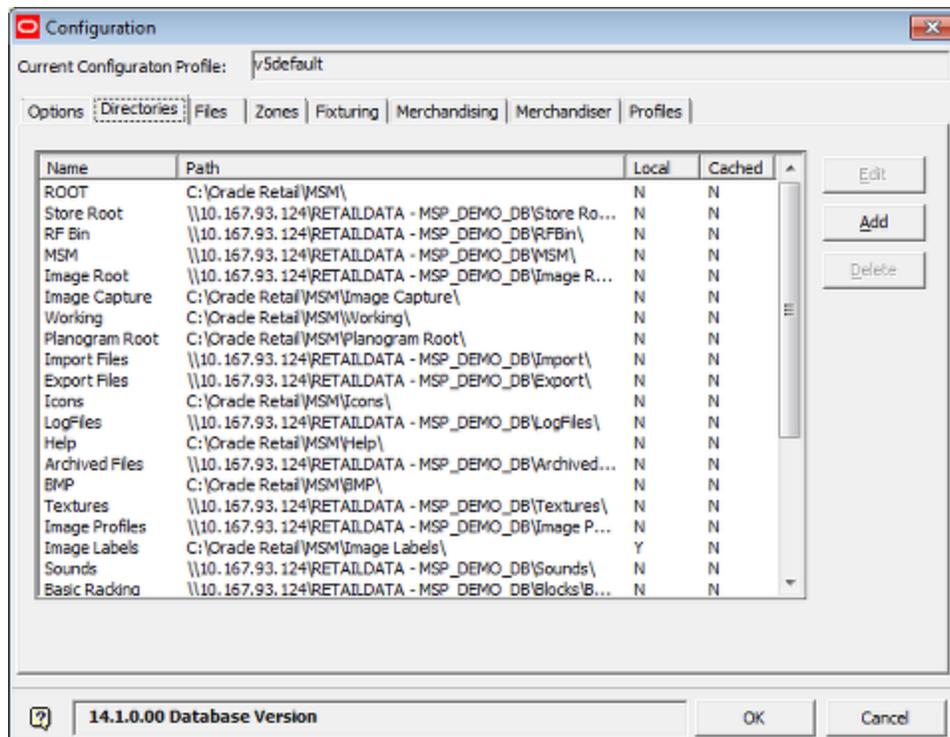
The **Type** is the type of object. It can be a Store, Floor or Revision. Clusters and sub-clusters will not appear as they are folders for holding files, not files themselves.

The **Description** is the name given to the object.

The **Path** is the path in the directory structure to the designated object.

Log Files

Log files are files recording events and problems during operation of Macro Space Management. This enables problems to be investigated at a later date. They can be found at the location specified in the Directories tab of the Configuration Module - this tab is only available if the configuration module is open via the Administration module.



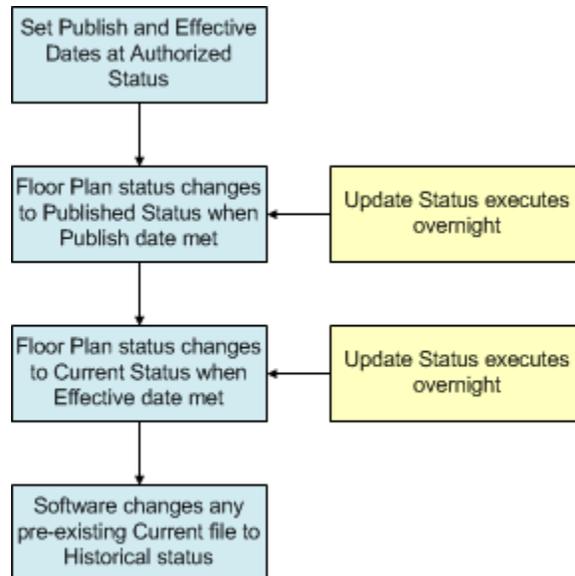
Double clicking on a specific file will bring up a log of that aspect of Macro Space Management's operations.

Note: In many cases, log files have been superseded by information written back to tables in the Macro Space Planning database.

Update Status

Overview of UpdateStatus.exe

UpdateStatus.exe is a small Macro Space Management tool that can be used to change the status of floor plans.



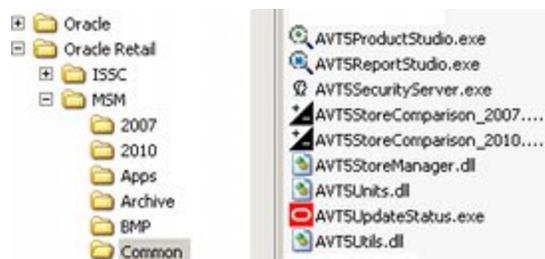
1. The initial stage is to set the Publish and Effective dates when a floor plan reaches Authorized status
2. Update status is set to execute every night by means of a scheduling tool.
3. When the Publish date is met or exceeded, the status of the floor plan is changed to Published.
4. When the Effective Data is met or exceeded, the status of the floor plan is changed to current.
5. At the same time as the status of the floor plan is changed to current any pre-existing current file for that floor is changed to Historical status.

Running Update Status

There are three ways of running UpdateStatus.exe; directly, using Windows Scheduler or using another batch scheduling tool. It is normal to install a copy of Macro Space Management on the batch server - UpdateStatus would generally be run from there.

1. Running Directly

To run UpdateStatus.exe directly, navigate to the C:\Program Files\Oracle Retail\MSM\Common directory on the batch server.



Click on AVT5UpdateStatus.exe to run the file.

2. Through Windows Scheduler

Windows Scheduler gives the option of running UpdateStatus.exe automatically at set intervals.

3. Through other Batch Scheduling Tools

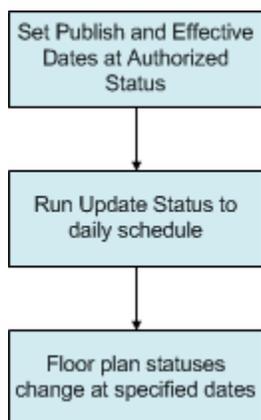
UpdateStatus.exe can also be run through more advanced batch scheduling tools.

Command Line Switches

If run through via a batch scheduling tool, the command line switch `/Silent` allows the user to run it without confirmatory dialog boxes appearing.

Using UpdateStatus.exe

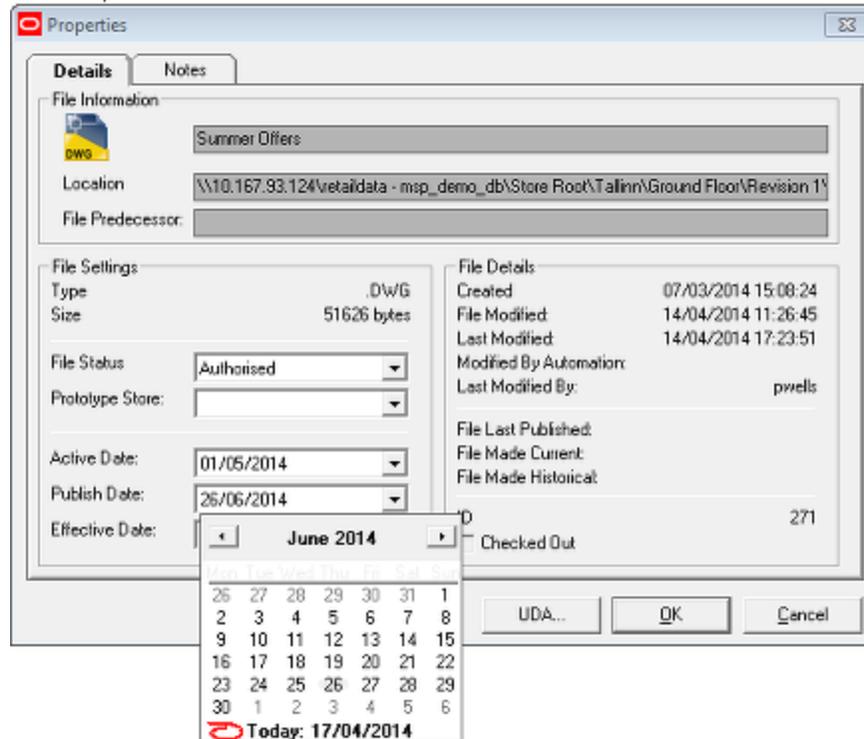
To use UpdateStatus.exe the following actions are required.



The process is carried out as follows:

1. Open the file Properties dialog box

This is done by highlighting the required file within the right hand pane of Store Manager then right clicking to bring up the pop-up menu. Selecting Properties from this menu will bring up the Properties dialogue box.



Note: setting the varying values required for Update Status is carried out by clicking the down arrow on the pertinent field. In the above screenshot, the effective date is being set.

2. Set File status to Authorized

This is done by highlighting the required file within the right hand pane of Store Manager then right clicking to bring up the pop-up menu. Selecting Properties from this menu will bring up the Properties dialogue box.

3. Set the Publish Date

The Publish Date is the date at which the floor plan will be set to Publish status by Update Status. This will allow the requisite store to begin preparations for implementing the changed floor plan. The default Publish Date is set a specific number of days ahead of date the value is being set - this time period is set by the PUBLISH_DATE_LEAD_PERIOD system variable in the Administration module.

The Publish Date can be set using the drop down calendar.

4. Set the Effective Date

The Effective Date is the date at which the floor plan will be set to Current status by Update Status. This is the date at which the requisite store will carry out the changes required for the floor plan. The default Effective Date is set a specific number of days ahead of date the value is being set - this time period is set by the EFFECTIVE_DATE_LEAD_PERIOD system variable in the Administration module.

The Effective Date can be set using the drop down calendar.

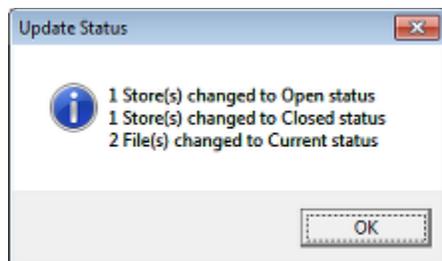
5. Run UpdateStatus.exe

Update status can be run manually. However, it is more normal to run it using a scheduling tool.

- When the Publish Date is met or exceeded, the status of the file will be changed to Published.
- When the Effective Date is met or exceeded, the status of the file will be changed to Current.

Note: If a floor contains several files of Authorized status with Effective dates before the date UpdateStatus.exe is run, only the latest file will have Current status - all other files will have Historical Status.

If run directly, a small pop-up window will report the results.



Note: UpdateStatus.exe will not actually publish the file or notify the store that Publish or Current status has been reached. This has to be done via MSMs Automated Floor Plan Publishing functionality and the retail organizations own reporting tools.

Potential difficulties with UpdateStatus.exe

Multiple Authorized Files within a Floor

If there are multiple Authorized files within a floor, when UpdateStatus.exe is run, it will sequentially change them to Current status based on the Effective Date. As each file is changed to Current status, it will change the preceding file to Historical Status.

Multiple Revisions

Each Revision for a floor can only contain one Authorized file. Therefore, if a floor is to have multiple Authorized files, multiple Revisions must be created for that floor. If a floor only has a single Revision then this can only contain a single Current file and a single Authorized file. (It can contain multiple Proposed and Historical files. If a floor has multiple revisions, then care must be taken to keep track of which Revision contains the Current version of the drawing. Files with an Effective Date greater than the date UpdateStatus.exe is run will not have their status changed. All Effective Dates set to a date before the date UpdateStatus.exe is run will be changed to Current status in the sequence based on the date and time they were authorized. This will result in all but the last file set to Authorized being set first to current, and then to historical status. This means that only the last file to be set to Authorized will retain Current status.

Status of Revisions

UpdateStatus.exe does not currently change the status of Revisions when floor plans within the Revision have their status changed. It is therefore currently possible to have a Current file in a Revision that is not of Current status.

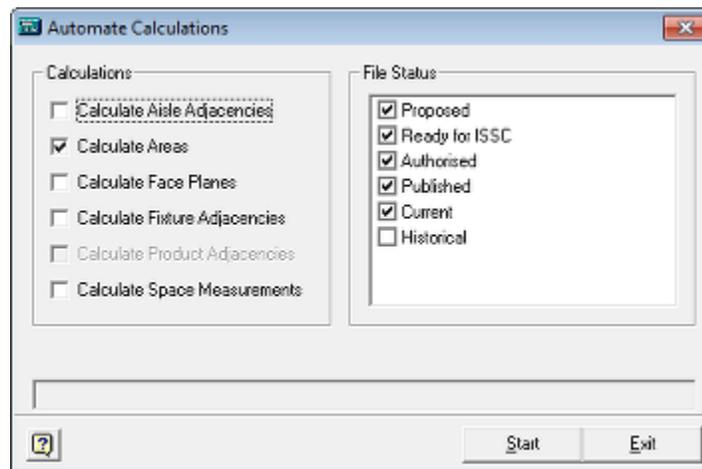
Dates

UpdateStatus will change the status of a floor plan depending on whether the Publish Date or Effective Date has been met or exceeded. Running Update status at 23.30 on 12th June will have a different date to running it at 00.15 on 13th June, although the two instances are only 45 minutes apart.

Automated Calculations

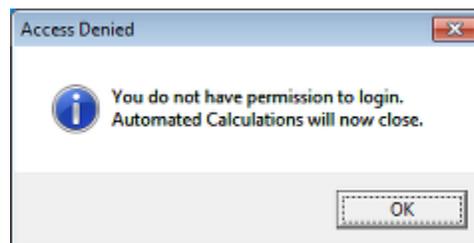
Automated Calculations

Automated Calculations are used to ensure the information held in the database has been updated for reporting purposes. It provides an alternative to some of the options in batch floor plan processing or the options in the pre-processing tab of the **Floor Plan Publishing Configuration dialog box** in the Administration module. Because Automated Calculations operates globally, access needs to be assigned to a User group before a member of that User Group can access the functionality.



Accessing Adjacency Calculations

Access to the Automated Calculations functionality is assigned in the Functional Security dialog box in the Administration module. Users who have not had those permissions assigned will see a warning dialog box if they attempt to access the functionality.



Running Manually

If access permissions have been granted, Automated Calculations can be run manually from the dialog box accessed from the provided shortcuts or run directly from the C:\Oracle Retail\MSM\Common folder. Users can then select which calculations to run and which file status those calculations will be run on. Users using this functionality should be aware that calculations will be updated for all specified files in the database.

Running from the Command Line

Automated Calculations can also be run from the Windows command line using the following syntax:

```
"Path\AVT5AutomatedCalcs.exe" /Silent /Options /Status /Files
```

An example would be:

```
"C:\Oracle Retail\MSM\Common\AVT5AutomatedCalcs.exe" /Silent /Options 25 /Status 23|25|27
```

This syntax can either be used to update the results of calculations for a number of files by entering the data manually, or it can be put into a file and run as part of a batch process.

Path and File Name

The path is the location where the AVT5AutomatedCalcs.exe file is located.

/Silent

This option is used to suppress confirmatory dialog boxes when automated calculations are being run in batch mode.

/Options

This is a bitwise value specifying the selected options.

Value	Calculation
0	No selection
1	Aisle Adjacency
2	Allocated Areas
4	Face Planes
8	Fixture Adjacencies
16	Product Adjacencies
32	Space Measurements

/Status

The statuses for files to process are specified as pipe delimited STA_ID's from the **Status** table: for example 23|25|27.

/Files

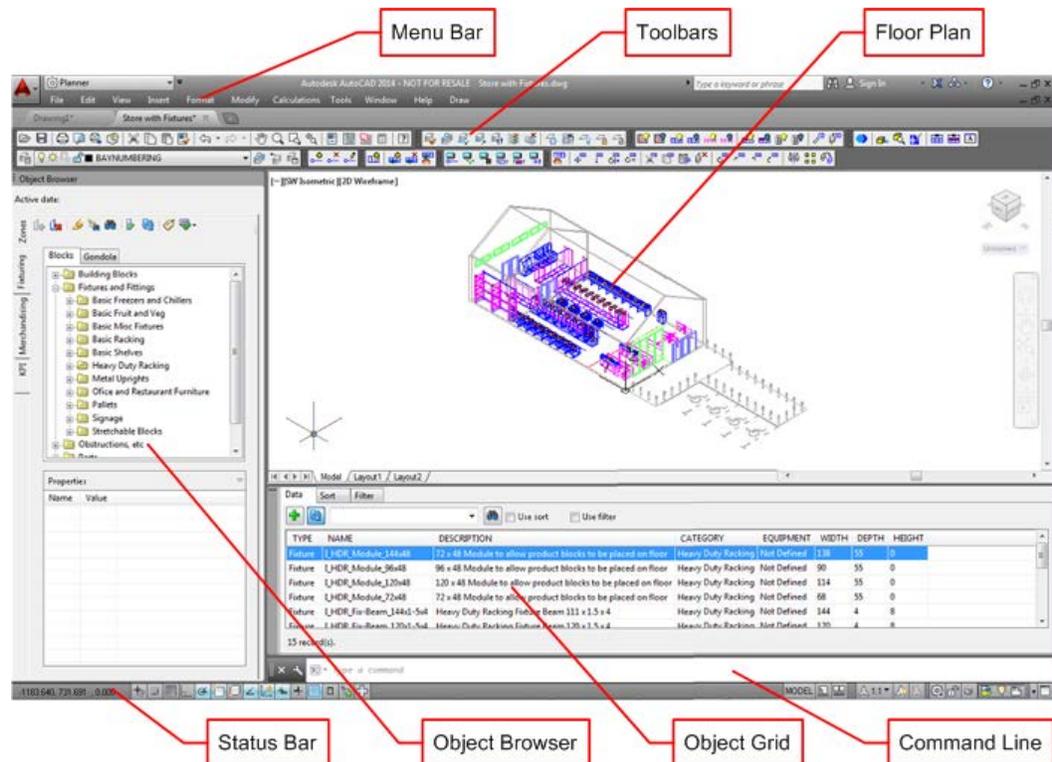
The ID of specific files to process is specified as a comma separated list of FIL_IDs from the **File** table: for example 235,483,679

Note: For full information on these tables see the *Oracle Retail Macro Space Planning Data Model*.

Planner Module

Overview of Planner Module

The Planner Module is based on AutoCAD. It can be used to plan the layout of departments (zones), equipment and merchandise within stores with considerable accuracy. It can also be used to generate reports on performance to enable the user to continually improve the efficiency and profitability of that store.



It has the following components:

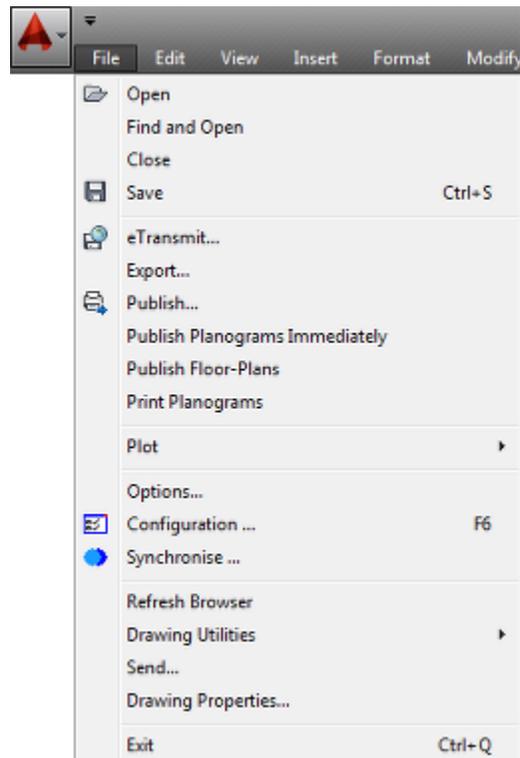
Component	Description
Menu Bar	This allows users to access various AutoCAD and Planner module commands.
Toolbars	These allow users to access various AutoCAD and Planner toolbars.
Object Browser	This allows users to add, edit, and delete zones, equipment, and merchandise. It also allows users to see visual performance reports (hot-spotting/Key Performance Indicators).
Object Grid	This is an alternative method for users to place fixtures, products, and planograms.
Command Line	This allows text-based input for many AutoCAD and Planner commands.
Status Bar	This allows many AutoCAD commands to be toggled on or off.
Floor Plan	This is the currently active representation of a floor within a specific store.

Planner Menu Overview

The File Menu

The **File Menu** allows users access to a number of general options.

Note: This section of the help file refers to the File menu associated with the 2014 version of AutoCAD. Users using earlier versions of AutoCAD may find a slightly different menu.



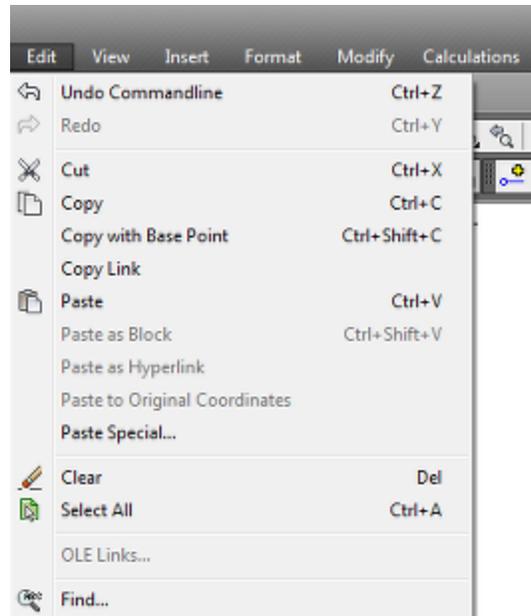
Functionality	Source	Comment
Open	Macro Space Management	Opens Store Manager
Close	Macro Space Management	Closes the current drawing
Save	Macro Space Management	Saves the current drawing
eTransmit	AutoCAD	See AutoCAD Help File for further information.
Export	AutoCAD	See AutoCAD Help File for further information.

Functionality	Source	Comment
Publish	AutoCAD	See AutoCAD Help File for further information.
Publish Planograms Immediately	Macro Space Management	Publishes any planograms associated with the currently open file to the folders specified in the Administration module.
Publish Floor Plans	Macro Space Management	Publishes any selected floor plans to the folders specified in the Administration module.
Print Planograms	Macro Space Management	Prints any planograms associated with the currently open floor plan.
Plot	AutoCAD/Macro Space Management	This menu allows the user to call the Print floor Plans dialog box using the Plot > Search and Print option. For the other options see the AutoCAD Help File.
Options	AutoCAD	See AutoCAD Help File for further information.
Configuration	Macro Space Management	Opens the Configuration Module
Synchronize	Macro Space Management	Opens the Synchronization Module
Refresh Browser	Macro Space Management	Refreshes the Object Browser with the latest information from the database
Drawing Utilities	AutoCAD	Calls varying AutoCAD utilities - see AutoCAD Help File for further information.
Send	AutoCAD	See AutoCAD Help File for further information.
Drawing Properties	AutoCAD	See AutoCAD Help File for further information.
Exit	Macro Space Management	Exits the Module

The Edit Menu

The **Edit Menu** gives access to AutoCAD Functionality.

Note: This section of the help file refers to the Edit menu associated with the 2014 version of AutoCAD. Users using earlier versions of AutoCAD may find a slightly different menu.

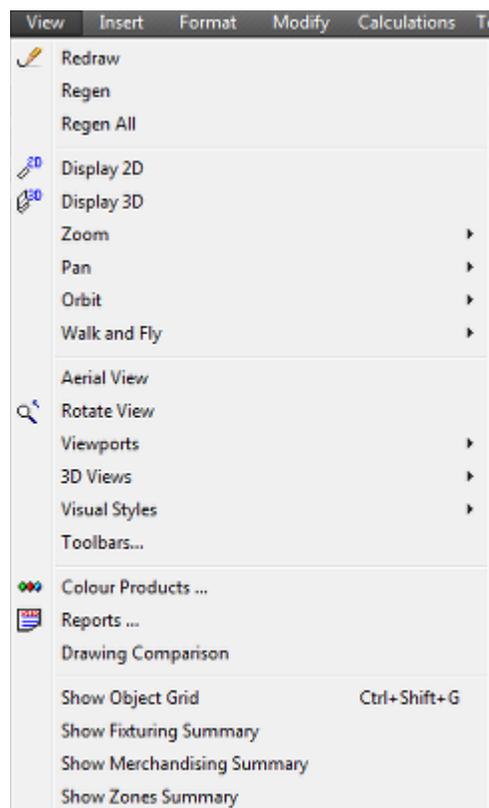


Functionality	Source	Comment
Undo	AutoCAD	Allows the last command(s) to be undone. The exact text will vary depending on what the last executed command was. In the example above, Undo can be used to stop the Publish Planograms Immediately command.
Redo	AutoCAD	Allows the last command(s) to be undone. (The exact text will vary depending on what the last executed command was).
Cut	AutoCAD	See AutoCAD Help File for further information.
Copy	AutoCAD	See AutoCAD Help File for further information.
Copy with Base Point	AutoCAD	See AutoCAD Help File for further information.
Copy Link	AutoCAD	See AutoCAD Help File for further information.
Paste	AutoCAD	See AutoCAD Help File for further information.
Paste as Block	AutoCAD	See AutoCAD Help File for further information.
Paste as Hyperlink	AutoCAD	See AutoCAD Help File for further information.
Paste to Original Coordinates	AutoCAD	See AutoCAD Help File for further information.
Paste Special	AutoCAD	See AutoCAD Help File for further information.
Clear	AutoCAD	See AutoCAD Help File for further information.
Select All	AutoCAD	See AutoCAD Help File for further information.
OLE Links	AutoCAD	See AutoCAD Help File for further information.
Find	AutoCAD	See AutoCAD Help File for further information.

The View Menu

The **View Menu** provides the following options:

Note: This section of the help file refers to the View menu associated with the 2014 version of AutoCAD. Users using earlier versions of AutoCAD may find a slightly different menu.



Functionality	Source	Comment
Redraw	AutoCAD	See AutoCAD Help File for further information.
Regen	AutoCAD	See AutoCAD Help File for further information.
Regen All	AutoCAD	See AutoCAD Help File for further information.
Display 2D	Macro Space Management	Displays the drawing in Macro Space Management 2D Mode. (The blocks must have been configured accordingly).
Display 3D	Macro Space Management	Displays the drawing in Macro Space Management 3D Mode. (The blocks must have been configured accordingly).
Zoom	AutoCAD	See AutoCAD Help File for further information.
Pan	AutoCAD	See AutoCAD Help File for further information.
Orbit	AutoCAD	See AutoCAD Help File for further information.

Functionality	Source	Comment
Walk and Fly	AutoCAD	See AutoCAD Help File for further information.
Aerial view	AutoCAD	See AutoCAD Help File for further information.
Rotate View	AutoCAD	See AutoCAD Help File for further information.
Viewports	AutoCAD	See AutoCAD Help File for further information.
3D views	AutoCAD	See AutoCAD Help File for further information.
Visual Styles	AutoCAD	See AutoCAD Help File for further information.
Toolbars	AutoCAD	See AutoCAD Help File for further information.
Color Products	Macro Space Management	Allows products to be colored according to their level in the Product Hierarchy.
Reports	Macro Space Management	Allows simple reports to be produced on objects within the current drawing.
Drawing Comparison	Macro Space Management	Allows one drawing to be compared with another.
Show (Hide) Object Grid	Macro Space Management	Will show or hide the Object Grid.
Show Fixturing Summary	Macro Space Management	Show a summary of the equipment in the currently active floor plan. This window can be docked in the Object Browser
Show Merchandising Summary	Macro Space Management	Show a summary of the merchandise in the currently active floor plan. This window can be docked in the Object Browser
Show Zones Summary	Macro Space Management	Show a summary of the zones in the currently active floor plan. This window can be docked in the Object Browser

The Summary Window

The Summary window displays information on the zones, Fixtures or Merchandise placed in the currently open floor plan. The content of this window is configurable by modifying the Custom SQL in the database. This allows an implementer to specify the information that appears in the window. As an example, the window could include a comparison between the zones in the currently open floor plan and any designated prototype store. This window is called from the **View** menu although it can be docked in AutoCAD once called.

Note: Custom SQL is modified in the **Custom SQL** table in the database. For more information on this table see the *Oracle Retail Macro Space Planning Data Model*.

Zone Summary

The Zone Summary shows information on the zones present in the currently active floor plan. The information displayed is configurable.

Zone Name	Gross Area (sq ...)	Net Area (sq ft)
Baby	612.11	612.11
Bakery	516.44	516.44
Beverages	1029.63	1029.63
Checkouts	419.46	419.46
Drygoods	1530.22	1530.22
Fresh Food	1409.73	1409.73
Frozen Food	528.26	528.26
Health and Wel...	1127.39	1127.39
Household	1221.3	1221.3
Manager's Office	75.88	75.88
Newsagent	590.93	590.93
Pet Care	383.47	383.47
Sales Floor Area	10355.26	10355.26
Staff Room	88.87	88.87
Stockroom	2645.09	2645.09
Store Entrance	980.17	980.17
Washrooms	162.41	162.41

Fixturing Summary

The Fixturing Summary shows information on the equipment present in the currently active floor plan. The information displayed is configurable.

Department	Category	Quantity	BaseLinear (ft)
Baby	Ambient	42	162
Bakery	Ambient	22	84
Beverages	Ambient	46	178
Drygoods	Ambient	82	318
Fresh Food	Chilled	13	78
Fresh Food	Fruit & Veg	22	100
Frozen Food	Chilled	1	6
Frozen Food	Frozen	28	71
Health and Wel...	Ambient	32	124
Health and Wel...	Fixture	29	116
Household	Ambient	64	246
Newsagent	Ambient	32	96
Pet Care	Ambient	28	108

Merchandising Summary

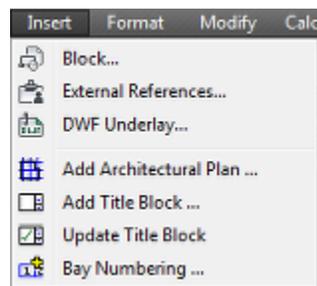
The Merchandising Summary shows information on the product present in the currently active floor plan. The information displayed is configurable.

BaseLinear	Class	Department
16	Baby Food	Baby & Kids
8	Baby Gear	Baby & Kids
8	Baby Wipes	Baby & Kids
12	Bath & Skincare	Baby & Kids
24	Diapers	Baby & Kids
8	Feeding	Baby & Kids
12	Laundry	Baby & Kids
8	Soothing & Teething	Baby & Kids
6	Toys	Baby & Kids
48	Bread	Bakery
12	Breakfast Bakery & Pastries	Bakery
12	Cakes & Tarts	Bakery
20	Beer & Cider	Beverages

The Insert Menu

The **Insert Menu** provides ways to attach further information to the store plan.

Note: This section of the help file refers to the Insert menu associated with the 2014 version of AutoCAD. Users using earlier versions of AutoCAD may find a slightly different menu.

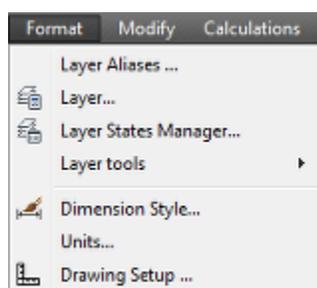


Functionality	Source	Comment
Block	AutoCAD	See AutoCAD Help File for further information.
External References	AutoCAD	See AutoCAD Help File for further information.
DWF Underlay	AutoCAD	See AutoCAD Help File for further information.
Add Architectural Plan	Macro Space Management	X-Refs an architectural plan to the currently active floor plan. This architectural plan must previously have been added to the parent floor in Store Manager.
Add Title Block	Macro Space Management	Adds a title block to the currently active floor plan.
Update Title Block	Macro Space Management	Updates the information in the title block in the currently active floor plan.
Bay Numbering	Macro Space Management	Add numbering to the fixtures in the store plan

The Format Menu

The **Format Menu** provides allows the user to control the layers, dimensions and units associated with the drawing.

Note: This section of the help file refers to the Format menu associated with the 2014 version of AutoCAD. Users using earlier versions of AutoCAD may find a slightly different menu.

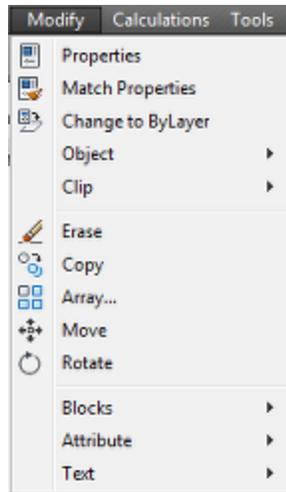


Functionality	Source	Comment
Layer Aliases	Macro Space Management & AutoCAD	Calls a mixture of Macro Space Management and AutoCAD functionality.
Layer	AutoCAD	See AutoCAD Help File for further information.
Layer States Manager	AutoCAD	See AutoCAD Help File for further information.
Layer Tools	AutoCAD	See AutoCAD Help File for further information.
Dimension Style	AutoCAD	See AutoCAD Help File for further information.
Units	AutoCAD	See AutoCAD Help File for further information.
Drawing Set Up	Macro Space Management	Allow the user to select the scales for Paper space.

The Modify Menu

The **Modify Menu** provides functionality for modifying objects in the store plan.

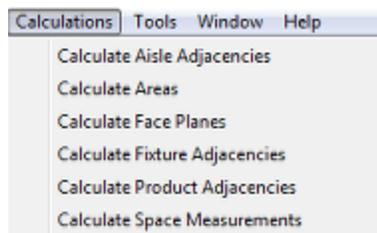
Note: This section of the help file refers to the Modify menu associated with the 2014 version of AutoCAD. Users using earlier versions of AutoCAD may find a slightly different menu.



Functionality	Source	Comment
Properties	AutoCAD	See AutoCAD Help File for further information.
Match Properties	AutoCAD	See AutoCAD Help File for further information.
Change to ByLayer	AutoCAD	See AutoCAD Help File for further information.
Object	AutoCAD	See AutoCAD Help File for further information.
Clip	AutoCAD	See AutoCAD Help File for further information.
Erase	AutoCAD	See AutoCAD Help File for further information.
Copy	AutoCAD	See AutoCAD Help File for further information.
Array	AutoCAD	See AutoCAD Help File for further information.
Move	AutoCAD	See AutoCAD Help File for further information.
Rotate	AutoCAD	See AutoCAD Help File for further information.
Blocks	Macro Space Management & AutoCAD	Calls a mixture of Macro Space Management and AutoCAD functionality.
Attributes	Macro Space Management	Allow the user to select the scales for Paper space.
Text	Macro Space Management & AutoCAD	Calls a mixture of Macro Space Management and AutoCAD functionality.

Calculations Menu

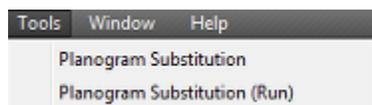
The **Calculations Menu** enables users to initiate varying calculations that write data into the central Macro Space Planning database.



None of the functionality accessed from this menu is AutoCAD functionality.

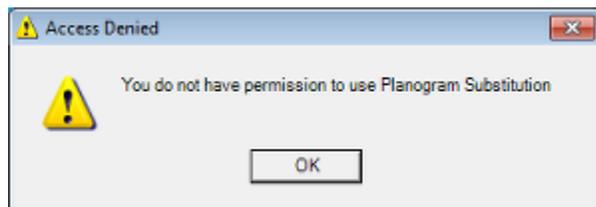
Tools Menu

The Tools menu allows users to call or run Planogram Substitution.



Functionality	Source	Comment
Planogram Substitution	Planogram Substitution is a module that can be called from the Planner, Merchandiser or Administration modules.	Pertinent permissions required.
Run Planogram Substitution	Planogram Substitution is a module that can be called from the Planner, Merchandiser or Administration modules.	Pertinent permissions required.

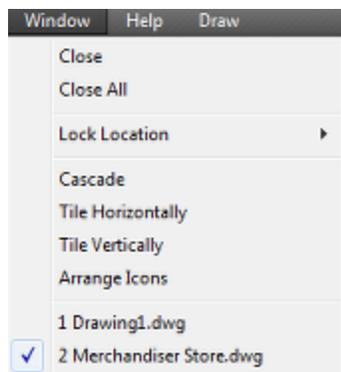
Permissions to access the planogram substitution functionality are set in the Administration module. If the appropriate permissions are not available, a warning message will result and access to the functionality will be denied.



The Window Menu

The **Window Menu** allows users to arrange multiple drawings, if open, and to select an active drawing from a set of open drawings.

Note: This section of the help file refers to the Window menu associated with the 2014 version of AutoCAD. Users using earlier versions of AutoCAD may find a slightly different menu.

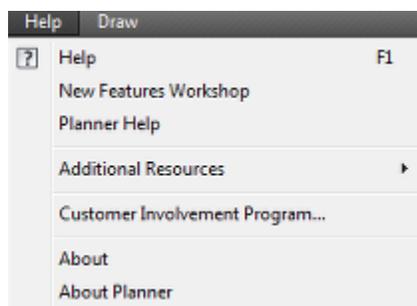


All functionality in this menu is AutoCAD functionality.

The Help Menu

The **Help Menu** contains a number of options that access Help and Assistance.

Note: This section of the help file refers to the Help menu associated with the 2014 version of AutoCAD. Users using earlier versions of AutoCAD may find a slightly different menu.



Functionality	Source	Comment
AutoCAD Help	AutoCAD	See AutoCAD Help File for further information.
New Features Workshop	AutoCAD	Not yet available
Planner Help	Macro Space Management	Calls Macro Space Management's Help File for this module.
Additional Resources	AutoCAD	See AutoCAD Help File for further information.
Customer Involvement Program	AutoCAD	See AutoCAD Help File for further information.
About	AutoCAD	Gives the AutoCAD version.
About Planner	Macro Space Management	Gives the Planner version

Customizable Buttons

Customizable Buttons

Overview of Functionality

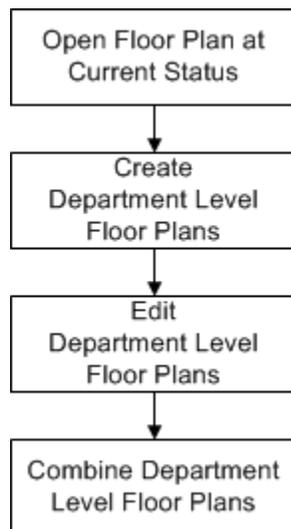
Customizable buttons are used in the Planner module. They are an optional item during the installation process, so not all retailers will have this functionality implemented. If implemented, the Planner user will see the **Customizable Button toolbar**.



This toolbar has ten buttons by default, each of which can call a stored procedure. This stored procedure is created by an implementer or administrator and can execute any task against data in the database.

Example of Customizable Button Use

The stored procedures called by the customizable buttons can execute any task that can be carried out by manipulating the data in the database. An example of this is splitting a floor plan up into departmental level floor plans, allowing multiple planners to work on a store plan simultaneously.

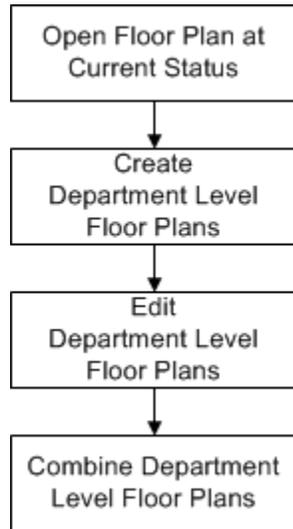


1. A floor plan at current status (i.e. already in service) is opened.
2. Clicking a customizable button runs a stored procedure that creates a series of floor plans for the individual departments in the floor plan.
3. Multiple store planners work on the departments they are responsible for.
4. Clicking on another customizable button runs a stored procedure that reassembles the department level floor plans into a single floor plan.

This would allow a floor plan to be revised in a quick time scale using a team of floor planners, each with expertise in a particular department of the store.

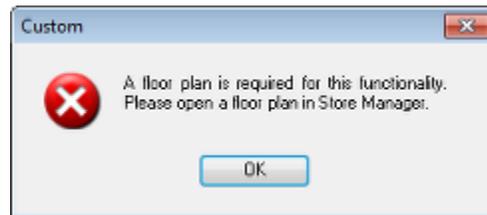
Example of Using the Functionality

An example of how to use the customizable Button functionality works is as follows:



Open Floor Plan

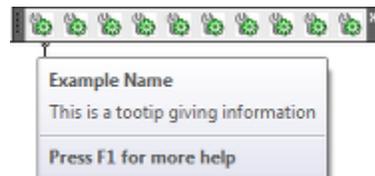
This functionality can only be used when a floor plan is open. Attempting to use it without one open will result in an error message.



Click Customizable Button

The purpose of each customizable button can be seen by hovering the mouse pointer over it. This will bring up the button name and a tooltip. These are customized during implementation. The functionality is run by clicking the selected button in the toolbar.

Note: Pressing F1 will bring up the AutoCAD help - not Planner help.



Note: Customizable buttons can also be run by typing `AVT_CUSTOM` into the command line, then entering the name of the command.

Verifying Permissions

Permission to use the functionality is assigned by an Administrator in MSMS Administration module. If the user does not have permission, the functionality will not run and a message to this effect will appear in AutoCAD's command line.

```
Command: AVT_CUSTOM : Example_Name
Unable to perform Example_Name. Please contact your helpdesk
Insufficient permissions for this functionality
> Type a command
```

Stored Procedure Execution

If sufficient permissions exist, the stored procedure will execute. A stored procedure is a way of directly manipulating data in the database. The data can be manipulated to perform a large number of tasks. What is configured will be retailer specific. Ask your administrator for details.

Command Line Results

Once the stored procedure has been executed, the results will appear in the AutoCAD command line.

```
Command: AVT_CUSTOM : Example_Name
Command completed successfully
Outdated Fixtures Replaced
> Type a command
```

In the above example the stored procedure was designed to replace outdated fixtures. The message indicates that this was completed successfully.

Carry out Necessary Follow Up Actions

After the stored procedure has executed, some follow up actions may be necessary. In the case of the above example where a stored procedure was used to replace outdated fixtures, it is necessary for the user to first synchronize the floor plan 'match the database' and then manually save changes to the floor plan. If they do not and merely exit the floor plan the changes made by the stored procedure will be rolled back and the floor plan will revert to the state of when the floor plan was last saved. This could be different from before the button was pressed because any other changes will also be rolled back.

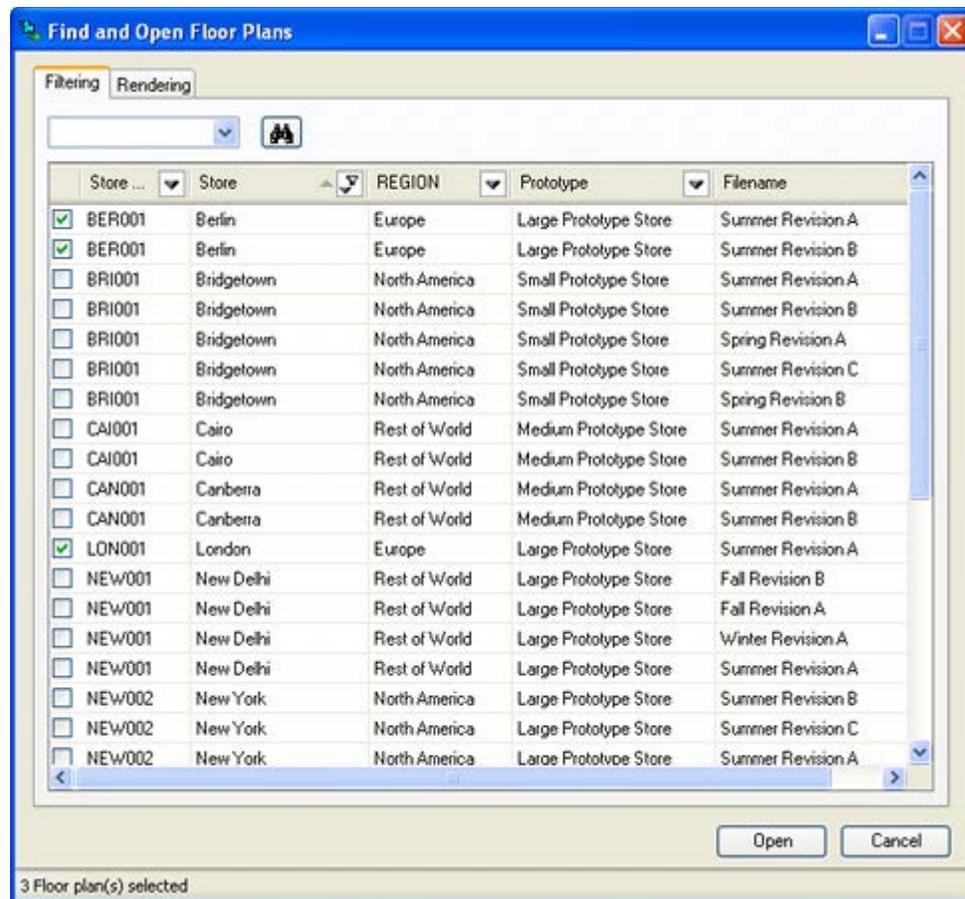
Find and Open

Overview of Find and Open

Find and Open provides an alternative to opening floor plans via Store Manager. It will return a list of all floor plans that a user has permissions for and allow them to select which to open. It is accessed from the File menu in the Planner module.

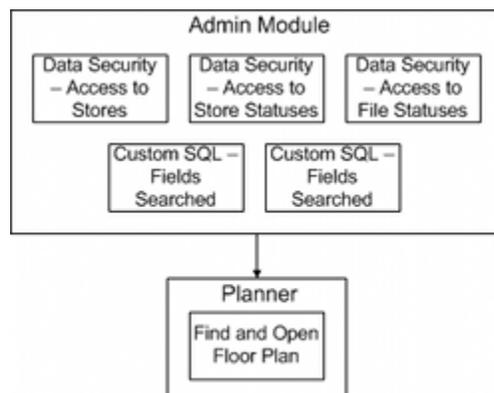


Selecting the **Find and Open** option will bring up the Find and Open dialog box.



Note: Users will only be able to see floor plans they have been assigned permissions for in the Administration Module. If a user has not been assigned those permissions, they will not be able to see the floor plan in the Find and Open dialog box.

The basic method of operation is as follows:



Administration Module

Within the Administration Module:

- The Stores users have permissions to open floor plans from are assigned in the Data Security dialog box - Stores Tab.
- The Store Statuses users have permissions to open floor plans from are assigned in the Data Security dialog box - Statuses Tab
- The File Statuses users have permissions to open floor plans from are assigned in the Data Security dialog box - Statuses Tab.
- Custom SQL (configurable from the Custom Query option accessed from the General Menu in the Administration module) will determine what fields appear in the Find and Open dialog box. This is done by modifying the Floor Plan Print dialog box.
- The Custom Query Option in the Administration Module (General Module) can be used to configure what fields can be search using the Find option. This is done by modifying the Stores query.

These settings determine what will appear in the Find and Open Floor Plans dialog box when it is accessed in the Planner module and what fields can be searched.

Note: In order to access the Administration Module, users must have permission to do so.

Planner Module

The Print Floor Plans dialog box may be accessed from the File Menu > Find and Open option. Users with permissions to access the Planner module automatically have permission to use the functionality.

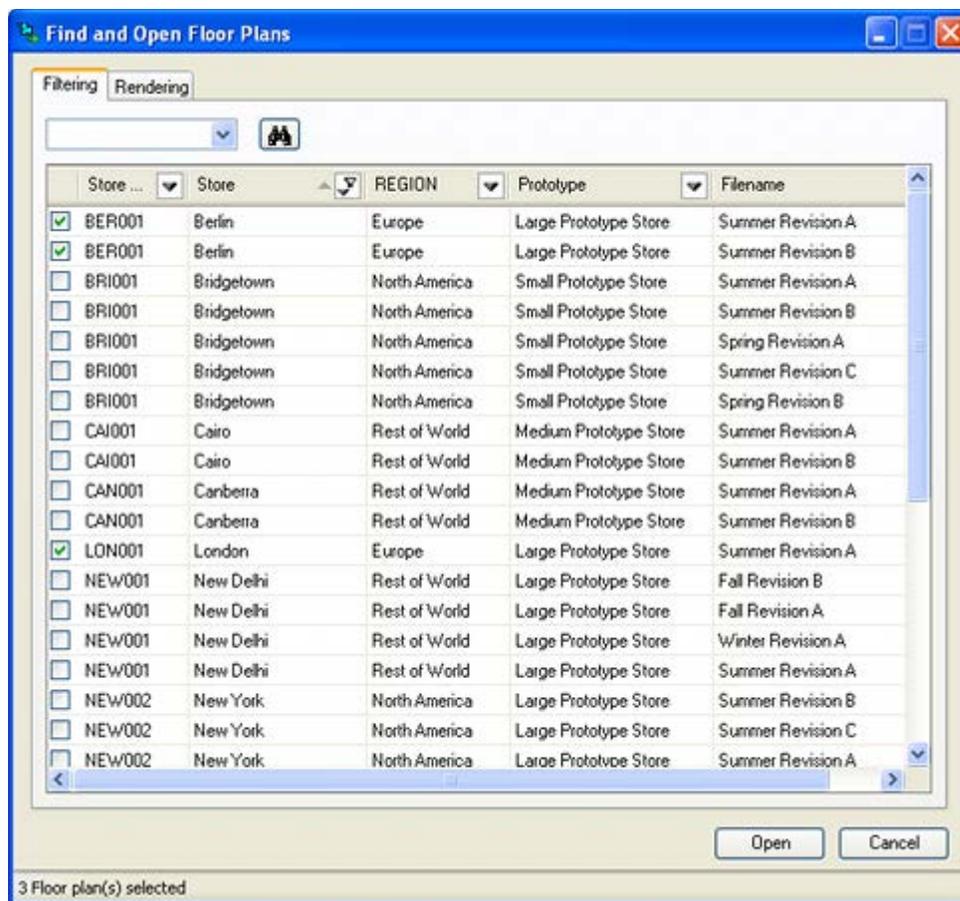
Using Find and Floor Plan

The functionality is used as follows:

1. The Find and Open Plans dialog box is selected from the file menu.
2. The appropriate floor plans are selected in the Filtering tab of the Print Floor Plans dialog box.
3. Settings determining the visual appearance of the printed drawing are specified in the Rendering tab.
4. On clicking the Open button, the selected floor plans will be opened. At the same time as they are opened, the required changes to the visual appearance (specified in the Rendering tab) will be made.
5. After the selected floor plans have been opened, the Find and Open Plans dialog box will remain open until the Cancel button has been clicked.

The Filtering Tab

The Filtering tab enables the user to select the Floor Plans to open. It will populate with all floor plans that the user has permission to access.



Find

Which fields Find will operate on is determined by the Custom SQL configured in the Custom Query option accessed from the General Menu in the Administration module. The Find option can be used by typing text into the text box then clicking the Find icon. Each successive click will move the user to the next floor plan matching the text being searched for. When no more matches are available, a confirmatory dialog box will appear.



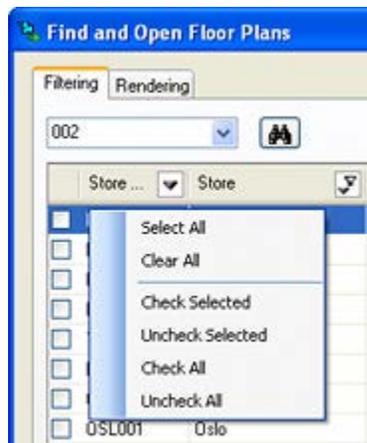
Find operates with explicit or implied wild cards. The explicit wild cards are:

Wild Card	Description
*	Any characters
?	Any character in this position
#	Any number in this position

If explicit wild cards are not used, implicit wild cards will be assumed. For example the text entry 'New' will be treated as '*New*' and will find New York, New Delhi, etc.

Right Click Menu

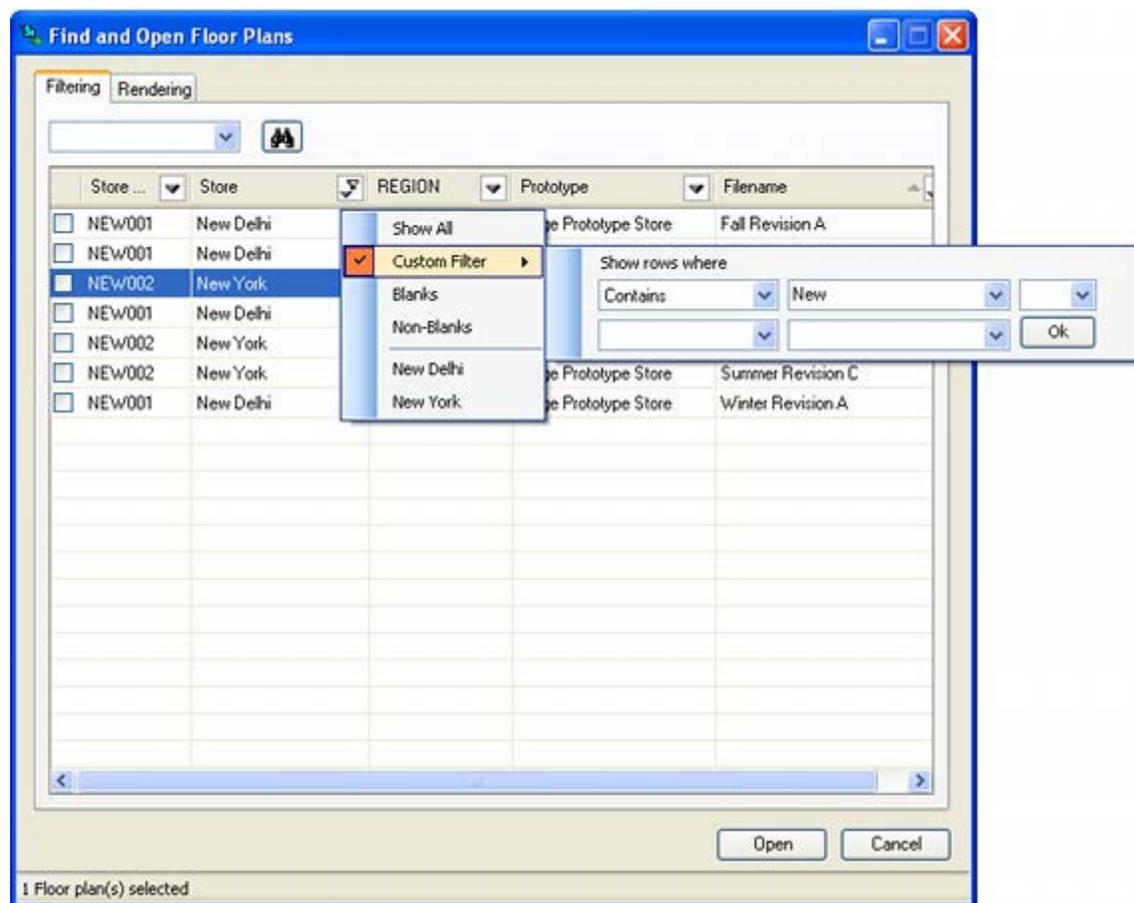
The right click menu provides a quick way of modifying the selected items.



- Select All will select (but not check) all rows of data
- Clear All will deselect (but not uncheck) all rows of data
- Check Selected will check all rows of selected data
- Uncheck Selected will uncheck all rows of selected data
- Check All will check all rows of data
- Uncheck All will uncheck all rows of data
- Paste allows users to paste a carriage returned list of floor plan identifiers from the Windows clipboard. All rows in the dialog box that match the pasted information will be checked.

Filtering

The dialog box is provided with a series of filters on each column. Setting a filter on one column will affect data in all other columns.



They are used as follows:

1. Show All - this option shows all results.
2. Custom Filter - this option allows users to set filters using Boolean logic. The options are:
 - Equal to: will return rows that are an exact match for the entered text.
 - Not Equal to: will return rows that do not match the text string
 - Contains: will return rows where part of the data matches the text string. (Uses implied wild cards).
 - Does not contain: will return rows where no part of the data matches the text string. (Uses implied wild cards).
 - Begins with: will return rows where the text string is an exact match for the start of the data.
 - Ends with: will return rows where the text string is an exact match for the end of the data.
 - Does not begin with: will return rows where the text string is not an exact match for the start of the data.
 - Does not end with: will return rows where the text string is not an exact match for the end of the data.
3. Blanks - column will be filtered to only show rows with null values.
4. Non-Blanks - column will be filtered to only show rows containing a value
5. Results - column will be filtered to only show the selected result.

Boolean logic also includes the use of And or Or.

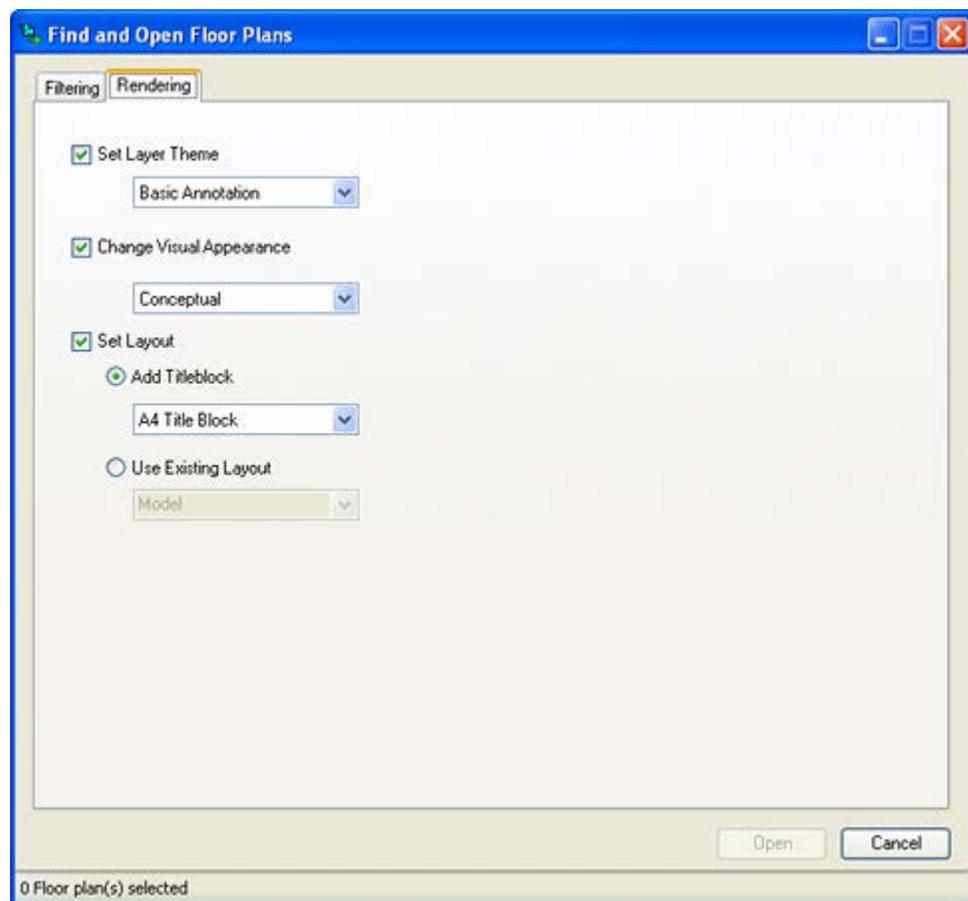
- And means that both conditions must be met. A and B means the data returned must contain both A and B.
- Or means either condition can be met. A or B means the data returned can contain either A or B. It does not need to contain both.

Selecting Floor Plans to open

Floor plans may be selected for opening by ticking the appropriate check box. On clicking OK, the floor plan(s) will open.

The Rendering Tab

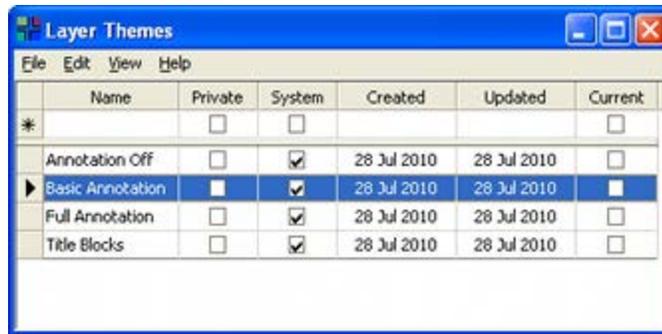
The **Rendering Tab** is used to ensure the visual appearance of the floor plan is as desired.



Set Layer Theme

If the check box is selected, users can select a layer theme from the drop down list. A number of layer themes can exist - each holding a specific set of settings for the individual layers. Selecting a specific layer theme, will automatically configure the individual layers to the settings designated for that layer theme.

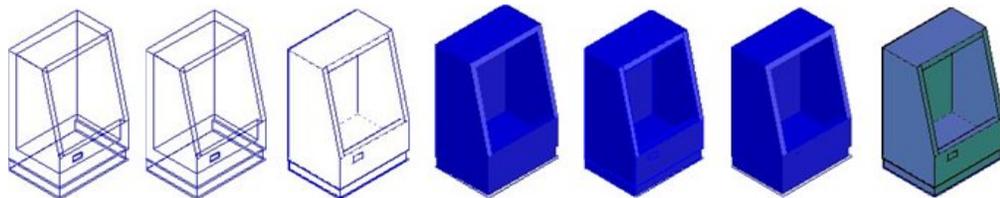
These layer themes are configured in the Layer Themes dialog box accessed from the Layer Aliased dialog box on the Format menu.



Change Visual Appearance

If the checkbox is ticked, this allows users to change the visual appearance of the drawing. The options are:

- 2D Wire Frame
- 3D Wire Frame
- Hidden Detail
- Shaded
- Shaded with Edges
- Conceptual
- Realistic



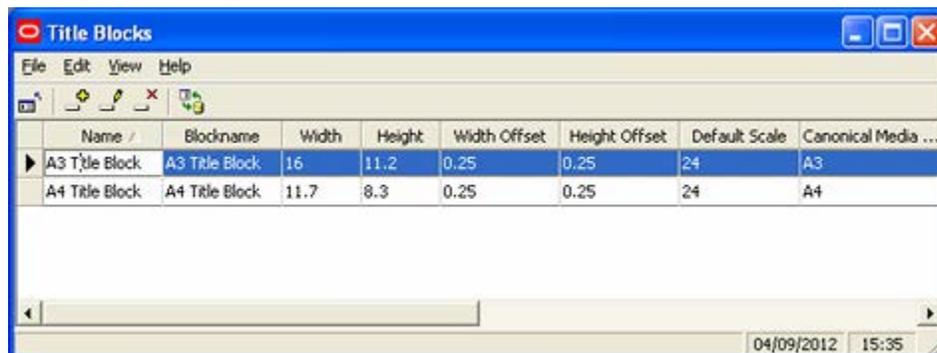
The images above show the different visual appearances available. They can be set by means of the Visual Styles toolbar or Visual Styles Manager.

Set Layout

If the checkbox is ticked the users can select one of two options: Add Titleblock or Use Existing Layout.

1. Add Titleblock

If the Add Titleblock option is selected, users may select a title block from a drop down list. The list of available title blocks is configured using the Title Block option on the Planning menu in the Administration module.



2. Use Existing Layout

If the Use Existing Layout option is selected, users can enter a name matching the name of a paper space tab. This may be typed in. Alternatively it may be selected from the drop down list, which will contain the last ten names. Information in the drop down list is not case sensitive and the following wild cards may be used:

Wild Card	Comment
*	Any number of characters
?	Any single character
#	Any single number

The names of the paper space tabs can be seen at the foot of the floor plan in the Planner module. In the example below they are named Overall Store, Food and Drink, Electrical and Clothing.



Floor Plan Printing

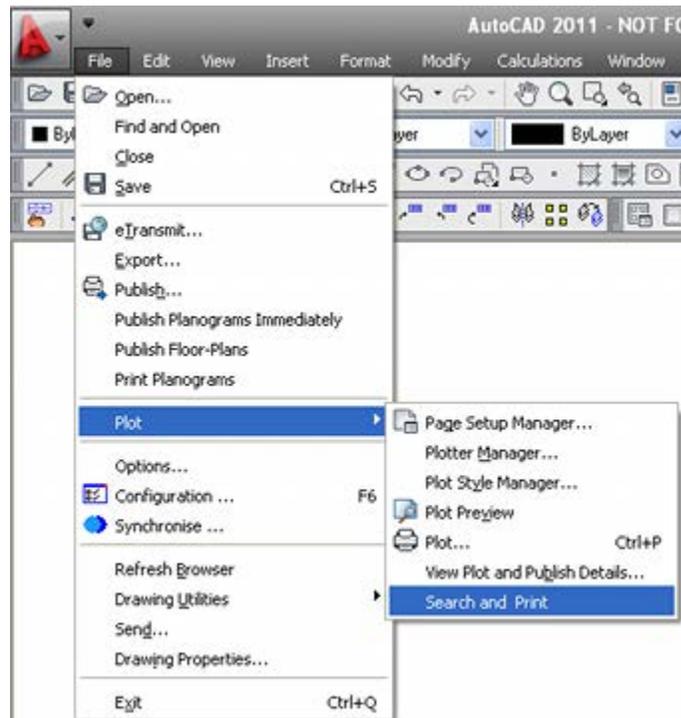
Overview of Floor Plan Printing

Floor Plan Printing allows the user to list all floor plans that they have access rights to. They then have the ability to select plans to be printed and, before they are printed, specify how the appearance and data associated with the floor plans can be updated. After printing, all changes will be undone so that the floor plan is in the condition it was in before printing.

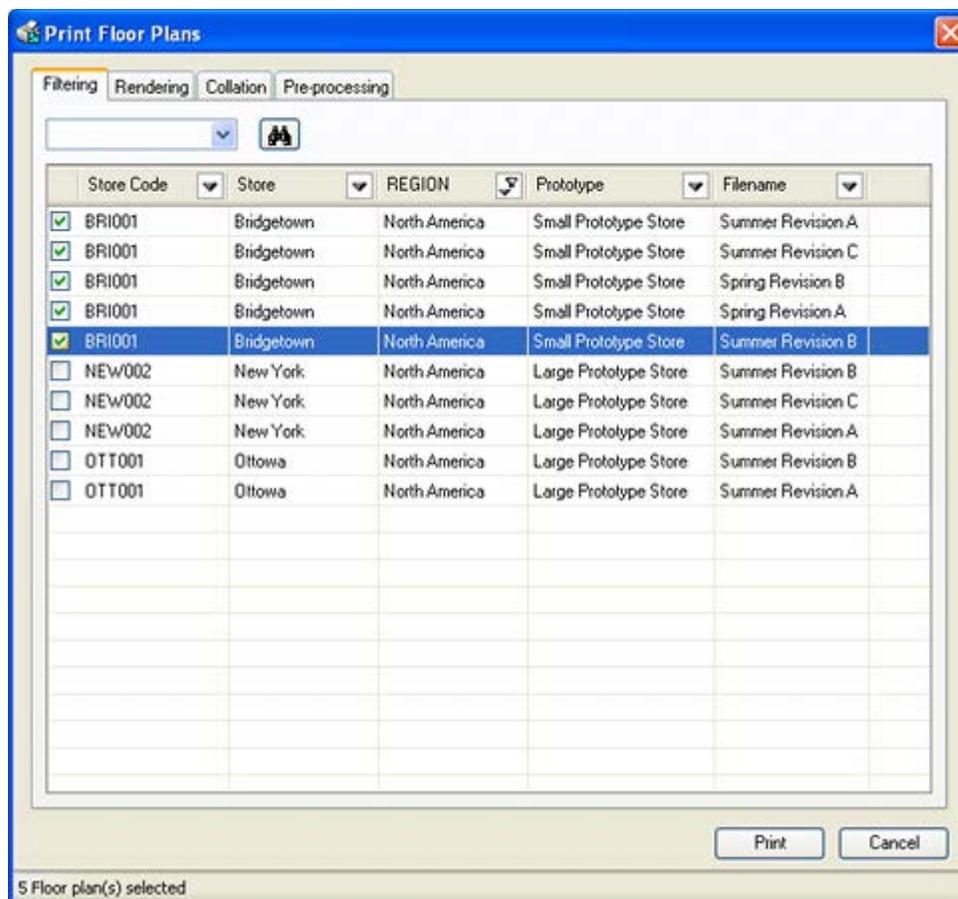
Note: Users wishing to Publish the floor plan (output it in electronic or hard copy form with permanent changes) should use the Immediate Floor Plan Publishing option from the File menu.

Assessing Floor Plan Printing

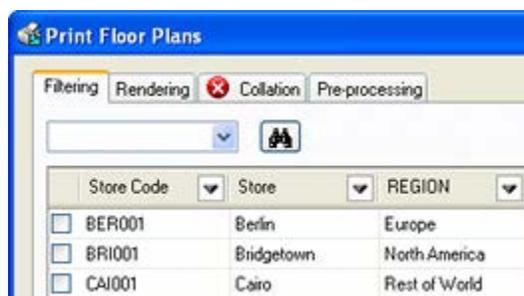
The Print Floor Plan functionality is accessed from the File Menu > Plot > Search and Print option. Users with permissions to access the Planner module will automatically have permission to use the functionality.



The Print Floor Plan dialog box will appear.



If there are any errors during selecting the options, a warning icon will appear on the appropriate tab and an explanation will appear in the status bar. In the example below, there is a problem with the selected options on the collation tab.



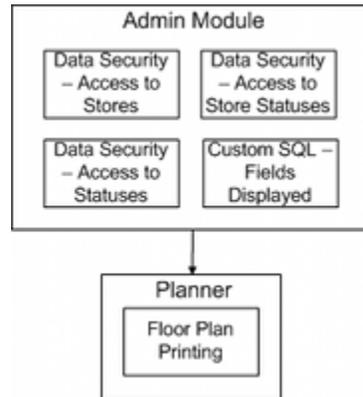
Reversing Changes Made During Floor Plan Printing

Options in the **Print Floor Plans dialog box** allow the use to specify the changes required to the floor plan before it is printed. The settings selected in the Rendering and Pre-Processing tabs will affect the visual appearance of the floor plan and will be made before it printing. This allows users to review a hard copy version of the floor plan in a specified condition.

After printing, the changes will be reversed and the floor plan returned to the state it was before printing. The status of the floor plan will also be left unchanged.

Using Floor Plan Printing

The basic method of operation is as follows:



Administration Module

Within the Administration Module:

- The Stores users have permissions to print floor plans from are assigned in the Stores option of the Status tab of the Data Security dialog box.
- The Store statuses users have permissions to print floor plans from are assigned in the Stores option of the Status tab of the Data Security dialog box.
- The file statuses users have permissions to print floor plans from are assigned in the Files option of the Statures tab of the Data Security dialog box.

Note: the floor plans that a user can see are dependent on the combination of store, store status and file status permissions.

- The fields that display in the Filtering Tab of the Print floor Plans dialog box are configured in the Custom SQL dialog box.

These settings determine what will appear in the Print floor Plans dialog box when it is accessed in the Planner and Merchandiser modules.

Note: In order to access the Administration Module, users must have permission to do so.

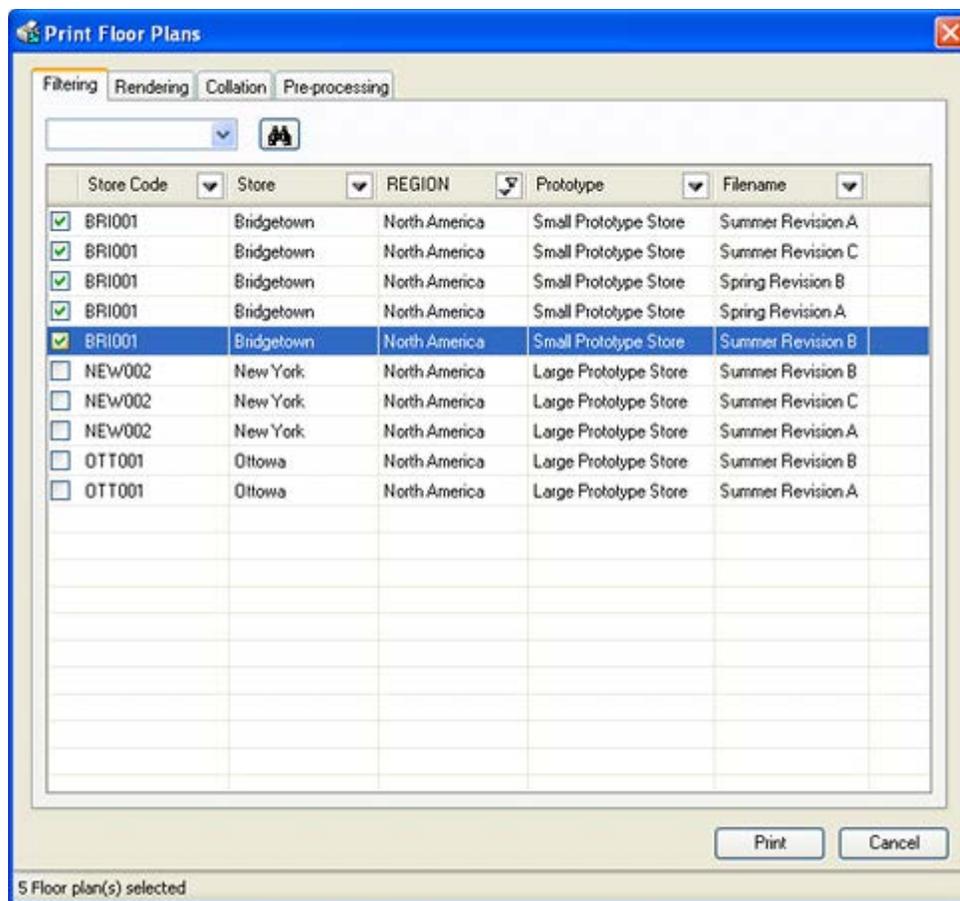
Planner Module

The Print Floor Plans dialog box may be accessed from the File Menu > Plot option. Users with permissions to access the Planner module automatically have permission to use the functionality.

Using Floor Plan Printing

The functionality is used as follows:

- The Print Floor Plans dialog box is selected from the file menu.
- The appropriate floor plans are selected in the Filtering tab of the Print Floor Plans dialog box.
- Settings determining the visual appearance of the printed drawing are specified in the Rendering tab.
- Settings determining how data associated with the floor plan is updated are specified in the Pre-Processing tab.



Find

The Find option can be used by typing text into the text box then clicking the Find icon. Each successive click will move the user to the next floor plan matching the text being searched for. When no more matches are available, a confirmatory dialog box will appear.



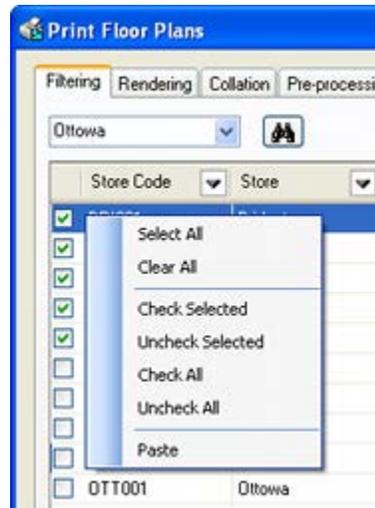
Find operates with explicit or implied wild cards. The explicit wild cards are:

Wild Card	Description
*	Any characters
?	Any character in this position
#	Any number in this position

If explicit wild cards are not used, implicit wild cards will be assumed. For example the text entry 'New' will be treated as '*New*' and will find New York, New Delhi, etc.

Right Click Menu

The right click menu provides a quick way of modifying the selected items.



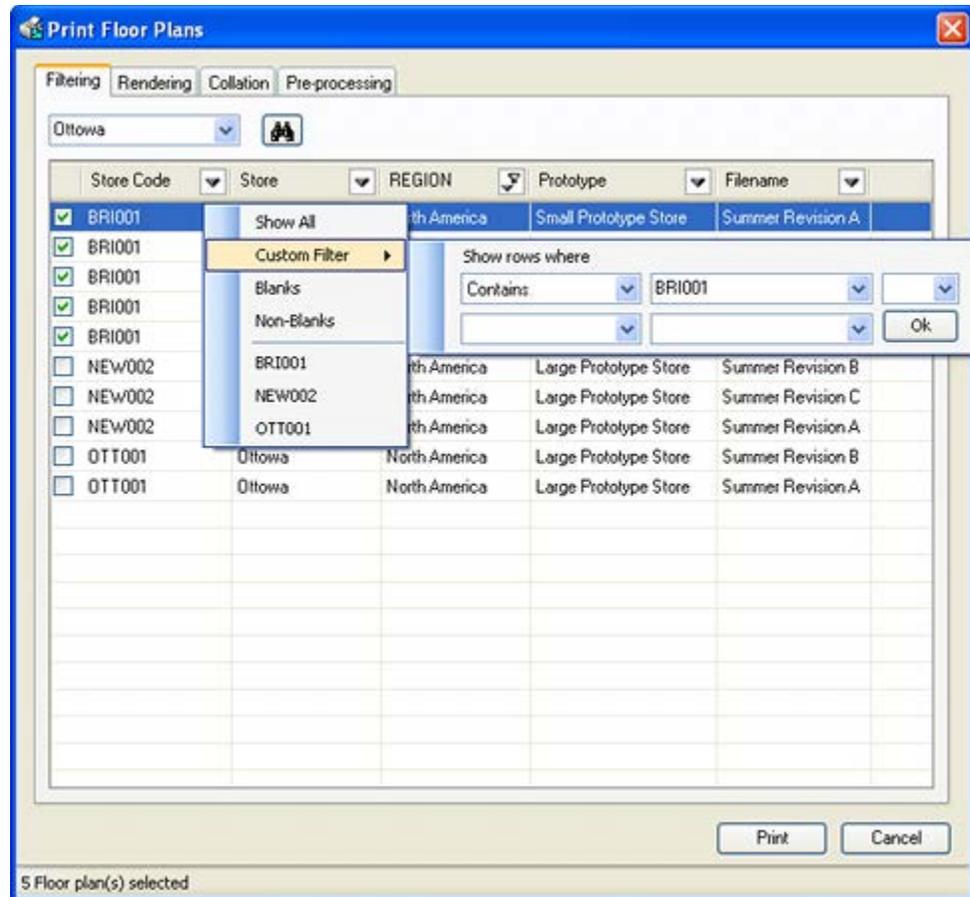
- Select All will select (but not check) all rows of data
- Clear All will deselect (but not uncheck) all rows of data
- Check Selected will check all rows of selected data
- Uncheck Selected will uncheck all rows of selected data
- Check All will check all rows of data
- Uncheck All will uncheck all rows of data
- Paste allows users to paste a carriage returned list of floor plan identifiers from the Windows clipboard. All rows in the dialog box that match the pasted information will be checked.

Selecting Floor Plans to Process

Floor plans may be selected for printing by ticking the appropriate check box.

Using Filters in the Filtering Tab

The Filtering Tab is provided with a series of filters on each column. Setting a filter on one column will affect data in all other columns.



They are used as follows:

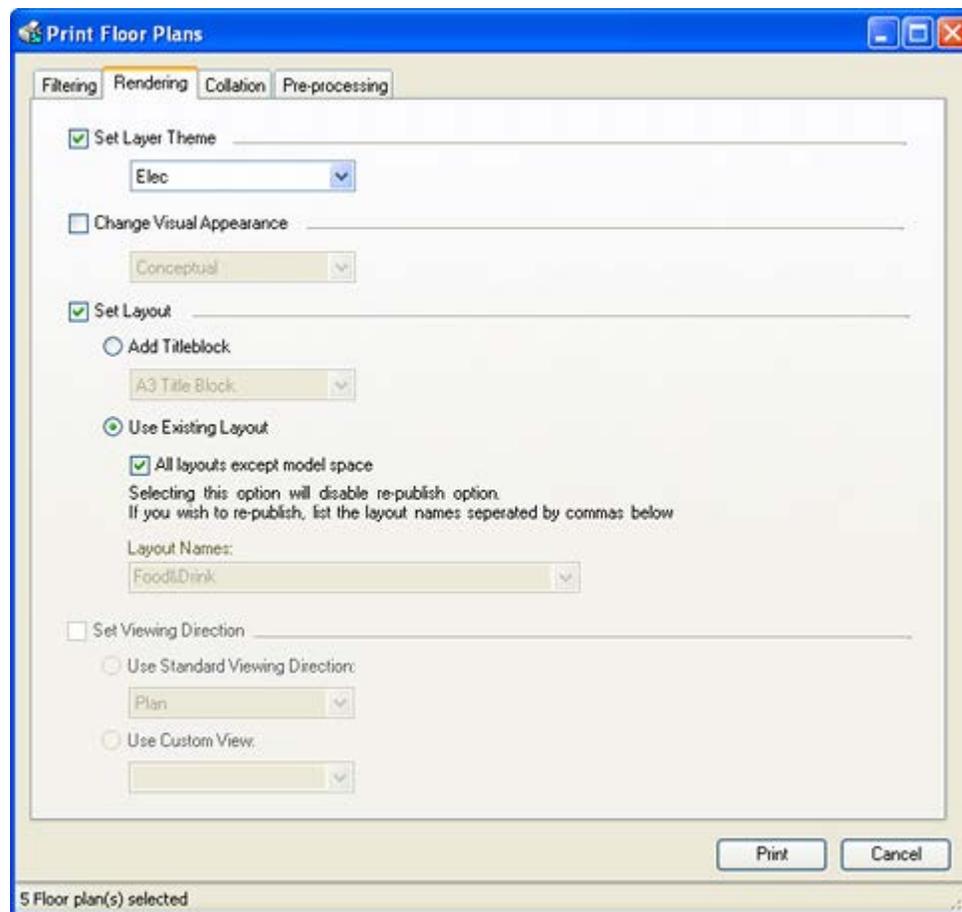
- Show All - this option shows all results.
- Custom Filter - this option allows users to set filters using Boolean logic. The options are:
 - Equal to: will return rows that are an exact match for the entered text.
 - Not Equal to: will return rows that do not match the text string
 - Contains: will return rows where part of the data matches the text string. (Uses implied wild cards).
 - Does not contain: will return rows where no part of the data matches the text string. (Uses implied wild cards).
 - Begins with: will return rows where the text string is an exact match for the start of the data.
 - Ends with: will return rows where the text string is an exact match for the end of the data.
 - Does not begin with: will return rows where the text string is not an exact match for the start of the data.
 - Does not end with: will return rows where the text string is not an exact match for the end of the data.
- Blanks - column will be filtered to only show rows with null values.
- Non-Blanks - column will be filtered to only show rows containing a value
- Results - column will be filtered to only show the selected result.

Boolean logic also includes the use of And or Or.

- And means that both conditions must be met. A and B means the data returned must contain both A and B.
- Or means either condition can be met. A or B means the data returned can contain either A or B. It does not need to contain both.

The Rendering Tab

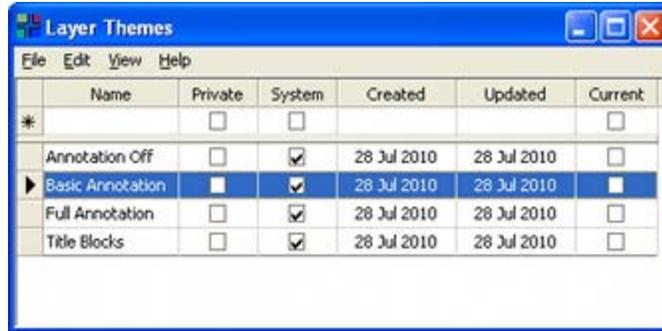
The Rendering Tab is used to ensure the visual appearance of the floor plan is as desired.



Set Layer Theme

If the check box is selected, users can select a layer theme from the drop down list. A number of layer themes can exist - each holding a specific set of settings for the individual layers. Selecting a specific layer theme, will automatically configure the individual layers to the settings designated for that layer theme.

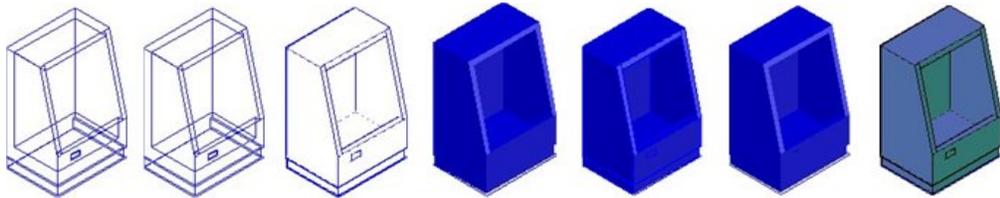
These layer themes are configured in the Layer Themes dialog box accessed from the Layer Aliased dialog box on the Format menu.



Change Visual Appearance

If the checkbox is ticked, this allows users to change the visual appearance of the drawing. The options are:

- 2D Wire Frame
- 3D Wire Frame
- Hidden Detail
- Shaded
- Shaded with Edges
- Conceptual
- Realistic



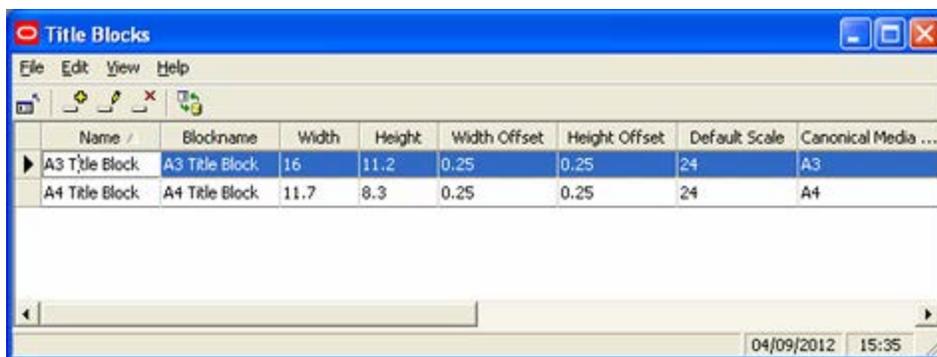
The images above show the different visual appearances available. They can be set by means of the Visual Styles toolbar or Visual Styles Manager.

Set Layout

If the checkbox is ticked the users can select one of two options: Add Titleblock or Use Existing Layout.

1. Add Titleblock

If the Add Titleblock option is selected, users may select a title block from a drop down list. The list of available title blocks is configured using the Title Block option on the Planning menu in the Administration module.



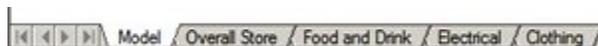
2. Use Existing Layout

If the Use Existing Layout option is selected, the user has two options; to publish all layouts except model space, or to publish selected layouts.

- All layouts except model space
- If this option is selected, all layouts except the model space layout will be published for each floor plan. The layout names option will also be grayed out and unavailable.
- Layout Names
- If this option is selected, users can enter a name matching the name of a paper space tab. This may be typed in. Alternatively it may be selected from the drop down list, which will contain the last ten names. Information in the drop down list is not case sensitive and the following wild cards may be used:

Wild Card	Comment
*	Any number of characters
?	Any single character
#	Any single number

- The names of the paper space tabs can be seen at the foot of the floor plan in the Planner module. In the example below they are named Overall store, food and drink, Electrical and Clothing.



- If multiple layout names are required, these should be separated by a comma.

3. Set Viewing Direction

The viewing direction can be set if a Layout tab has been selected in the set Layout section. Users can then select the View direction from the drop down list. The options are:

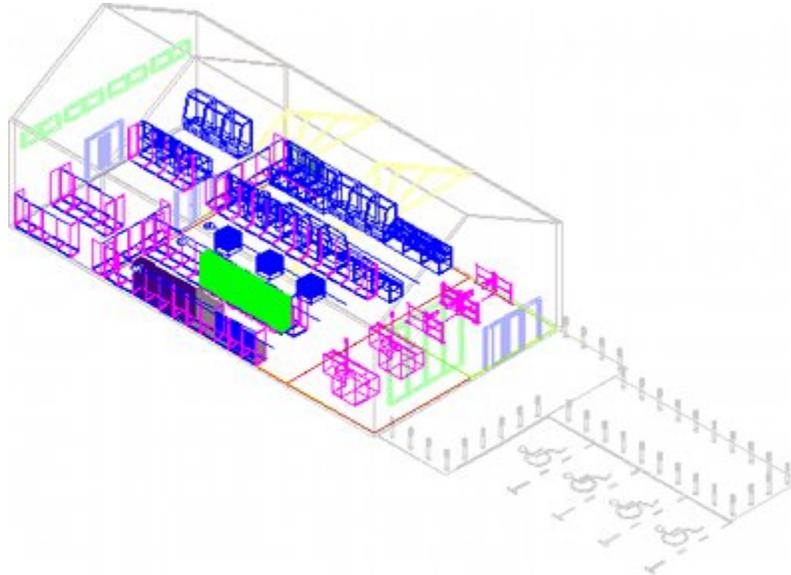
- Plan
- NE Isometric
- SW Isometric
- SE Isometric
- NW Isometric
- N Elevation

- E Elevation
- S Elevation
- W Elevation

These correspond to the options in the 3D view option from the View menu, or in the View toolbar.

If the user elects to Use Custom View, the user will be able to type in the name of a custom view. This custom view name may use standard wild cards to allow for inconsistencies in the actual name. It will not be case sensitive.

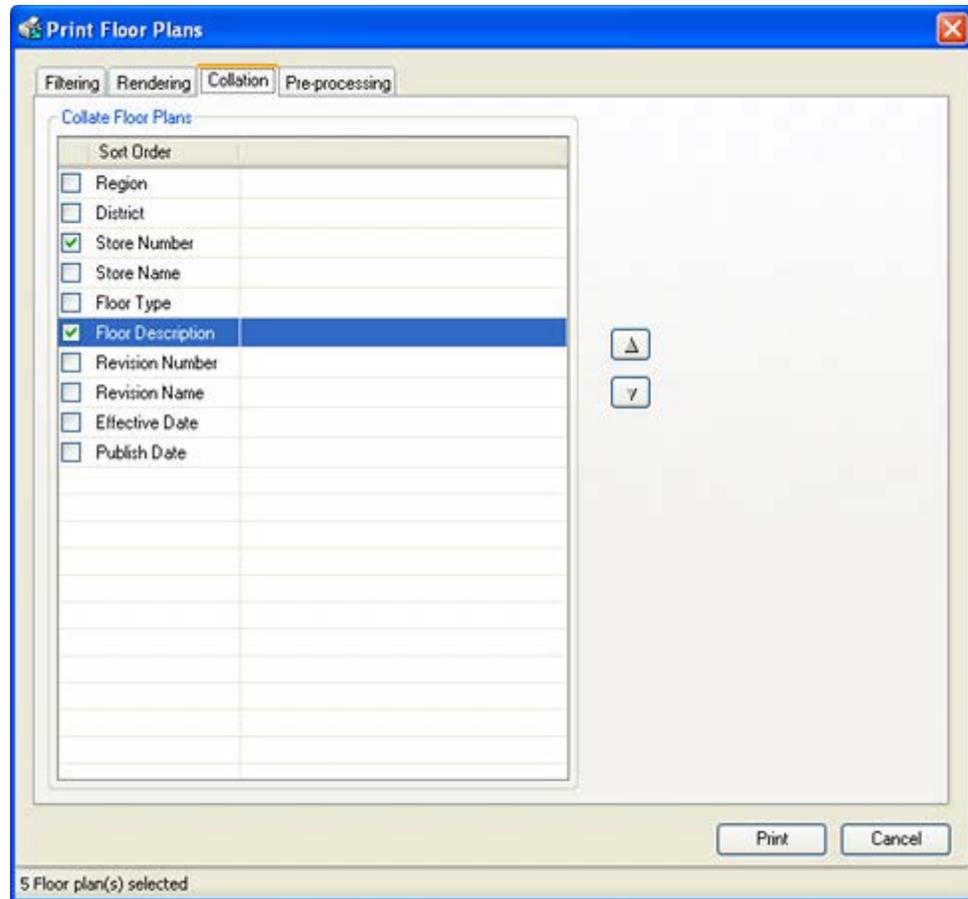
The example below shows a floor plan in SW Isometric view.



The Collation Tab

The Collation Tab allows users to specify the sequence the floor plans will be printed in. This makes it easier to sort and distribute them after printing.

At least one collation option must be selected, or the tab will show as having an error.



The available options can be ordered by highlighting them, then using the up or down arrows. The options are made active by using the check boxes.

- Region is a specific type of cluster set in the Cluster type drop down list in the Cluster dialog box in Store Manager.
- District is a specific type of cluster set in the Cluster type drop down list in the Cluster dialog box in Store Manager.



- Store Number is the Store Code in the Store dialog box in Store Manager.
- Store Name is the Store Name in the Store dialog box in Store Manager.

Edit Store

General | Units | Address | Attributes

Store ID: 31

Store Code: PAR001

Store Name: Paris

Directory Name: Paris\

Latitude: 0

Longitude: 0

Status: Open

Opened Date: 01/02/2013

Closed Date: 31/12/2999

Store Prototype: Large Prototype Store

Set as Prototype:

OK Cancel

- Floor Type is the Floor Type in the Floor dialog box in Store Manager.
- Floor Description is the Floor Description in the Floor dialog box in Store Manager.

Edit Floor

Floor ID: 40

Floor Type: Ground Floor

Description: Ground Floor

Directory: Ground Floor\

Status: Existing

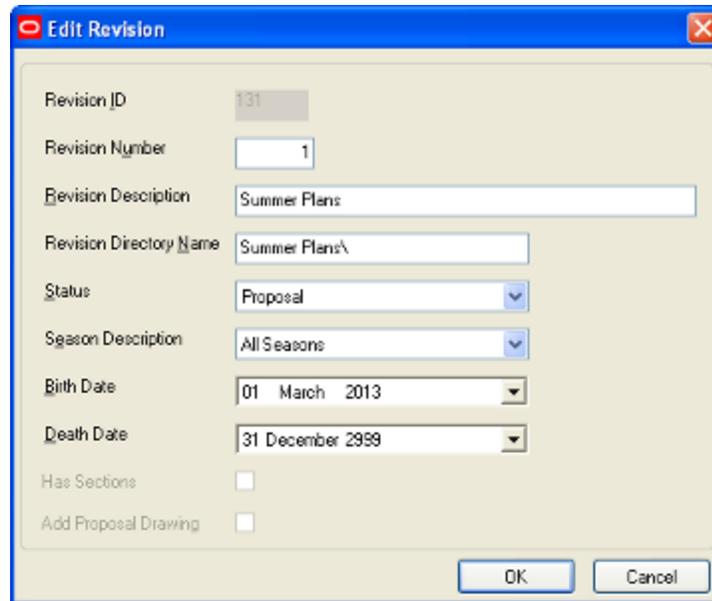
Allocated Area Percentage Tolerance: 0

Elevation: 0

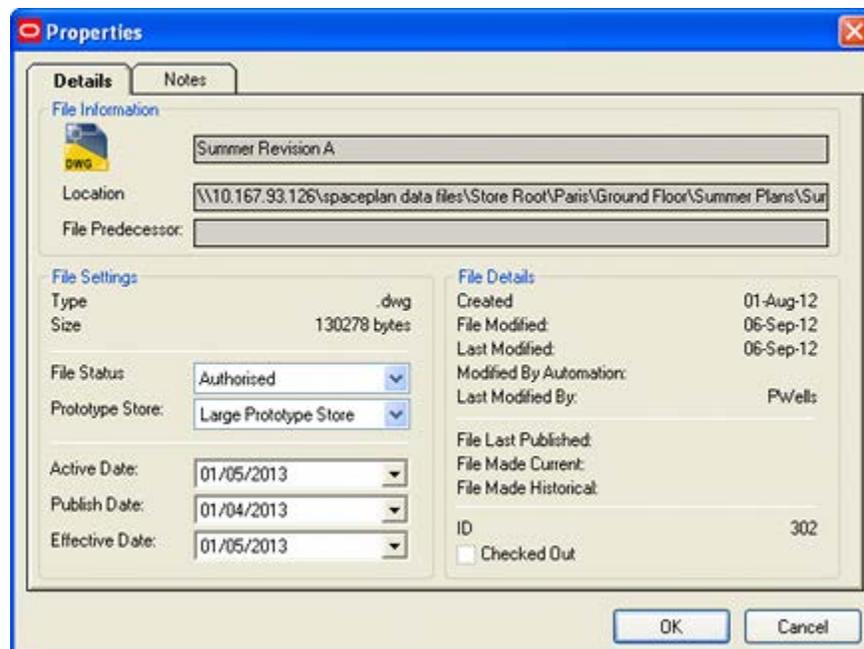
Edit Levels ...

OK Cancel

- Revision Name is the Revision Name in the Floor dialog box in Store Manager.
- Revision Number is the Revision Number in the Floor dialog box in Store Manager.

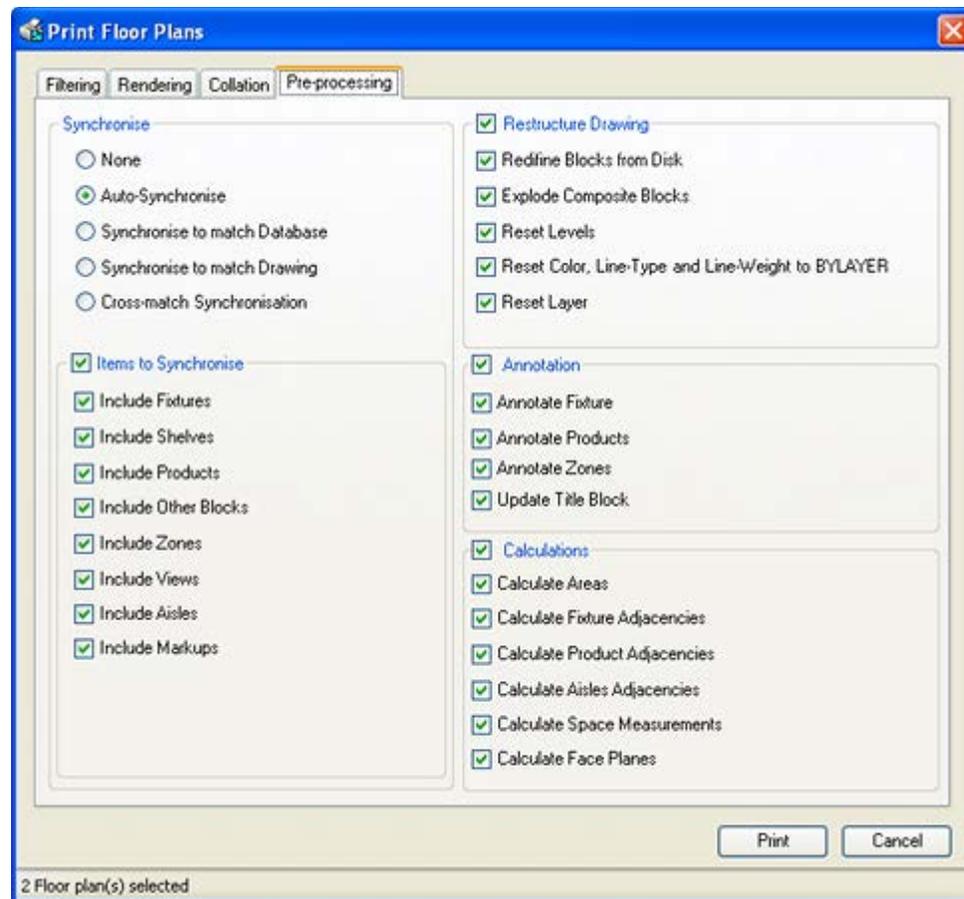


- Effective Date is the Effective Date in the File Properties dialog box in Store Manager.
- Publish Date is the Publish Date in the File Properties dialog box in Store Manager.



The Pre-Processing Tab

The Pre-processing tab is used to ensure that the information in the floor plan is up to date.



Synchronize

Synchronize is used to make sure that the information in the floor plan matches that held in the Macro Space Planning database. This information could differ for a number of reasons:

- Changes have been made in the floor plan using AutoCAD tools and these changes have not been written to the database.
- Changes have been manually made to floor plans in the Merchandiser module, or in In-Store Space Collaboration.
- Changes have been made to floor plans in the database by batch processes.
- Changes have been made to the floor plan outside Macro Space Planning - for example in raw AutoCAD.

The following options are available:

- None - no synchronization operations will be carried out.
- Auto-Synchronize - the application will automatically detect which form of synchronization is required:
 - If the information in the database exceeds the date the floor plan was last modified and saved in Planner (or modified in raw AutoCAD), the information will be synchronized "match the database".
 - If the date of the information in the floor plan (or the date it was modified in raw AutoCAD) exceeds the date the information was written to the database, the information will be synchronized "match the drawing".

- If (i) the date the floor plan was last modified in raw AutoCAD exceeds the date the floor plan was last modified in Planner and (ii) the date the floor plan was last modified in Planner is less than the date the floor plan was last modified in Merchandiser, In-Store Space Collaboration or by a batch process, synchronization will be by 'cross-matching'.

- Information in the floor plan for zones, fixtures and other blocks and aisles will be written to the database.

- Information in the database for shelves and merchandise will be written into the floor plan.
 - Synchronize to Match Database - information in the database will be written into the floor plan.
 - Synchronize to Match Drawing - information from the floor plan will be written to the database.
 - Cross Match - information on zones, fixtures and other blocks and aisles will be written to the database, while information on shelves and merchandise will be written into the floor plan.

Items to Synchronize

Once the synchronization method has been selected, specific items can be selected for the synchronization operation to work on.

- Include Fixtures - fixtures and fittings will be synchronized.
- Include Shelves - shelf objects will be synchronized.
- Include Products - products and planograms will be synchronized.
- Include Other Blocks - include blocks not yet registered in Fixture Studio.
- Include Zones - Zones will be synchronized.
- Include Views - view positions in Planner or Merchandiser will be synchronized. (This will not affect In-Store Space Collaboration).
- Include Aisles - Aisles will be synchronized.

The following points should be noted:

- If shelf positions are changed in Planner and the 'Synchronize to Match Drawing' option is selected, the modified shelf positions will be written back to the database. This could potentially affect any planograms using those shelves.
- Zones can only be added, edited or deleted in Planner. If 'Synchronize to Match Database' is selected, the current zone information in the Planner floor plan will be changed to match that held in the database. This might be done to reverse changes made and saved in the Planner module.
- Aisles can only be added, edited or deleted in Planner. If 'Synchronize to Match Database' is selected, the current aisle information in the Planner floor plan will be changed to match that held in the database. This might be done to reverse changes made and saved in the Planner module.

Restructure Drawing

Restructure Drawing allows users to update the drawing so that the blocks in the drawing match the latest information defined in Fixture Studio.

- Redefine Blocks from Disc - this will result in the DWG files in the drawing being updated with the latest versions of those DWG files defined in Fixture Studio.

- Explode Composite Blocks - this will explode all blocks defined as composites in Fixture Studio. These blocks will be placed on Layer 0 and will require having Color, Line type and Line-Weight to set to BYLAYER.

Note: Composite Blocks that are not flagged as composite in Fixture Studio will not be exploded.

- Reset Levels - this will reset the elevation of the block to that defined by the level assigned to it in the Insertion Tab of the Block Details dialog box in Fixture Studio.
- Reset Color, Line type and Line-Weight to BYLAYER - this option will look at the color, line type and line weight of each instance of a block in the drawing. If they differ from the defaults for that layer, they will be set back to those defaults.
- Reset Layer - if blocks have been moved to a layer different to that specified in the Insertion Tab of the Block Details dialog box in Fixture Studio, the block will be restored to the default layer.

Annotation

The annotation option allows users to update the annotation in the floor plan so it matches the latest annotation rules specified in the Text Styles option in the Administration Module.

- Annotate Fixtures - all fixtures that have had the 'Include in Fixture Annotation' check box ticked in the Category Tab of the Block Details dialog box in Fixture Studio will have their annotation updated.
- Annotate Products - all products, planograms and planogram profiles will have their annotation updated.
- Annotate Zones - all zones will have their annotation updated.
- Update Title Block - all text boxes in the title block that reference information in the database will have that information updated.

Calculations

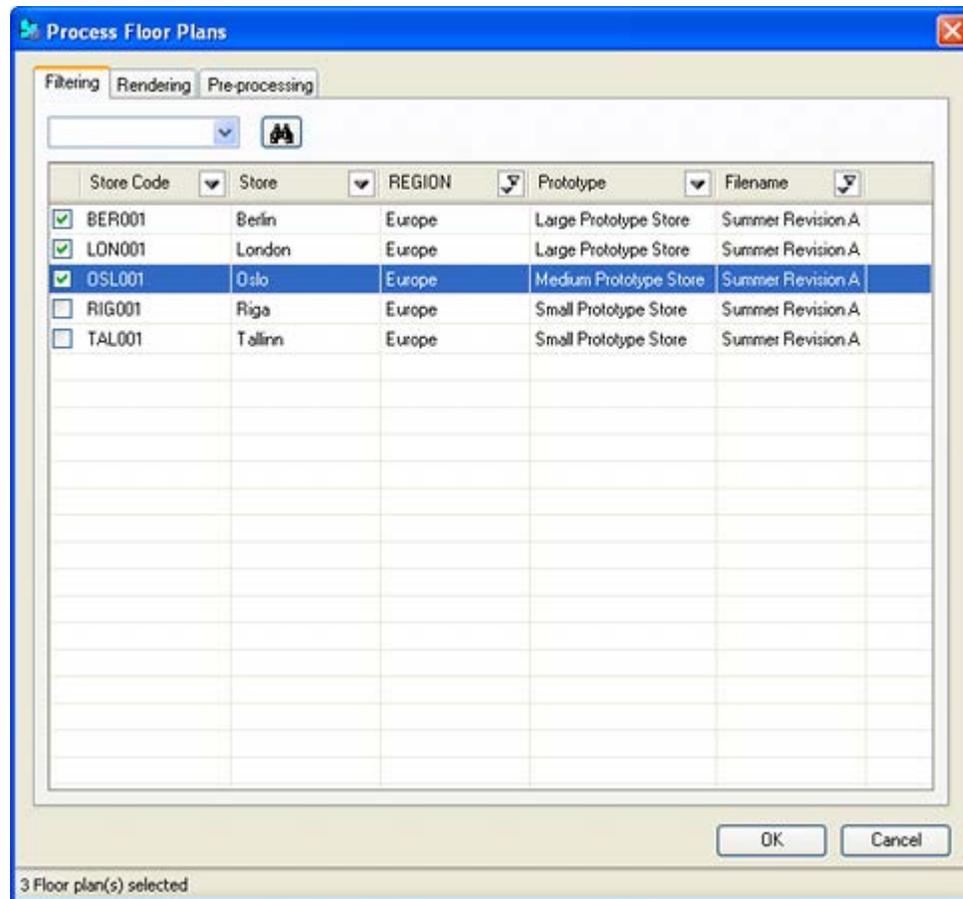
This option is used to update the calculations associated with the floor plan. This has a number of benefits including ensuring that reports based on this floor plan are accurate and up to date. It also ensures that annotation draws correctly.

- Calculate Areas - this updates the area calculations; and hence the floor area assigned to each fixture.
- Calculate Fixture Adjacencies - this updates the fixture adjacencies; and hence the relationship of one fixture to another.
- Calculate Product Adjacencies - this updates the product adjacencies; and hence the relationship of one product to another.
- Calculate Aisle Adjacencies - this updates the aisle adjacencies; and hence which products share an aisle.
- Calculate Space Measures - this updates space measures: the volume occupied by each product in a planogram.
- Calculate Face Planes - this updates face planes: the frontal area occupied by each product in a planogram.

Floor Plan Processing

The Filtering Tab

The **Filtering tab** enables the user to select the Floor Plans to Process. It will populate with all floor plans which have Publish Dates on or before the current date.



Find

The Find option can be used by typing text into the text box then clicking the Find icon. Each successive click will move the user to the next floor plan matching the text being searched for. When no more matches are available, a confirmatory dialog box will appear.



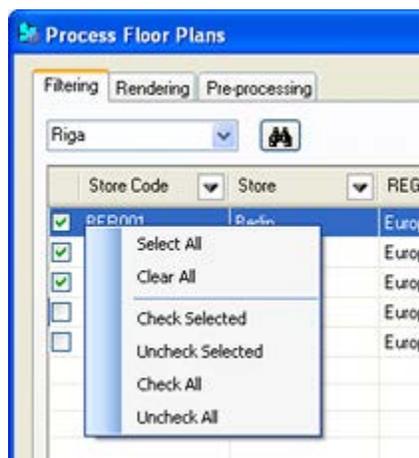
Find operates with explicit or implied wild cards. The explicit wild cards are:

Wild Card	Description
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?	Any character in this position
#	Any number in this position

If explicit wild cards are not used, implicit wild cards will be assumed. For example, the text entry 'New' will be treated as '*New*' and will find New York, New Delhi, etc.

Right Click Menu

The right click menu provides a quick way of modifying the selected items.



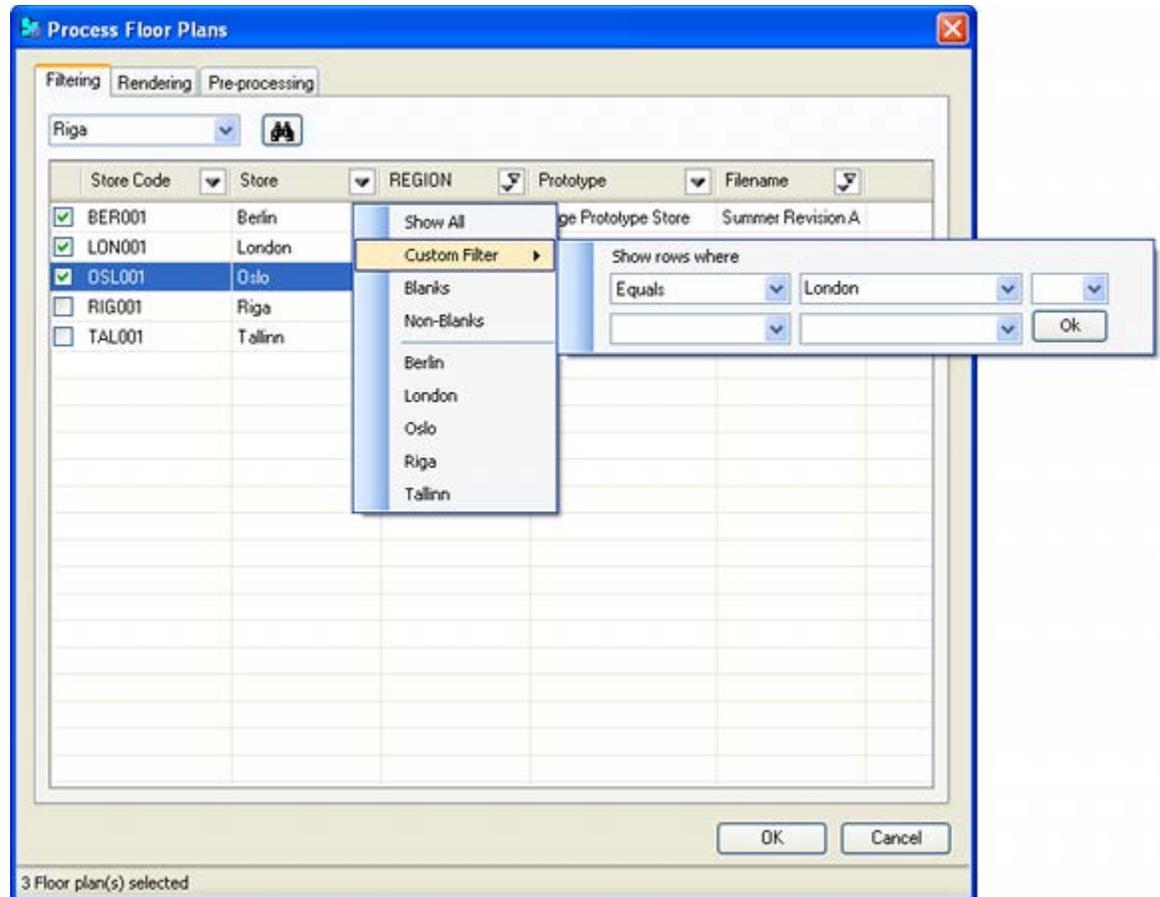
- Select All will select (but not check) all rows of data
- Clear All will deselect (but not uncheck) all rows of data
- Check Selected will check all rows of selected data
- Uncheck Selected will uncheck all rows of selected data
- Check All will check all rows of data
- Uncheck All will uncheck all rows of data

Selecting Floor Plans to Process

Floor plans may be selected for processing by ticking the appropriate check box.

Using Filters in the Filtering Tab

The Filtering Tab is provided with a series of filters on each column. Setting a filter on one column will affect data in all other columns.



They are used as follows:

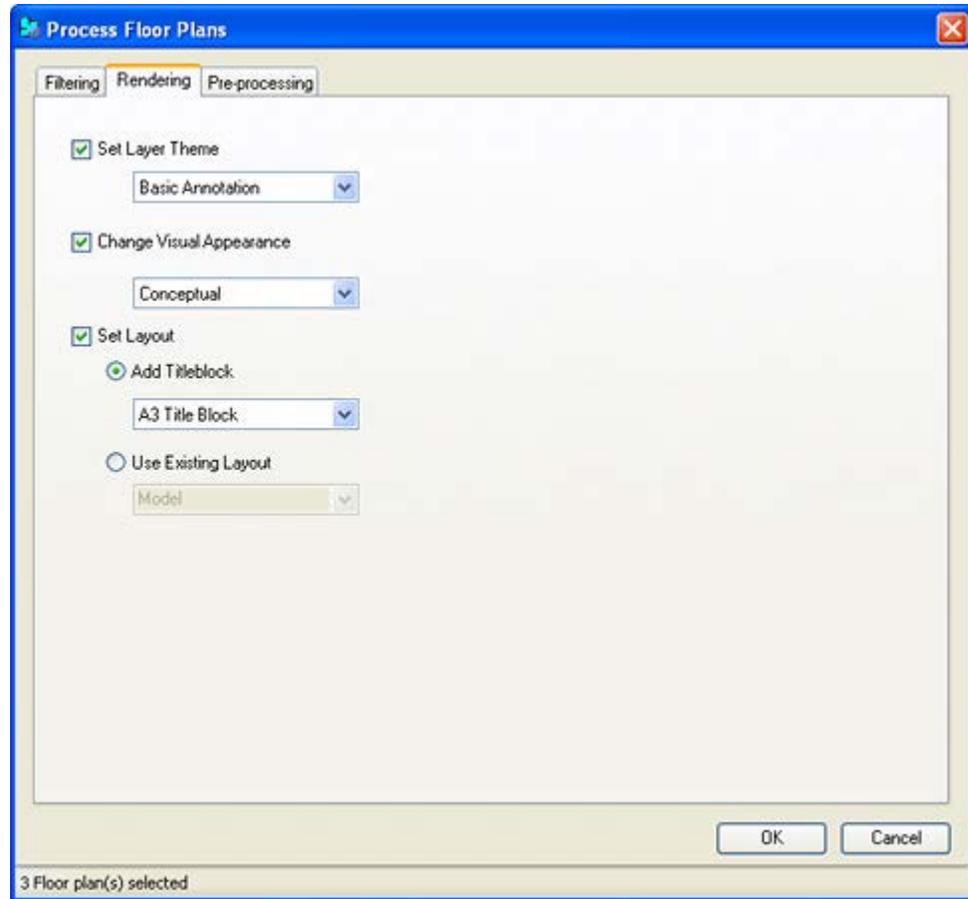
- Show All - this option shows all results.
- Custom Filter - this option allows users to set filters using Boolean logic. The options are:
 - Equal to: will return rows that are an exact match for the entered text.
 - Not Equal to: will return rows that do not match the text string
 - Contains: will return rows where part of the data matches the text string. (Uses implied wild cards).
 - Does not contain: will return rows where no part of the data matches the text string. (Uses implied wild cards).
 - Begins with: will return rows where the text string is an exact match for the start of the data.
 - Ends with: will return rows where the text string is an exact match for the end of the data.
 - Does not begin with: will return rows where the text string is not an exact match for the start of the data.
 - Does not end with: will return rows where the text string is not an exact match for the end of the data.
- Blanks - column will be filtered to only show rows with null values.
- Non-Blanks - column will be filtered to only show rows containing a value
- Results - column will be filtered to only show the selected result.

Boolean logic also includes the use of And or Or.

- And means that both conditions must be met. A and B means the data returned must contain both A and B.
- Or means either condition can be met. A or B means the data returned can contain either A or B. It does not need to contain both.

The Rendering Tab

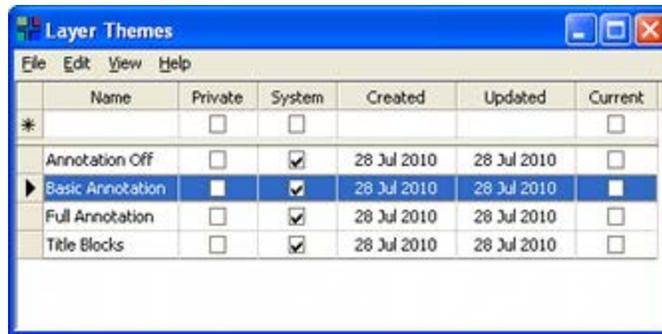
The **Rendering Tab** is used to ensure the visual appearance of the floor plan is as desired.



Set Layer Theme

If the check box is selected, users can select a layer theme from the drop down list. A number of layer themes can exist - each holding a specific set of settings for the individual layers. Selecting a specific layer theme, will automatically configure the individual layers to the settings designated for that layer theme.

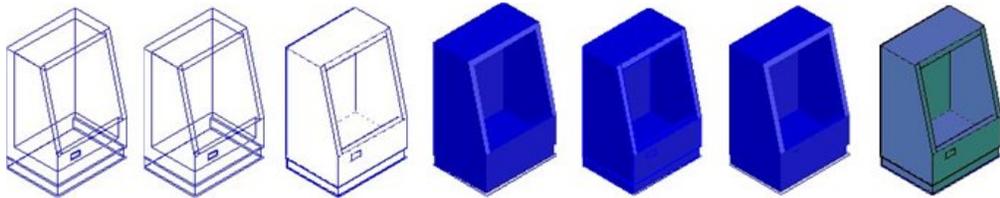
These layer themes are configured in the Layer Themes dialog box accessed from the Layer Aliased dialog box on the Format menu.



Change Visual Appearance

If the check box is ticked, this allows users to change the visual appearance of the drawing. The options are:

- 2D Wire Frame
- 3D Wire Frame
- Hidden Detail
- Shaded
- Shaded with Edges
- Conceptual
- Realistic

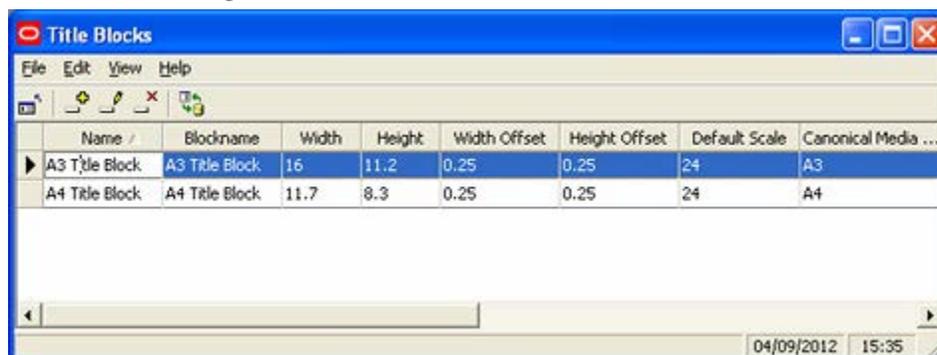


The images above show the different visual appearances available. They can be set by means of the Visual Styles toolbar or Visual Styles Manager.

Set Layout

If the checkbox is ticked the users can select one of two options: Add Titleblock or Use Existing Layout.

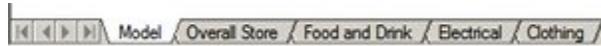
- **Add Titleblock**
- If the Add Titleblock option is selected, users may select a title block from a drop down list. The list of available title blocks is configured using the Title Block option on the Planning menu in the Administration module.



- **Use Existing Layout**
- If the Use Existing Layout option is selected, users can enter a name matching the name of a paper space tab. This may be typed in. Alternatively it may be selected from the drop down list, which will contain the last ten names. Information in the drop down list is not case sensitive and the following wild cards may be used:

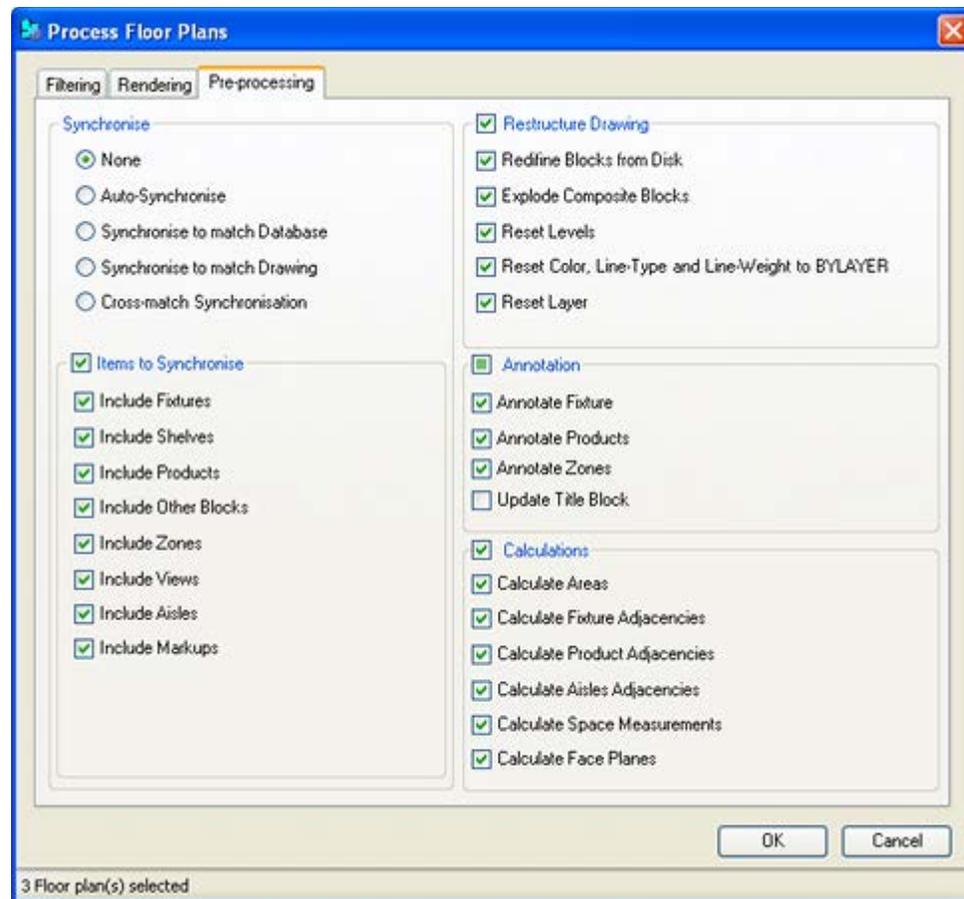
Wild Card	Comment
*	Any number of characters
?	Any single character
#	Any single number

- The names of the paper space tabs can be seen at the foot of the floor plan in the Planner module. In the example below they are named Overall store, food and drink, Electrical and Clothing.



The Pre-processing Tab

The **Pre-processing tab** is used to ensure that the information in the floor plan is up to date.



Synchronize

Synchronize is used to make sure that the information in the floor plan matches that held in the Macro Space Planning database. This information could differ for a number of reasons:

- Changes have been made in the floor plan using AutoCAD tools and these changes have not been written to the database.
- Changes have been manually made to floor plans in the Merchandiser module, or in In-Store Space Collaboration.
- Changes have been made to floor plans in the database by batch processes.
- Changes have been made to the floor plan outside Macro Space Planning - for example in raw AutoCAD.

The following options are available:

- None - no synchronization operations will be carried out.
- Auto-Synchronize - the application will automatically detect which form of synchronization is required:
 - If the information in the database exceeds the date the floor plan was last modified and saved in Planner (or modified in raw AutoCAD), the information will be synchronized "match the database".
 - If the date of the information in the floor plan (or the date it was modified in raw AutoCAD) exceeds the date the information was written to the database, the information will be synchronized "match the drawing".

- If (i) the date the floor plan was last modified in raw AutoCAD exceeds the date the floor plan was last modified in Planner and (ii) the date the floor plan was last modified in Planner is less than the date the floor plan was last modified in Merchandiser, In-Store Space Collaboration or by a batch process, synchronization will be by 'cross-matching'.
- -Information in the floor plan for zones, fixtures and other blocks and aisles will be written to the database.
- -Information in the database for shelves and merchandise will be written into the floor plan.
- Synchronize to Match Database - information in the database will be written into the floor plan.
- Synchronize to Match Drawing - information from the floor plan will be written to the database.
- Cross Match - information on zones, fixtures and other blocks and aisles will be written to the database, while information on shelves and merchandise will be written into the floor plan.

Items to Synchronize

Once the synchronization method has been selected, specific items can be selected for the synchronization operation to work on.

- Include Fixtures - fixtures and fittings will be synchronized.
- Include Shelves - shelf objects will be synchronized.
- Include Products - products and planograms will be synchronized
- Include Other Blocks - this synchronizes all blocks assigned as type 'other' in Fixture Studio.
- Include Zones - Zones will be synchronized.
- Include Views - view positions in Planner or Merchandiser will be synchronized. (This will not affect In-Store Space Collaboration).
- Include Aisles - Aisles will be synchronized.

The following points should be noted:

- If shelf positions are changed in Planner and the 'Synchronize to Match Drawing' option is selected, the modified shelf positions will be written back to the database. This could potentially affect any planograms using those shelves.
- Zones can only be added, edited or deleted in Planner. If 'Synchronize to Match Database' is selected, the current zone information in the Planner floor plan will be changed to match that held in the database. This might be done to reverse changes made and saved in the Planner module.
- Aisles can only be added, edited or deleted in Planner. If 'Synchronize to Match Database' is selected, the current aisle information in the Planner floor plan will be changed to match that held in the database. This might be done to reverse changes made and saved in the Planner module.

Restructure Drawing

Restructure Drawing allows users to update the drawing so that the blocks in the drawing match the latest information defined in Fixture Studio.

- Redefine Blocks from Disc - this will result in the DWG files in the drawing being updated with the latest versions of those DWG files defined in Fixture Studio.

- Explode Composite Blocks - this will explode all blocks defined as composites in Fixture Studio. These blocks will be placed on Layer 0 and will require having Color, Line type and Line-Weight to set to BYLAYER.

Note: Composite Blocks that are not flagged as composite in Fixture Studio will not be exploded.

- Reset Levels - this will reset the elevation of the block to that defined by the level assigned to it in the Insertion Tab of the Block Details dialog box in Fixture Studio.
- Reset Color, Line type and Line-Weight to BYLAYER - this option will look at the color, line type and line weight of each instance of a block in the drawing. If they differ from the defaults for that layer, they will be set back to those defaults.
- Reset Layer - if blocks have been moved to a layer different to that specified in the Insertion Tab of the Block Details dialog box in Fixture Studio, the block will be restored to the default layer.

Annotation

The annotation option allows users to update the annotation in the floor plan so it matches the latest annotation rules specified in the Text Styles option in the Administration Module.

- Annotate Fixtures - all fixtures that have the 'Include in Fixture Annotation' checkbox ticked in the Category Tab of the Block Details dialog box in Fixture Studio will have their annotation updated.
- Annotate Products - all products, planograms and planogram profiles will have their annotation updated.
- Annotate Zones - all zones will have their annotation updated.
- Update Title Block - all text boxes in the title block that reference information in the database will have that information updated.

Calculations

This option is used to update the calculations associated with the floor plan. This has a number of benefits including ensuring that reports based on this floor plan are accurate and up to date. It also ensures that annotation draws correctly.

- Calculate Areas - this updates the area calculations; and hence the floor area assigned to each fixture.
- Calculate Fixture Adjacencies - this updates the fixture adjacencies; and hence the relationship of one fixture to another.
- Calculate Product Adjacencies - this updates the product adjacencies; and hence the relationship of one product to another.
- Calculate Aisle Adjacencies - this updates the aisle adjacencies; and hence which products share an aisle.
- Calculate Space Measures - this updates space measures: the volume occupied by each product in a planogram.
- Calculate Face Planes - this updates face planes: the frontal area occupied by each product in a planogram.

Floor Plan Publishing

Permissions to Run Immediate Floor Plan Publishing

Before a user can run Immediate Floor Plan Publishing, they must first have been assigned the appropriate permissions in the Administration module. This is done using the Functional Security dialog box accessed from the Security menu.

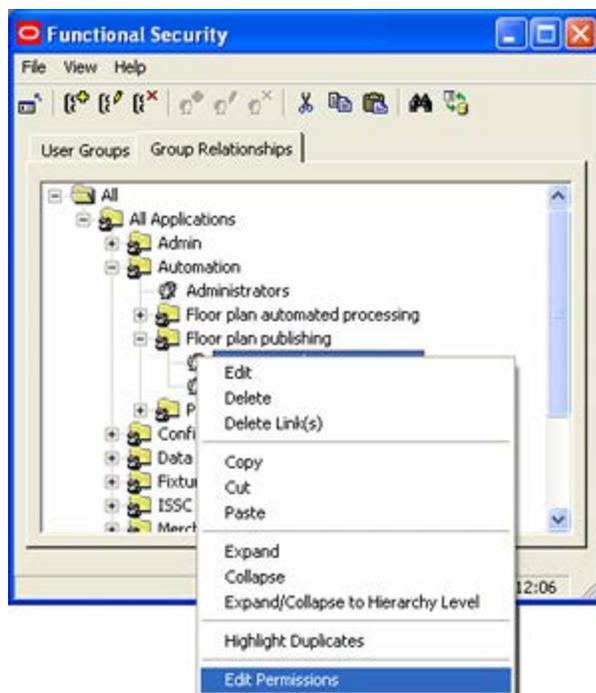
Note: this dialog box will only be accessible to users with access rights to the Administration Module.



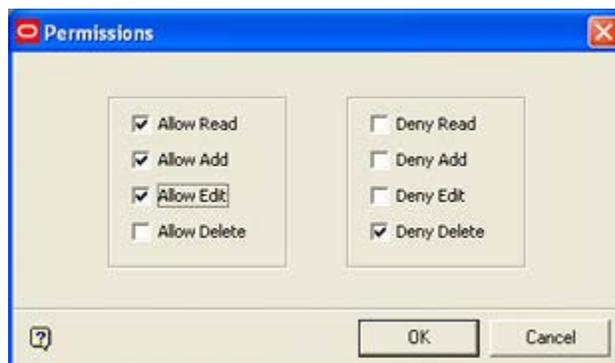
Users assigned to the Automation Command Group (such as the Administrator User Group) can run all Automation Functionality. User Groups assigned to the child Command Groups (Floor plan automated publishing, Floor plan publishing, Planogram publishing) have the ability to use that functionality. In the example above, the Equipment Planning Manager and Merchandise Planning Manager User Groups have been assigned permission to use the Floor Plan Publishing functionality.

Note: Floor Plan Automated Publishing (the right to run calculations on floor plans) is a separate user group. Users with permissions for Floor Plan Publishing can set calculation options in the Pre-processing tab of the Floor Plan Publishing Configuration dialog box. These will execute during the publishing of floor plans. They will not execute unless the user is a member of a User Group with permissions for the Floor Plan Automated Publishing User Group.

The User Groups precise rights depend on settings in the Permissions dialog box. This is accessed from the right click menu in the Functional Security dialog box.



This will bring up the Permissions dialog box.

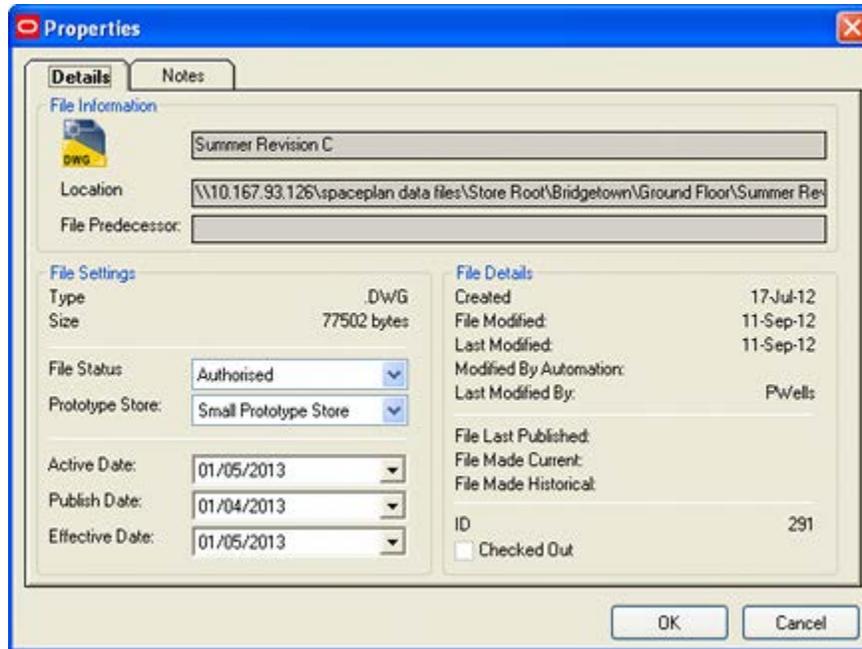


- If the User Group belongs to a Command Group higher in the Command Group hierarchy, by default it will inherit the permissions from that higher Command Group. This permission can be varied at the lower level by changing the selections made using the check boxes.
- If the User Group only exists at this level in the hierarchy, the Permissions dialog box will initially have all check boxes blank. The Administrator must then assign Allow or Deny permissions.

Dates Floor Plans will be Published

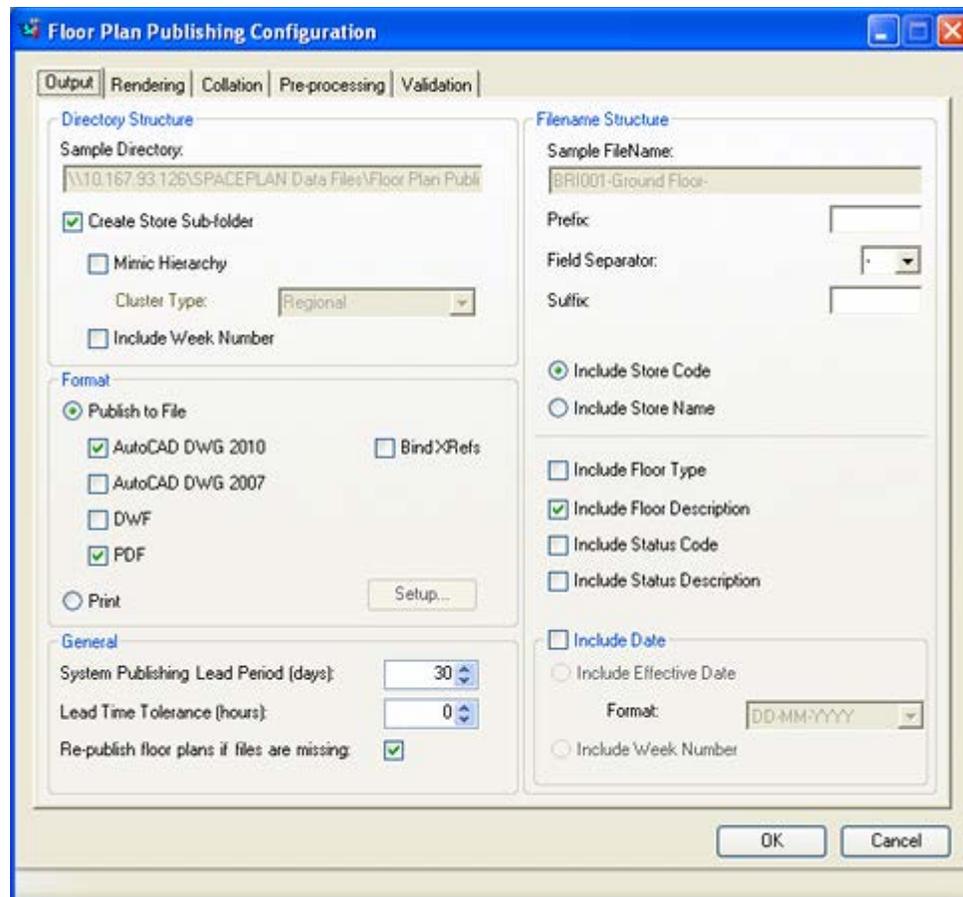
The purpose of publishing a floor plan is to disseminate information on the type, quantity and layout of equipment and merchandise to those tasked with implementing the change. Publishing a floor plan can be done in hard copy or electronic format. The date at which this is executed depends on the Publish Date set in the File Properties dialog box in Store Manager.

Note: the Publish Date operates on the date only and takes no account of the time of day. Publish Dates are stored in Date/Time format in the database, but the functionality only references the Date.



Another factor affecting the date at which at which floor plans will be published is the Lead Time Tolerance (Hours) setting on the Output tab of the Floor Plan Publishing Configuration dialog box in the Administration Module.

Note: this dialog box will only be accessible to users with access rights to the Administration Module.



Batch processes can be set to start at any time of the day. For example, the batch process might initiate at 8 p.m. (20.00 hrs) in the evening to allow the maximum number of batch processes to be run before users come in for work again the following morning. However, the Publish date for the floor plan might be set for when the following day begins at midnight. The Lead Time Tolerance (Hours) setting allows for this.

For example, if batch process is run on the 2nd June at 20.00 hrs in the evening and has no lead time tolerance, a floor plan that has a Publish Date of 3rd June would be ignored for publishing purposes by this run of the batch process. If however, the Lead Time Tolerance (Hours) setting is set to 5 hours, this will be added onto the Date and Time for the batch process and cause the batch process to operate as if it were running at 01.00 hrs in the morning of 3rd June. All floor plans with a Publish Date of 3rd June would then be published.

Criteria for Publishing Floor Plans

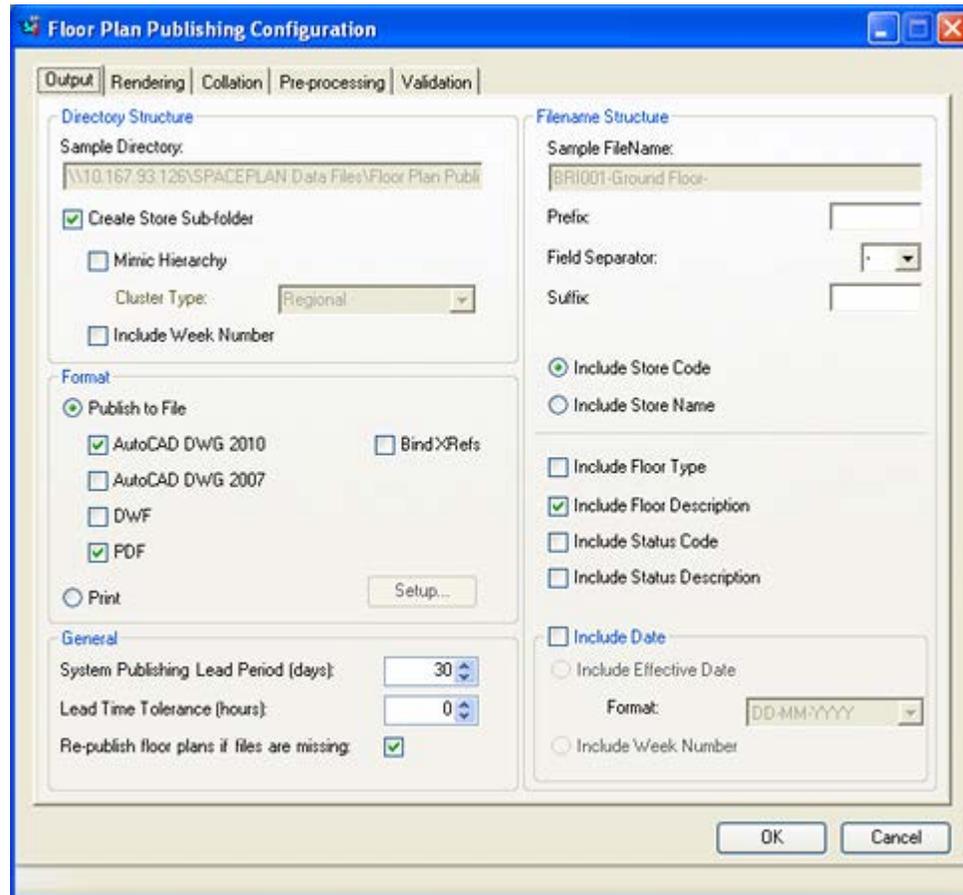
There are two criteria for publishing floor plans:

- Floor Plan Publish Date is equal to or earlier than the current date
If the Publish Date set in the File Properties dialog box in Store Manager is equal to or earlier than the current date (taking into account the Lead Time Tolerance (Hours) setting), the floor plan will be published.
- Floor Plan has been Updated since it was Published
In some implementations of Macro Space Planning it is possible that the floor plan may have been modified after it was last published. The condition for this is that the Modified by Planner date is greater than the Last Published Date.

Locations Floor Plans will be Published To

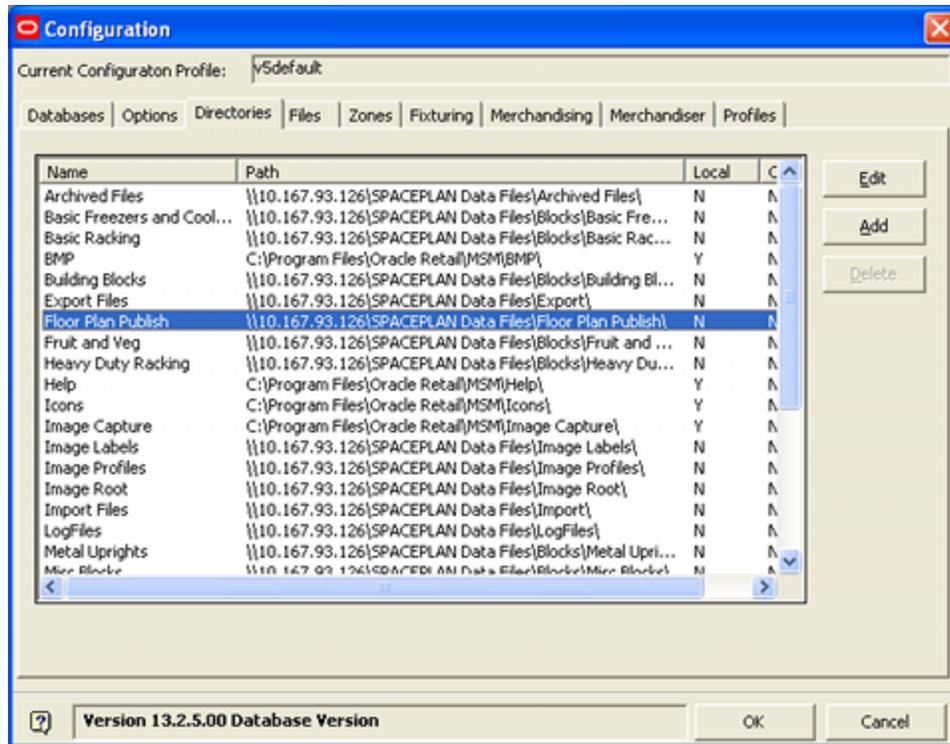
The locations Floor Plans will be published to and the file names used are specified in the Output tab of the Floor Plan Publishing Configuration dialog box in the Administration module.

Note: this dialog box will only be accessible to users with access rights to the Administration Module.



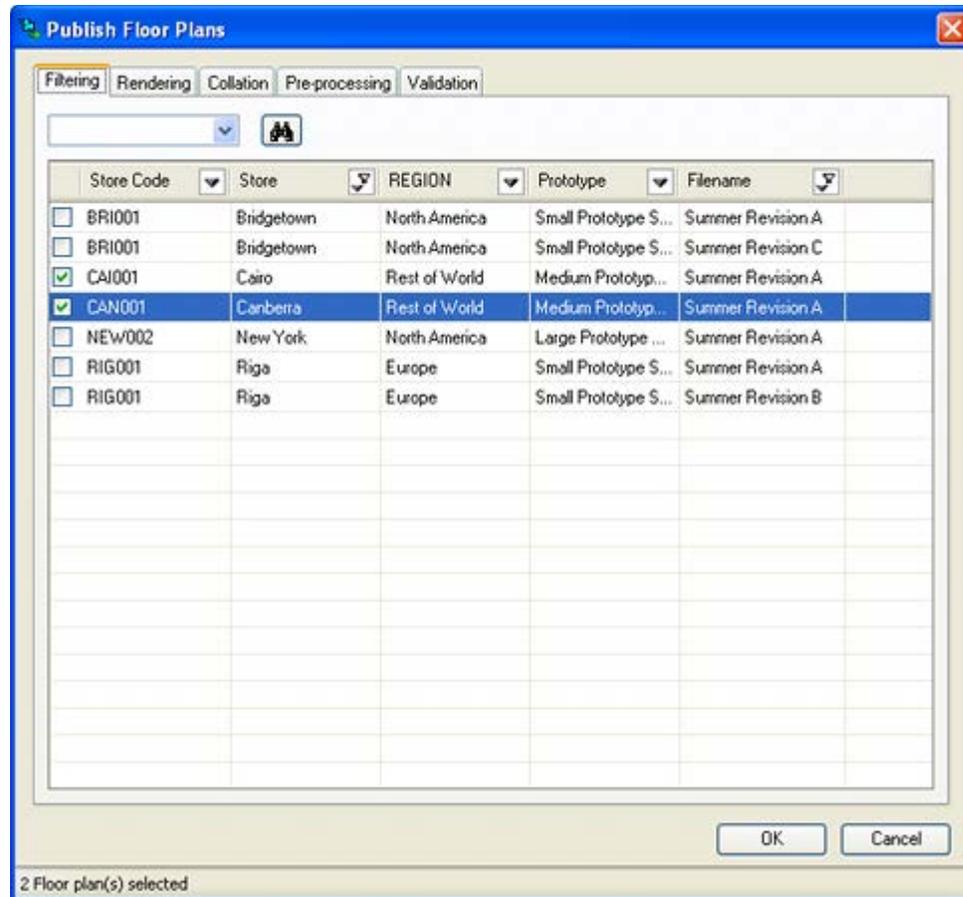
This dialog box allows Administrators to specify the directory structure, file format and file name that will be used when floor plans are published.

The starting point for the location floor plans will be published to in electronic form can be seen in the details for the Floor Plan Publish system directory specified in the Directories Tab of the Configuration module. This tab can only be accessed if the Configuration module is opened from the Administration module.



The Filtering Tab

The **Filtering Tab** is used to select the floor to publish.



Find

The Find option can be used by typing text into the text box then clicking the Find icon. Each successive click will move the user to the next floor plan matching the text being searched for. When no more matches are available, a confirmatory dialog box will appear.



Find operates with explicit or implied wild cards. The explicit wild cards are:

Wild Card	Description
*	Any characters
?	Any character in this position
#	Any number in this position

If explicit wild cards are not used, implicit wild cards will be assumed. For example the text entry 'Wine' will be treated as '*Wine*' and will find White Wine, Red Wine, etc.

Right Click Menu

The right click menu provides a quick way of modifying the selected items.



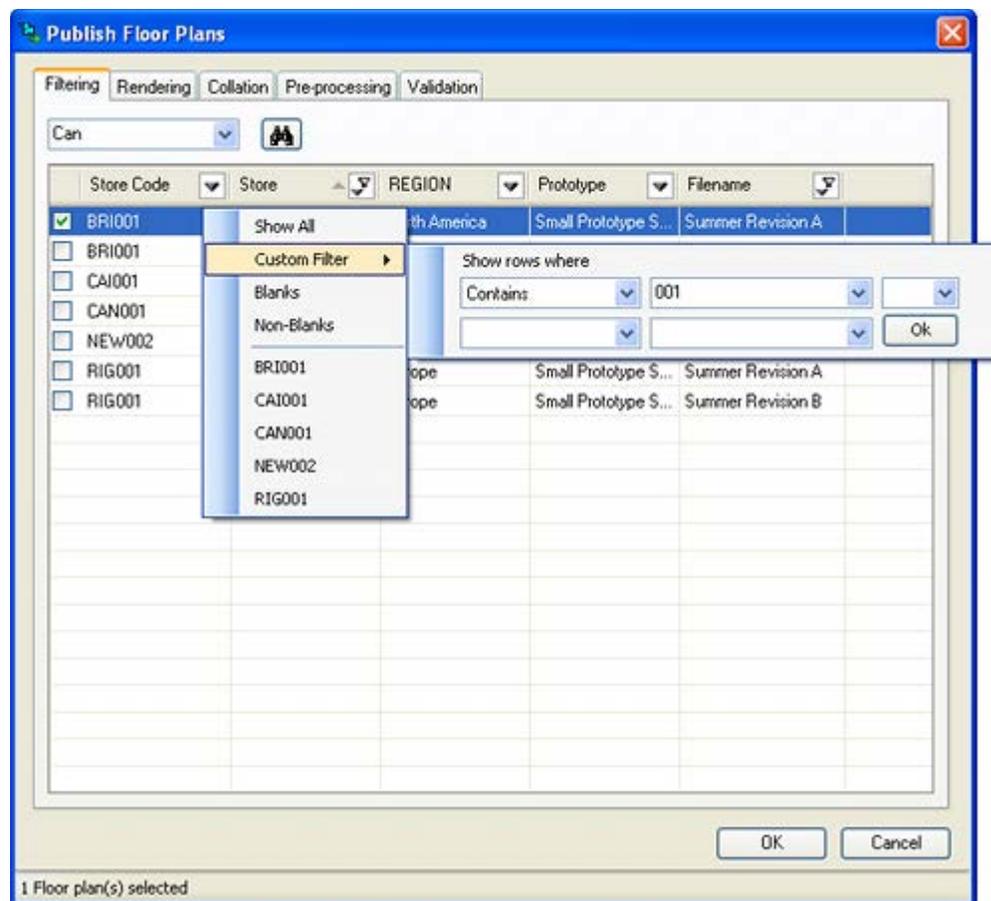
- Select All will select (but not check) all rows of data
- Clear All will deselect (but not uncheck) all rows of data
- Check Selected will check all rows of selected data
- Uncheck Selected will uncheck all rows of selected data
- Check All will check all rows of data
- Uncheck All will uncheck all rows of data
- Paste allows users to paste a carriage returned list of floor plan identifiers from the Windows clipboard. All rows in the dialog box that match the pasted information will be checked.

Selecting Floor Plans to Process

Floor plans may be selected for printing by ticking the appropriate check box.

Using Filters in the Filtering Tab

The Filtering Tab is provided with a series of filters on each column. Setting a filter on one column will affect data in all other columns.



They are used as follows:

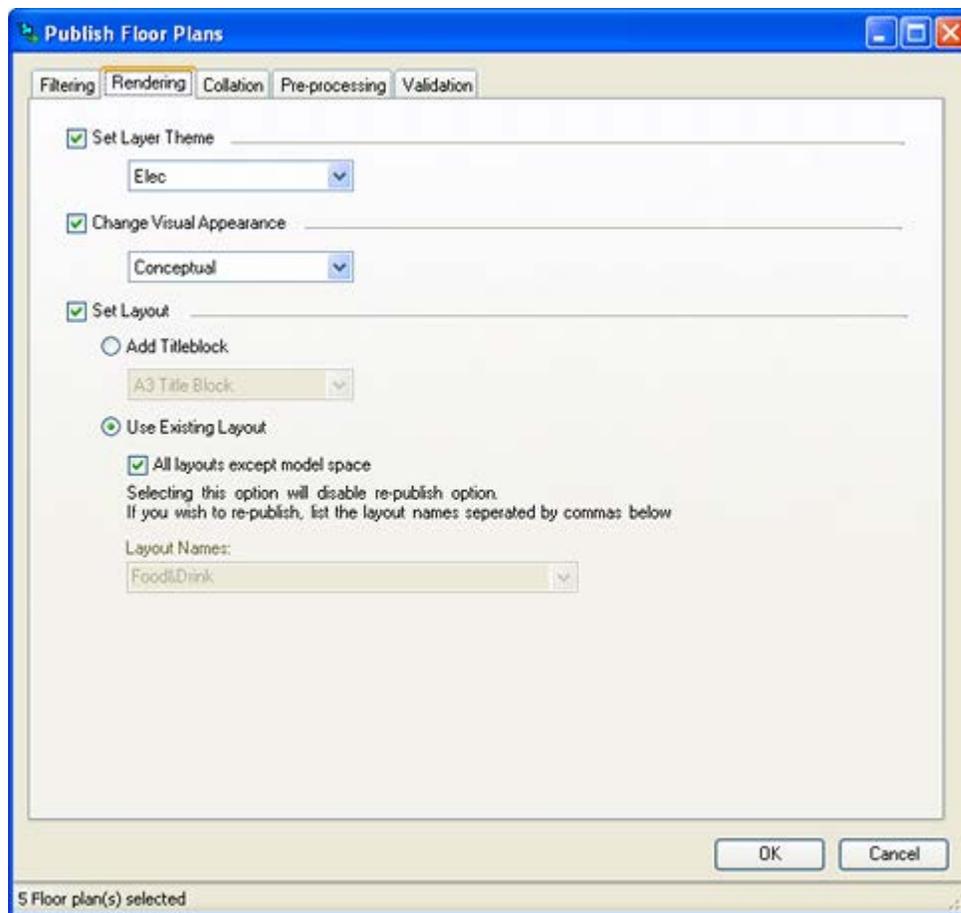
- Show All - this option shows all results.
- Custom Filter - this option allows users to set filters using Boolean logic. The options are:
 - Equal to: will return rows that are an exact match for the entered text.
 - Not Equal to: will return rows that do not match the text string
 - Contains: will return rows where part of the data matches the text string. (Uses implied wild cards).
 - Does not contain: will return rows where no part of the data matches the text string. (Uses implied wild cards).
 - Begins with: will return rows where the text string is an exact match for the start of the data.
 - Ends with: will return rows where the text string is an exact match for the end of the data.
 - Does not begin with: will return rows where the text string is not an exact match for the start of the data.
 - Does not end with: will return rows where the text string is not an exact match for the end of the data.
- Blanks - column will be filtered to only show rows with null values.
- Non-Blanks - column will be filtered to only show rows containing a value
- Results - column will be filtered to only show the selected result.

Boolean logic also includes the use of And or Or.

- And means that both conditions must be met. A and B means the data returned must contain both A and B.
- Or means either condition can be met. A or B means the data returned can contain either A or B. It does not need to contain both

The Rendering Tab

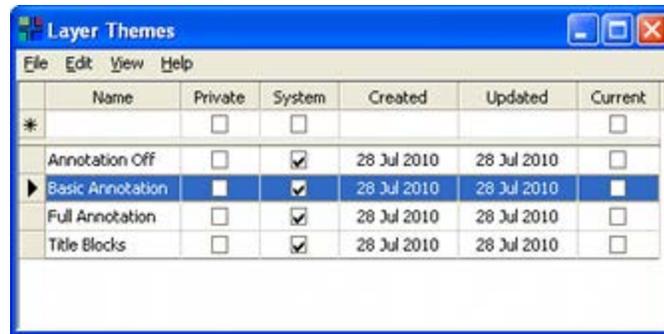
The **Rendering Tab** is used to ensure the visual appearance of the floor plan is as desired.



Set Layer Theme

If the checkbox is selected, users can select a layer theme from the drop down list. A number of layer themes can exist - each holding a specific set of settings for the individual layers. Selecting a specific layer theme, will automatically configure the individual layers to the settings designated for that layer theme.

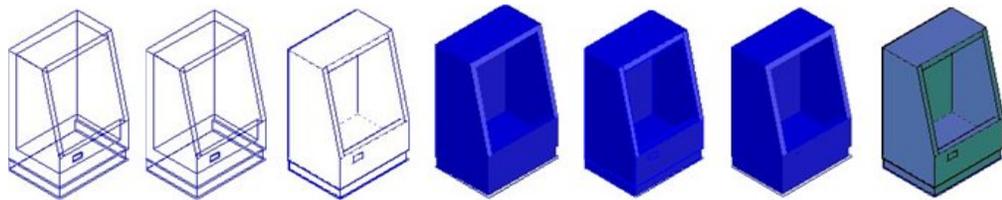
These layer themes are configured in the Layer Themes dialog box accessed from the Layer Aliased dialog box on the Format menu in the Planner module.



Change Visual Appearance

If the check box is ticked, this allows users to change the visual appearance of the drawing. The options are:

- 2D Wire Frame
- 3D Wire Frame
- Hidden Detail
- Shaded
- Shaded with Edges
- Conceptual
- Realistic

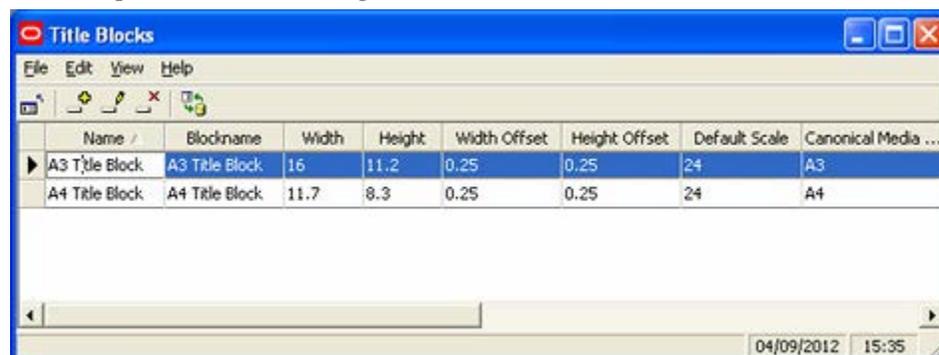


The images above show the different visual appearances available. Within the Planner module, the option can be set in either the Visual Styles toolbar or Visual Styles Manager.

Set Layout

If the checkbox is ticked the users can select one of two options: Add Titleblock or Use Existing Layout.

- **Add Titleblock**
 - If the Add Titleblock option is selected, users may select a title block from a drop down list. The list of available title blocks is configured using the Title Block option on the Planning menu in the Administration module.



- **Use Existing Layout**
 - If the Use Existing Layout option is selected, the user has two options; to publish all layouts except model space, or to publish selected layouts.
- **All layouts except model space**
 - If this option is selected, all layouts except the model space layout will be published for each floor plan. The layout names option will also be grayed out and unavailable. In addition, if this option is chosen, it will not be possible to republish floor plans. This is because without a list of specified layout names, it is not possible to determine which layouts require republishing.
- **Layout Names**
 - If this option is selected, users can enter a name matching the name of a paper space tab. This may be typed in. Alternatively it may be selected from the drop down list, which will contain the last ten names. Information in the drop down list is not case sensitive and the following wild cards may be used:

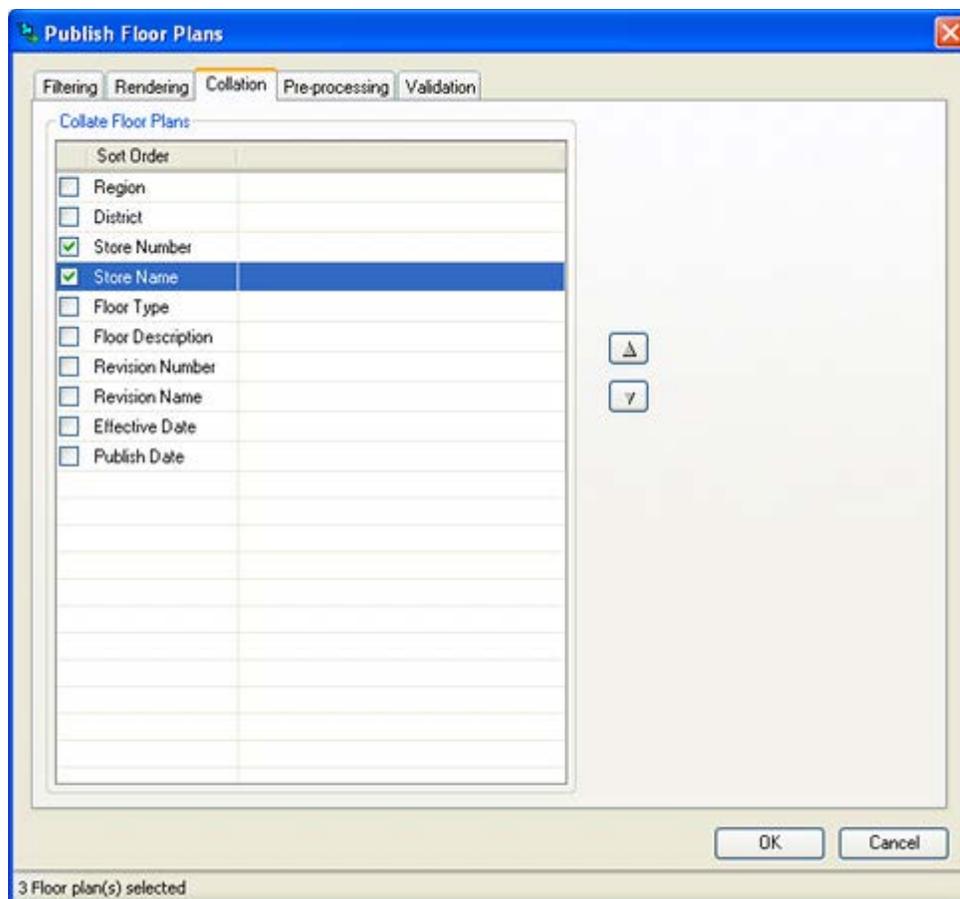
Wild Card	Comment
*	Any number of characters
?	Any single character
#	Any single number

- If wild cards are used, the Republish option will only publish a single match for each floor plan. For example, if the wildcard is Con*, the Confectionery layout will be published and the Consumables layout will be omitted.
 - The names of the paper space tabs can be seen at the foot of the floor plan in the Planner module. In the example below they are named Overall Store, Food and Drink, Electrical and Clothing.
- 
- The screenshot shows a horizontal sequence of tabs in a software interface. From left to right, the tabs are: 'Model', 'Overall Store', 'Food and Drink', 'Electrical', and 'Clothing'. Each tab is separated by a vertical line, and the 'Overall Store' tab is currently selected, indicated by a darker background.
- If multiple layout names are required, these should be separated by a comma.

The Collation Tab

The **Collation Tab** allows users to specify the sequence floor plans will be published or printed in. Its main use is in printing hard copy versions of the floor plans where the sequence they are printed in makes it easier to sort and distribute them after printing.

At least one collation option must be selected, or the tab will show as having an error.



The available options can be ordered by highlighting them, then using the up or down arrows. The options are made active by using the check boxes.

- Region is a specific type of cluster set in the Cluster type drop down list in the Cluster dialog box in Store Manager.
- District is a specific type of cluster set in the Cluster type drop down list in the Cluster dialog box in Store Manager.



- Store Number is the Store Code in the Store dialog box in Store Manager.
- Store Name is the Store Name in the Store dialog box in Store Manager.

The 'Edit Store' dialog box has four tabs: General, Units, Address, and Attributes. The 'General' tab is selected. It contains the following fields:

- Store ID: 31
- Store Code: PAR001
- Store Name: Paris
- Directory Name: Paris\
- Latitude: 0
- Longitude: 0
- Status: Open
- Opened Date: 01/02/2013
- Closed Date: 31/12/2999
- Store Prototype: Large Prototype Store
- Set as Prototype:

Buttons: OK, Cancel

- Floor Type is the type selected from the drop down list in the Floor dialog box in Store Manager.
- Floor Description is the Description in the Floor dialog box in Store Manager.

The 'Edit Floor' dialog box contains the following fields:

- Floor ID: 40
- Floor Type: Ground Floor
- Description: Ground Floor
- Directory: Ground Floor\
- Status: Existing
- Allocated Area: 0
- Percentage Tolerance: 0
- Elevation: 0

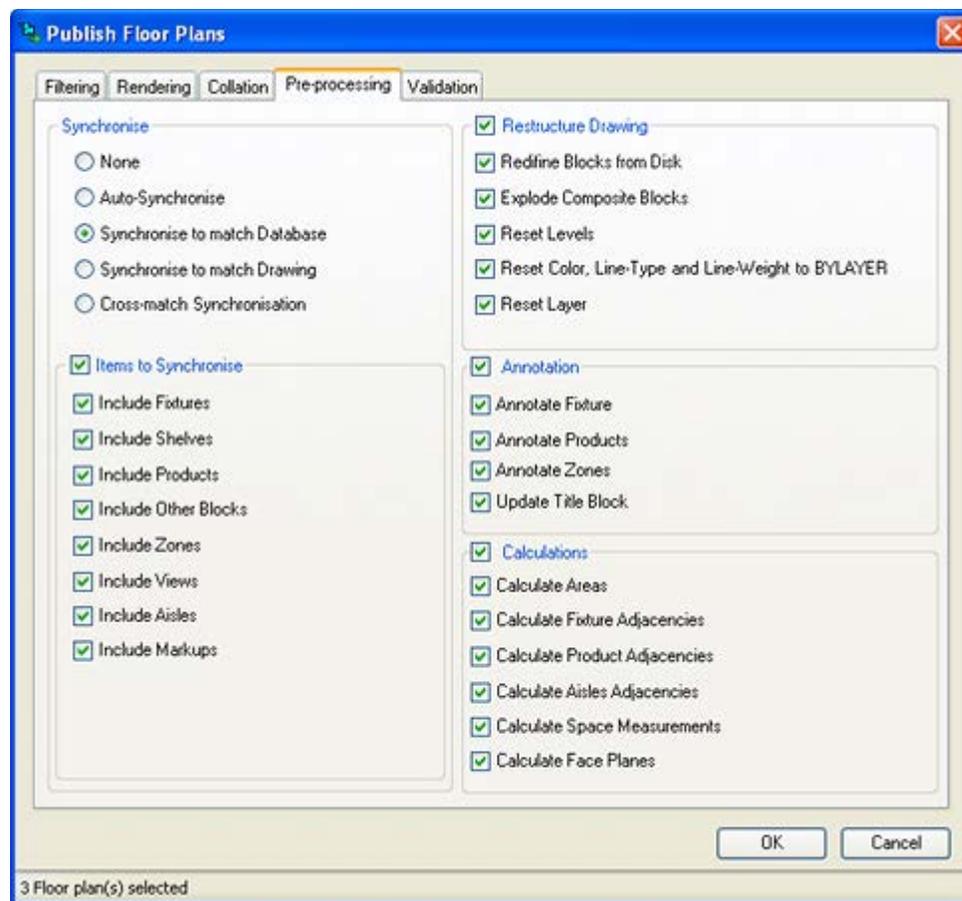
Buttons: Edit Levels..., OK, Cancel

- Revision Number is the Revision Number in the Revision dialog box in Store Manager.
- Revision Name is the Revision Description in the Revision dialog box in Store Manager.

- Publish Date is the Publish Date set in the File Properties dialog box in Store Manager.
- Effective Date is the Effective Date set in the File Properties dialog box in Store Manager.

The Pre-processing Tab

The **Pre-processing tab** is used to ensure that the information in the floor plan has been correctly updated.



Synchronize

Synchronize is used to make sure that the information in the floor plan matches that held in the Macro Space Planning database. This information could differ for a number of reasons:

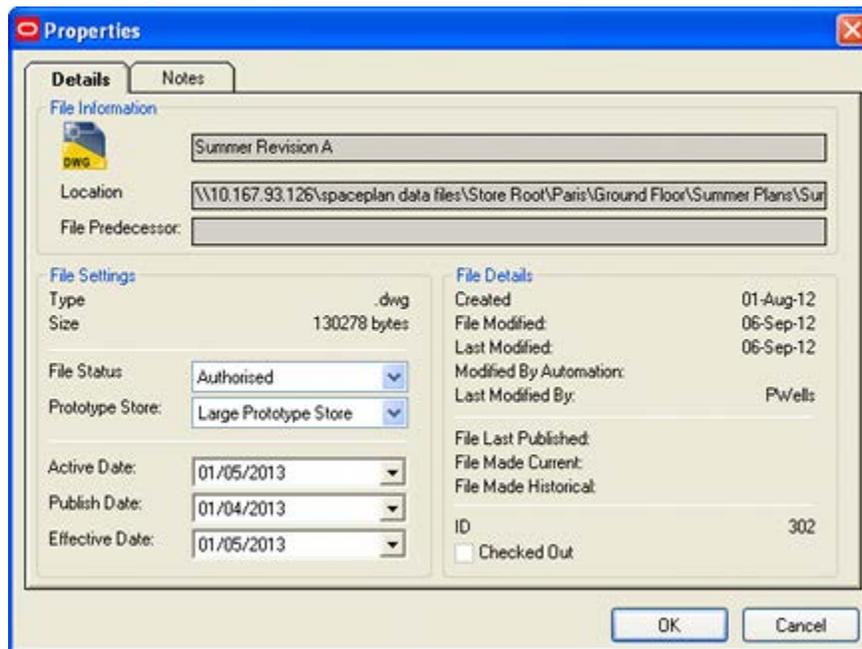
- Changes have been made in the floor plan using AutoCAD tools and these changes have not been written to the database.
- Changes have been manually made to floor plans in the Merchandiser module, or in In-Store Space Collaboration.
- Changes have been made to floor plans in the database by batch processes.
- Changes have been made to the floor plan outside Macro Space Planning - for example in raw AutoCAD.

The following options are available:

- None - no synchronization operations will be carried out.
- Auto-Synchronize - the application will automatically detect which form of synchronization is required:
 - If the information in the database exceeds the date the floor plan was last modified and saved in Planner (or modified in raw AutoCAD), the information will be synchronized "match the database".
 - If the date of the information in the floor plan (or the date it was modified in raw AutoCAD) exceeds the date the information was written to the database, the information will be synchronized "match the drawing".

- If (i) the date the floor plan was last modified in raw AutoCAD exceeds the date the floor plan was last modified in Planner and (ii) the date the floor plan was last modified in Planner is less than the date the floor plan was last modified in Merchandiser, In-Store Space Collaboration or by a batch process, synchronization will be by 'cross-matching'.
- - Information in the floor plan for zones, fixtures and other blocks and aisles will be written to the database.
- - Information in the database for shelves and merchandise will be written into the floor plan.
- Synchronize to Match Database - information in the database will be written into the floor plan.
- Synchronize to Match Drawing - information from the floor plan will be written to the database.
- Cross Match - information on zones, fixtures and other blocks and aisles will be written to the database, while information on shelves and merchandise will be written into the floor plan.

Date information can be seen in the File Properties dialog box in Store Manager.



Items to Synchronize

Once the synchronization method has been selected, specific items can be selected for the synchronization operation to work on.

- Include Fixtures - fixtures and fittings will be synchronized.
- Include Shelves - shelf objects will be synchronized.
- Include Products - products and planograms will be synchronized
- Include Other Blocks - this synchronizes all blocks assigned as type 'other' in Fixture Studio.
- Include Zones - Zones will be synchronized.
- Include Views - view positions in Planner or Merchandiser will be synchronized. (This will not affect In-Store Space Collaboration).

- Include Aisles - Aisles will be synchronized.

The following points should be noted:

- If shelf positions are changed in Planner and the 'Synchronize to Match Drawing' option is selected, the modified shelf positions will be written back to the database. This could potentially affect any instances of placed planograms using those shelves.
- Zones can only be added, edited or deleted in Planner. If 'Synchronize to Match Database' is selected, the current zone information in the Planner floor plan will be changed to match that held in the database. This might be done to reverse changes made and saved in the Planner module.
- Aisles can only be added, edited or deleted in Planner. If 'Synchronize to Match Database' is selected, the current aisle information in the Planner floor plan will be changed to match that held in the database. This might be done to reverse changes made and saved in the Planner module.

Restructure Drawing

Restructure Drawing allows users to update the drawing so that the blocks in the drawing match the latest information defined in Fixture Studio.

- Redefine Blocks from Disc - this will result in the DWG files in the drawing being updated with the latest versions of those DWG files defined in Fixture Studio.
- Explode Composite Blocks - this will explode all blocks defined as composites in Fixture Studio. These blocks will be placed on Layer 0 and will require having Color, Line type and Line-Weight to set to BYLAYER.

Note: Composite Blocks that are not flagged as composite in Fixture Studio will not be exploded.

- Reset Levels - this will reset the elevation of the block to that defined by the level assigned to it in the Insertion Tab of the Block Details dialog box in Fixture Studio.
- Reset Color, Line type and Line-Weight to BYLAYER - this option will look at the color, line type and line weight of each instance of a block in the drawing. If they differ from the defaults for that layer, they will be set back to those defaults.
- Reset Layer - if blocks have been moved to a layer different to that specified in the Insertion Tab of the Block Details dialog box in Fixture Studio, the block will be restored to the default layer.

Annotation

The annotation options allow users to update the annotation in the floor plan so it matches the latest annotation rules specified in the Text Styles option in the Administration Module.

- Annotate Fixtures - all fixtures that have the 'Include in Fixture Annotation' check box ticked in the Category Tab of the Block Details dialog box in Fixture Studio will have their annotation updated.
- Annotate Products - all products, planograms and planogram profiles will have their annotation updated.
- Annotate Zones - all zones will have their annotation updated.
- Update Title Block - all text boxes in the title block that reference information in the database will have that information updated.

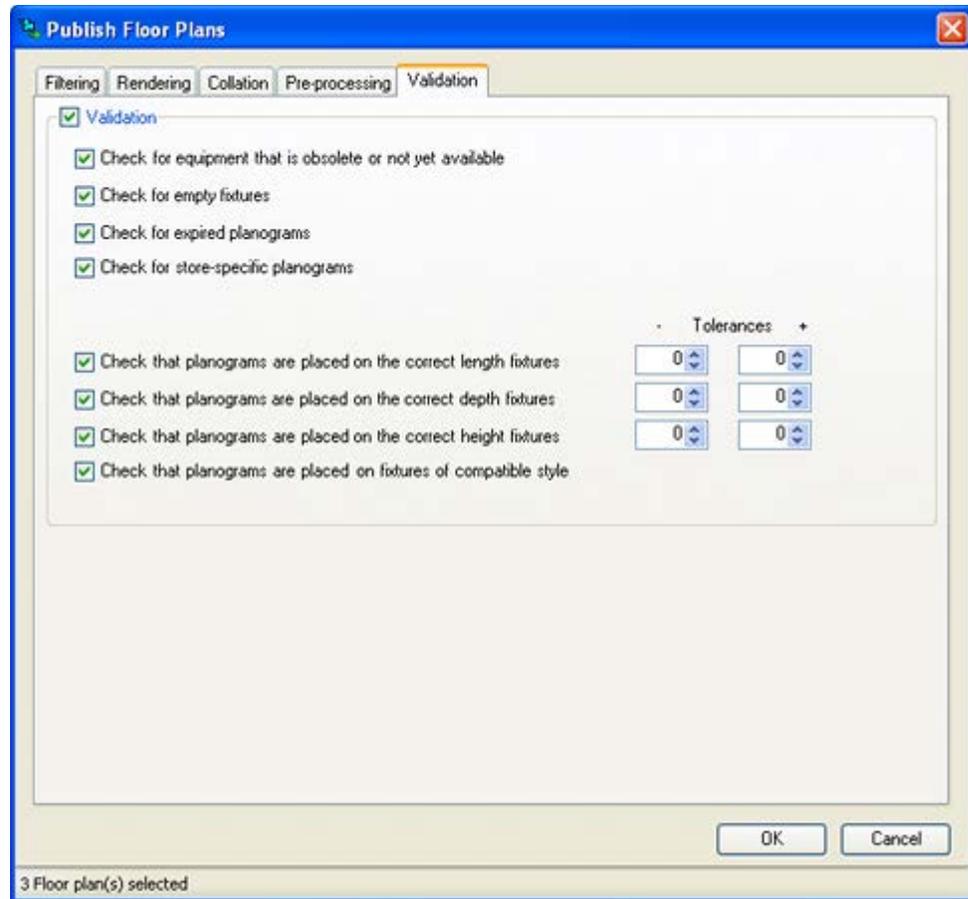
Calculations

This option is used to update the calculations associated with the floor plan. This has a number of benefits including ensuring that reports based on this floor plan are accurate and up to date. It also ensures that annotation draws correctly.

- Calculate Areas - this updates the area calculations; and hence the floor area assigned to each fixture.
- Calculate Fixture Adjacencies - this updates the fixture adjacencies; and hence the relationship of one fixture to another.
- Calculate Product Adjacencies - this updates the product adjacencies; and hence the relationship of one product to another.
- Calculate Aisle Adjacencies - this updates the aisle adjacencies; and hence which products share an aisle.
- Calculate Space Measures - this updates space measures: the volume occupied by each product in a planogram.
- Calculate Face Planes - this updates face planes: the frontal area occupied by each product in a planogram.

The Validation Tab

The **Validation Tab** enables users to set a series of validation checks that must be satisfied before the floor plan is published. If any of the checks fail, the floor plan will be not be published and details written to the AVTTB_PROCESS_FILE_LOG table. Information in this table can be read by means of a BI Publisher report or similar.



The tolerance values will use the system units, i.e. inches for imperial systems, and millimeters for metric systems. The values on the left are the lower tolerance; the values on the right are the upper tolerance.

- **Check for equipment that is obsolete or not yet available** - if selected, this validation option will compare the effective and expiry dates of the equipment against the effective date of the planogram

The Effective and Expiry Dates of the equipment are set in the Category tab of the Block Details dialog box in Fixture Studio.

Block Details: L_Fruit_and_Veg_Stand_48x36x43

Description: Fruit and Veg Stand 48 x 36 x 43

Category | Insertion | Size | Connections | Parts | Fixture | UDAs | Styles/Ranges | Merchandisable areas | Shelf | Preview

Equipment Type

Retail Type: Fixture

Can Populate with Display Style:

Can Populate with Placeholder:

Attaches to Primary Equipment:

Attaches to Secondary Equipment:

Accepts Secondary Equipment:

Corner Block:

General

Directory: Fruit and Veg

Manufacturer: Generic

Category: (none)

Units: Imperial inch

Material: Chrome

Print Material: Chrome

Status: Current

Effective Date: 11 March 2008

Expiry Date: 30 December 2009

Product Code:

Icon: Fixture

Cost: 0

Type

Fixed Size:

Symbol:

Scaled Size:

Drawn 1:1:

Graphics

No Graphics:

3D:

2D:

Rectangular

Working/Stacking Axes

Working: X Y Z

Stacking: X Y Z

Area Calc Directions

N:

S:

E:

W:

Reporting Options

Exclude from Reports:

Exclude Instances in DB:

Exclude Attributes:

Include in Fixture Annotation:

Save OK Cancel

The Effective Date of the Planogram is set in the Details tab of the Planogram design dialog box in the Merchandiser module.

Planogram: 1_Bay_Uncle_Bens_Express_Rice

Details | Properties | Stores | Seasons | Fixture Styles | Design | Financial | LDAs

Name: 1_Bay_Uncle_Bens_Express_Rice Revision: 1

Description: 1 Bay Uncle Bens Express Rice

Associated Document: ...

Size Description: 36 x 24 x 72

Status: Authorized Client Code: 00000067

Family Code: Family ABC Buddy Family Code: Buddy Family 456

Assortment Code: Assortment 123 Units: Imperial Inch

Temperature Range: Ambient Goods Time Units: standard hour

Weight Range: < No Ranges Selected > Manpower Set Time: 1.00

Publish Date: 02 November 2011 Manpower Dismantle Time: 0.50

Effective Date: 12 November 2011 Category Role: Primary Business Driver

Expiry Date: 31 December 2999 Inventory Model: Inventory DEF

Stock Type: Normal Rank: 0

Autofill Rule: < No Rule Selected > Traffic Flow: Left to Right Right to Left

Preferred Template: Basic Planogram Report Requires Power:

Can be Split:

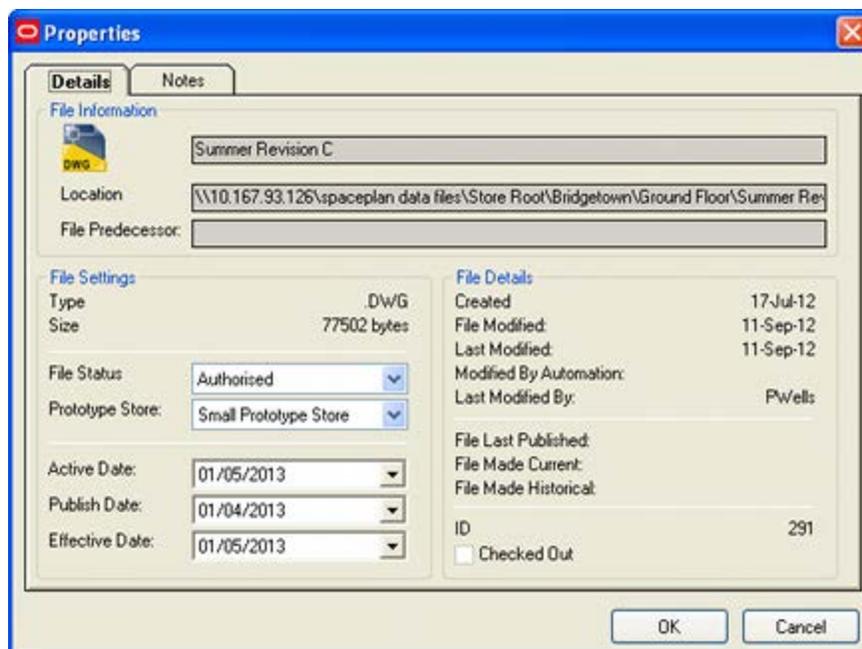
OK Save As Cancel

This validation check will error if the Planogram Effective Date is before the Equipment Effective Date or after the Equipment Expiry Date.

The relevant part of the check will be ignored if the equipment effective or expiry date is undefined.

- Check for empty fixtures - if selected, this validation option will search for fixtures which do not contain any products.
- Check for expired planograms - if selected, this validation option will compare the effective and expiry dates of the planogram against the effective date of the floor-plan. It will check:
 - The Effective Date of the Planogram is less than or equal to the Floor Plan Effective Date
 - The Floor Plan Effective Date is less than the Planogram Expiry Date

The Floor Plan Effective Date is set in the File Properties dialog box in Store Manager. (Store Manager can be accessed from the Planner or Merchandiser modules).

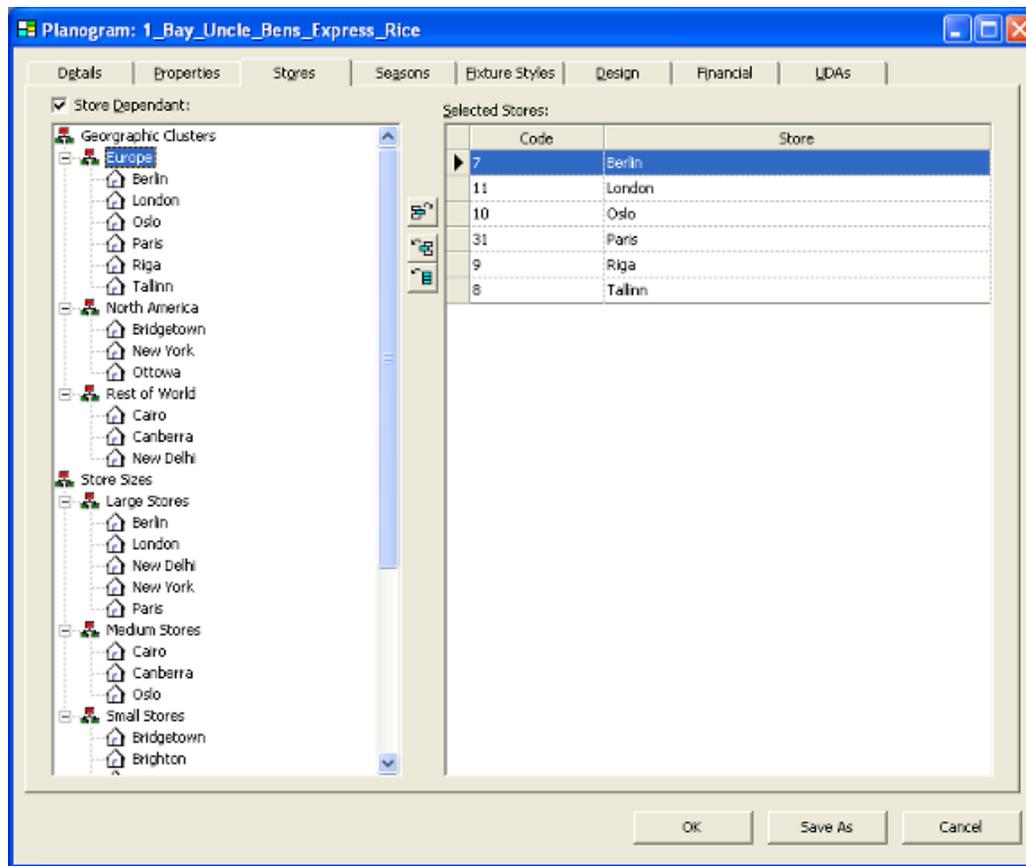


Note: Active Dates can also be set in the File Properties dialog box in Store Manager.

The relevant part of the check will be ignored if the planogram effective or expiry date is undefined.

- Check for store-specific planograms - if selected, this validation option will check the placed planograms are either store specific and associated with this store, or are generic planograms that are associated with all stores.

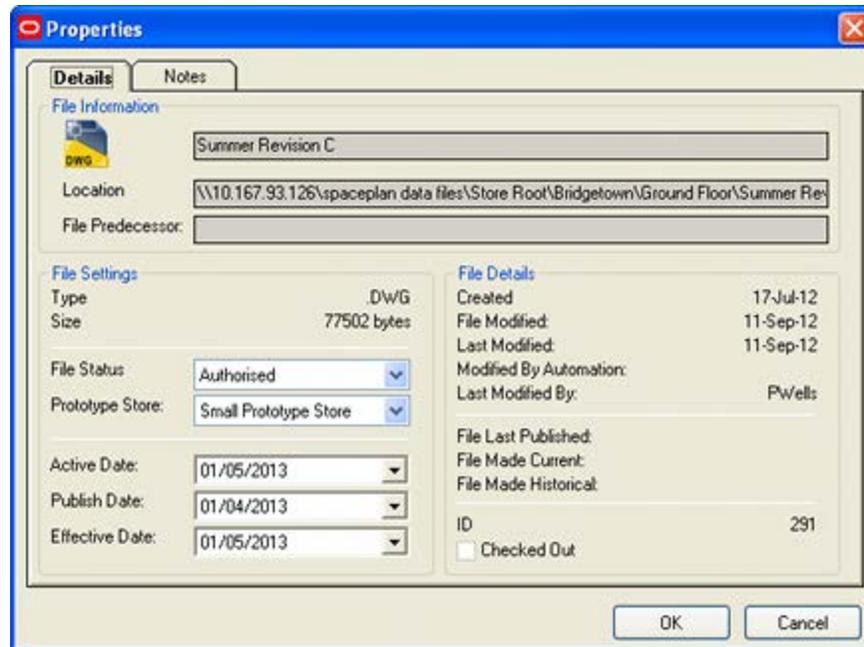
Whether planogram are store specific or not is specified in the Stores tab of the Planogram Design dialog box in the Merchandiser module.



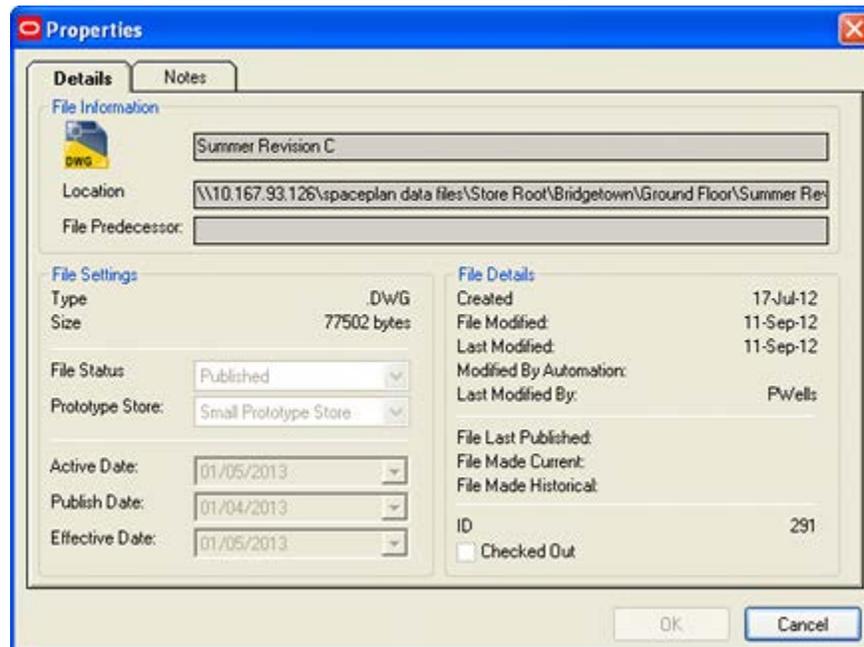
- Check that planograms are placed on correct length fixtures - if checked, this option will check that the length of the planogram falls within the total of the fixture lengths that the planogram is placed on. This check will take into account the length tolerances.
- Check that planograms are placed on correct depth fixtures - if checked, this option will check that the depth of the planogram matches the fixture depths that the planogram is placed on. This check will take into account the depth tolerances.
- Check that planograms are placed on correct height fixtures - if checked, this option will check that the height of the planogram matches the fixture heights that the planogram is placed on. This check will take into account the heights tolerances.
- Check that planograms are placed on correct fixture styles - if checked, this option will check that the fixture style assigned to the planogram matches the fixture styles assigned to the fixtures it has been placed on.

Floor Plan Publishing and Status Change

When floor plans are reviewed and accepted for subsequently being put into service, the status is set to Authorized and the Publish Date and Effective Dates set in the File Properties dialog box in Store Manager.



When Floor Plan Publishing is run, the status of the Floor Plan will be changed to Published. (Depending on settings in the Status dialog box, it may also be changed to Read Only).



This change of status allows the progress of the floor plan through its business life cycle to be monitored.

Planogram Publishing

Overview of Planogram Publishing

Note: The way that planogram publishing performs in the Planner and Merchandiser modules is dependent of settings in other modules. This section is included so that users of the Planogram Publishing Functionality can discuss requested changes with the Administrators. The default settings for the Planogram Publishing dialog box are derived from settings in the Planogram Publishing Configuration dialog box in the Administration module.

The purpose of publishing a planogram is to disseminate information on the type, quantity and location of shelves and merchandise to those tasked with implementing the change. Publishing a planogram design can be done in hard copy or electronic format. The date at which this is executed depends on the Publish Date set in the Details tab of the Planogram Design dialog box in the Merchandiser module.

The screenshot shows a dialog box titled "Planogram: 1_Bay_Misc_Tinned_Vegetables" with a tabbed interface. The "Details" tab is active, displaying various configuration fields:

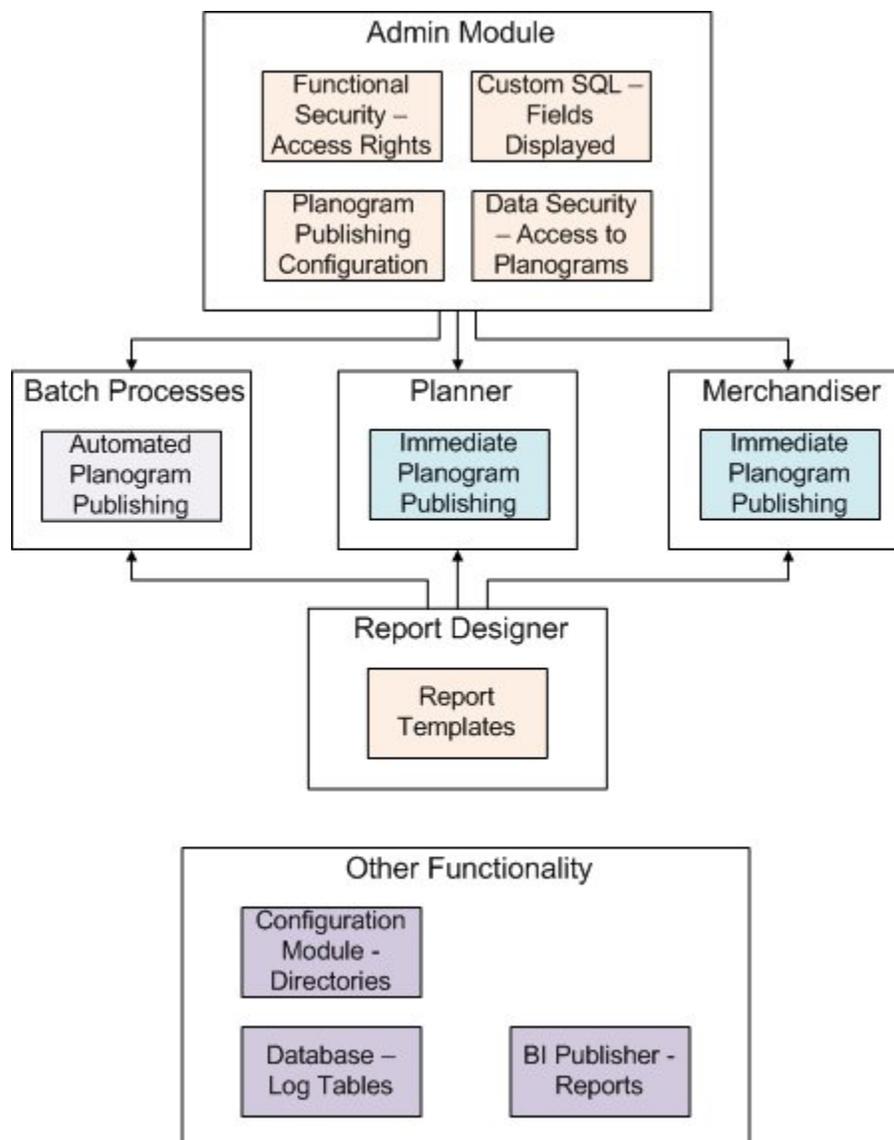
- Name:** 1_Bay_Misc_Tinned_Vegetables
- Revision:** 1
- Description:** 1 Bay Misc Tinned Vegetables
- Associated Document:** (empty field with a browse button)
- Size Description:** 36 x 24 x 72
- Master Planogram:**
- Status:** Published
- Client Code:** 0000061
- Family Code:** Family ABC
- Buddy Family Code:** Buddy Family 456
- Assortment Code:** Assortment 123
- Units:** Imperial inch
- Temperature Range:** Ambient Goods
- Time Units:** standard hour
- Weight Range:** < No Ranges Selected >
- Manpower Set Time:** 1.00
- Publish Date:** 14 July 2014
- Manpower Dismantle Time:** 0.50
- Effective Date:** 30 July 2014
- Category Role:** Routine
- Expiry Date:** 31 December 2999
- Inventory Model:** Inventory DEF
- Stock Type:** Normal
- Rank:** 0
- Autofill Rule:** < No Rule Selected >
- Traffic Flow:** Left to Right, Right to Left
- Preferred Template:** Basic Planogram Report
- Requires Power:**
- Can be Split:**

Buttons at the bottom include "OK", "Save As", and "Cancel".

The Planogram Publishing functionality is used to disseminate planogram designs to specified printers or Windows folders to facilitate implementing those planogram designs.

Note: a retail organization will still need a method of distributing the planogram designs from the printer or Windows folder to the end user.

The basic method of operation is as follows:



1. Administration Module

The Administration module is used to configure access to the different parts of the functionality. It is also used to assign permissions to print or publish specific floor plans and planograms. Finally, it is used to configure how the batch processes for publishing floor plans will work. There are three options that affect publishing and printing of floor plans.

- The Functional Security option (Security menu) allows Administrators to control who can run Planogram Publishing as a batch process. It also controls who can access Immediate Planogram Publishing in the Planner Module. It also allows Administrators to control who can access Report Designer to create report templates for publishing planogram designs.

- The Data Security option (Security menu) allows Administrators to control what planograms a user can print or publish from in the Planner and Merchandiser modules (and in In-Store Space Collaboration).
- The Custom Query dialog box allows an Administrator to specify what fields will appear in the Immediate Planogram Publish dialog box in the Planner module.

2. Configuring Outputs for Batch Process

The outputs for the batch process output of Planograms are configured in the administration module using the Planogram Publishing Configuration dialog box.

3. Running as a Batch Processes

Planogram Publishing can be run as a batch process - typically run overnight so that this processor hungry tasks can be executed without affecting the manual users of the system. The settings determining how this operates are set in the Planogram Publishing Configuration dialog box.

The rights to do this are set in Functional Security in the Administration Module.

4. Planner Module

Within the Planner module, the Immediate Publishing of Floor Plans functionality can only be used by users for whom permissions have been granted in the Administration module.

5. Merchandiser Module

Within the Merchandiser module, the Immediate Publishing of Floor Plans functionality can only be used by users for whom permissions have been granted in the Administration module.

6. Report Designer

Report Designer can be used to create report templates that determine the format the planogram design is published in.

7. Other Functionality

There are three other items of functionality that affect planogram publishing.

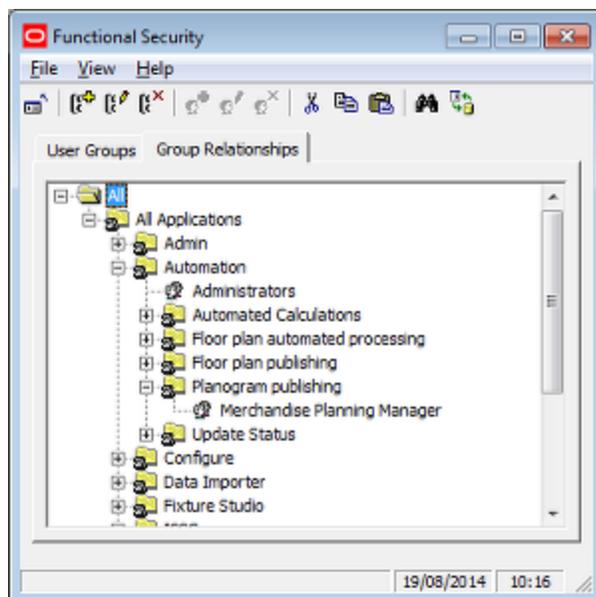
- Configuration Module - the Directories tab allows users to specify where the root folders holding published planograms are located. Sub-folders holding specific planograms will be created as children of this root folder.
- Tables in the Macro Space Planning database hold the results of planogram publishing operations.
- BI Publisher (or a similar application) can be used to generate reports based on the information held in the database - for example the names and results of planograms that have been published.

Permissions to Run Immediate Planogram Publishing

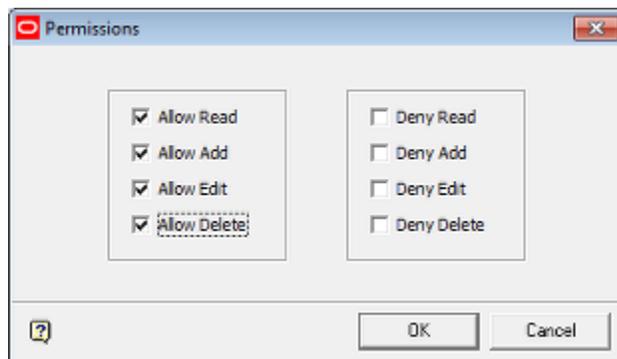
Accessing the Functionality

Before a user can run Immediate Planogram Publishing, they must first have been assigned the appropriate permissions in the Administration module. This is done using the Functional Security dialog box accessed from the Security menu.

Note: this dialog box will only be accessible to users with access rights to the Administration Module.



Users assigned to the Automation Command Group (such as the Administrator User Group) can run all Automation Functionality. User Groups assigned to the child Command Groups (Floor plan automated publishing, Floor plan publishing, Planogram publishing) have the ability to use that functionality. In the example above, the Merchandise Planning Manager User Group has been assigned permission to use the Planogram Publishing functionality. The User Group's precise rights depend on settings in the Permissions dialog box. This is accessed by highlighting the User Group and selecting the **Edit Permissions** option from the right click menu. This will bring up the Permissions dialog box.

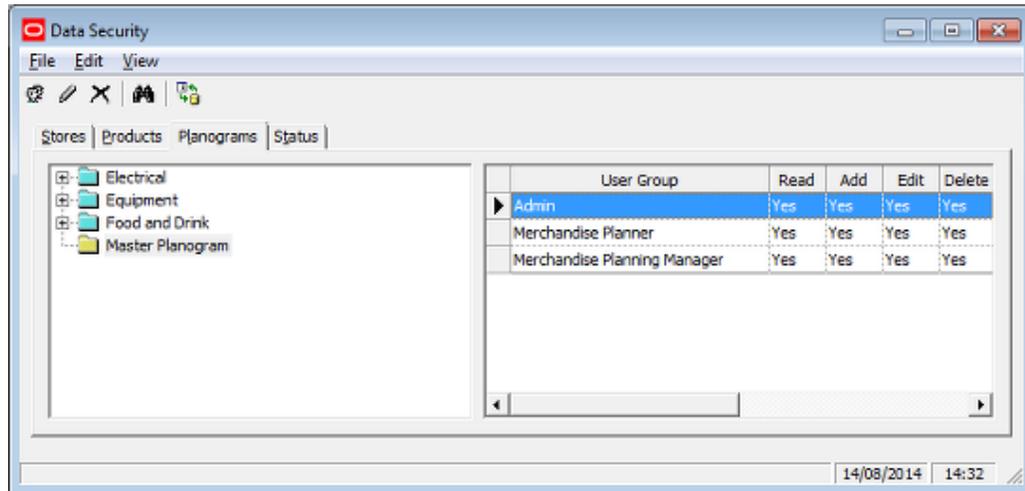


1. If the User Group belongs to a Command Group higher in the Command Group hierarchy, by default it will inherit the permissions from that higher Command Group. This permission can be varied at the lower level by changing the selections made using the check boxes.
2. If the User Group only exists at this level in the hierarchy, the Permissions dialog box will initially have all check boxes blank. The Administrator must then assign Allow or Deny permissions.

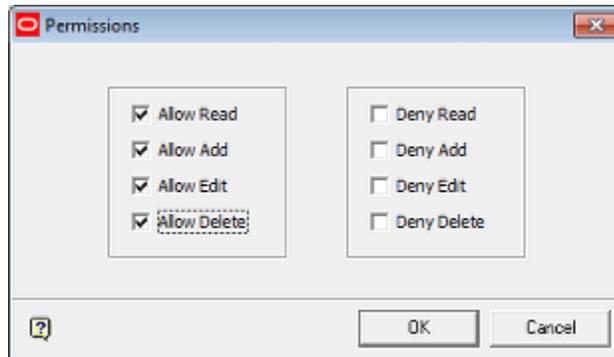
Giving Permission for Planogram Publishing

In order for a user to publish planograms, they must have access rights to the planogram groups containing both the master and individual planograms involved. This is set via the Planogram tab of the Data Security dialog box accessed from the Security menu in the Administration module. Permissions are inherited from higher level groups. Giving

permissions to a top level group will give permissions to all planograms that are children of that group. Giving permissions to lower level groups will make access to planograms more restrictive.



After assigning user groups to planogram groups, users must also be assigned permissions in the Edit permissions dialog box accessed by right clicking a User Group. Users require full permissions.



Dates Planograms will be Published

The purpose of publishing a planogram is to disseminate information on the type, quantity and location of shelves and merchandise to those tasked with implementing the change. Publishing a planogram design can be done in hard copy or electronic format. The date at which this is executed depends on the Publish Date set in the Details tab of the Planogram Design dialog box in the Merchandiser module.

Note: the Publish Date operates purely on the date only and takes no account of the time of day. Publish Dates are stored in Date/Time format in the database, but the functionality only references the Date.

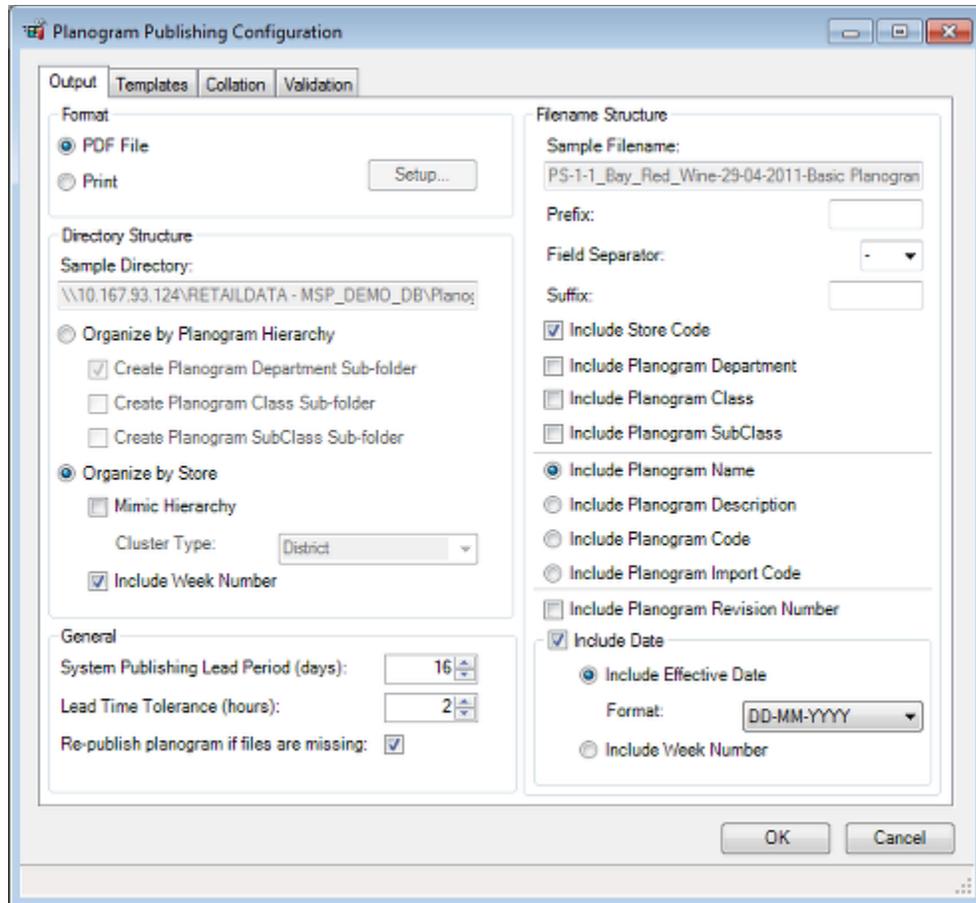
The screenshot shows a dialog box titled "Planogram: 1_Bay_Misc_Tinned_Vegetables" with several tabs: Details, Properties, Stores, Seasons, Fixture Styles, Design, Financial, and UDAs. The "Details" tab is active, showing the following fields:

- Name: 1_Bay_Misc_Tinned_Vegetables (Revision: 1)
- Description: 1 Bay Misc Tinned Vegetables
- Associated Document: [Empty]
- Size Description: 36 x 24 x 72
- Status: Published
- Family Code: Family ABC
- Assortment Code: Assortment 123
- Temperature Range: Ambient Goods
- Weight Range: < No Ranges Selected >
- Publish Date: 14 July 2014
- Effective Date: 30 July 2014
- Expiry Date: 31 December 2999
- Stock Type: Normal
- Autofill Rule: < No Rule Selected >
- Preferred Template: Basic Planogram Report
- Can be Split: [Unchecked]
- Master Planogram: [Unchecked]
- Client Code: 00000061
- Buddy Family Code: Buddy Family 456
- Units: Imperial inch
- Time Units: standard hour
- Manpower Set Time: 1.00
- Manpower Dismantle Time: 0.50
- Category Role: Routine
- Inventory Model: Inventory DEF
- Rank: 0
- Traffic Flow: Left to Right (Selected)
- Requires Power: [Unchecked]

Buttons at the bottom: OK, Save As, Cancel.

Another factor affecting the date at which at which planograms will be published is the Lead Time Tolerance (Hours) setting on the Output tab of the Planogram Publishing Configuration dialog box in the Administration Module.

Note: this dialog box will only be accessible to users with access rights to the Administration Module.



Batch processes can be set to start at any time of the day. For example, the batch process might initiate at 8 p.m. (20.00 hrs) in the evening to allow the maximum number of batch processes to be run before users come in for work again the following morning. However, the Publish date for the floor plan might be set for when the following day begins at midnight. The Lead Time Tolerance (Hours) setting allows for this.

For example, if batch process is run on the 2nd June at 20.00 hrs in the evening and has no lead time tolerance, a planogram that has a Publish Date of 3rd June would be ignored for publishing purposes by this run of the batch process. If however, the Lead Time Tolerance (Hours) setting is set to 5 hours, this will be added onto the Date and Time for the batch process and cause the batch process to operate as if it were running at 01.00 hrs in the morning of 3rd June. All planograms with a Publish Date of 3rd June would then be published.

Criteria for Publishing Planograms

There are two criteria for publishing planograms:

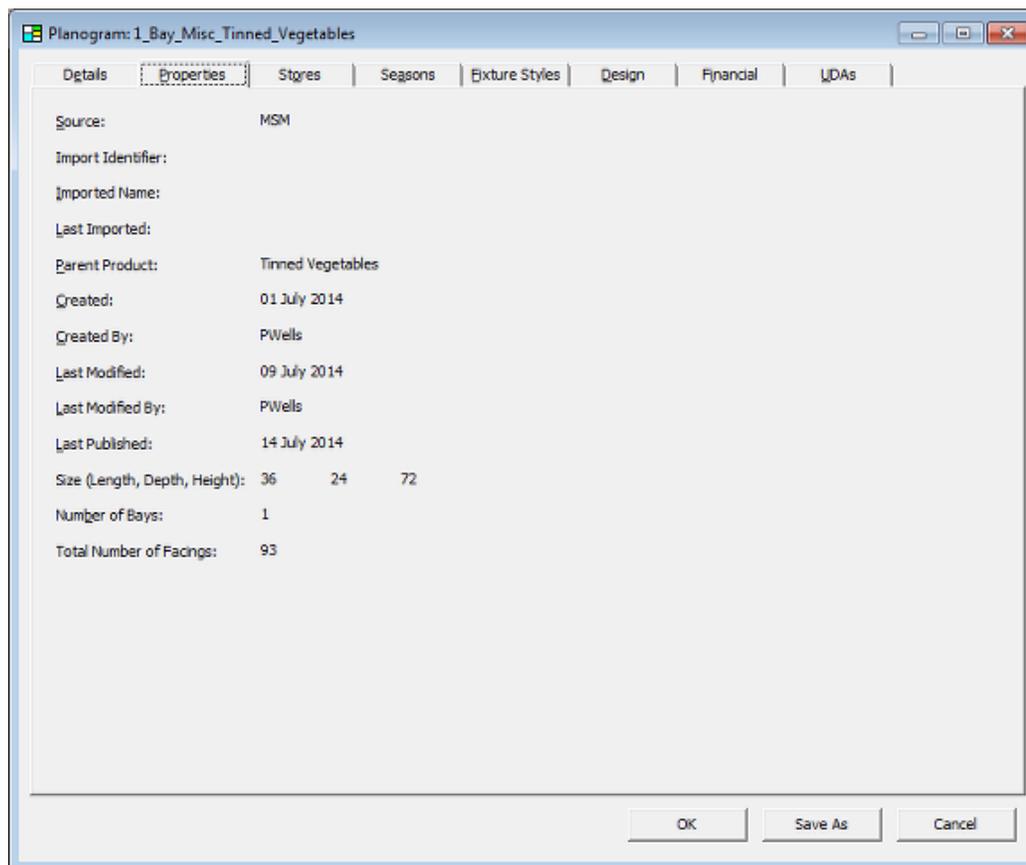
1. Publish Date has been exceeded

If the Publish Date set in the Details Tab of the Planogram Design dialog box in Merchandiser exceeds the current date (taking into account the Lead Time Tolerance (Hours) setting in the Planogram configuration dialog box in the Administration module), the floor plan will be published.

2. Planogram has been Updated since it was Published

It is possible that the floor plan may have been modified after it was last published - for example of a later revision has been created. The condition for this is that the Last

Modified date is greater than the Last Published Date. These can be seen on the Properties tab of the Planogram Design dialog box in the Merchandiser module.



Note: Planograms may also be republished if the Republish planogram if files are missing option has been checked in the Planogram Publishing Configuration dialog box.

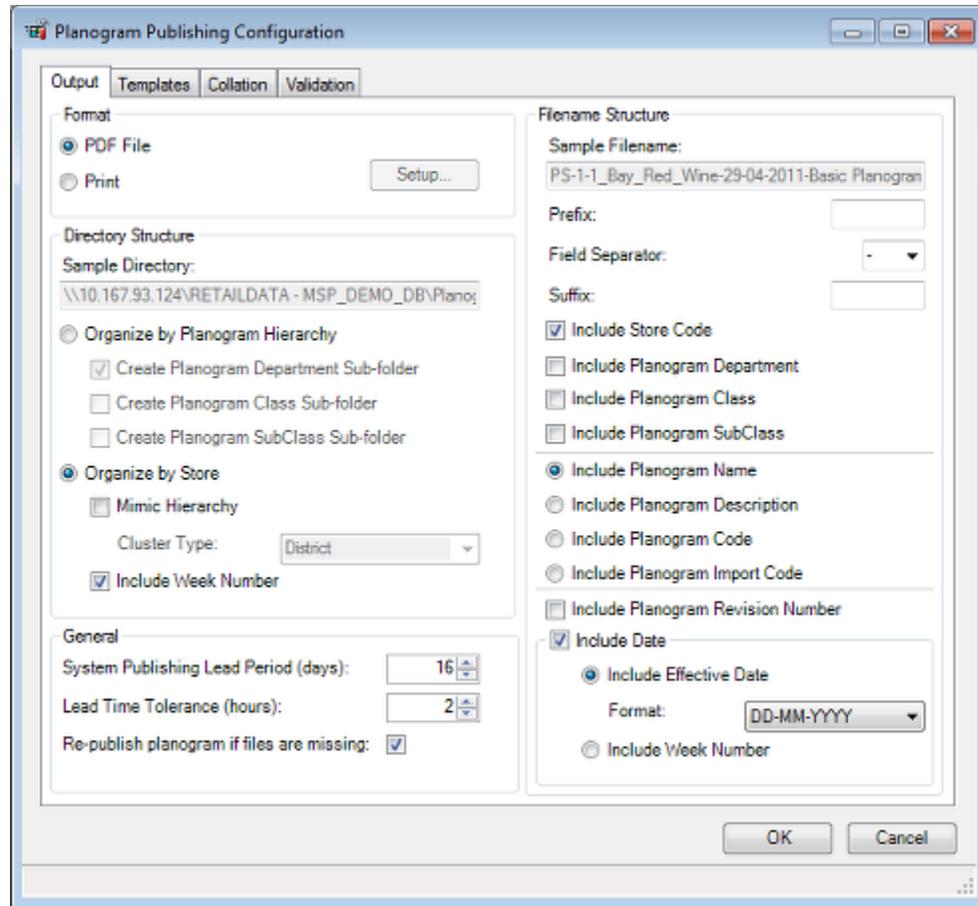
Master Planograms

Master Planograms act as placeholders in floor plans - see the detailed section on master planograms in the section on Merchandise. Because a master planogram acts as a placeholder for individual planograms, there is no need to update the floor plan every time an individual planogram is changed. Instead, when the planogram is published, the functionality will substitute the mapped individual planogram for the master planogram present in the floor plan.

Locations Planograms will Be Published To

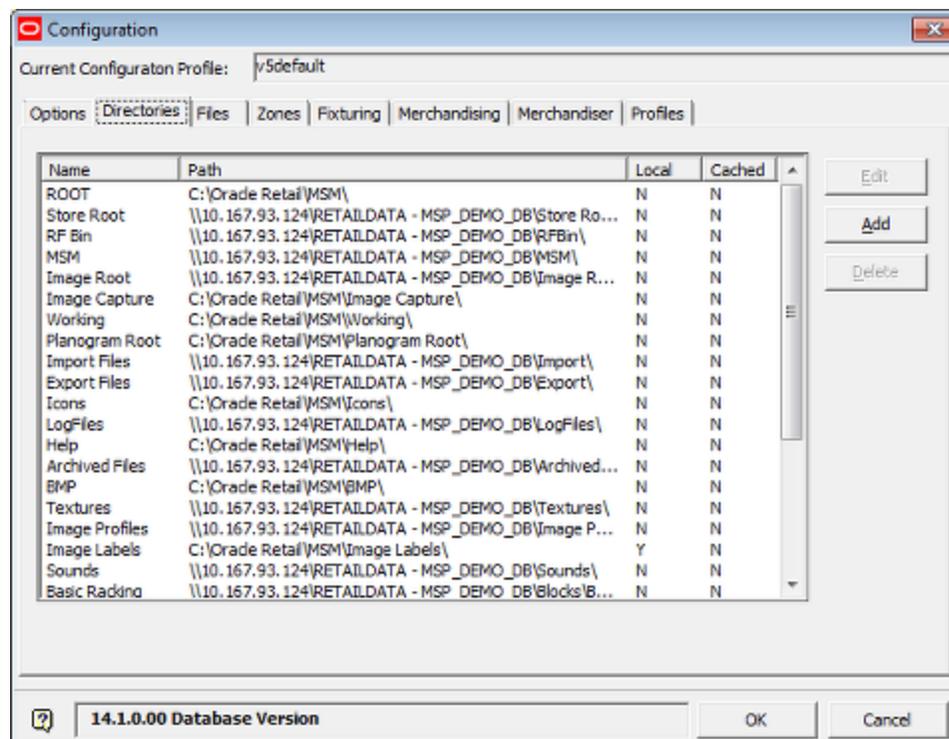
The locations Planogram designs will be published to and the file names that will be used are specified in the Output tab of the Planogram Publishing Configuration dialog box in the Administration module. If the date is included in the filename and the planograms are being organized by store then the store specific effective dates will be used.

Note: this dialog box will only be accessible to users with access rights to the Administration Module.



Note: For the Master Planogram functionality to work, the output format must be set to **Organize by Store**.

This dialog box allows Administrators to specify the directory structure, file format and file name that will be used when planogram designs are published. The starting point for the location planograms will be published to in electronic form can be seen in the details for the Planogram Publish system directory specified in the Directories Tab of the Configuration module.



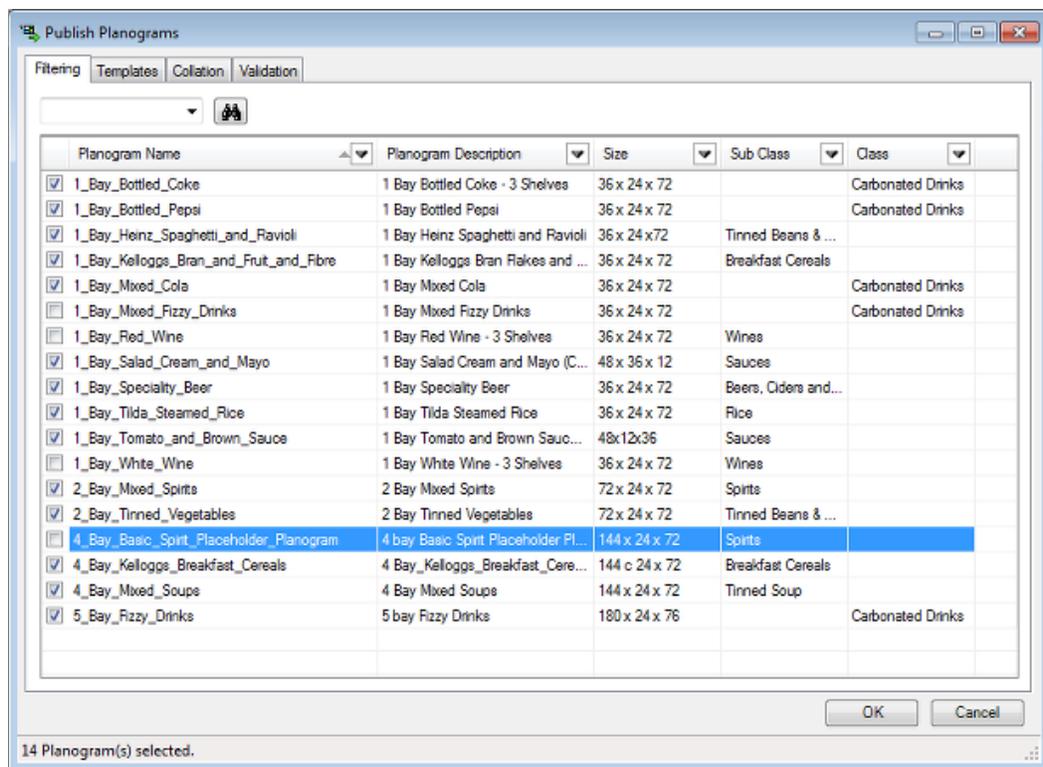
The Filtering Tab

The Filtering tab enables the user to select the Planograms to publish. It will populate with all planograms in the currently active floor plan.

Note: If there are multiple instances of a planogram in a floor plan, only a single entry will appear in the list of planograms.

The Filtering tab returns a list of all planograms in the database. If only specific zones have been loaded into the floor plan when it was opened, the Filtering tab will also contain the planograms in the zones that were not loaded.

Note: The option to only load specific zones is controlled by the Express Load option in the Merchandiser tab of the Configuration module.



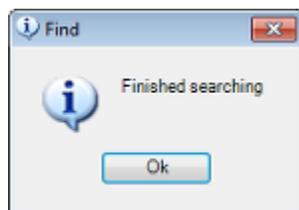
Planograms may be selected for printing by ticking the appropriate check box. The report to be used can be selected on the Template tab, while the order in which the planograms will print is specified on the Collation tab.

Master Planograms

If master planograms are in a floor plan, these should map to individual planograms. The individual planogram that will list will be the one where the floor plan date is set to between the planograms Effective and Expiry dates.

Find

The Find option can be used by typing text into the text box then clicking the Find icon. Each successive click will move the user to the next floor plan matching the text being searched for. When no more matches are available, a confirmatory dialog box will appear.



Find operates with explicit or implied wild cards. The explicit wild cards are:

Wild Card	Description
*	Any characters
?	Any character in this position

Wild Card	Description
-----------	-------------

#	Any number in this position
---	-----------------------------

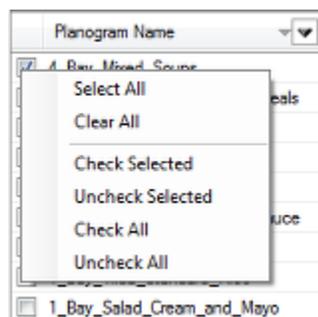
If explicit wild cards are not used, implicit wild cards will be assumed. For example the text entry 'Wine' will be treated as '*wine*' and will find I Bay Red Wine, 1 Bay White Wine, etc.

Pick

Pick takes the user to the currently active floor plan. They can then use AutoCAD selection methods to select specific planograms. When the AutoCAD selection is completed with a right mouse click, the user will be returned to the Print Planogram dialog box and the dialog box will populate with the selected planograms.

Right Click Menu

The right click menu provides a quick way of modifying the selected items.



Option	Effect
--------	--------

Select All	This will select (but not check) all rows of data.
------------	--

Clear All	This will deselect (but not uncheck) all rows of data.
-----------	--

Check Selected	This will check all rows of selected data.
----------------	--

Uncheck Selected	This will uncheck all rows of selected data.
------------------	--

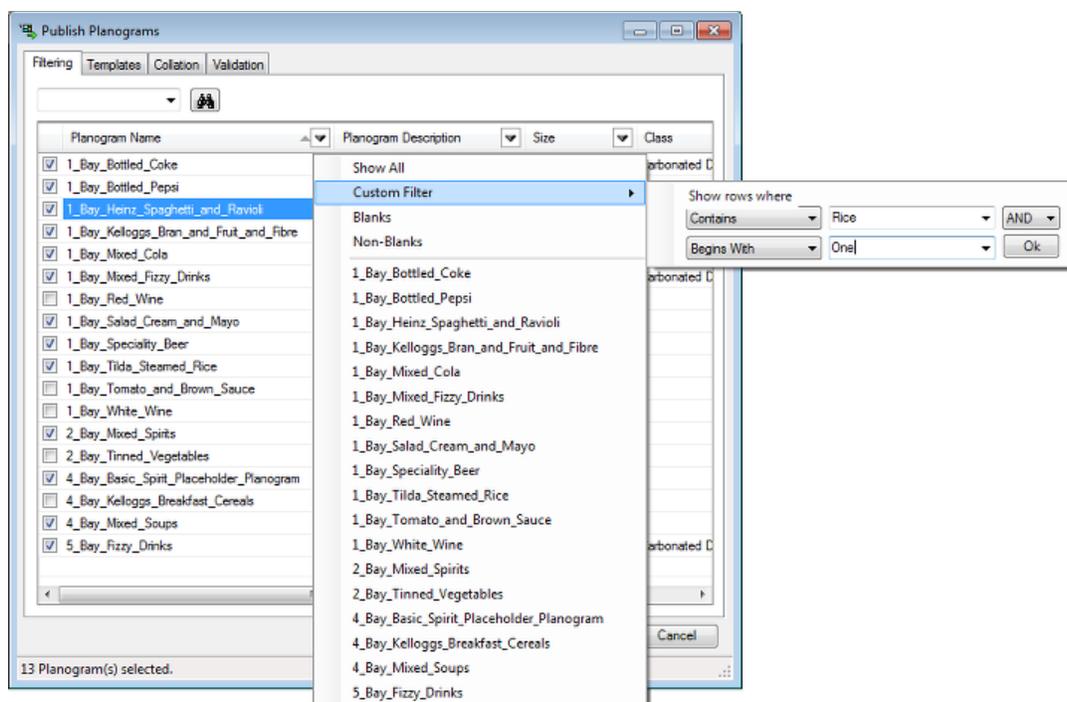
Check All	This will check all rows of data.
-----------	-----------------------------------

Uncheck All	This will uncheck all rows of data.
-------------	-------------------------------------

Paste allows users to paste a carriage returned list of floor plan identifiers from the Windows clipboard. All rows in the dialog box that match the pasted information will be checked.

Filters

The Filtering Tab is provided with a series of filters on each column. Setting a filter on one column will affect data in all other columns. If a filter is active it will be shown by the symbol on the column header.

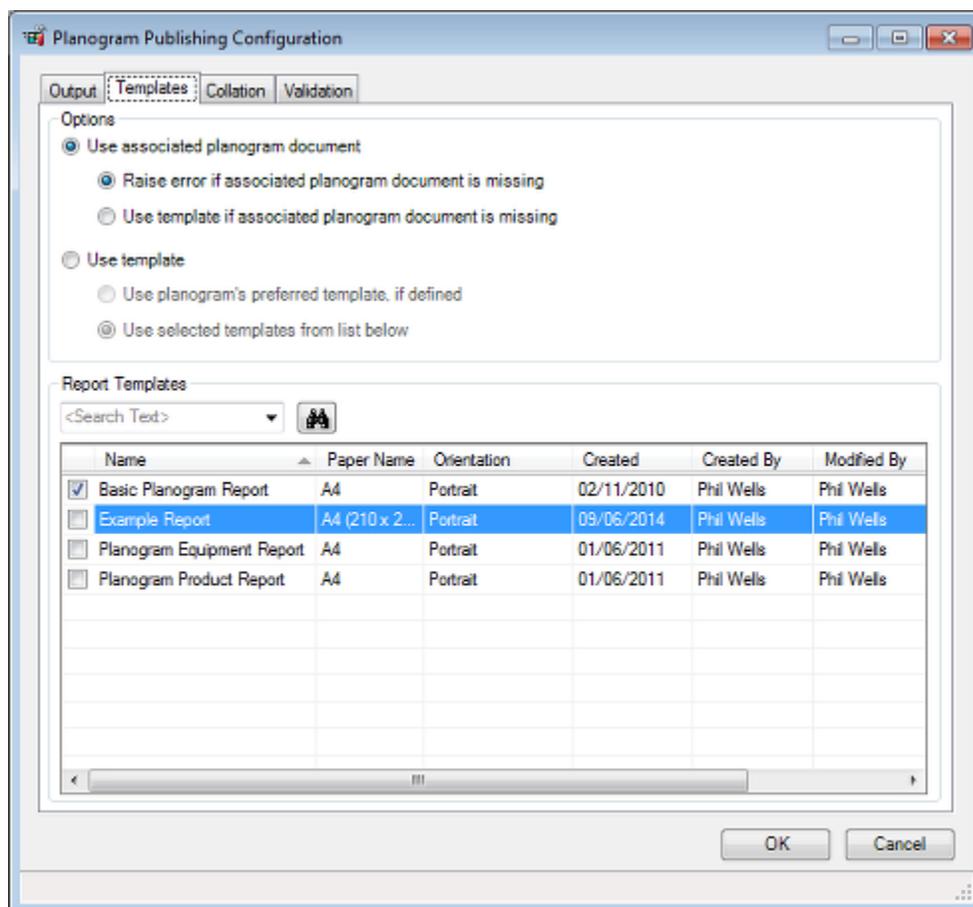


They are used as follows:

Option	Description
Show All	This option shows all results. It can be used to remove the effects of any applied filters.
Custom Filter	<p>This option allows users to set filters using Boolean logic. The options are:</p> <ul style="list-style-type: none"> Equal to: will return rows that are an exact match for the entered text. Not Equal to: will return rows that do not match the text string Contains: will return rows where part of the data matches the text string. (Uses implied wild cards). Does not contain: will return rows where no part of the data matches the text string. (Uses implied wild cards). Begins with: will return rows where the text string is an exact match for the start of the data. Ends with: will return rows where the text string is an exact match for the end of the data. Does not begin with: will return rows where the text string is not an exact match for the start of the data. Does not end with: will return rows where the text string is not an exact match for the end of the data.
Blanks	Column will be filtered to only show rows with null values.
Non-Blanks	Column will be filtered to only show rows containing a value
Planogram list	Column will be filtered to only show the selected result.

The Templates Tab

The **Templates Tab** allows users to specify the template format to be used when printing planogram designs.



The user can use a radio button to specify the form the report will take: an imported 'associated planogram document' or a template that is configured in the Report Designer Module.

Use Associated Planogram document

This option publishes the planogram design information using a pre-generated report using one of the following file formats: BMP, GIF, JPEG, JPG, PDF, PNG, TIFF or WMF. This report will be imported when a planogram is imported using Oracle Data Integrator (ODI). The Associated Document (if available) is specified in the Associated Document text box in the Details tab of the Planogram Design dialog box in the Merchandiser module.

Planogram: 2_Bay_Mixed_Cola

Details | Properties | Stores | Seasons | Fixture Styles | Design | Financial | UDAs

Name: 2_Bay_Mixed_Cola Revision: 2

Description: 2 Bay Mixed Cola

Associated Document: C:\Users\pwells.ORADEV\Documents\BC\60b7d5249a5792c3da.pdf ...

Size Description: 72x 24 x 72 Master Planogram:

Status: Proposed Client Code: 00000032

Family Code: Family ABC Buddy Family Code: Buddy Family 456

Assortment Code: Assortment 123 Units: imperial inch

Temperature Range: Ambient Goods Time Units: standard hour

Weight Range: < No Ranges Selected > Manpower Set Time: 1.00

Publish Date: Manpower Dismantle Time: 0.50

Effective Date: Category Role: Routine

Expiry Date: 31 December 2999 Inventory Model: Inventory DEF

Stock Type: Normal Rank: 0

Autofill Rule: < No Rule Selected > Traffic Flow: Left to Right Right to Left

Preferred Template: Basic Planogram Report Requires Power:

Can be Split:

OK Save As Cancel

There are two options (selected using the radio button) for when the pre-generated report is missing.

- Write an error to the AVTTB_PUBLISH_POG_LOG table. Information in this table can be read by means of a BI Publisher report or similar.
- Use the default Report Designer template.

Use Template

This option allows the user to define the way the template from the Report Designer module is selected. There are two options (selected using the radio button):

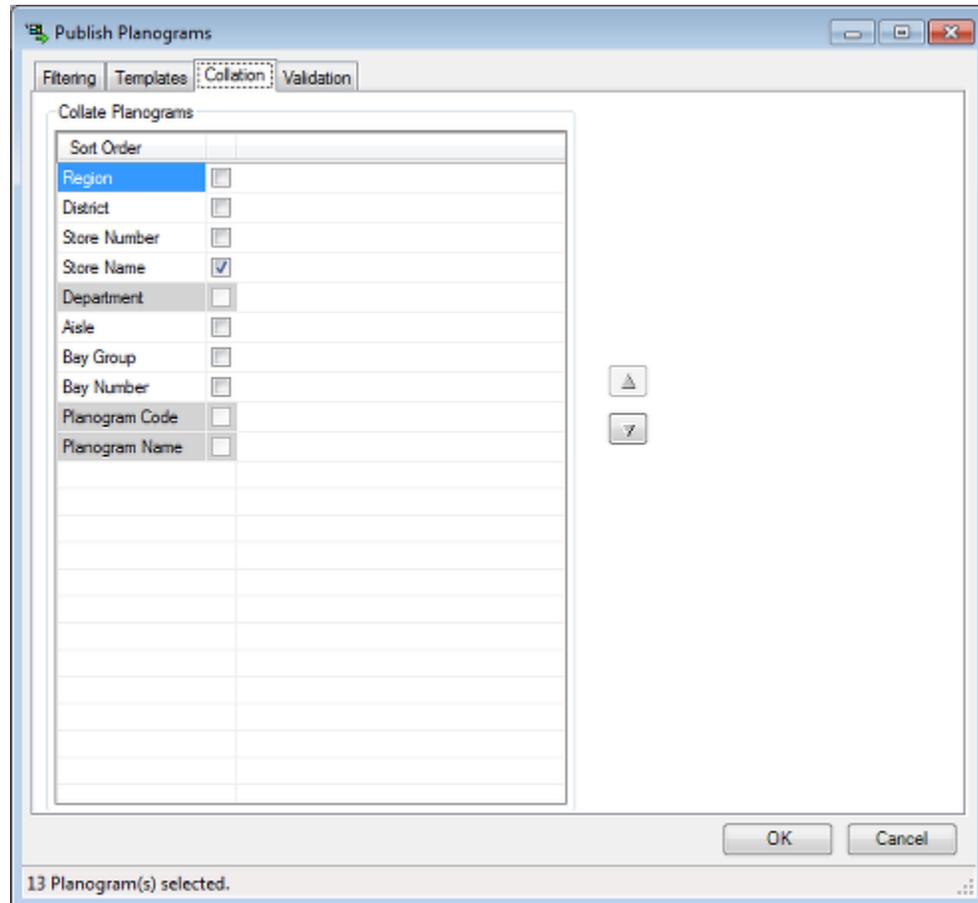
- Use Planograms preferred template, if defined - this option is specified in the Preferred Template drop down list in the Details tab of the Planogram Design dialog box in the Merchandiser module.
- Use Selected Template from List Below - this option can be set by checking items in the list of available templates. One or more templates may be selected. If multiple templates are selected, the name of the template will be added to the file name in brackets - for example 1_Bay_Mixed_Fizzy_Drinks (Basic Planogram Report).pdf

If necessary, the list of templates can be searched by entering a text string into the drop down list, then clicking the Find button. (Actual or implied wild cards can be used). Each click of the Find button will cause the search engine to move forward through the matching results until no results are left.

Note: the last 10 text searches can be selected using the drop down list in the text box.

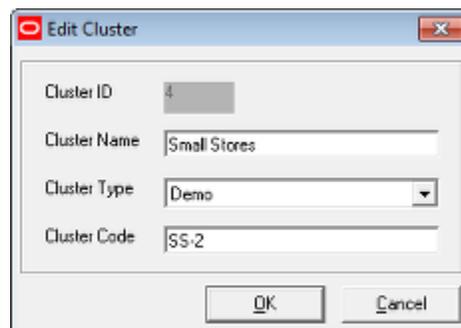
The Collation Tab

The Collation Tab allows users to specify the sequence the planogram designs will be published or printed in. At least one collation option must be selected, or the tab will show as having an error. The order of the collation options can be modified highlighting them and then using the **Up** or **Down** arrows.



The available options can be ordered by highlighting them, then using the up or down arrows. The options are made active by using the check boxes.

- **Region** is a specific type of cluster set in the Cluster type drop down list in the Cluster dialog box in Store Manager.
- **District** is a specific type of cluster set in the Cluster type drop down list in the Cluster dialog box in Store Manager.



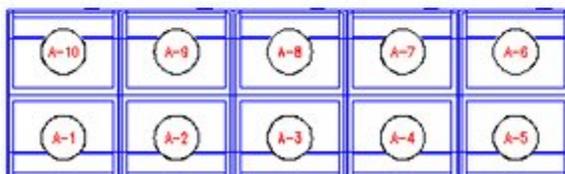
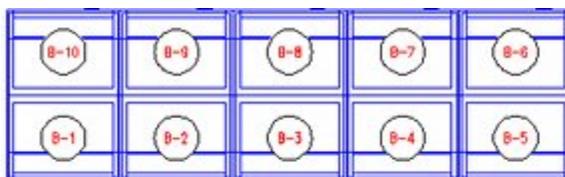
- **Store Number** is the Store Code in the Store dialog box in Store Manager.

- **Store Name** is the Store Name in the Store dialog box in Store Manager.

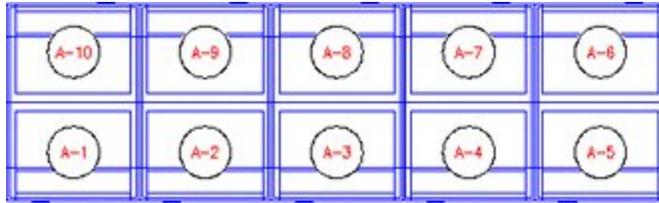
The 'Add Store' dialog box contains the following fields and options:

- Store ID: [Empty]
- Store Code: AA-1
- Store Name: Example
- Directory Name: Example
- Latitude: 0
- Longitude: 0
- Status: Open
- Opened Date: 31/10/2014
- Closed Date: 31/12/2999
- Store Prototype: Large Prototype Store
- Set as Prototype:

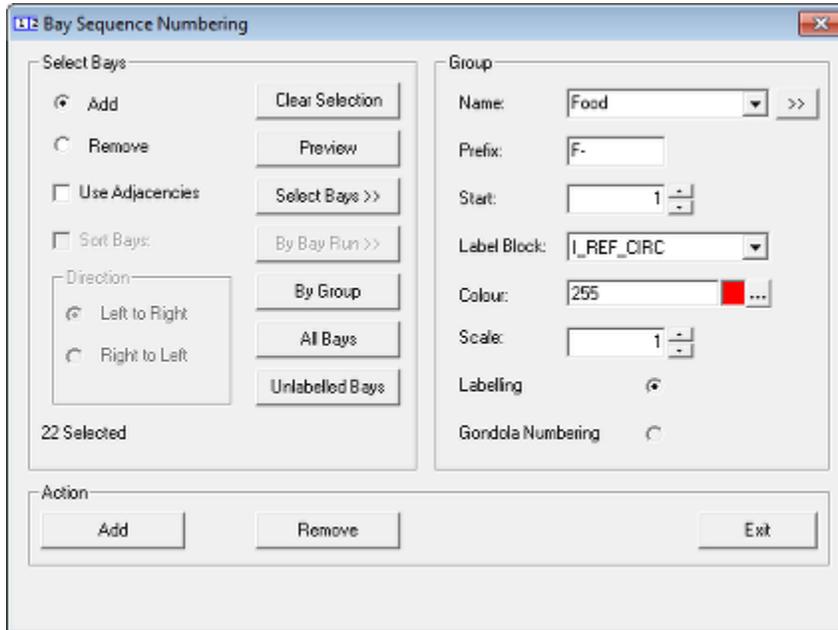
- **Department** is the department (zone) in the floor plan the planogram is associated with.
- **Aisle** is the aisle the planogram is associated with. For this option to operate, aisles must first be drawn in the floor plan in the Planner module. In the example below, Aisle F-1 has been drawn between two runs of fixtures.



- **Bay Number** is the bay number associated with the fixtures the planogram is placed on. For this option to operate, the fixtures in the floor plan must previously have been bay numbered.



- **Bay Group** is the Name assigned to a number of fixtures sharing a common characteristic. It is assigned in the Name field of the Bay Numbering dialog box in the Planner module.



- **Planogram Name** is the name of the planogram. This is set in the Name field of the Planogram Design dialog box in Merchandiser.
- **Planogram Code** is the code for the planogram. This is set in the Client Code field of the Planogram Design dialog box in Merchandiser.

Planogram: 2_Bay_Mixed_Cola

Details | Properties | Stores | Seasons | Fixture Styles | Design | Financial | UDAs

Name: 2_Bay_Mixed_Cola Revision: 2

Description: 2 Bay Mixed Cola

Associated Document: C:\Users\pwells.ORADEV\Documents\BC\60b7d5249a5792c3da.pdf ...

Size Description: 72x 24 x 72 Master Planogram:

Status: Proposed Client Code: 00000032

Family Code: Family ABC Buddy Family Code: Buddy Family 456

Assortment Code: Assortment 123 Units: imperial inch

Temperature Range: Ambient Goods Time Units: standard hour

Weight Range: < No Ranges Selected > Manpower Set Time: 1.00

Publish Date: Manpower Dismantle Time: 0.50

Effective Date: Category Role: Routine

Expiry Date: 31 December 2999 Inventory Model: Inventory DEF

Stock Type: Normal Rank: 0

Autofill Rule: < No Rule Selected > Traffic Flow: Left to Right
 Right to Left

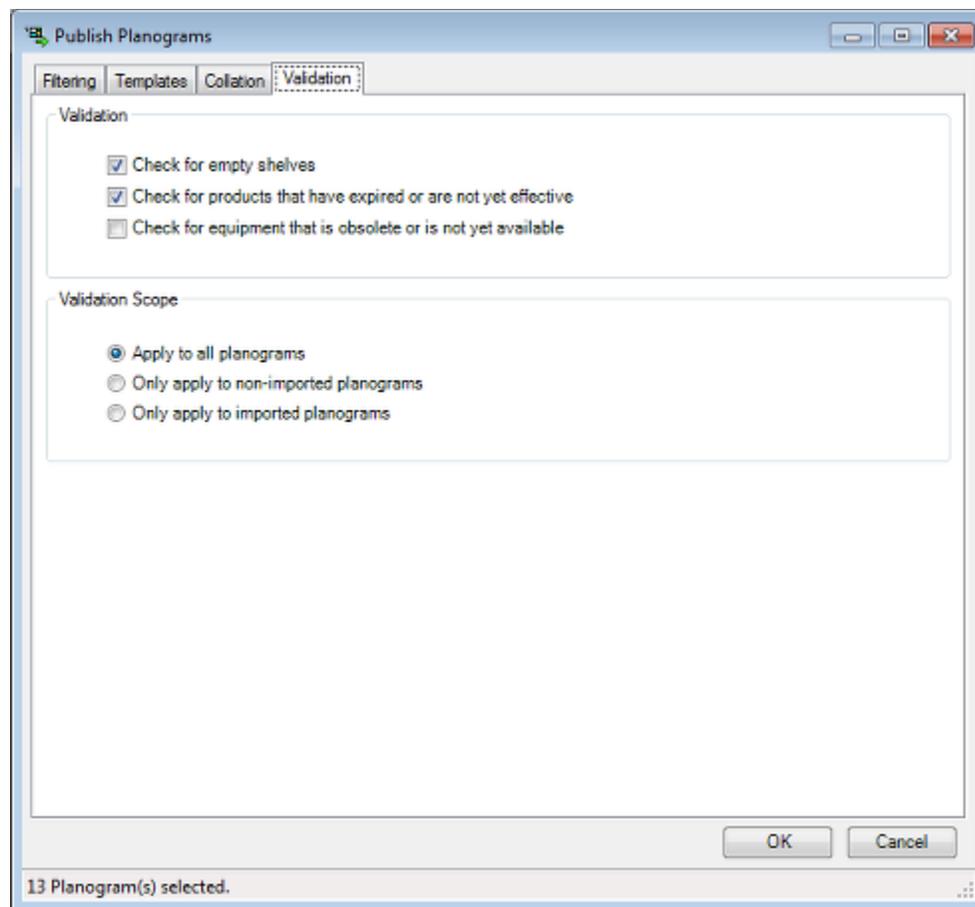
Preferred Template: Basic Planogram Report Requires Power:

Can be Split:

OK Save As Cancel

The Validation Tab

The Validation tab enables users to set a series of validation checks that must be satisfied before the planogram design is published. If any of the checks are failed, the details will be written to the AVTTB_PUBLISH_POG_LOG table. Information in this table can be read by means of a BI Publisher report or similar.



1. Check for empty shelves - this option will check the parent fixture and associated shelf objects. It will raise an error report if:
 - The fixture and associated shelf objects can be populated with product placeholders, but no product placeholder has been placed.
 - The fixture and associated shelf objects can be populated with display styles, but no display styles have been placed.
2. Check for products that have expired or are not yet effective - this option will check all products in the planogram against the effective date of the planogram. It will raise an error report if:
 - The Product Effective Date is after the Planogram Effective Date - i.e. the product is not yet available to place in the planogram.
 - The Product Expiry Date is before the Planogram Effective Date - i.e. the product will expire while the planogram is still in service.

The check will be ignored if the product effective or expiry date is undefined.

The Planogram Effective Date is set in the Details tab of the Planogram Design dialog box in Merchandiser.

The screenshot shows a dialog box titled "Planogram: 1_Bay_Misc_Tinned_Vegetables" with the following fields and values:

Field	Value
Name	1_Bay_Misc_Tinned_Vegetables
Revision	1
Description	1 Bay Misc Tinned Vegetables
Associated Document	[Empty]
Size Description	36 x 24 x 72
Master Planogram	<input type="checkbox"/>
Status	Published
Client Code	00000061
Family Code	Family ABC
Buddy Family Code	Buddy Family 456
Assortment Code	Assortment 123
Units	Imperial inch
Temperature Range	Ambient Goods
Time Units	standard hour
Weight Range	< No Ranges Selected >
Manpower Set Time	1.00
Publish Date	14 July 2014
Manpower Dismantle Time	0.50
Effective Date	30 July 2014
Category Role	Routine
Expiry Date	31 December 2999
Inventory Model	Inventory DEF
Stock Type	Normal
Rank	0
Autofill Rule	< No Rule Selected >
Traffic Flow	<input checked="" type="radio"/> Left to Right <input type="radio"/> Right to Left
Preferred Template	Basic Planogram Report
Requires Power	<input type="checkbox"/>
Can be Split	<input type="checkbox"/>

Buttons at the bottom: OK, Save As, Cancel

The Product Effective and Expiry dates are set in the Details tab of the SKU dialog box in Product Studio.

3. Check for equipment that is obsolete or not yet available - this option will check all equipment in the planogram against the effective date of the planogram. It will raise an error report if:
 - The Equipment Effective Date is after the Planogram Effective Date - i.e. the equipment is not yet available for the planogram.
 - The Equipment Expiry Date is before the Planogram Effective Date - i.e. the equipment will be taken out of service while the planogram is still in use.

The check will be ignored if the equipment effective or expiry date is undefined. The Equipment Effective and Expiry dates are set in the Category tab of the Block Details dialog box in Fixture Studio.

Block Details: Example

Description: Example

Category | Insertion | Size | Connections | Parts | Fixture | UDAs | Styles/Ranges | Merchandisable areas | Shelf | Preview

Equipment Type

Retail Type: Fixture

Can Populate with Display Style

Can Populate with Placeholder

Attaches to Primary Equipment

Attaches to Secondary Equipment

Accepts Secondary Equipment

Corner Block:

General

Directory: MSM

Manufacturer: Own Manufacture - Equipment

Category: Basic Racking

Units: Imperial inch

Material: Bluey Grey

Print Material: Bluey Grey

Status: Current

Effective Date: 01 July 2014

Expiry Date: 31 December 2999

Product Code:

Icon: Fixture

Cost: 0

Type

Fixed Size

Symbol

Scaled Size

Drawn 1:1

Graphics

No Graphics

3D

2D

Rectangular >>>

Working/Stacking Axes

Working X Y Z

Stacking X Y Z

Area Calc Directions

N

W E

S

Reporting Options

Exclude from Reports

Exclude Instances in QB

Exclude Attributes

Include in Fixture Annotation

Save OK Cancel

4. Validation Scope - this controls when to apply the validation checks. There are three options - selectable by the radio button.
- Apply to all planograms.
 - Apply to non-imported (manually created) planograms.
 - Apply to imported planograms.

The application will automatically distinguish between imported and manually created planograms by means of the information held in the Macro Space Planning database.

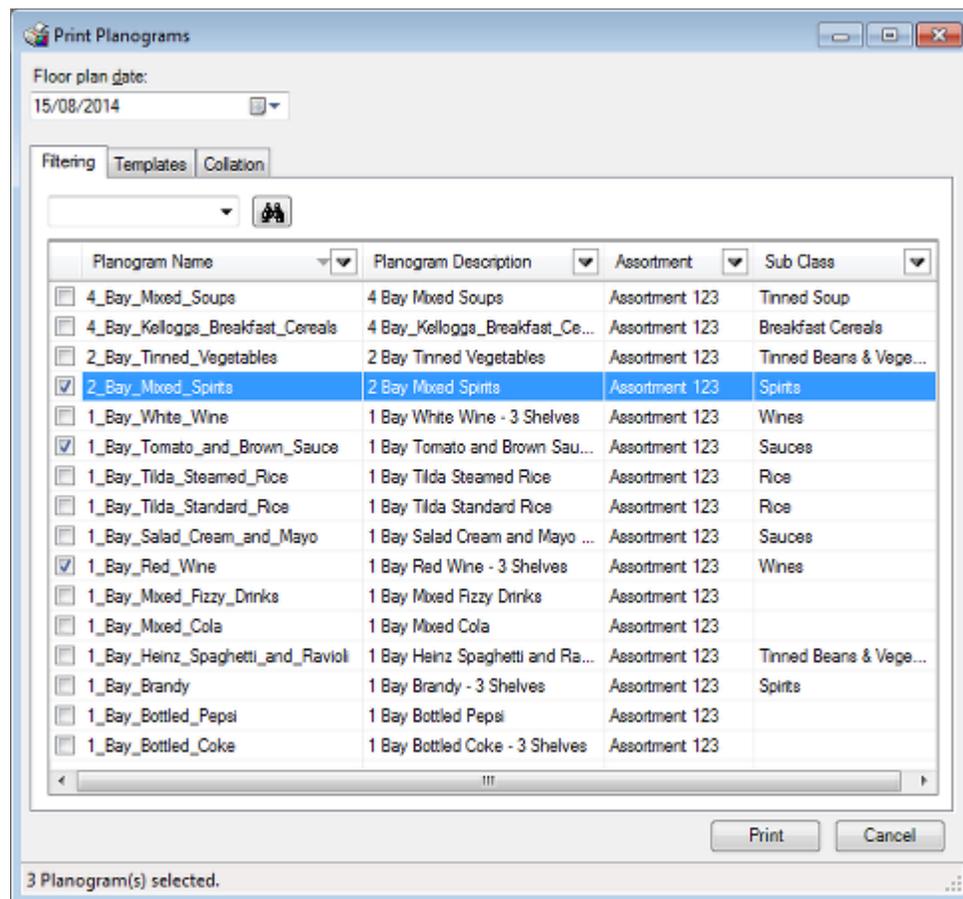
Planogram Printing

Overview of Planogram Printing

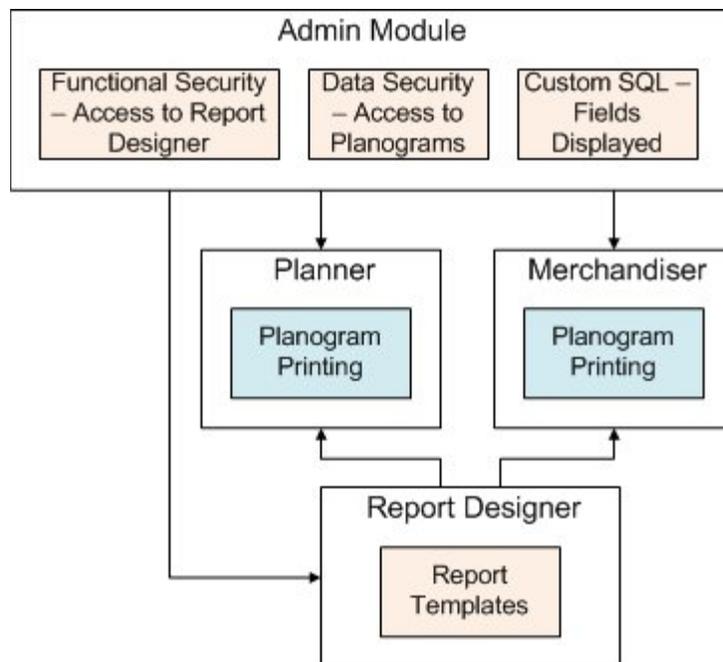
Planogram Printing allows users to select planograms in the currently active floor plan and print out information on the ones they have permissions to print.

Note: Users wishing to Publish the planogram design (output it in electronic or hard copy form with permanent changes) should use the Immediate Planogram Publishing option from the **File** menu.

Note: The default settings for this dialog box are derived from settings in the Planogram Publishing Configuration dialog box in the Administration module.



The basic method of operation is as follows:



1. Administration Module

Within the Administration Module:

- The planogram users have permissions to print are assigned in the Data Security dialog box - Planograms Tab.
- The fields that display in the Filtering Tab of the Print Planograms dialog box are configured in the Custom SQL dialog box.
- Planograms can be printed using report templates specified in the Report Designer module. Permission to access this module is specified in the Functional Security dialog box.

These settings determine what will appear in the Print Planograms dialog box (and the reports that will be available) when it is accessed in the Planner and Merchandiser modules.

Note: In order to access the Administration Module, users must have permission to do so.

2. Planner Module

The Print Planograms dialog box may be accessed from the File Menu - a floor plan containing planograms must previously have been opened. Users with permissions to access the Planner module automatically have permission to use the functionality.

3. Merchandiser Module

The Print Planograms dialog box may be accessed from the File > Print Menu - a floor plan containing planograms must previously have been opened. Users with permissions to access the Merchandiser module automatically have permission to use the functionality.

4. Report Designer

The Report Designer module is used to design report templates that can be specified for use in the Print Planograms dialog box. Permissions to access this module are assigned in the Functional Security dialog box in the Administration module.

Using Planogram Printing

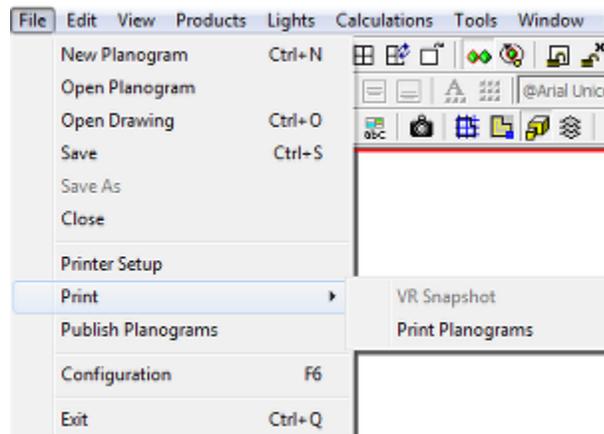
The functionality is used as follows:

1. A floor plan containing planograms is opened in the Planner or Merchandiser module.
2. The Print Planogram option is selected from the File menu in the Planner or Merchandiser module.
3. The appropriate planograms are selected in the Filtering tab of the Print Planograms dialog box based on the date selected in the dialog box.
4. The report to use is specified in the Templates tab.
5. The sequence the selected floor plans are to be printed in is specified in the Collation Tab.
6. On clicking the Print button, the selected planogram reports will be printed on the default printer associated with the user's computer.

Accessing the Functionality

Note: before accessing the Print Planogram functionality, users should open a floor plan containing planograms.

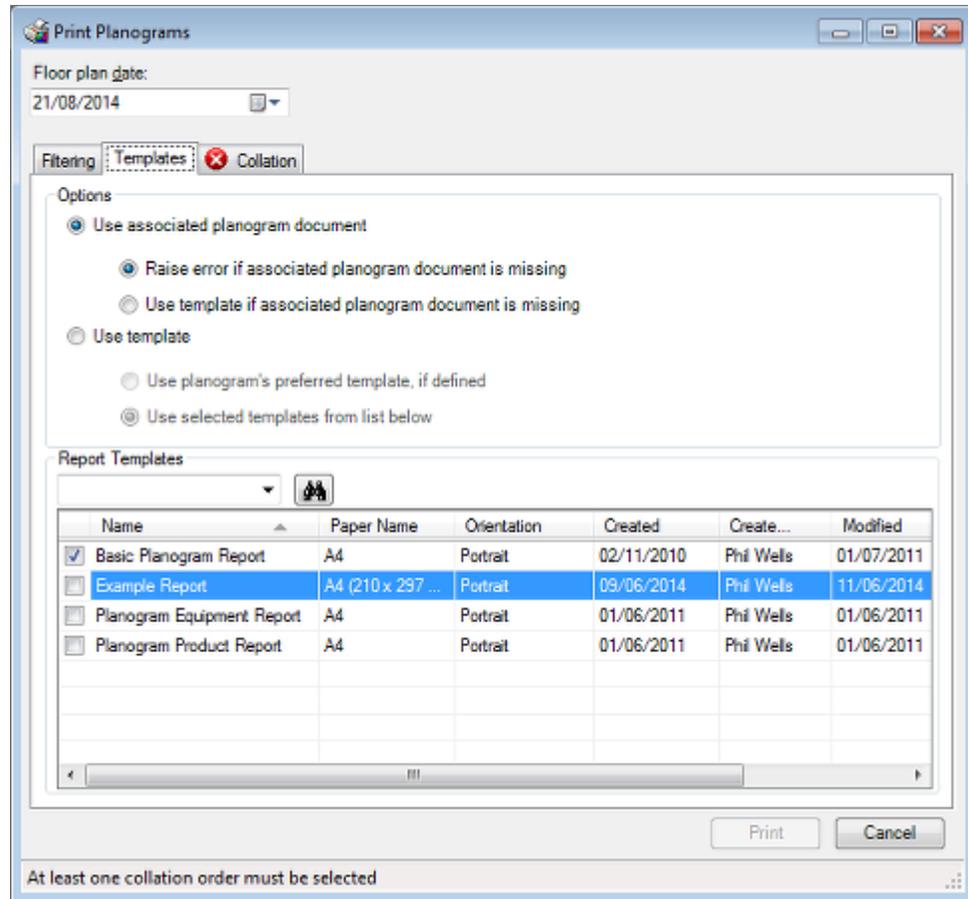
The Print Planogram functionality is accessed from the File Menu > Print option. Users with permissions to access the Planner module will automatically have permission to use the functionality.



When the Print Planogram dialog box opens it will be populated with all planograms in the currently active floor plan. By default, they will not be selected. The columns that are displayed in the dialog box are configurable in the Custom SQL option available from the General Menu in the Administration module. The appropriate revision for any planogram will be listed based on the floor plan date specified in the dialog box. Any Master Planograms in the floor plan will be mapped to specific individual planograms. If the individual planograms have store specific effective dates specified, these will be used in determining what planogram revision is appropriate.

Errors and Results

If any settings in the Print Planograms dialog box are not set, an error symbol will be displayed on the tab containing the data with the problem. The Print button will also be grayed out and unavailable.

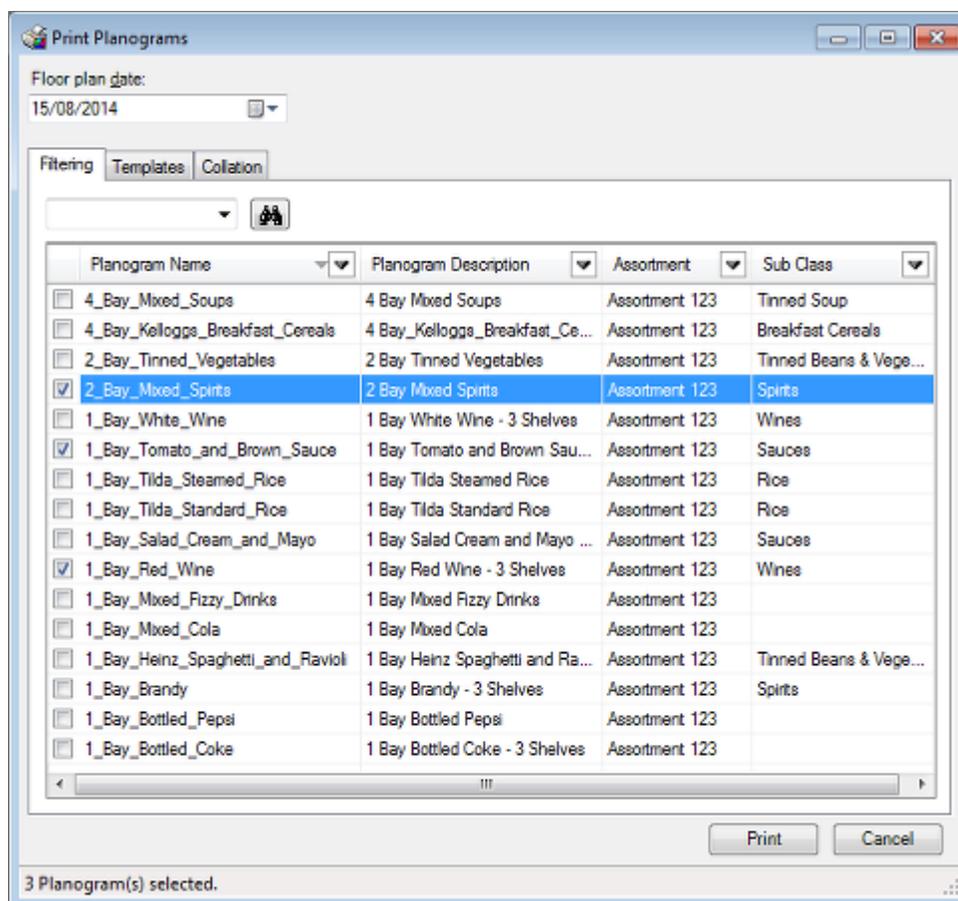


Users must correct the problems before the Print button will activate.

The Filtering Tab

The Filtering tab enables the user to select the Planograms to print. It will populate with all planograms in the currently active floor plan.

Note: If there are multiple instances of a planogram in a floor plan, only a single entry will appear in the list of planograms.



Planograms may be selected for printing by ticking the appropriate check box. The report to be used can be selected on the Template tab, while the order in which the planograms will print is specified on the Collation tab.

Floor Plan Date

The Floor Plan Date is for use with the Master Planogram functionality. When master planograms are present, this date is used to determine which corresponding individual planogram to print. The initial date set depends on the floor plan status.

Status	Initially Set Date
Proposed	The date will be set to the floor plans active date. If this has not been set, it will be set to today's date.
Authorised	The date will be set to the floor plans effective date. If the floor plans effective date has not been set, it will be set to the active date. If neither date has been set, it will be set to today's date.
Published	The date will be set to the floor plans effective date. If the floor plans effective date has not been set, it will be set to the active date. If neither date has been set, it will be set to today's date.
Current	The date will be set to today's date.
Superseded (Historical)	The date will be set to the floor plans expiry date - the date it was replaced by a more recent floor plan.

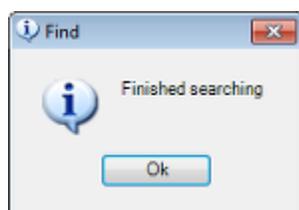
It is possible to use the control to change the set date. If the effective and expiry date have been set, the date can only be varied between those limits. If these dates have not been set, there is no limit to that date can be set.

Floor Plan Date and Master Planograms

If master planograms are in a floor plan, these should map to individual planograms. The individual planogram that will be listed will be the one where the floor plan date is set to between the planograms Effective and Expiry dates.

Find

The Find option can be used by typing text into the text box then clicking the Find icon. Each successive click will move the user to the next floor plan matching the text being searched for. When no more matches are available, a confirmatory dialog box will appear.



Find operates with explicit or implied wild cards. The explicit wild cards are:

Wild Card	Description
*	Any characters
?	Any character in this position
#	Any number in this position

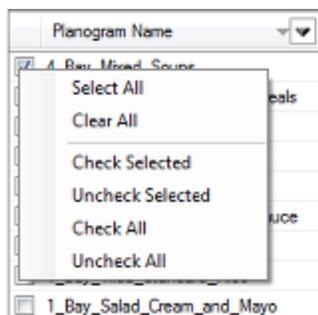
If explicit wild cards are not used, implicit wild cards will be assumed. For example the text entry 'Wine' will be treated as '*wine*' and will find I Bay Red Wine, 1 Bay White Wine, etc.

Pick (Planner Only)

Pick takes the user to the currently active floor plan. They can then use AutoCAD selection methods to select specific planograms. When the AutoCAD selection is completed with a right mouse click, the user will be returned to the Print Planogram dialog box and the dialog box will populate with the selected planograms.

Right Click Menu

The right click menu provides a quick way of modifying the selected items.

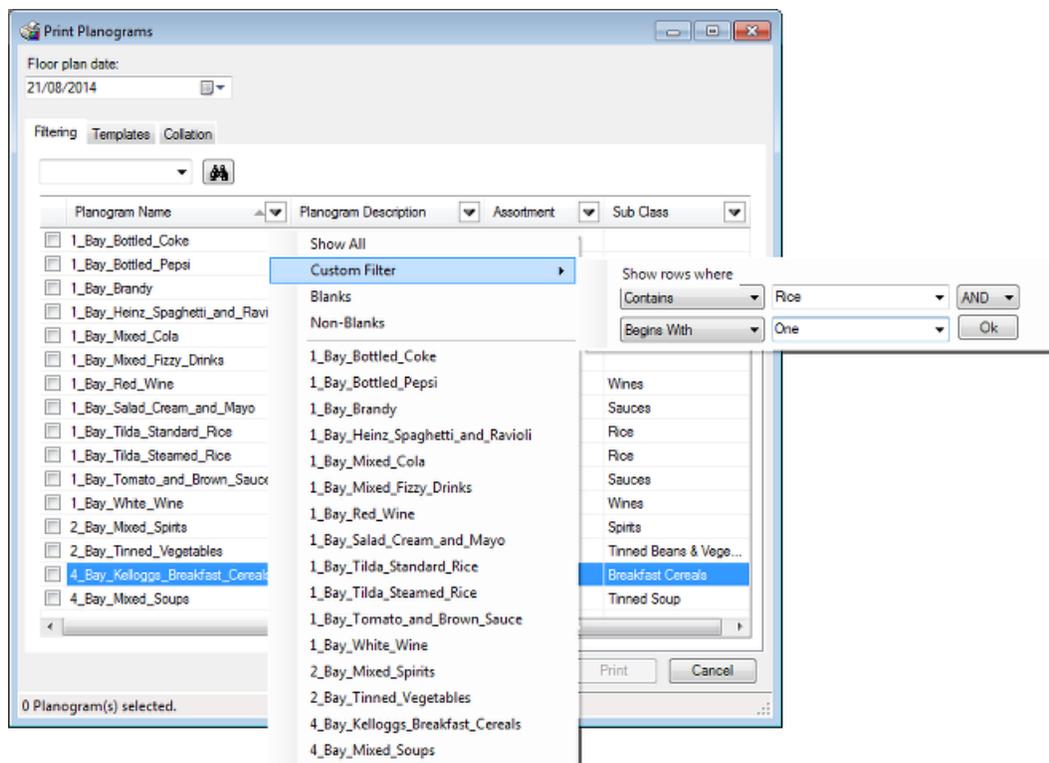


Option	Effect
Select All	This will select (but not check) all rows of data.
Clear All	This will deselect (but not uncheck) all rows of data.
Check Selected	This will check all rows of selected data.
Uncheck Selected	This will uncheck all rows of selected data.
Check All	This will check all rows of data.
Uncheck All	This will uncheck all rows of data.

Paste allows users to paste a carriage returned list of floor plan identifiers from the Windows clipboard. All rows in the dialog box that match the pasted information will be checked.

Filters

The Filtering Tab is provided with a series of filters on each column. Setting a filter on one column will affect data in all other columns. If a filter is active it will be shown by the symbol on the column header.

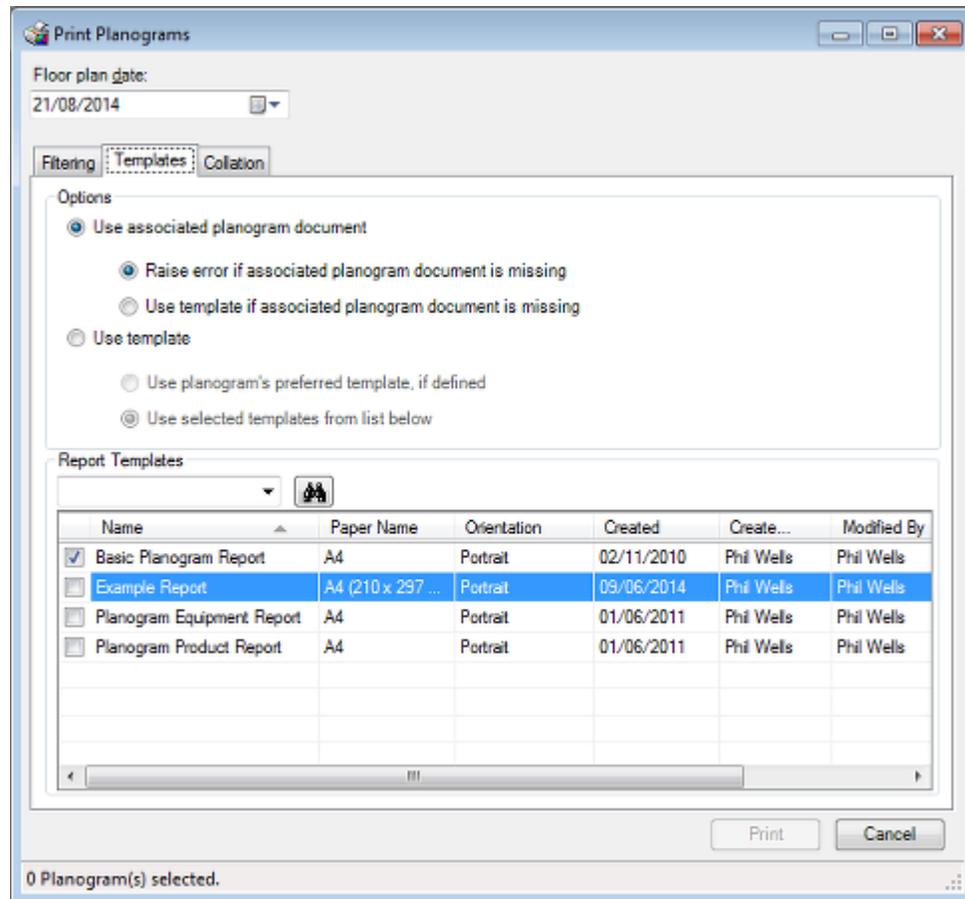


They are used as follows:

Option	Description
Show All	This option shows all results. It can be used to remove the effects of any applied filters.
Custom Filter	<p>This option allows users to set filters using Boolean logic. The options are:</p> <ul style="list-style-type: none"> Equal to: will return rows that are an exact match for the entered text. Not Equal to: will return rows that do not match the text string Contains: will return rows where part of the data matches the text string. (Uses implied wild cards). Does not contain: will return rows where no part of the data matches the text string. (Uses implied wild cards). Begins with: will return rows where the text string is an exact match for the start of the data. Ends with: will return rows where the text string is an exact match for the end of the data. Does not begin with: will return rows where the text string is not an exact match for the start of the data. Does not end with: will return rows where the text string is not an exact match for the end of the data.
Blanks	Column will be filtered to only show rows with null values.
Non-Blanks	Column will be filtered to only show rows containing a value
Planogram list	Column will be filtered to only show the selected result.

The Templates Tab

The **Templates Tab** allows users to specify the template format to be used when printing planogram designs.



The user can use a radio button to specify the form the report will take: an imported 'associated planogram document' or a template that is configured in the Report Designer Module.

Use Associated Planogram document

This option publishes the planogram design information using a pre-generated report using one of the following file formats: BMP, GIF, JPEG, JPG, PDF, PNG, TIFF or WMF. This report will be imported when a planogram is imported using Oracle Data Integrator (ODI). The Associated Document (if available) is specified in the Associated Document text box in the Details tab of the Planogram Design dialog box in the Merchandiser module.

There are two options (selected using the radio button) for when the pre-generated report is missing.

- Write an error to the AVTTB_PUBLISH_POG_LOG table. Information in this table can be read by means of a BI Publisher report or similar.
- Use the default Report Designer template.

Use Template

This option allows the user to define the way the template from the Report Designer module is selected. There are two options (selected using the radio button):

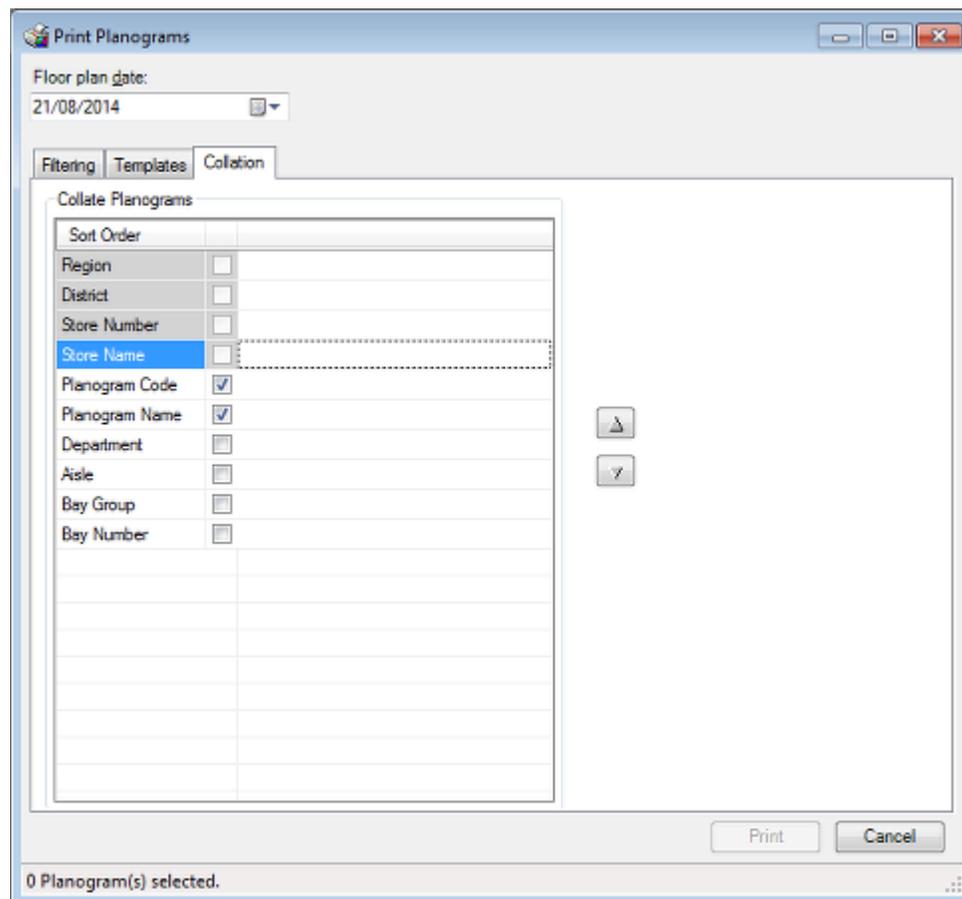
- Use Planograms preferred template, if defined - this option is specified in the Preferred Template drop down list in the Details tab of the Planogram Design dialog box in the Merchandiser module.
- Use Selected Template from List Below - this option can be set by checking items in the list of available templates. One or more templates may be selected. If multiple templates are selected, the name of the template will be added to the file name in brackets - for example 1_Bay_Mixed_Fizzy_Drinks (Basic Planogram Report).pdf

If necessary, the list of templates can be searched by entering a text string into the drop down list, then clicking the Find button. (Actual or implied wild cards can be used). Each click of the Find button will cause the search engine to move forward through the matching results until no results are left.

Note: the last 10 text searches can be selected using the drop down list in the text box.

The Collation Tab

The Collation Tab allows users to specify the sequence the planogram designs will be printed in. Its main use is in printing hard copy versions of the designs where the sequence they are printed in makes it easier to sort and distribute them after printing. At least one collation option must be selected, or the tab will show as having an error. The order of the collation options can be modified highlighting them and then using the **Up** or **Down** arrows.

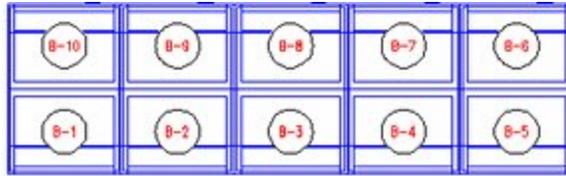


The available options can be ordered by highlighting them, then using the up or down arrows. The options are made active by using the check boxes.

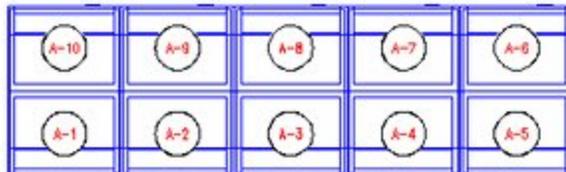
- Region is a specific type of cluster set in the Cluster type drop down list in the Cluster dialog box in Store Manager.
- District is a specific type of cluster set in the Cluster type drop down list in the Cluster dialog box in Store Manager.

- Store Number is the Store Code in the Store dialog box in Store Manager.
- Store Name is the Store Name in the Store dialog box in Store Manager.

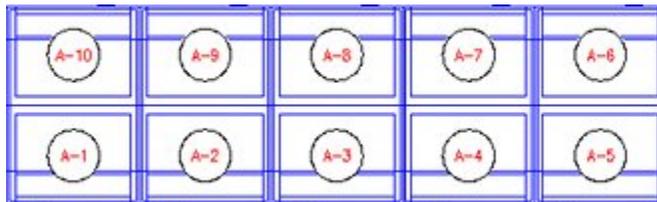
- Department is the department (zone) in the floor plan the planogram is associated with.
- Aisle is the aisle the planogram is associated with. For this option to operate, aisles must first be drawn in the floor plan in the Planner module. In the example below, Aisle F-1 has been drawn between two runs of fixtures.



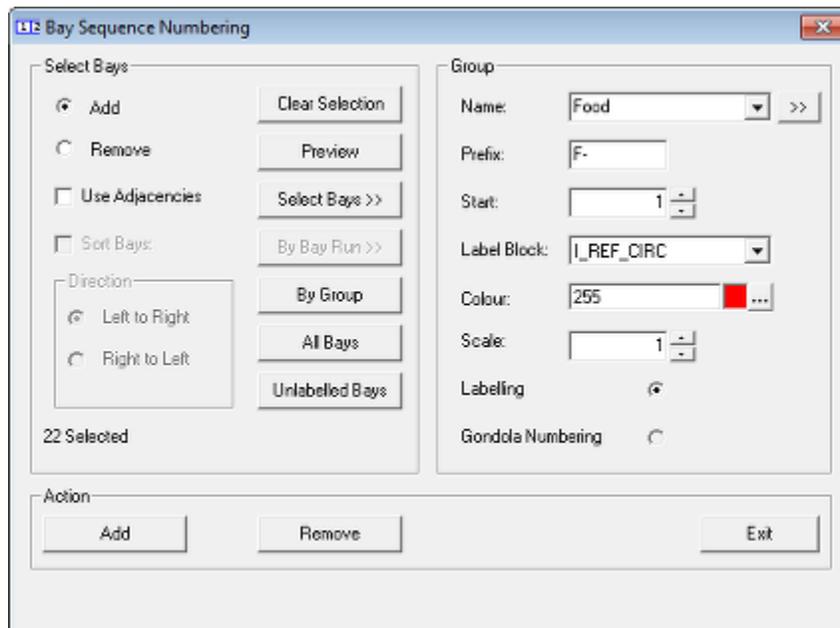
F-1



- Bay Number is the bay number associated with the fixtures the planogram is placed on. For this option to operate, the fixtures in the floor plan must previously have been bay numbered.



- Bay Group is the Name assigned to a number of fixtures sharing a common characteristic. It is assigned in the Name field of the Bay Numbering dialog box in the Planner module.



- Planogram Name is the name of the planogram. This is set in the Name field of the Planogram Design dialog box in Merchandiser.
- Planogram Code is the code for the planogram. This is set in the Client Code field of the Planogram Design dialog box in Merchandiser.

Planogram: 2_Bay_Mixed_Cola

Details | Properties | Stores | Seasons | Fixture Styles | Design | Financial | UDAs

Name: 2_Bay_Mixed_Cola Revision: 2

Description: 2 Bay Mixed Cola

Associated Document: C:\Users\pwells.ORADEV\Documents\BC\60b7d5249a5792c3da.pdf

Size Description: 72x 24 x 72 Master Planogram:

Status: Proposed Client Code: 00000032

Family Code: Family ABC Buddy Family Code: Buddy Family 456

Assortment Code: Assortment 123 Units: imperial inch

Temperature Range: Ambient Goods Time Units: standard hour

Weight Range: < No Ranges Selected > Manpower Set Time: 1.00

Publish Date: Manpower Dismantle Time: 0.50

Effective Date: Category Role: Routine

Expiry Date: 31 December 2999 Inventory Model: Inventory DEF

Stock Type: Normal Rank: 0

Autofill Rule: < No Rule Selected > Traffic Flow: Left to Right
 Right to Left

Preferred Template: Basic Planogram Report Requires Power:

Can be Split:

OK Save As Cancel

Synchronization

Overview of Synchronization

Planner and Synchronization

The Planner module is based on AutoCAD. Work done in the floor plans is initially saved back to an AutoCAD (DWG) file before information is written back to the Macro Space Planning (MSP) database. However, there are ways that the information in the AutoCAD floor plan can diverge from the information held in the database. These ways are:

- The floor plan has been modified in Raw AutoCAD.
- AutoCAD functionality can be used which results in changes to the floor plan, but not to the database. This will occur when dynamic synchronization is set to Off.
- Changes can be made to the floor plan in the Merchandiser module - this will write information back to the MSP database but not to the AutoCAD drawing in Planner.
- Changes can be made to the floor plan in In-Store Space Collaboration - this will write information back to the MSP database but not to the AutoCAD drawing in Planner.
- Changes can be made to the floor plan using batch processes such as Planogram Substitution. This will write information back to the MSP database but not to the AutoCAD drawing in Planner.

Synchronization is therefore used to ensure that what is shown graphically in the floor plan is also what is held in the database. There are three forms of synchronization.

Manual Synchronization

Manual synchronization is synchronization carried out by the user by invoking the functionality from the menu bar or Retail toolbar.

Dynamic Synchronization

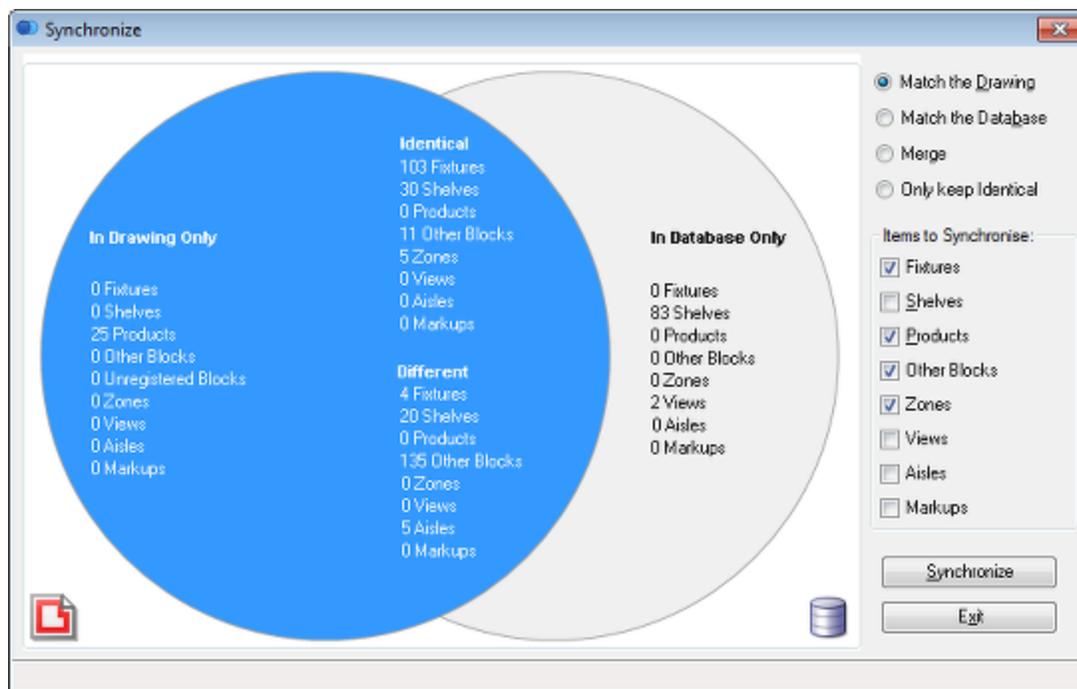
Dynamic Synchronization can be turned on or off by the user. If turned on, the changes made by AutoCAD tools are simultaneously written back to the database.

Auto-Synchronization

Auto-Synchronization is used when changes have been made to the database by work carried out in the Merchandiser module, in In-Store Space Collaboration or by Batch tools. If active, when a floor plan is subsequently opened in Planner, the required updates will be made to the floor plan. Dependent on settings; confirmation may be required from the user first.

Manual Synchronization

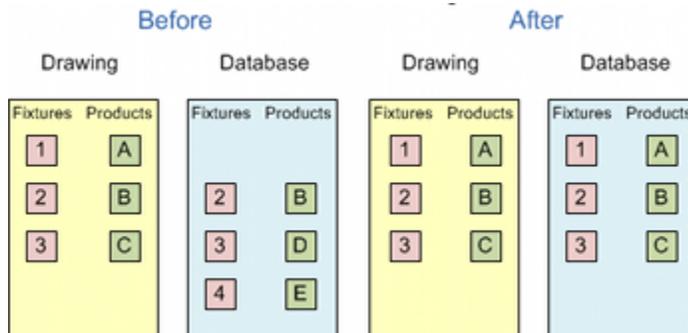
Manual Synchronization is used to ensure that the information held in the floor plan in the Planner module is identical to the information held in the database. It is done using the Synchronization dialog box.



Synchronization can be done in several ways:

Match the Drawing

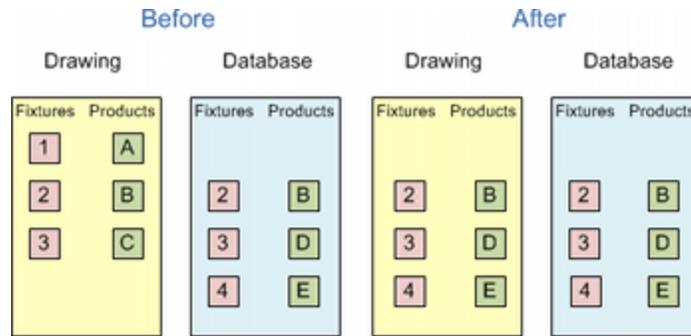
Data in the database will be overwritten with data from the drawing.



In this example, the drawing contains Fixtures 1, 2 and 3, together with products A, B and C. This information overwrites the data on Fixtures 2, 3 and 4 and their associated products B, D and E that was originally held in the database.

Match the Database

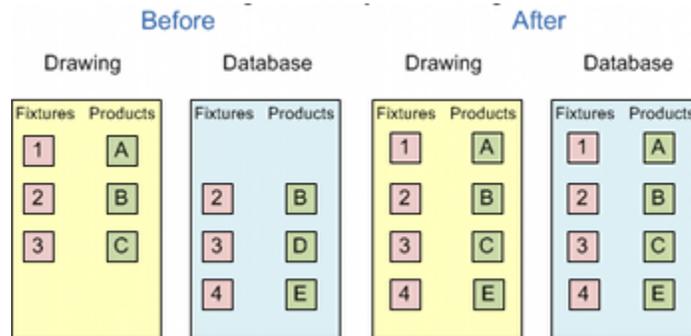
Data in the drawing will be overwritten with data from the database.



In this example, the drawing contains Fixtures 1, 2 and 3, together with products A, B and C. This information is updated with Fixtures 2, 3 and 4 and their associated products B, D and E that is held in the database.

Merge

Merge combined the data in the drawing and the database so the same information is present in both places. Where information is present in both locations, merging can be done with priority to the drawing or priority to the database.

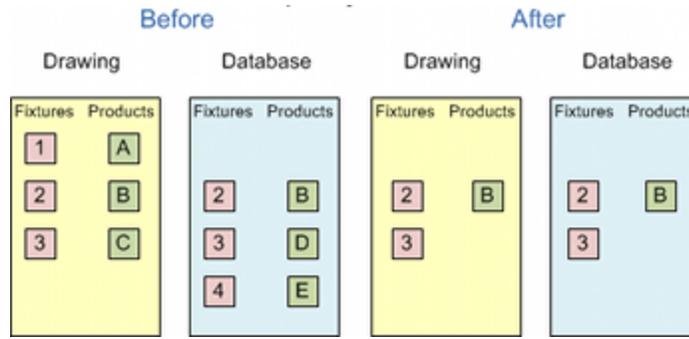


In this Merge example, priority has been given to the drawing. Data is modified as follows:

- Fixture 4 and Product E do not exist in the drawing, so they are added.
- Fixture 1 and Product A do not exist in the database, so they are added.
- Fixtures 2 and 4, together with Product B are identical in both the database and drawing, so no changes are made.
- Product C in the drawing coincides with Product D in the database. Because priority has been given to the drawing, Product C overwrites Product D in the database.

Keep Identical

Keep identical only keeps items that are identical in the drawing and the database.



In this example, only Fixtures 2 and 3 and product B are identical. After the synchronize operation these three items only will be present in both database and drawing.

Manual Synchronization Dialog Box

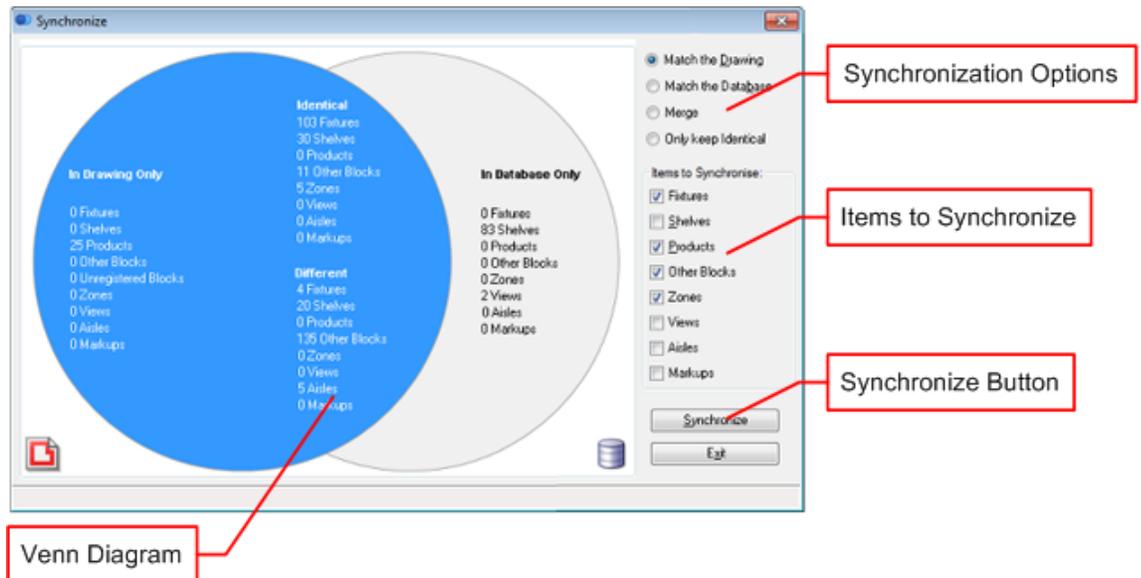
Accessing the Synchronization Dialog Box

The synchronization dialog box can be accessed by the **Synchronization** option on the **File** menu. Alternatively, it can be accessed from the Retail toolbar.



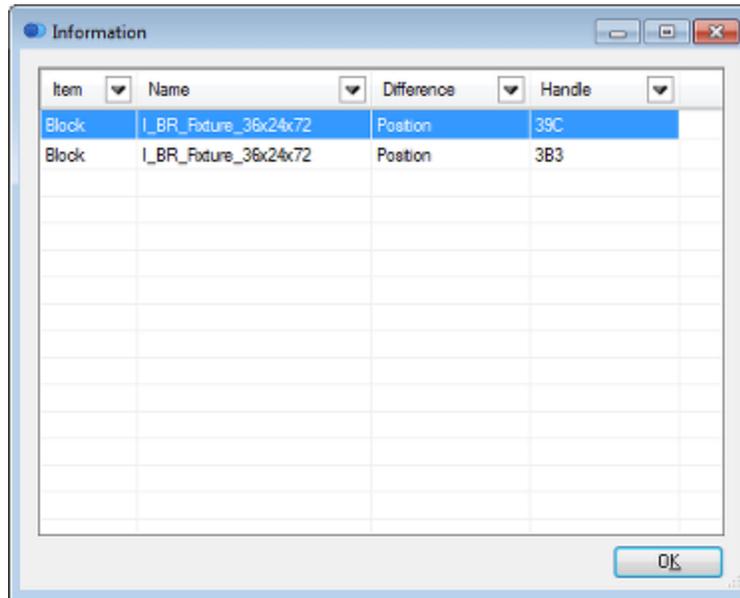
Parts of the Synchronization Dialog Box

The synchronization dialog box has the following components.



- **Synchronization Options:** These specify the form synchronization is to take - for example write the contents of the floor plan to the database (Match the Drawing).
- **Items to Synchronize:** These specify what objects in the floor plan are to be synchronized - for example zones, aisles and fixtures.
- **Venn Diagram:** This can be used to determine which synchronization option is required.
- **Synchronize Button:** This initiates manual synchronization options.

If the mouse pointer is poised over a category of information in the Venn diagram, the cursor will change from a pointer to a hand. Left clicking on the category will bring up a dialogue box with details of the items.



Guidelines for Manually Synchronizing

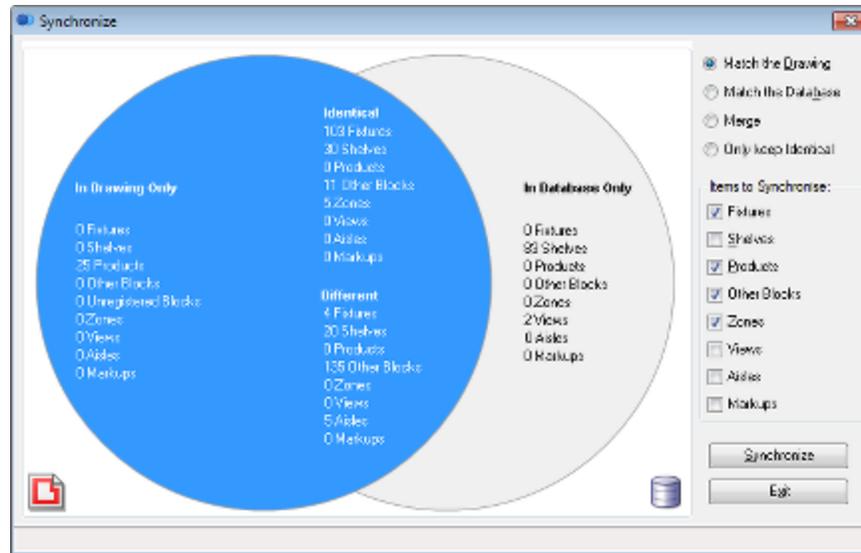
The appropriate synchronization actions can be determined using the Venn diagram in the synchronization dialog box. This will vary according to the Synchronization option selected in the upper right of the dialog box. The Venn diagram identifies:

- Objects that are identical in the drawing (floor plan) and the database.
- Objects that exist in the drawing and database but differ in some way - for example in their position.
- Objects that exist in the drawing only.
- Objects that exist in the database only.

Note: Manual Synchronization will only be required if Auto-Synchronization and Dynamic Synchronization have not been enabled.

Match the Drawing

The Match the Drawing option has a light blue circle highlighting what data is identical in the drawing and database, what is different and what is in the drawing only. The dark blue circle shows data in the database only.

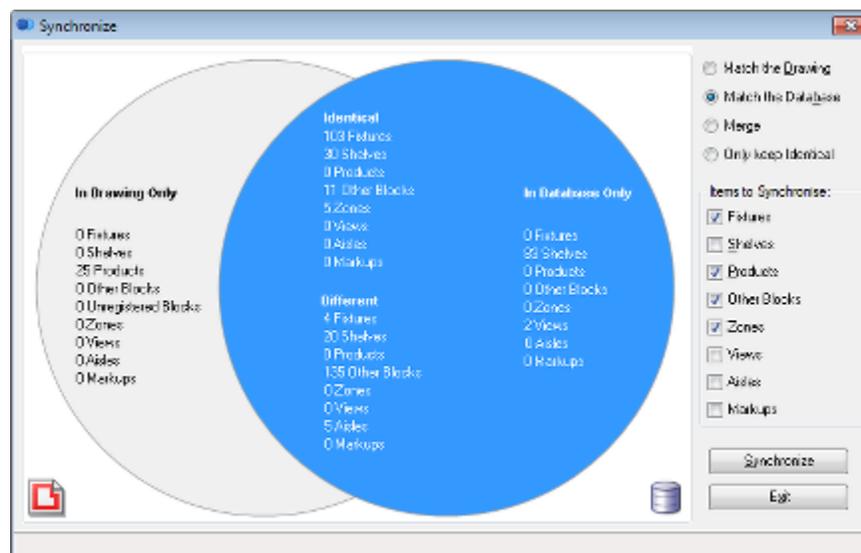


Use this option when the information in the currently active Planner floor plan is the version you wish to save back to the database. This may be required if:

- A raw AutoCAD drawing has been imported.
- The USER11 system variable has been set to 0 and the results of specific AutoCAD operations are not being written to the database.

Match the Database

The Match the Database option has a light blue circle highlighting what data is identical in the floor plan and database, what is different and what is in the database only. The dark blue circle shows data in the drawing only.



Use this option if the floor plan has been modified outside of the planner module. This could occur if:

- The floor plan has been updated in the Merchandiser module.
- The floor plan has been updated in In-Store Space Collaboration
- The floor plan has been updated by a batch process.

Merge

This option is not commonly used. It might be required if changes have been made to the floor plan in the Planner module but not written back to the database. If the floor plan is in this condition when (for example) batch tools are used it will be difficult to establish what the correct version of the drawing should be like. In this event it may be necessary to merge to changes so that floor plan and database are identical, then use KPT's and reports to determine where errors exist in the floor plan.

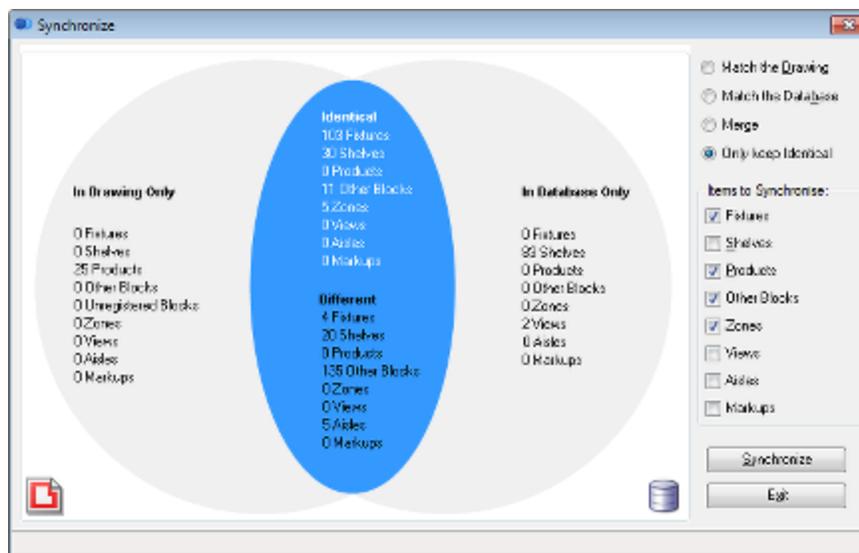


All data is enclosed within the light blue circles.

- Data in the drawing but not in the database will be written to the database.
- Data in the database but not in the drawing will be written to the drawing.
- Data for objects that have differences (but are identical in position) will be overwritten in the drawing or database depending on which priority radio button is selected.

Only Keep Identical

This option is not commonly used. It applies to a similar situation where a floor plan has had changes made in both the planner module and (for example) by a batch process. The data may have become confused. The most practical option might be only to keep data that is identical in the drawing and database as only this data can be guaranteed to be correct. Any necessary changes can then be reapplied.



All data is enclosed within the blue circle. Only data shown as identical within the drawing and database will be retained.

Dynamic Synchronization

Overview of Dynamic Synchronization

Dynamic Synchronization can be turned on or off as required. The setting determines whether changes to **Fixtures**, **Product Blocks** and **Other Blocks** made in a Planner AutoCAD floor plan using AutoCAD commands are automatically written back to the database when they are executed or whether manual synchronization is subsequently required.

DYNAMIC_SYNC System Variable

The initial setting for a new user is governed by the value of the **DYNAMIC_SYNC** system variable set in the System Variable dialog box accessed from the General menu of the Administration module. This may be set to one of two options:

- Off: Dynamic sync is not enabled.
- On: Dynamic Sync is enabled

The first time a user accesses a Planner floor plan, the dynamic synchronization setting for that user will be set to that matching the **DYNAMIC_SYNC** system variable. After the global value of dynamic synchronization has been set, individual users can then toggle dynamic synchronization on or off as required.

Changing Individual Settings for Dynamic Synchronization

Once an individual user has been assigned the global value for dynamic synchronization, they can change this as desired via the AutoCAD command line.

```
Command: AVT_DYNAMICSYNC
Enter new state for Dynamic Synchronize [ON/OFF] <OFF>:
```

Entering the command **AVT_DYNAMICSYNC** will allow users to enter On or Off as an option.

Note: once users have entered their personal setting for Dynamic Synchronization this will not be affected by changes to the DYNAMIC_SYNC system variable.

Use of Dynamic Synchronization

Users have the option of turning Dynamic Synchronization On or Off. There are advantages for either option.

Dynamic Synchronization On

If dynamic synchronization is on, changes made to **fixtures, products, planograms** and **other blocks** made with AutoCAD tools will be immediately written back to the database. This will mean the information in quick reports, the summary window in the Object Browser, etc will be continually updated. However, for large floor plans, performance of the application may be marginally slowed.

Dynamic Synchronization Off

If dynamic synchronization is off, performance of the application may be slightly faster. However, the user will have to manually synchronize the floor plan in order to ensure that the effects of changes made with AutoCAD tools will be written back to the database.

Auto-Synchronizing

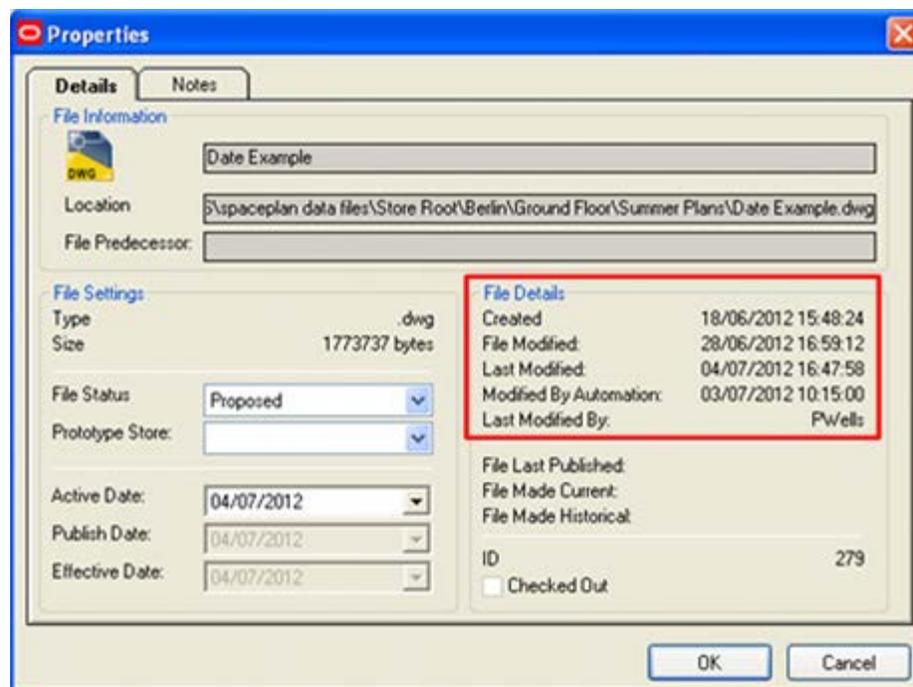
Depending on settings in the Administration module, it is possible to set the floor plan to automatically undergo the required changes when opened in the Planner module. Depending on the precise settings, this will either require the user to confirm the synchronization can occur, or it will occur without requiring permission. If confirmation is required, a dialog box will appear, requiring the user to click Yes before synchronization can proceed.



Note: Depending on the auto-synchronize options, different objects will be synchronized - see below for details.

How Auto-Synchronization Works

Auto-Synchronization works by comparing a series of dates held in the **File** table in the database. This table is only available to people with permissions to access the database - although most can be seen in the File Properties dialog box in Store Manager.

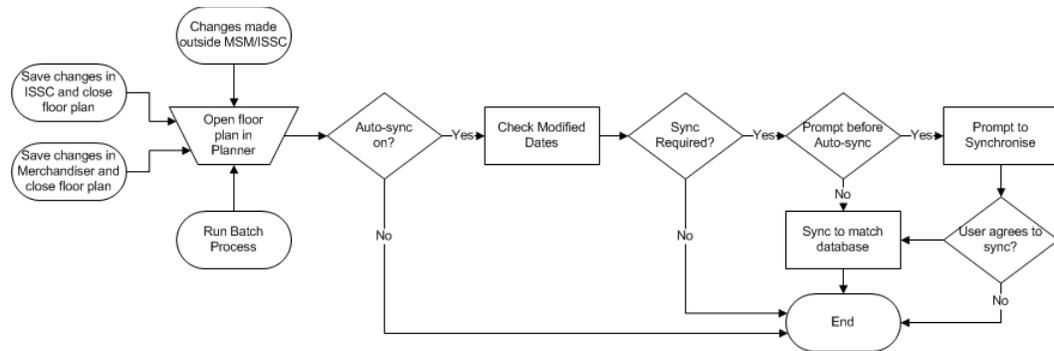


These dates have the following significance:

Properties Dialog Box Date	Comment
Created	This is the date the floor plan was originally created. If the floor plan was created in Store Manager, this will be the date the floor plan was created. If the floor plan was copied from another floor plan in Store Manager, this will be the date the floor plan was copied. If the floor plan was imported, this will be the date it was originally created in raw AutoCAD.
File Modified	This is the date the floor plan was originally created in Store Manager. Alternatively, if the floor plan was imported, this will be the date it was last modified in raw AutoCAD. Once the file has been saved in Planner, the FIL_DATE field will hold the date of that save but the File Modified field will continue to show the date it was last modified in raw AutoCAD.
Last Modified	This is the date the file was last saved by a user in the Planner or Merchandiser modules or in In-Store Space Collaboration.
Modified by Automation	This is the date the file was last modified by a batch process such as planogram substitution.
DWG Date (not in Dialog Box)	This date is stored purely in the DWG file for the floor plan. It is the date the floor plan was last saved to the windows folder. This could have been done in raw AutoCAD or it could have been done via the Planner module.

The logic of Auto-Synchronization can be seen in the following flowchart.

1. Changes can be made outside of the Planner floor plan leading to differences between the data held in that floor plan and the database.
2. If Auto-Sync has been turned on in the Administration module, the dates associated with the floor plan will be compared.
3. Depending on the results in the Check Modified Dates stage, different types of auto-synchronization will be carried out.



Case 1 - Changes made in Merchandiser or ISSC

This is checked by seeing if the following cases apply:

Last Modified Date > File Modified Date >= DWG Date

1. If the Last Modified Date is greater than the File Modified Date this means the file was last modified in Merchandiser or ISSC.
2. If the File Modified Date is greater than or equal to the DWG Date (not visible in the File Properties dialog box) this means the file has not been modified by an external application such as raw AutoCAD or the file has not been overwritten by a new raw AutoCAD file.

If one of these cases is true, then the Planner floor plan will be synchronized **match the database** as the database holds more recent information than in the Planner floor plan.

Case 2 - Changes made by a Batch Process

This is checked by seeing if the following cases apply:

Modified by Automation > Last Modified Date >= DWG Date

1. If the Modified by Automation date is greater than the Last Modified Date this means the file was modified by a batch process after the floor plan was last physically saved by a Planner user.
2. If the Last Modified Date is greater than or equal to the DWG Date (not visible in the File Properties dialog box) this means the file has not been modified by an external application such as raw AutoCAD or the file has not been overwritten by a new raw AutoCAD file.

If one of these cases is true, then the floor plan will be synchronized **Match the Database** as the database holds more recent information than in the Planner floor plan..

Case 3 - Changes made outside of MSM or ISSC simultaneous with adding in Raw AutoCAD drawing

This is checked by seeing if both the following cases apply:

DWG Date > Last Modified Date

And

Modified by Automation date > Last Modified Date OR DWG Date > File Modified Date

1. If the DWG date is greater than the Last Modified Date this means the floor plan has been modified by an external program such as raw AutoCAD
AND
2. Either of the following is true:

- a. Modified by Automation Date is greater than Last Modified Date means the data for the floor plan in the database has been modified after the floor plan was last saved by the user
- b. File Modified Date is greater than Last Modified Date means the Planner floor plan has been updated after a used updated date in merchandiser or ISSC.

If Case (1) and one of the options in Case (2) is true then the floor plan will be synchronized Cross Match as the database contains more recent information than the floor plan and the floor plan has also been updated by an external program such as raw AutoCAD.

Synchronization Options

Synchronize 'Match the Database'

The following objects will be synchronized.

- Fixtures
- Products
- Other Blocks

Synchronize 'Match the Drawing'

The following objects will be synchronized:

- Fixtures
- Products
- Other Blocks
- Zones
- Aisles

Synchronize 'Cross Match'

The following objects will be synchronized:

- Fixtures
- Shelves
- Products
- Other Blocks
- Zones
- Aisles

Fixtures, other blocks, zones and aisles will be updated in the database to match the floor plan using the existing synchronize functionality. Shelves, planogram definition placeholders and product placeholders will be updated in the floor plan to match the database using the existing Synchronize functionality.

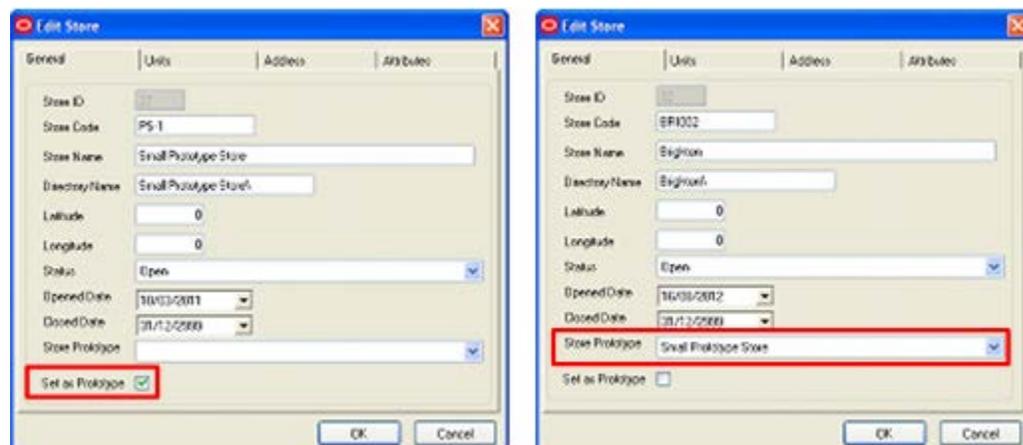
Prototype Stores

Overview of Prototype Stores

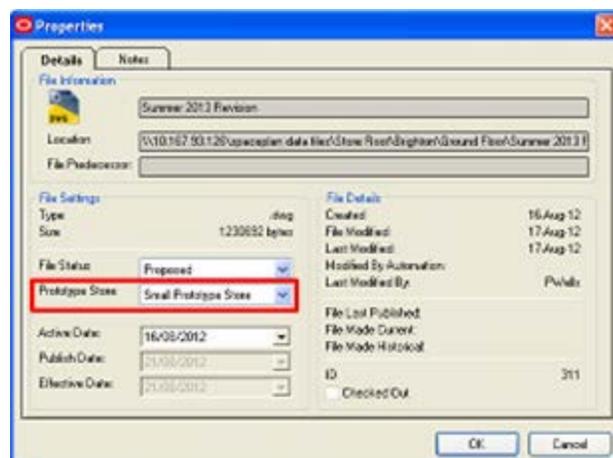
Prototype Stores are a Macro Space Management concept. They are stores that can be designated as having specific properties that can be used as a basis for comparison for other stores.

Setting and Designating Prototype Stores

Designating a store as a prototype store is done in **Store Manager** by checking the **Set as Prototype** check box in the **General Tab** of the **Add/Edit Store** dialog box (left hand screen shot below). Once prototype stores have been designated, they can be selected as the basis for comparison by other stores. This is done by selecting the required from the Store Prototype drop down list in the **General Tab** of the **Add/Edit Store** dialog box (right hand screen shot below). This associates the store with its designated prototype store in the database. This link can then be used for reporting purposes.



A further action will be required in the **File Properties** dialog box (right click Menu in Store Manager).



Here the Prototype Store to be used as the basis for comparison is set using the drop down list in the Details tab.

Technicalities of Using Prototype Stores

When a prototype store is assigned, a flag is set in the database.

- The STR_PROTOTYPE field is set in the Store table when the prototype store is designated in the Add/Edit Store dialog box in Store Manager.
- The STR_PROTOTYPE field is set in the File table when the prototype store is designated in the File Properties dialog box in Store Manager.

This information can then be used by Macro Space Management's Custom SQL to generate information specific to the currently active floor plan. Example uses include comparing the zones, equipment or merchandise between a store and its designated prototype. This comparison normally meets two criteria:

- The floors are the same type; for example the first floor in one store is being compared with the first floor in another.
- The floor plan in the prototype store is at Current status as this represents the in-service version of the prototype store.

Note: For details on these tables see the *Oracle Retail Macro Space Planning Data Model*.

Example Uses of Prototype Stores

Once a store has been set as a prototype and referenced by another store/floor plan, the information can be used in several ways:

- As a basis for comparison in the Object Browser.
- As a filter for selection in the Object Grid.
- As a basis for comparison in Quick Reports
- As data used in Key Performance Indicators (KPIs).
- As a store to compare against in Store Comparison.

Using Prototype Stores in Planner

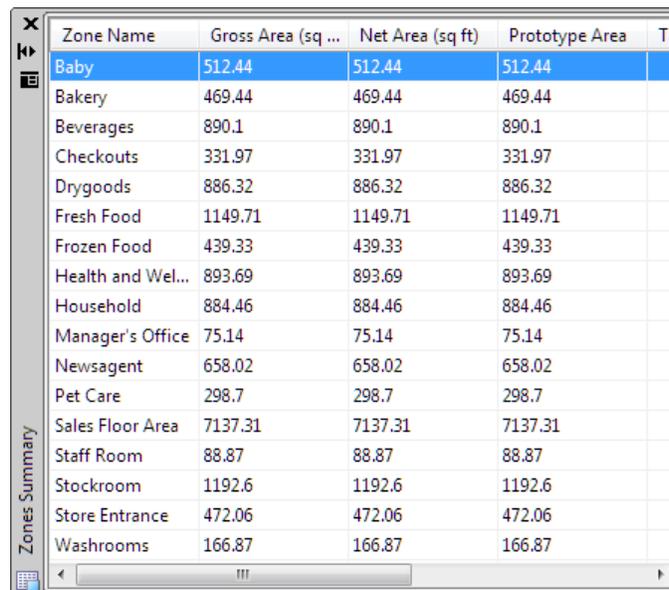
Example Uses of Prototype Stores

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- As a basis for comparison in the Object Browser.
- As a filter for selection in the Object Grid.
- As a basis for comparison in Quick Reports
- As data used in Key Performance Indicators (KPIs).
- As a store to compare against in Store Comparison.

Summary window

The information displayed in the Summary Window can be customized by changing the Custom SQL that returns the information. In the example below, the standard information has been customized to allow a comparison of the area of the zones in the current and prototype stores. This allows the areas of the zones in stores of dissimilar shape to be adjusted until they occupy roughly the same area.



Zone Name	Gross Area (sq ...)	Net Area (sq ft)	Prototype Area	Ta
Baby	512.44	512.44	512.44	
Bakery	469.44	469.44	469.44	
Beverages	890.1	890.1	890.1	
Checkouts	331.97	331.97	331.97	
Drygoods	886.32	886.32	886.32	
Fresh Food	1149.71	1149.71	1149.71	
Frozen Food	439.33	439.33	439.33	
Health and Wel...	893.69	893.69	893.69	
Household	884.46	884.46	884.46	
Manager's Office	75.14	75.14	75.14	
Newsagent	658.02	658.02	658.02	
Pet Care	298.7	298.7	298.7	
Sales Floor Area	7137.31	7137.31	7137.31	
Staff Room	88.87	88.87	88.87	
Stockroom	1192.6	1192.6	1192.6	
Store Entrance	472.06	472.06	472.06	
Washrooms	166.87	166.87	166.87	

Similar modifications can be made to the Custom SQL to display comparisons between the equipment and merchandise in the current and prototype stores.

Object Grid

The information displayed in the object grid for the current floor plan can be compared relative to information in the prototype store. In the example below, planograms present in the prototype store and already placed in the current floor plan are shown in black, planograms present in the prototype store but not yet present in the current floor plan are shown in red.

NAME	IMPORT NAME	GROUP	BAYS	WIDTH (FT)	DEPTH (IN)	HEIGHT (IN)	SPLITABLE	STATUS
2_Bay_Uncle_Bens_Rice		Rice	2	5.9	25	72	No	Authorized
1_Bay_Uncle_Bens_Express_Rice		Rice	1	3	24	72	No	Authorized
1_Bay_Uncle_Bens_Boil_in_the_Bag		Rice	1	3	24	72	No	Authorized
2_Bay_Tilda_Rice		Rice	2	5.9	25	72	No	Authorized
1_Bay_Tilda_Standard_Rice		Rice	1	3	24	72	No	Authorized
1_Bay_Tilda_Steamed_Rice		Rice	1	3	25	72	No	Authorized
1_Bay_Kelloggs_Coco_Pops		Breakfast Cereals	1	3	24	72	No	Authorized

14 record(s).

Quick Reports

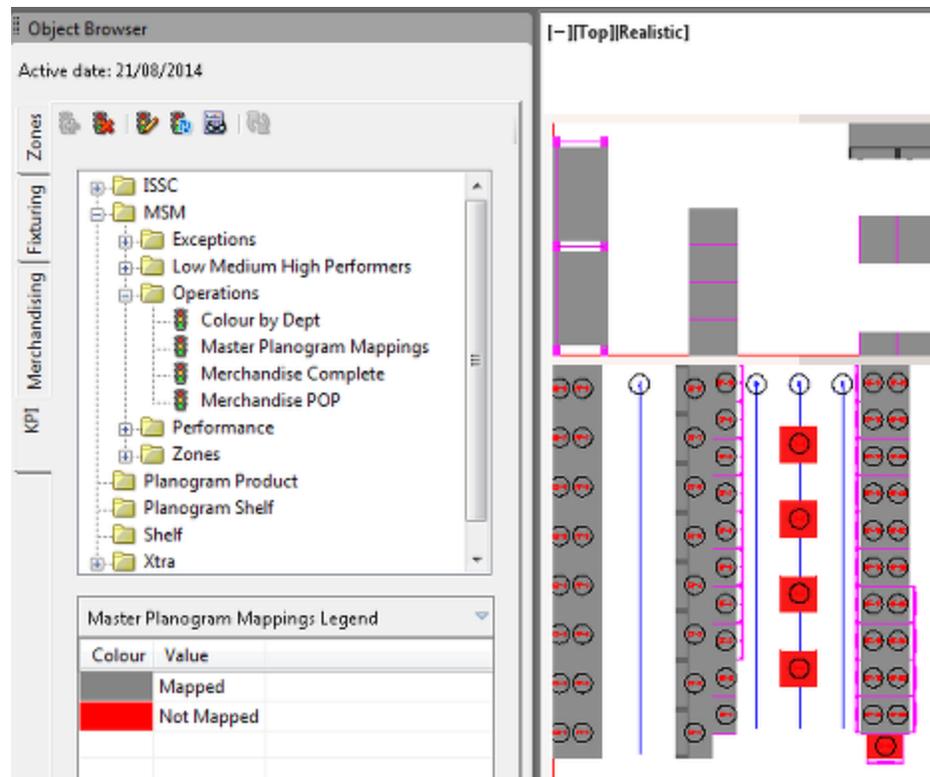
Prototype Stores can also be used in Quick Reports. In the example below, the Quick Report has been set up to show the base linear for products at sub-class level in the currently active store and its associated prototype.

PRODUCTS	STORE	PROTOTYPE
Beers, Lagers and Ciders	18 FT	12 FT
Wines	12 FT	6 FT
Spirits	24 FT	12 FT
Bread	6 FT	6 FT
Tinned Vegetables	12 FT	12 FT
Rice	12 FT	12 FT
Tinned Soup	12 FT	18 FT
Frozen Pizza	4 FT	4 FT

13 Item(s) Summer Revision A.dwg

KPIs

KPI's are another way of comparing the prototype store to the currently active store pan. In the example below, planogram performance in the current floor plan is being compared to that of the prototype store. This enables anyone viewing the floor plan to see relative performance at a glance.



Drawing Comparison

Drawing Comparison is a utility available from the View menu in the Planner module. The utility allows comparison of equipment, merchandise categories or planograms between a designated prototype store and the current floor plan.

The screenshot shows the 'Drawing Comparison' utility window. It has a menu bar with 'File', 'View', and 'Reports'. Below the menu bar is a toolbar with various icons. The main area is a table with the following data:

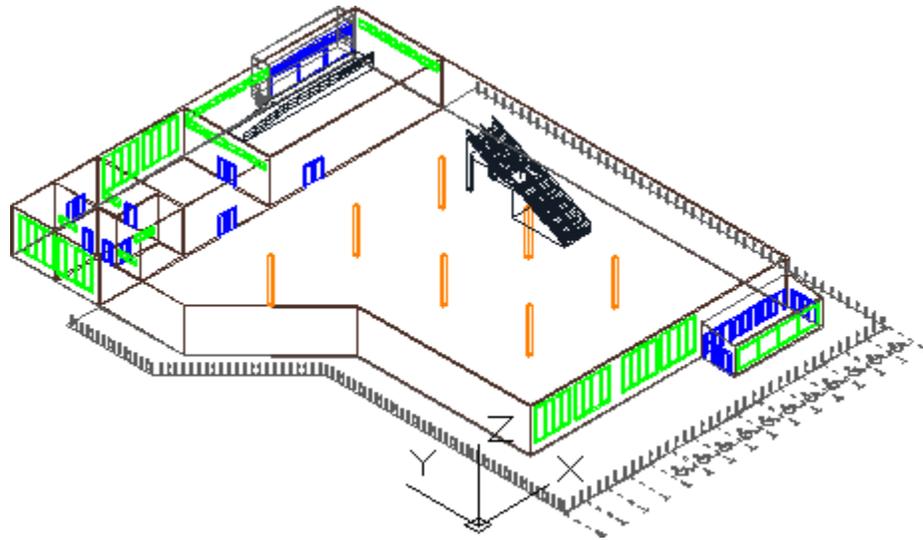
Category	Planogram	Template	Store Base	Difference
Tinned Soup	00000051	70	35	Under
Beers, Ciders and Lager	00000037	35	70	Over
Beers, Ciders and Lager	00000040	35	70	Over
Tinned Soup	00000054	70	35	Under
Books and Newspapers	00000036	37	0	Missing
Sauces	00000026	48	0	Missing
Sauces	00000025	48	0	Missing
Spirits	00000024	0	140	Illegal
Wines	00000005	0	70	Illegal

At the bottom of the window, there is a status bar that reads: 'Planogram Differences' and 'Prototype Store :Sum 9 Items'.

Architectural Plans

Using Architectural Plans

Architectural Plans are used as underlays to floor plans. They allow zones and fixturing to be accurately placed in relation to doors, windows, walls and other physical features. Architectural plans may also contain information on services such as electrical power sockets, essential for the location of chiller and freezer units.



Architectural plans are used in two stages:

1. They must first be associated with a parent floor in Store Manager.
2. After the architectural plan has been associated with a specific floor, it can then be associated with any child floor plan. This is done from the Insert menu in the Planner module once the floor plan has been opened in Planner.

Types of Architectural Plans

Macro Space Planning recognizes two forms of architectural plans:

- DWG files can only be used within the Planner module.
- DWF files can be used both within the Planner module and in In-Store Space Collaboration (ISSC).

Because of a current limitation of the software, if a DWF file is to be used for ISSC, it must be associated before any DWG files are associated for use in Planner. If this is not done, the DWF file will fail to appear in ISSC.

Note: The DWF file used in ISSC must be of type **Sheet**, not of type **3D**. Only DWF files of type Sheet will show as architectural plans in ISSC.

Architectural plans are not visible in ISSC Mobile.

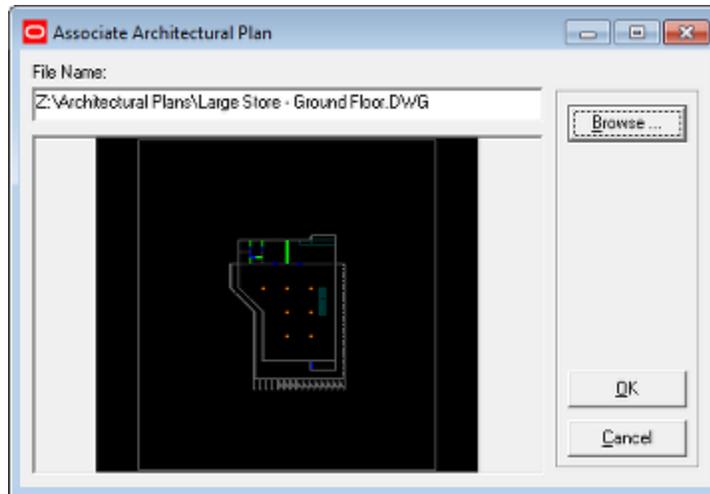
Associating the Architectural Plan with a Floor in Store Manager

To associate the architectural plan with a floor in store manager:

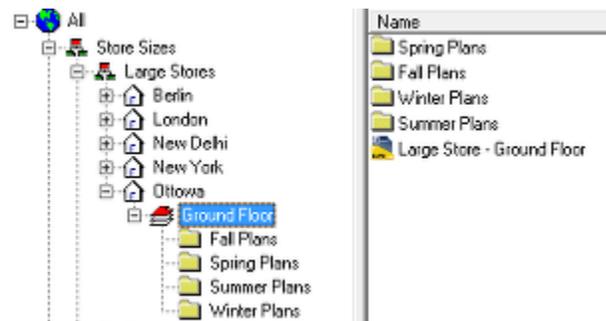
1. Highlight the required floor in the Store Manager.
2. Click Add Architectural Plan on the toolbar.



3. This will bring up the Associate Architecture Plan dialog box.



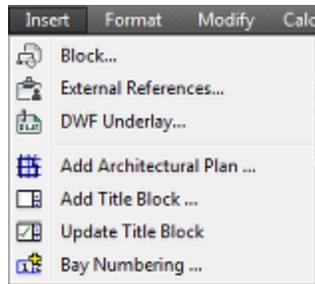
4. Browse to the required architectural plan, select it and click OK. The architectural plan will now be associated with a floor.



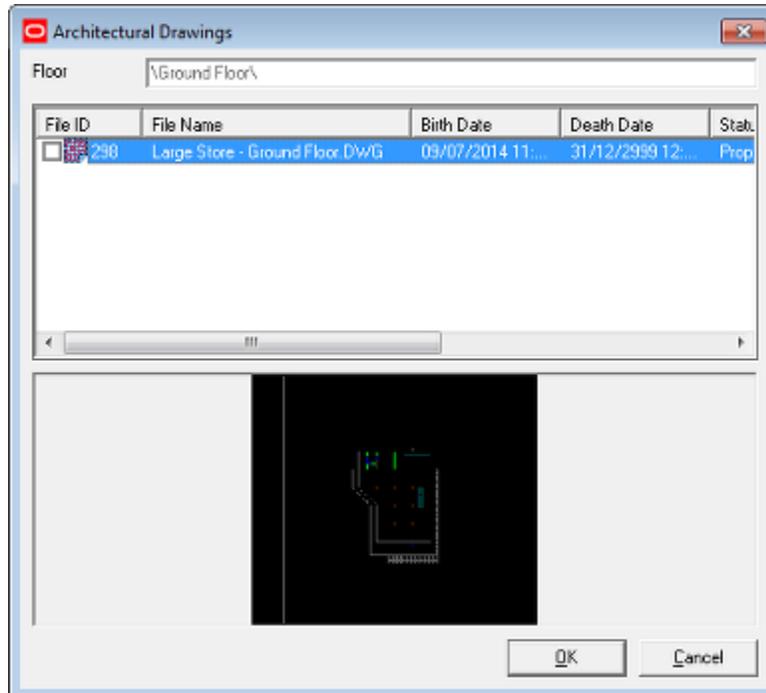
Associating an Architectural Plan with a Specific Floor Plan

To associate an architectural plan with a specific floor plan:

1. Select Add Architectural Plan from the Insert Menu.



2. This will bring up the Architectural Drawings dialog box.



3. The available architectural plans will be displayed in the dialog box. Select the required plans and click OK. The architectural plans will now be associated with that floor plan as an underlay.

Removing Architectural Plans

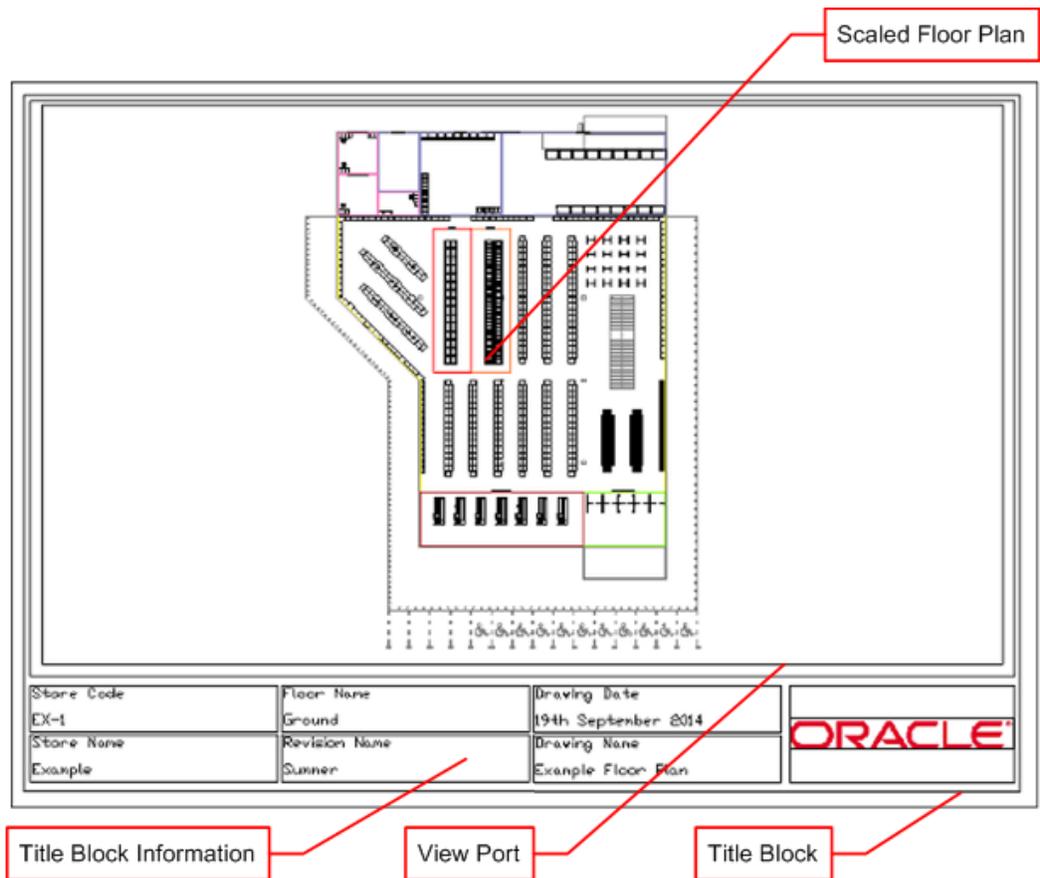
To remove an architectural plan, select the **Add Architectural Plan** option from the **Insert menu**. Deselect the architectural plans it is desired to remove. Click **OK** and they will no longer be associated with the floor plan.

Title Blocks

Overview of Title Blocks

Title Blocks are used to put a frame round a drawing in preparation for publishing it in hard copy or PDF form. Title Blocks can also contain information on the drawing.

Note: For a full explanation of how to create a Title Block see the *Macro Space Management Administration Module Help File*.



Option	Description
Title Block	This is a special form of AutoCAD DWG file that overlays the store plan on model space. It contains text based information on the floor plan and one or more View Ports to display the drawing.
View Port	The View Port (of which there may be one or several) can be a window cut through the title block to show the floor plan underneath.
Title Block Information	This is a series of fields that can be populated with specific items of information. In the example above data like the store code and store name are shown, but any information in the database can be configured to appear.

Option	Description
Scaled Floor Plan	The floor plan is visible through the View Port. It is set to a specific scale.

Each Title Block is designed for a specific size of paper, so if drawings are to be printed off in a range of sizes, title blocks should be created for each size. A metric implementation of Macro Space Management may contain title blocks for A2, A3 and A4 size paper, while an imperial one may contain title blocks for ANSI A, ANSI B, ANSI C, ANSI D and ANSI E size paper.

Using Title Blocks

There are three ways title blocks can be used:

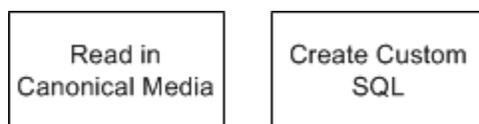
Option	Description
Print from Planner module	Once a title block has been added to a floor plan it can be printed using AutoCAD Plot functionality. Using this method, floor plans can be printed at any status.
Publish Floor Plans from Planner module	The Publish Floor Plans option on the File menu allows users to manually publish selected floor plans. Dependent on settings in the Floor Plan Publishing configuration dialog box, a title block can be included.
Batch Publish Floor Plans	Floor plans can be batch published - the normal way of publishing floor plans in bulk. The functionality allows a title block to be specified.

Overview of Creating Title Blocks

There are two stages to creating title blocks: preparation and configuration.

Preparation

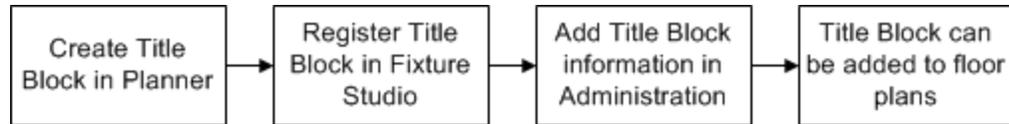
There are two actions required for preparation. These are carried out at the implementation stage and will generally not be modified afterwards.



Action	Description
Read in Canonical Media	Canonical media is the AutoCAD term for paper size. These have to be read into the database from the network printers before floor plans can be published.
Create Custom SQL	Custom SQL is a slightly modified form of standard SQL. It can be used to extract information from the Macro Space Planning database so that it can be inserted into the title block.

Configuration

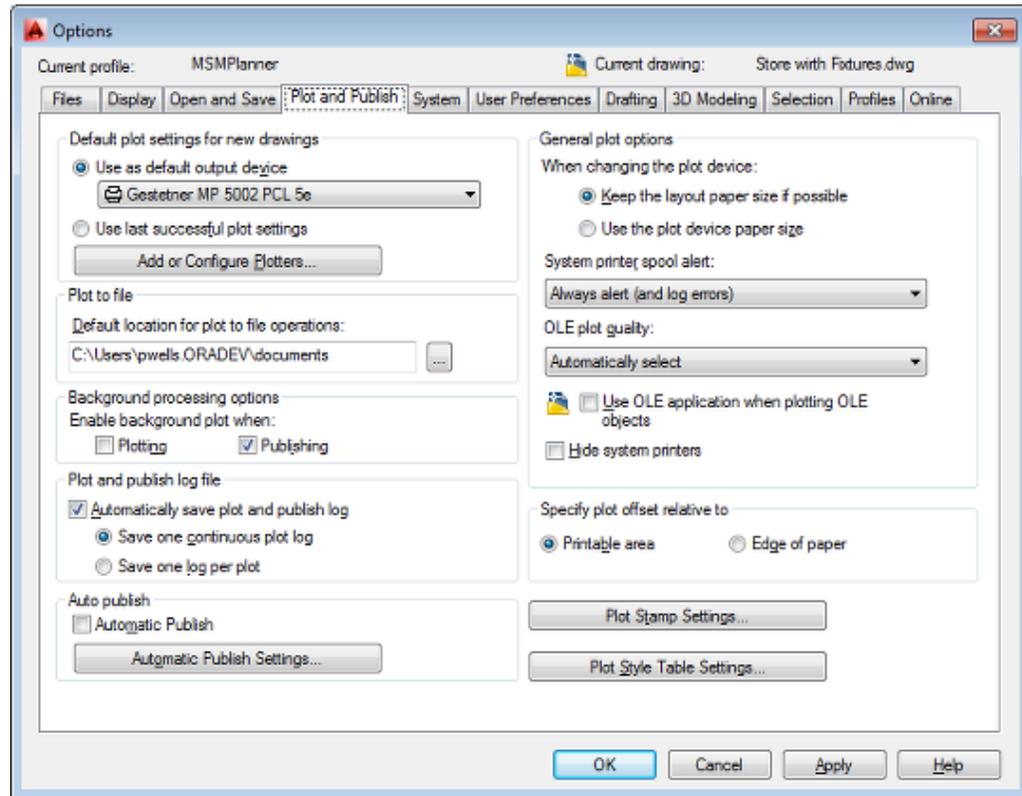
There are a series of steps to be following in order to create a title block and make it available for use in published floor plans.



Action	Description
Create Title Block in Planner	A Title Block is a special form of AutoCAD drawing. This had to be created in the Planner module and written to a specific Windows folder.
Register Title Block in Fixture Studio	After the Title Block has been created, it must next be registered in Fixture Studio. This will make it appear in the list of blocks available for placement.
Add Title Block Information in Administration	Once the title block has been registered in Fixture Studio, some additional information needs to be added in the Administration module. This includes information such as the size of the viewport - in effect a window cut through the title block so that the floor plan can be seen through it.
Add Title Block to floor plans	After the Title Block has been created in Planner registered in Fixture Studio and added to the list of title blocks in Administration, it can then be used in floor plans.

Influence of AutoCAD Settings on Title Block Parameters

Some AutoCAD parameters influence the configuration of Title Blocks. An example is the AutoCAD options dialog box.



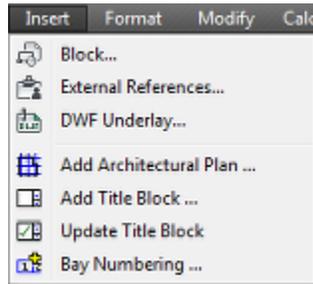
One setting that affects how title blocks function is the option to plot offset from the printable area or edge of the paper. This affects the parameters set in the **Title Blocks** dialog box accessed from the Planning Menu in the Administration module. These

AutoCAD settings should be consistent on all machines used to publish floor plans. This setting may also affect some AutoCAD functionality.

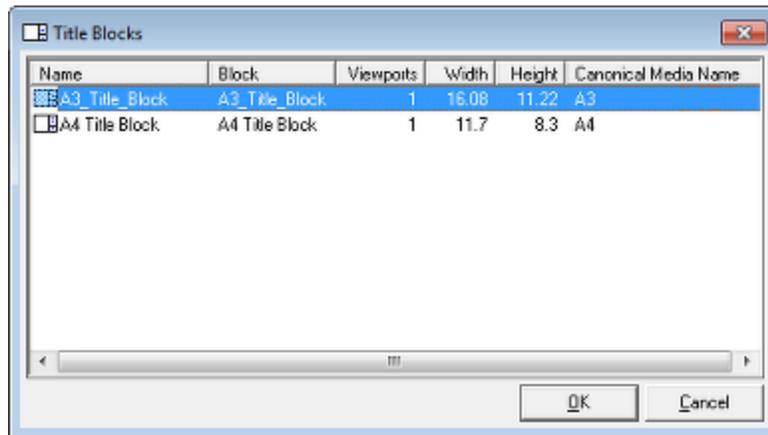
Note: See the AutoCAD help files for more information.

Placing and Updating Title Blocks in Planner

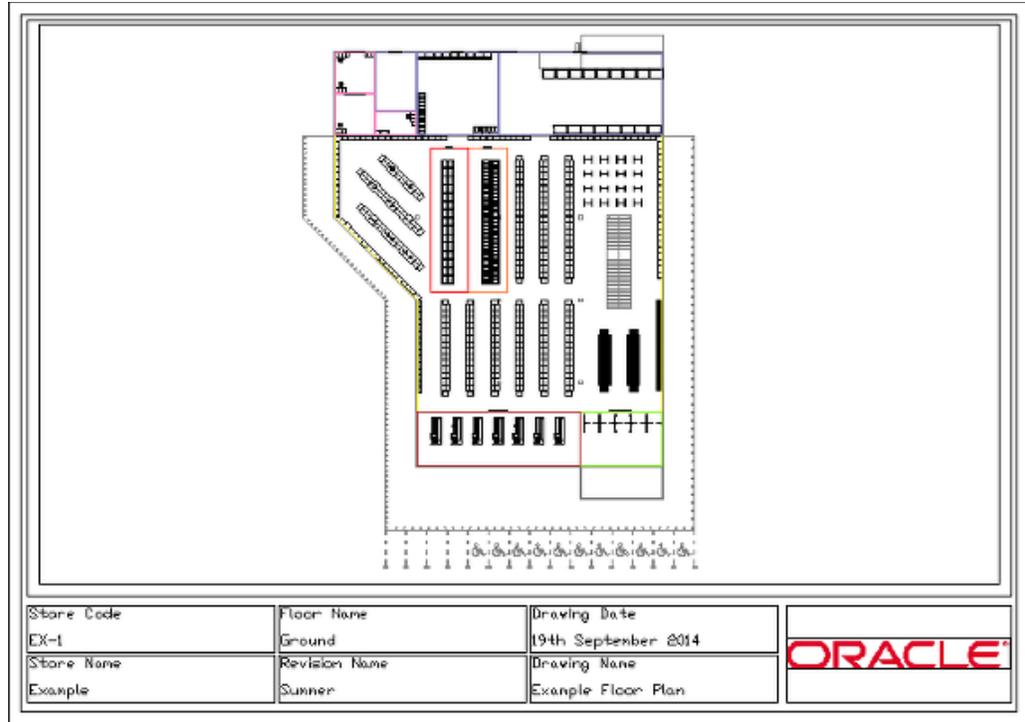
To place **Title Blocks** in Planner, select the Add Title Blocks option from the Insert menu.



This will bring up the Title Blocks dialogue box.



The list of available Title Blocks is that specified in the Administration Module. To place a Title Block, highlight it in the list then click OK.

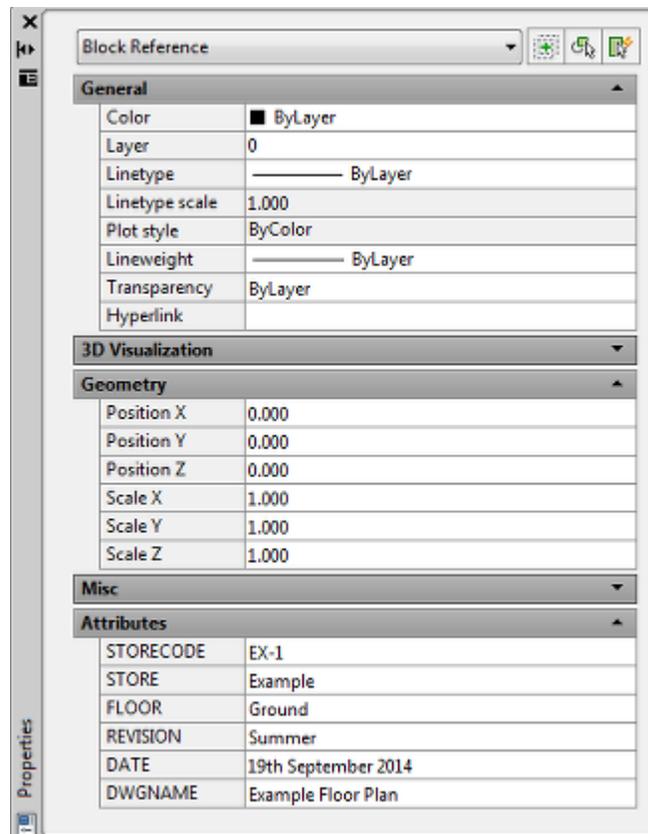


Updating Title Block Information

The text information in the Title block is populated when added. However, if the floor plan is subsequently modified, the information may become outdated. An example would be if the number of fixtures and planograms is changed. In this event the information in the title block can be updated by means of the **Update Title Block** option on the Insert menu.

Editing the Title Block Attributes

If it is needed to manually update the information in the Title Block, the attributes can be edited for that instance of the title block by double clicking on the frame of the Title Block. This will bring up the **AutoCAD Properties dialog box**. This can be used to modify the values of the attributes for that floor plan. This will not normally be required as the information in the title block can be refreshed by means of the **Update Title Block** option on the Insert menu.



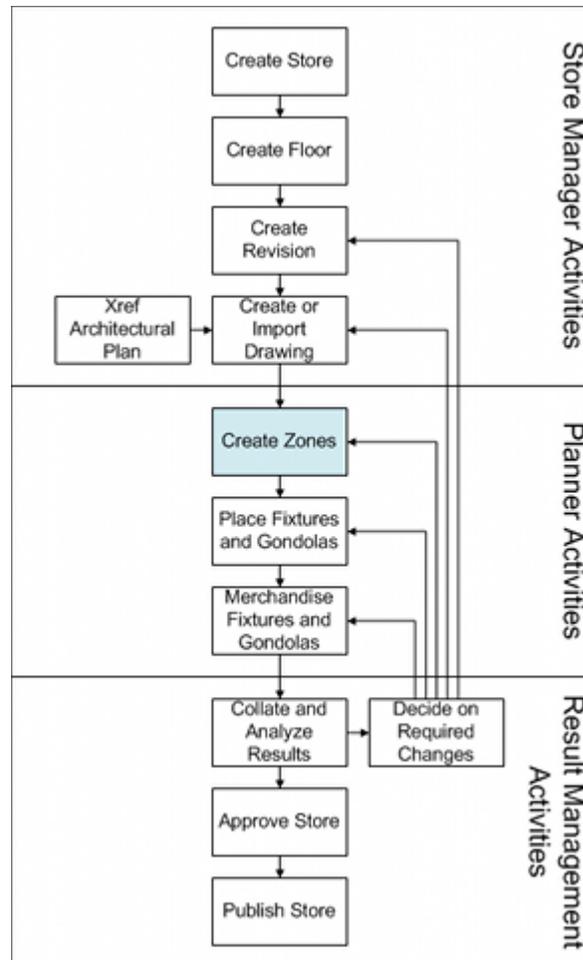
Modification of Title Blocks

On occasion Title Blocks can be redesigned in Planner and reregistered in Fixture Studio. Providing the title block has kept the same name, any new instance in a floor plan will be automatically be added using the latest version of the Title Block. Any existing instances of the older version of the title block should be updated with the **Redefine blocks from Disc** option in the Restructure Drawing dialog box available from the **Modify > Blocks** menu in Planner. Once the Title Block has been redefined, the attributes it contains should be updated by the Update Title Block option on the Insert Menu in Planner.

Zones in Planner

Overview of Zones

Note: The information in this section is for guidance only. It should not be taken as a definitive business process.



Configuring Zones

Zones are configured in the Administration Module - their properties can thus only be changed by a user with Administration privileges.

Placing Zones

After the floor plan has been created in Store Manager, the next stage is to subdivide the available floor area into departments/zones. These zones serve to define a section of floor that is used for a specific and clearly defined purpose. Examples would include areas for food and drink sales, cafeterias, holding stock or staff only areas.

Zones can be added to a floor plan and subsequently edited. If zones contain obstructions such as staircases, pillars or lifts, 'holes' can be cut in the zone to allow for these non-productive areas.

Clashing Zones

Because it is important for reporting accuracy to avoid overlapping zones of the same type, a **Detect Clashes** facility is available. This allows overlapping zones to be easily identified and corrected.

Filtering using Zones

It is possible to configure Macro Space Management so that the zones can be used for filtering purposes when selecting from the Object Grid. For example, it is possible to filter the list of available products to they are pertinent for the zone the selected fixture is in.

Reporting using Zones

Zones can be used as filters for reporting purposes. For example it is possible to return performance figures per square foot department by department.

Zones, Filtering and Reporting

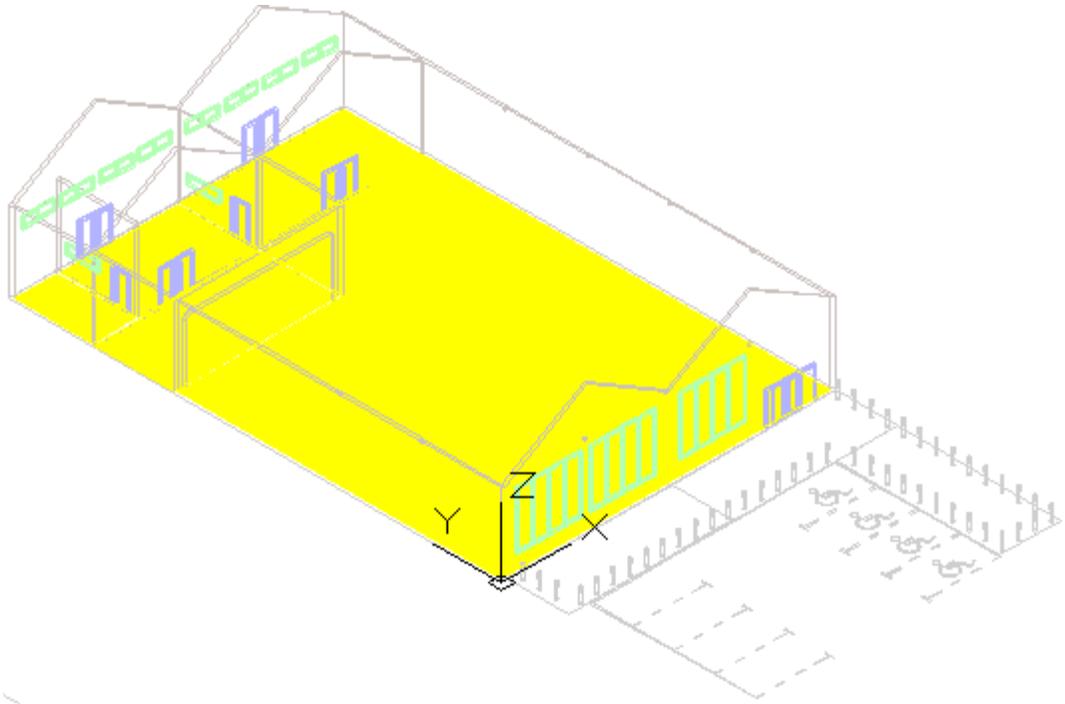
Technicalities of Allocating Fixtures to Parent Zones

Zones have several uses for reporting purposes. The exact use depends on what parent type the zone has been assigned to in the Administration module. The three zone types are:

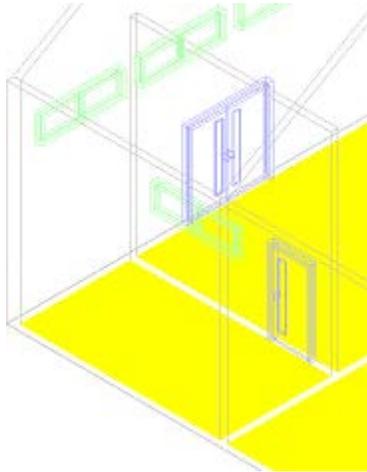
- Internal Area
- Department
- Other

Internal Area

The Internal Area type zone is used to define the maximum area used for retail purposes. There should only be one zone of zone type Internal Area per floor. In the example below, it defines the maximum area within the store.



For accuracy, the internal area zone can be added in a series of stages. This prevents the thickness of walls being taken into account. In the example below, an internal area has been added for each room in the store, ensuring the total area relates to floor area alone and not occupied by the footprint of the walls.



The internal area zone also set bounds for how much area can be assigned to a fixture in the Allocated Area calculation.

Department

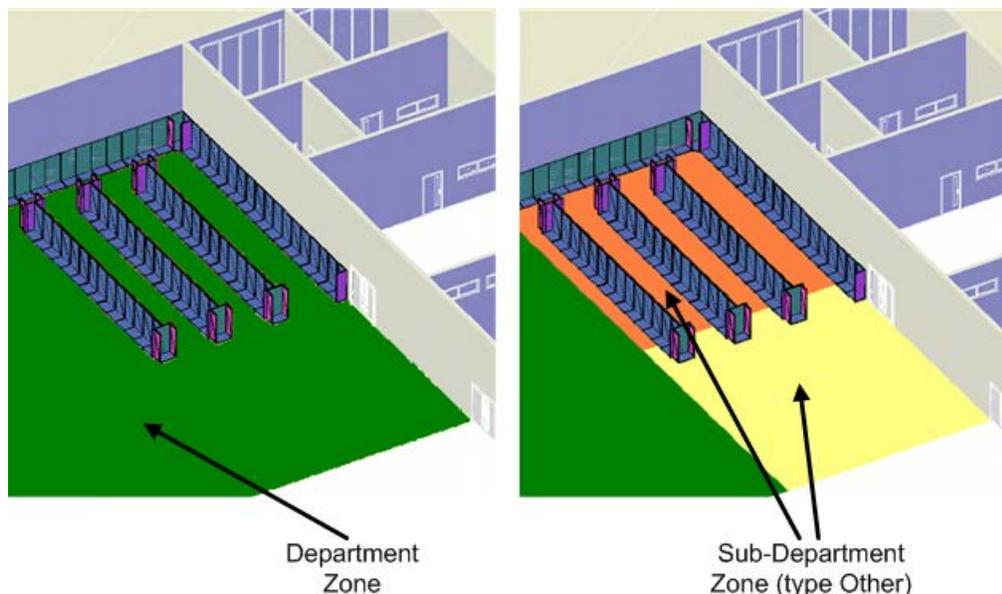
Department type zones are the main zone used for reporting purposes. This is because fixtures can be assigned to one (and one only) department type zone. (This information is stored in the ZON_ID field of the AVTTB_FIXTURE table).

Other

All zones not of Internal Area type or Department type belong to the Other type. Fixtures can be assigned to multiple zones of type Other as well as type Department. (This information is stored in the AVTTB_ZONE_FIXTURE_LINK table).

Example of Reporting using Department and Other Type Zones

Consider the example below. In the left hand image all the fixtures are within a Department type zone. In the AVTTB_FIXTURE table they will be shown as exclusively belonging to that department for reporting purposes.



In the right hand image sub-departments have been assigned within the main department. The AVTTB_ZONE_FIXTURE_LINK table will show fixtures as belonging to both the parent department and the pertinent sub-department. In the case of fixtures crossing the sub-department boundaries, they may show as belonging to both departments. Filtering and reporting needs to take this into account.

Note: Information on how fixtures are assigned to tables is not normally accessible to ordinary users. The information on tables specified above is mainly for the benefit of implementers and administrators.

Filtering

Because of the way Macro Space Management (MSM) automatically assigns fixtures to parent zones, this information can be used for filtering purposes in the Object Grid. For example, it is possible to modify the Custom SQL (AVTTB_CUSTOM_SQL table) for the Object Grid so that it only displays products and planograms pertinent to the zone the selected fixtures are in. This form of filtering can be used to save time and make it faster to populate a floor plan with merchandise.

Reporting

Zones can be used as filters for reporting purposes. For example, because fixtures are associated with zones and products or planograms can then be associated with their parent fixtures, it is possible to report on the performance of the merchandise within a specific zone. These reports can then be aggregated as necessary. For example, it would

be possible to report in the sub-departments within the Food and Drink department to see how sub-segments of this department were performing. It would then be possible to aggregate these reports up to see the performance of the entire department. Because zones have measurable areas, it is possible to report performance related to area.

Department or Sub-Department	Area	Profit	Profit/square foot
Drinks	10,000 ft ²	\$44,000	\$4.40/ft ²
Spirits and Liqueurs	1,500 ft ²	\$10,000	\$6.67/ft ²
Wines	2,000 ft ²	\$12,000	\$6.00/ft ²
Beers and Lagers	2,500 ft ²	\$13,500	\$5.40/ft ²
Soft Drinks	4,000 ft ²	\$8,500	\$2.13/ft ²

Zones and the Administration Module

Options in the Administration Module allow several aspects of Zones to be configured.

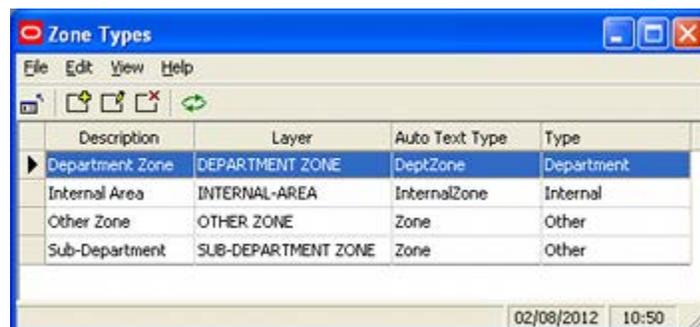
Note: The Administration Module is only available to users with Administrators Privileges.

If you do not have these privileges, you will not be able to access the Administration Module.

- **Zone Types** can be configured using the Zone Types option.
- Zone Definitions can be configured using the Zone Definition option.
- Zone Hatch Styles can be configured using the Hatch Styles option.
- Zone Annotation can be configured in using the Text Styles option.

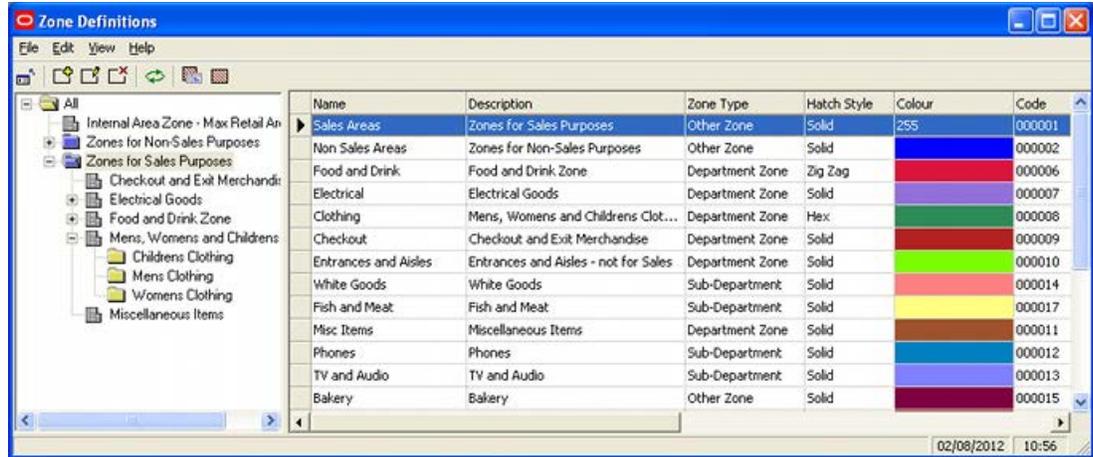
Zone Types

Zones are assigned to one of three types: **Internal Area**, **Department** and **Other**. These types are configured in the **Zone Types** dialog box.



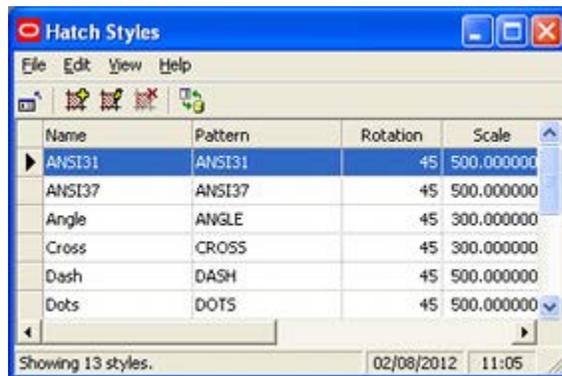
Zone Definitions

Zone definitions are the actual zones that are placed. The hierarchy, name, hatch style and color, etc, can all be set up in the **Zone Definitions** dialog box in the Administration module.



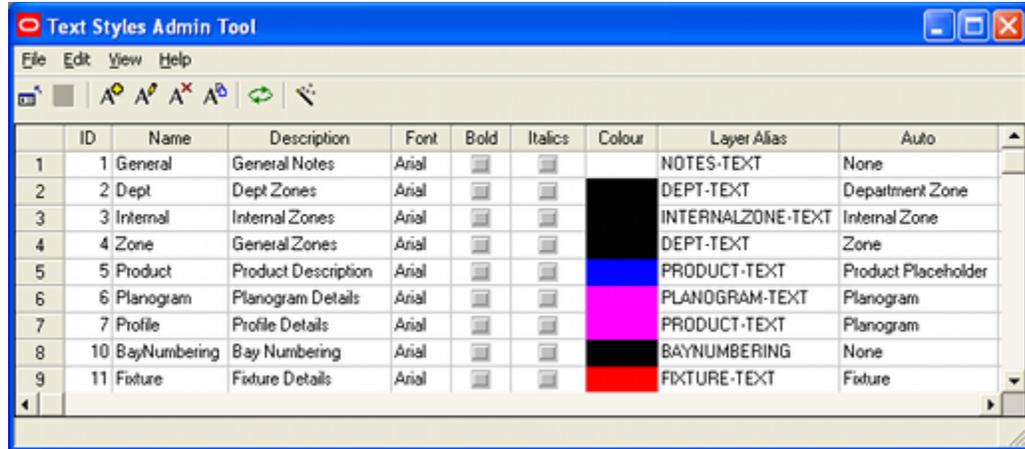
Hatch Styles

Hatch styles are a method of coloring zones in both the Planner and Merchandiser modules. Planner comes with a pre-configured set of hatch styles, but hatch styles need to be configured for Merchandiser. This is done in the Hatch Styles dialog box.



Annotation

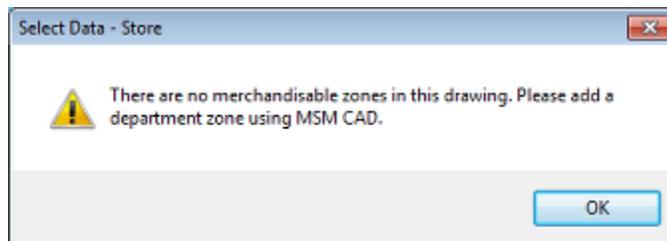
The annotation for zones is controlled from the Text Styles dialog box. This allows full control over the text description placed, together with its position and size.



ID	Name	Description	Font	Bold	Italics	Colour	Layer Alias	Auto
1	General	General Notes	Arial				NOTES-TEXT	None
2	Dept	Dept Zones	Arial				DEPT-TEXT	Department Zone
3	Internal	Internal Zones	Arial				INTERNALZONE-TEXT	Internal Zone
4	Zone	General Zones	Arial				DEPT-TEXT	Zone
5	Product	Product Description	Arial				PRODUCT-TEXT	Product Placeholder
6	Planogram	Planogram Details	Arial				PLANOGRAM-TEXT	Planogram
7	Profile	Profile Details	Arial				PRODUCT-TEXT	Planogram
8	10 BayNumbering	Bay Numbering	Arial				BAYNUMBERING	None
9	11 Fixture	Fixture Details	Arial				FIXTURE-TEXT	Fixture

Zones and In-Store Space Collaboration

In-Store Space Collaboration (an application that can use and modify data created in Macro Space Planning can only work within department type zones within a floor plan. If no zones of that type are available, then an error message will result when a user tries to open that floor plan.



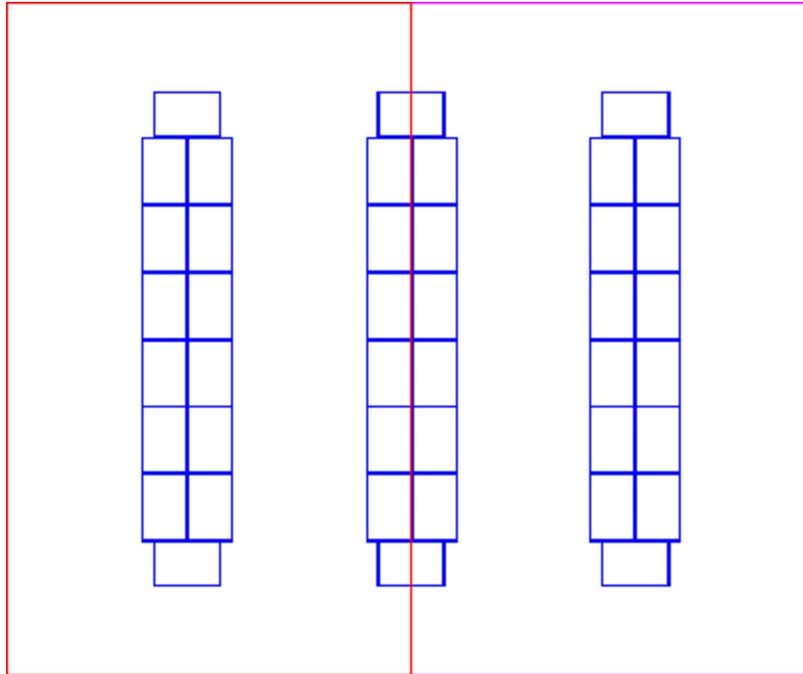
Accordingly, all floor plans intended for use within In-Store Space Collaboration should have a minimum of one department type zone.

Practical Tips for Drawing Zones

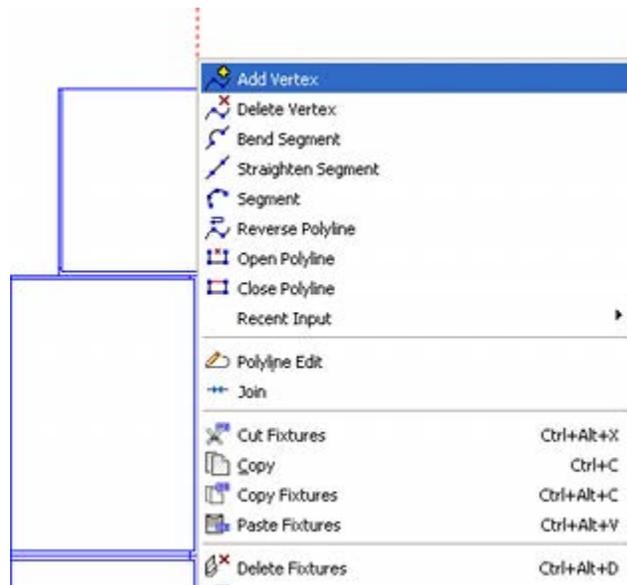
When drawing zones, some practical tips should be borne in mind.

Zones and End Caps

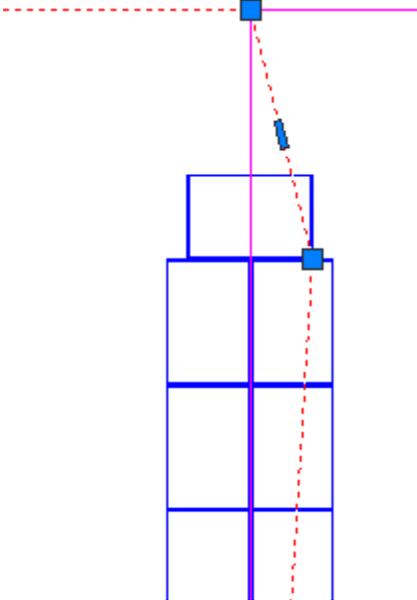
End caps on gondolas present a specific problem as far as zones and reporting are concerned. By virtue of their position, many end caps are precisely bisected by a zone drawn along the axis of gondola. This 50/50 split can cause problems with reporting as it is difficult for the functionality to determine which zone the majority of the fixture is in. In the example below, the central gondola is precisely bisected by the boundaries of two zones.



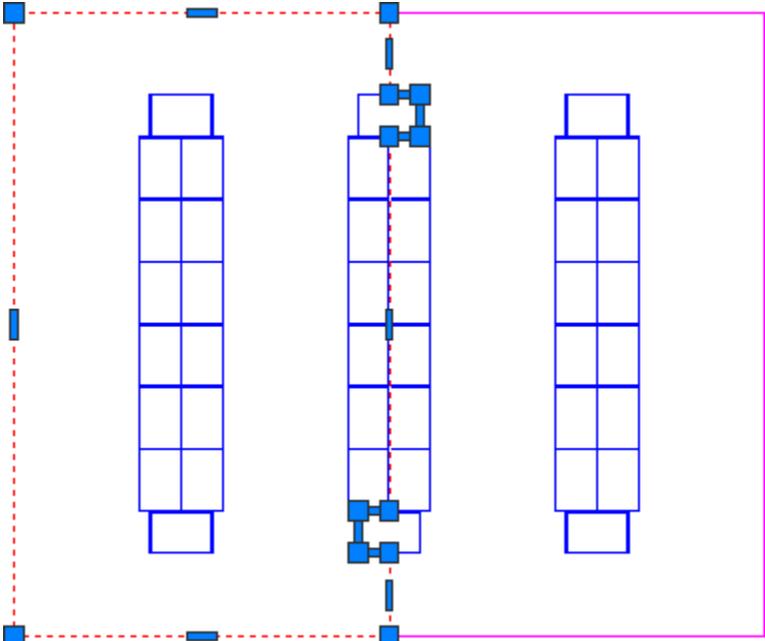
The solution is to move the position of the boundaries by using AutoCAD vertices. To do this, select a boundary line for a zone, right click and select Add Vertex.



With Object Snap (OSNAP) turned on, snap the line to a corner of the end cap.



Continue until both zones have been lead round the sizes of the end caps. In the example below, one zone boundary has been selected for clarity.

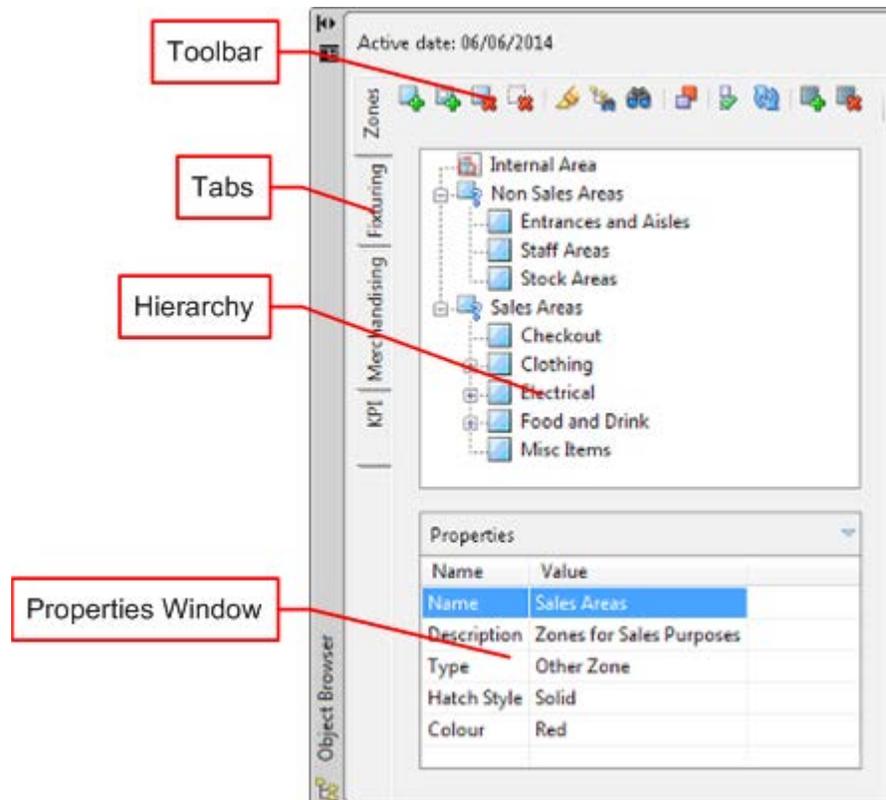


This will ensure accuracy for any reports based on zones.

Zones on the Object Browser

Overview of Zones on the Object Browser

The **Zones Tab** can be used to add and delete zones in the currently active floor plan. It can also be used for other operations involving zones including highlighting them in the zone hierarchy or floor plan and adding and removing hatching.



- The Zones Toolbar contains a series of icons used to control operations concerning zones.
- The Zones Hierarchy displays the available zones.
- The Properties Window has information on the zone currently highlighted in the hierarchy.

Using the Object Browser for Zone Operations

Overview of the Zones Tab

Macro Space Management uses Zones to assign space to different departments and non-sales areas. The zone types available to your business are customized within the Administration Module. Zones can also be used to help user's select fixtures or merchandise.

The Zones tab is divided into three sections:

- The Toolbar – provides controls to add, modify, and delete zones from a store plan.
- The Zones Window – shows a hierarchy of a available zones.
- The Properties Window – when a Zone is selected from the hierarchy, its properties are visible in this window.

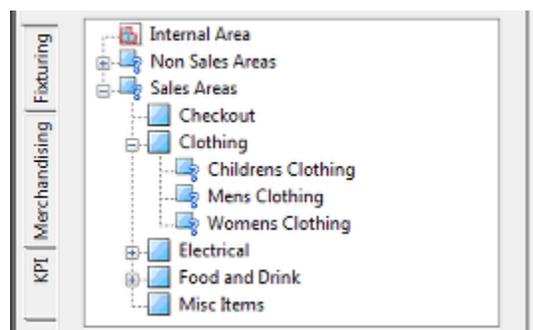
Toolbar



Icon	Description
	Add Zone
	Add Hole
	Delete all Zones of that type
	Delete selected Zone or Hole
	Highlight Zone in Floor Plan
	Highlight Selected Zone in Tree
	Find Zone in Hierarchy
	Detect Clashes
	Options
	Refresh
	Add Hatch
	Remove Hatch

The Hierarchy Window

The hierarchy window displays the zone hierarchy. This hierarchy is defined in the Administration module and shows all the zones that can be added to a store plan.



The hierarchy can be expanded using the plus control next to each item on the hierarchy. It can also be collapsed by using the minus control next to each item. The type of zone in the hierarchy is indicated by the icon.

Icon	Description
	Internal Area Zone
	Department Zone
	Other Zone Type

The Properties Window

The Properties window displays information for the zone that has been selected in the zone hierarchy. The content of this window is by modifying the Custom SQL in the database. This allows an implementer to specify the information that appears in the window.

Note: See the *Oracle Retail Macro Space Planning Data Model* for information on Custom SQL.



The Refresh Option

The Refresh option in the toolbar refreshes zone information in the Object Browser.

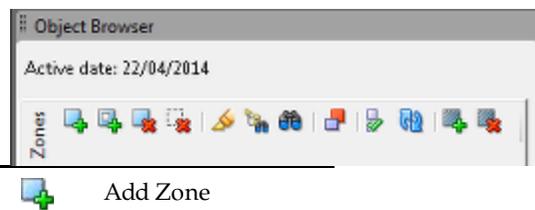
	Refresh
---	---------

Clicking on the Refresh button in the zones tab will load the latest zone information from the database into the zone hierarchy. This is used to update the Object Browser when changes have been made to Zone Types and Zone Descriptions in the Administration module.

Creating and Editing Zones

Adding the Zone

Zones can be added to the currently active floor plan by highlighting a zone in the zone hierarchy in the Object Browser and clicking the Add Zone icon on the toolbar.



Drawing the Zone

Note: Zones must be a single closed boundary. If the end of the line defining the boundary is not correctly attached to the start (**Closed** in AutoCAD terminology), the zone will not draw correctly.

Once **Add Zone** has been selected from the Object Browser toolbar, the **Specify start point** prompt will appear in the command line.

```
Command: AVT_SETFOCUS
Command: Specify start point:
```

The zone can be drawn using various methods in AutoCAD. The easiest of these are:

- Using OSNAPS

An effective way to draw a zone conforming to the contours of door, walls, stairs, etc, is to turn AutoCAD's OSNAP (Object Snap) functionality on and draw the zone section by section, snapping to specific points in an architectural plan. The final part of the zone (joining the line back to the start point) is best done by typing the AutoCAD Close command into the command line. This will cause a line to be drawn from the position of the last drawn point to the start of the zone, thus forming the closed boundary required for the zone to be drawn directly.
- Drawing the zone using AutoCAD's coordinate system

An alternative way of drawing the zone is to draw a line to points defined by AutoCAD's coordinate system; either to absolute points (560,480) or to points relative to the last point (@560,480). As per the OSNAP method, the final part of the zone (joining the line back to the start point) is best done by typing the AutoCAD Close command into the command line.

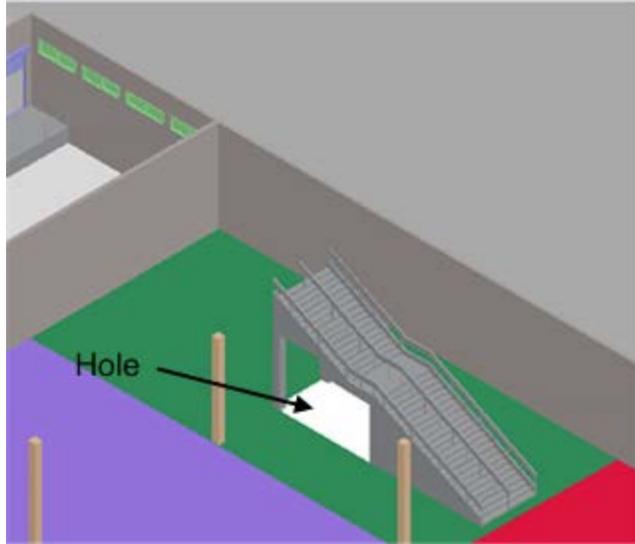
Adding Holes



To cut the hole, highlight the zone into which the hole is to be cut in the zone hierarchy in the Object Browser then click the **Cut Hole** icon on the Zone toolbar. The hole can then be drawn in a similar way to a zone.

Reason for Holes

There will be unproductive areas of floor in any floor plan. In the example below, the area under the stairs cannot be used. The white rectangle visible under the stairs represents a hole cut in the zone.



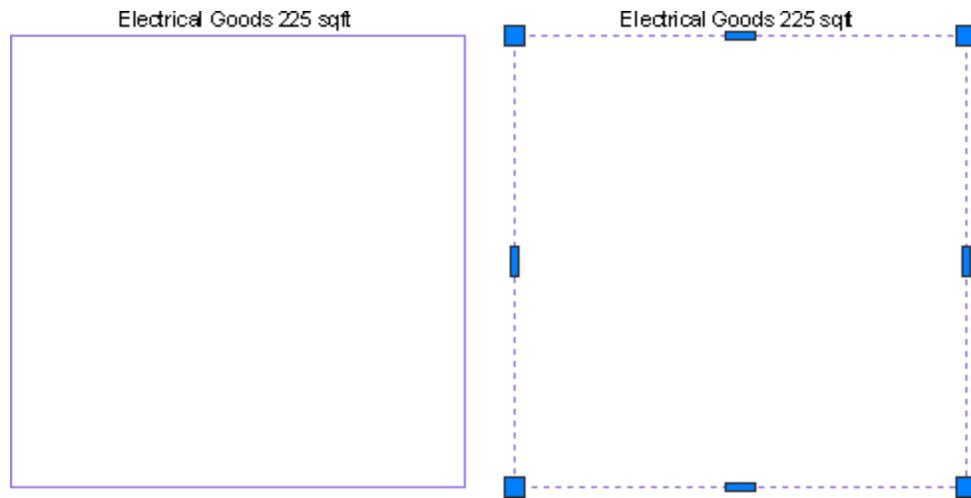
This allows performance metrics to be based on the usable area of the zone, not its total area.

Summary			
Zone Name	Gross Area	Net Area	Zone Type
Food and Drink Z...	8740.82	8740.82	Department Zone
Electrical Goods	9120.14	9120.14	Department Zone
Bakery	2674.16	2674.16	Other Zone
Fish and Meat	1699.06	1699.06	Sub-Department
Mens, Womens a...	3466.28	2926.28	Department Zone
Beers, Wines and...	2633.2	2633.2	Sub-Department
Frozen Goods	1699.06	1699.06	Sub-Department

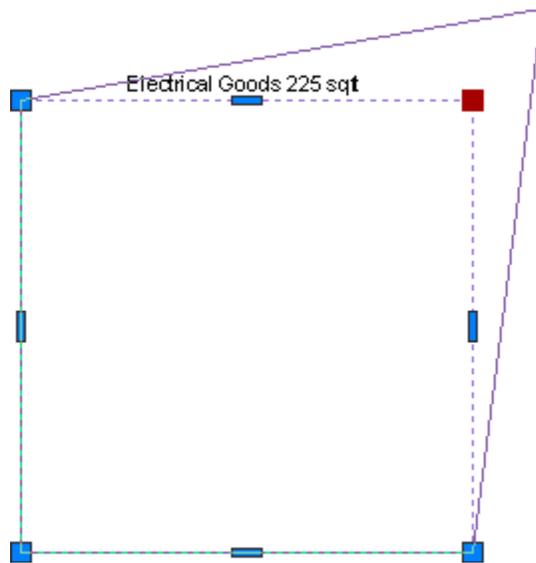
In this example, the Gross Area of the zone is 3466 square feet and the net area 2926 square feet. Assuming the zone has generated \$50,000 of sales in a week, using the gross area would give sales of \$14.4 per square foot and using the net area would give sales of \$17.1 per square foot. The latter figure is probably more representative of how the zone is performing.

Editing the Zone Boundaries

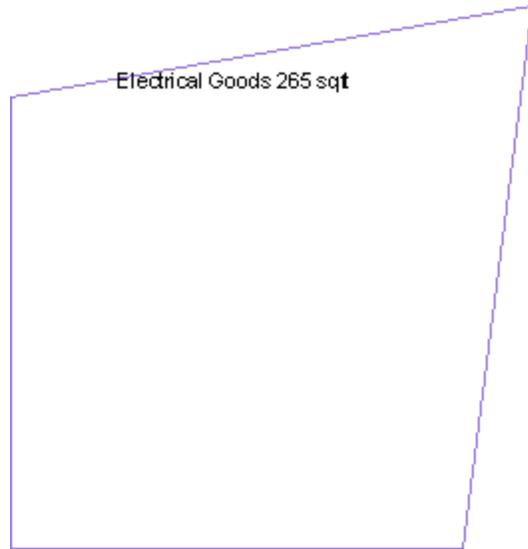
The position of a zone boundary can be changed using AutoCAD Grips. To resize a zone, click on the boundary to activate the grips. These appear as blue squares or rectangles.



The grips can then be used to drag the zone boundary to its new position.

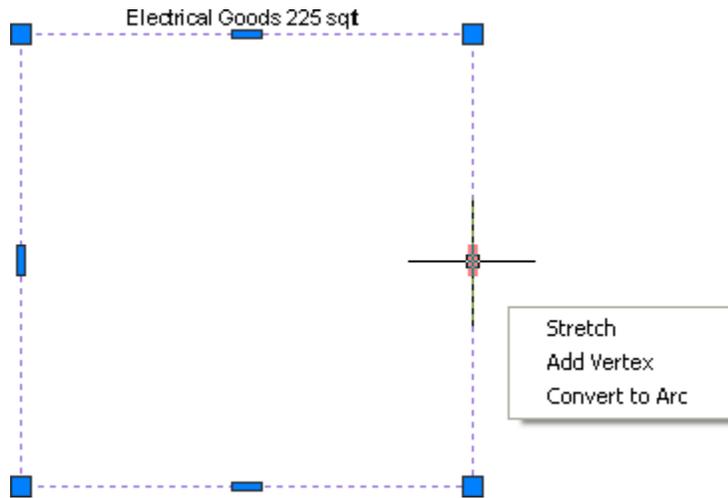


On hitting the Escape Key, the boundary will become permanent in its new position.



The zone annotation will update to reflect the new size, but changes in the zone boundary position will not be written back to the database. Accordingly, after the zone boundaries have been modified, the floor plan must be synchronized **Match the Drawing**.

A slightly more advanced way of changing the zone boundaries is to activate the AutoCAD grips, the hover the mouse pointer over one of them. This will bring up a list of additional options.



After using these options, the floor plan must again be synchronized.

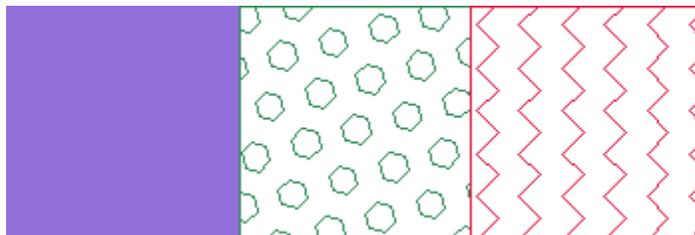
Hatching the Zone

If zones are not set to hatch automatically on being placed (configuration module), they can be hatched (or have the hatching removed) by means of the Add Hatch or Delete Hatch icons on the Zones toolbar.



	Add Hatch
	Remove Hatch

The example below show solid, hexagon and zig-zag hatches.



- To hatch a zone, select the zone in the hierarchy and click the Hatch icon.
- To remove the hatch, select the zone in the hierarchy and click the Delete Hatch icon

Deleting Zones and Holes

Deleting holes and zones can be done in one of two separate ways:

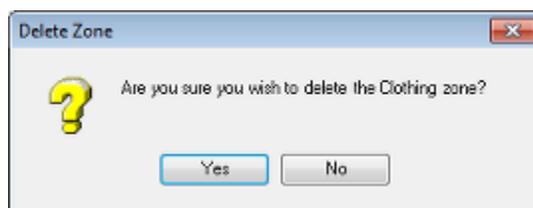
- Deleting all instances of a zone (and its associated holes) in a floor plan
- Deleting a specific instance of a zone or a hole



Icon	Description
	Delete all Zones of that type
	Delete selected boundary

Deleting all instances of a zone (and its associated holes) in a floor plan

Deleting all instances of a zone within a floor plan is done by highlighting the appropriate zone in the zone hierarchy in the object browser and clicking Delete zone in the toolbar. The Delete Zone confirmation will appear. On clicking OK, the zone will be deleted.



This option is useful when a zone is drawn in several parts. For example a zone might have an aisle for general passage running through it. In this case the zone might be drawn in two parts: one either side of the aisle. Deleting all zones of that type ensures that both parts of the zone would be deleted.

Deleting a specific boundary of a zone or a hole

Deleting a specific boundary of a zone or hole within a floor plan (or hole within a zone) is done by clicking the **Delete Selected Zone or Hole** icon on the toolbar. A prompt will appear in the command line asking the user to select

```
Command: *Cancel*
Command: Select boundary to remove
```

On left clicking the outline of a zone or hole, it will be deleted from the floor plan without the need for further confirmation.

Zone Highlighting Options

There are three highlighting options available on the zones toolbar.



Icon	Description
	Highlight Zone in Floor Plan
	Highlight Selected Zone in Tree
	Find Zone in Hierarchy

Highlight Zone

Highlight zone allows a user to find a zone in the floor plan. The option has to be turned on by toggling the icon on the Zones toolbar so it is depressed. After the icon has been toggled on, highlighting any zone in the zone hierarchy will cause the selected zone to be highlighted in the floor plan. The highlighting method will depend on setting in the Zones tab of the Configuration module.

Note: It is recommended that the Highlight zone option be left off until needed - leaving it on may have a marginal impact on performance in the floor plan.

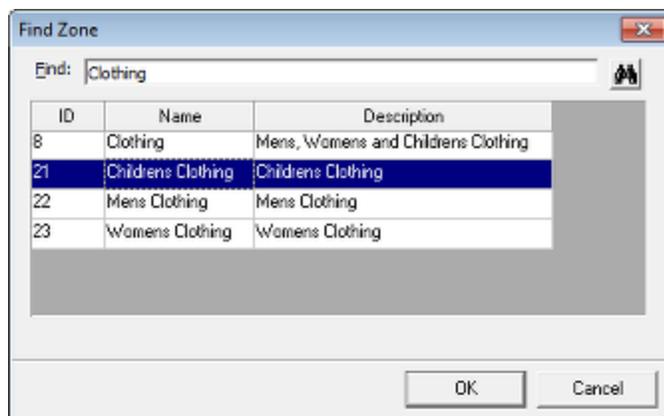
Highlight Selected Item in Tree

Highlight Selected Item in Tree allows a user to select a zone in the floor plan and have it highlighted in the Zone Hierarchy in the Object browser. The option has to be turned on by toggling the icon on the Zones toolbar so it is depressed. Clicking on the boundary of the zone in the floor plan will then cause that zone to be highlighted in the hierarchy.

Note: It is recommended that the Highlight zone option be left off until needed - leaving it on may have a marginal impact on performance in the floor plan.

Find in Hierarchy

Clicking the **Find Zone In Hierarchy** option brings up the **Find Zone dialog box**.



To use this dialog box:

1. Type an item of text into the text box.
2. Click the Find icon. This will bring up a list of zones matching that text.
3. Highlight a zone and click OK. This will highlight the zone in the zone hierarchy.

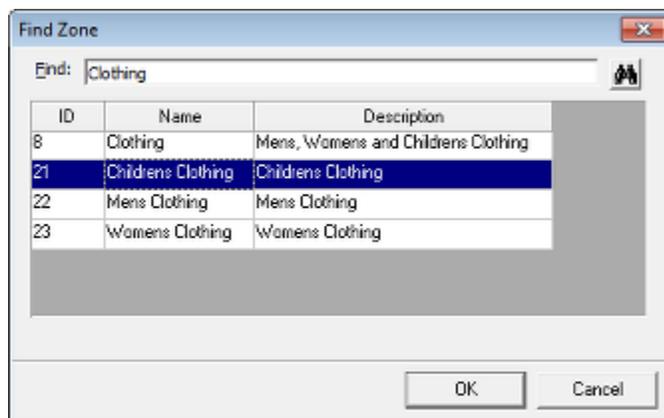
Find In Tree

Find in Tree allows users to search for Zone Names in the Zone Hierarchy.



 Find Zone in Hierarchy

Clicking the icon will bring up the Find Zone dialogue box.



To use the dialog box:

1. Type part of all of a zone name into the Find text box.
2. Click the Find icon. A list of all zones matching the search string will appear.
3. Highlight the required zone in the list and click OK.
4. The required zone will be highlighted in the hierarchy.

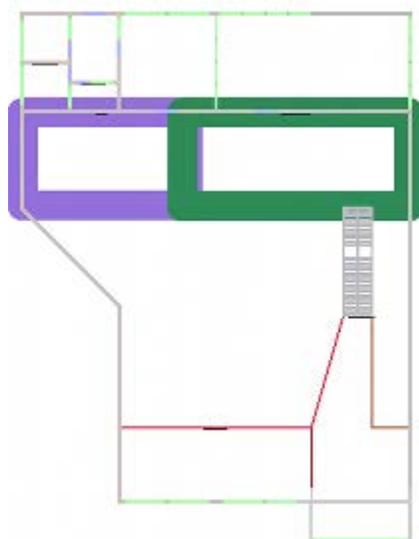
Detect Clashes

Clashes occur when the boundaries of two zones of the same type (which must be on the same AutoCAD layer) overlap. This could mean inaccurate reporting. If the Detect Clashes option in the zones tab of the Configuration module has not been selected, the **Detect Clashes** option on the Zones toolbar can be used to manually check for clashes.



 Detect Clashes

If clashes exist, the offending zones will be highlighted.



In the above example highlighting has been set to the thicken option - the two overlapping zones have greatly thickened boundaries.

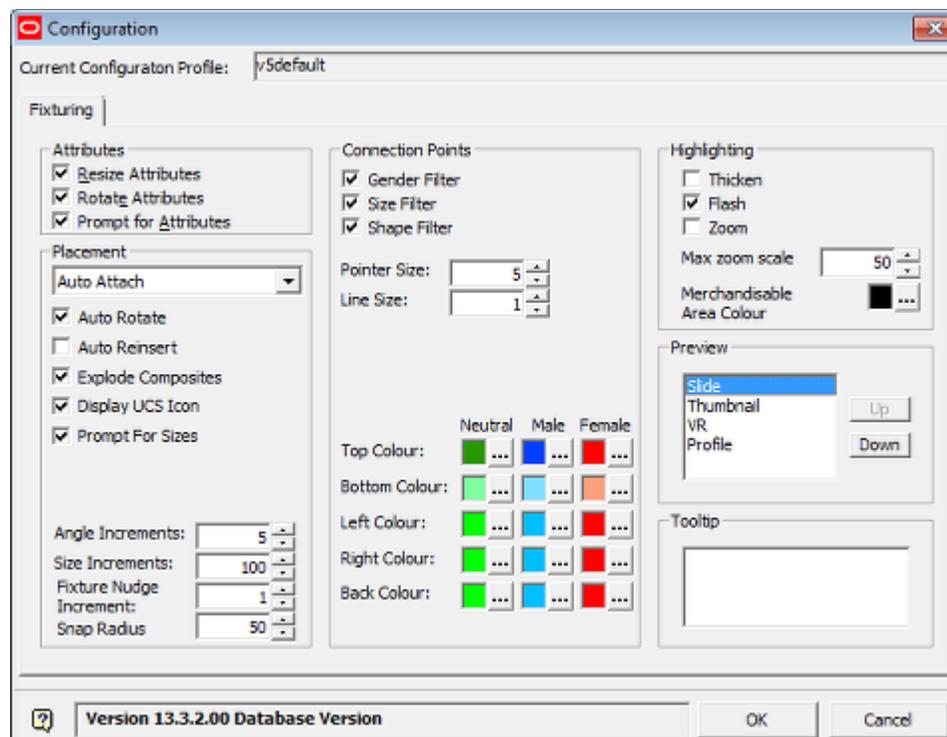
Configuring Zone Behavior

The way zones behave can be configured in the Configuration module. To access the Zones tab, click **Options** on the Zones toolbar.



 Options

This will bring up the Zones tab of the Configuration module.



The general options are as follows:

- Auto Close will cause the zone boundary to close (became a continuous boundary) when drawing it if you left click with the mouse within the Proximity distance of the start point of the zone.
- Hatch determines if the zones should hatch when drawn.
- Hatch over Text specifies whether the hatch should overlap the text or not.
- Detect Clashes will cause any zones of the same zone type to flash if the boundaries overlap when being drawn. This is important for reporting accuracy.
- Prompt for Name will allow the user to enter a custom name for the zone when placing it.

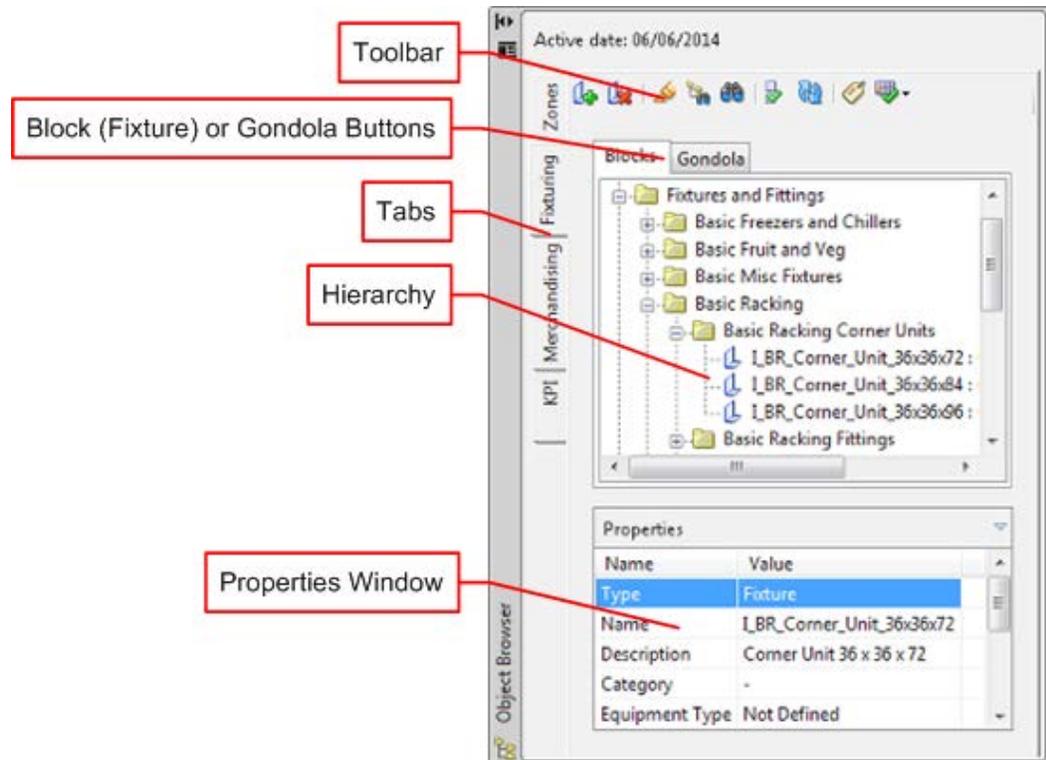
The highlight options are as follows:

- Thicken Boundary will cause the zone boundary to thicken when the Highlight Zone option is chosen on the zone toolbar.
- Flash will cause the zone boundary to flash when the Highlight Zone option is chosen on the zone toolbar.
- Zoom will cause the zone boundary to increase in size when the Highlight Zone option is chosen on the zone toolbar.

Fixturing on the Object Browser

Overview of Fixturing on the Object Browser

Clicking on the Fixturing Tab on the Object Browser brings up a series of options for adding, editing and deleting Fixtures and Gondolas.



- The Toolbar gives access to a series of options concerning fixtures.
- The Buttons allow the user to toggle between Fixtures (Blocks) and Gondolas.
- The Hierarchy Window allows users to select fixtures (or gondolas) from the list available.
- The Properties Window shows the properties assigned to the selected fixture.

Using the Object Browser for Fixturing Operations

Overview of the Fixturing Tab

The Fixturing tab allows users to add fixtures, fittings, gondolas and other equipment to the store plan. It is divided into five parts as follows:

- The toolbar – provides controls that allow users to add, edit, and delete fixtures and gondolas
- The Fixtures window – shows a hierarchy of available blocks and gondolas
- The Properties window – after selecting a block from the hierarchy, this window shows the details for the selected block. The content of this window is customizable.

A fourth option - the Fixtures Summary Window – shows details of the zones based on the currently active floor plan. This is now called from the **View** menu but can be docked in the Object Browser if required.

The **Fixturing Tab Toolbar** in the Object Browser enables the user to control all aspects of adding, editing and deleting fixtures and gondolas within the Planner and Merchandiser environments.

Clicking on the Switch Buttons will determine whether the Fixturing or Gondola options are active.

Fixturing Toolbar



Icon	Option	Description
	Add Fixture	Add a fixture to a floor plan. This will cause the Add Fixture dialog box to appear.
	Delete Fixture	Delete the fixtures that are currently in a selection set in the floor plan.
	Highlight Fixture in Floor Plan	If selected, selecting a fixture in the Object Browser Fixture Hierarchy will cause the pertinent fixture to be highlighted in the floor plan. The exact nature of the highlighting will depend on selections made in the Fixturing Tab of the Configuration Module.
	Highlight selected item in tree	If selected, selecting a fixture in the floor plan will cause the pertinent fixture to be highlighted in the Object Browser Fixture Hierarchy.
	Find	This option brings up the Find dialog box, allowing users to search for objects in the Fixture Hierarchy.
	Options	This option brings up the Fixturing Tab of the Configuration module, allowing users to customize their settings.
	Refresh	This option refreshes the Object Browser with the latest information on fixtures and gondolas in the database.
	Show Attributes	This option shows the fixture attributes for any selected fixtures. Fixture attributes are customizable items of information assigned to specific fixtures.
	Promotional Fixtures	This option allows the user to assign or remove the Promotional Attribute and to highlight fixtures with the promotional attribute.

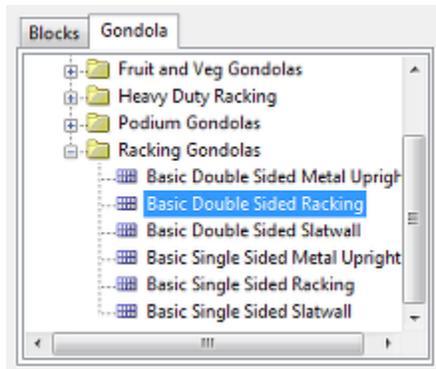
Gondola Toolbar



Icon	Option	Description
	Add Fixture	Adds the highlighted gondola to the currently active floor plan.
	Delete Fixture	This option is grayed out and unavailable on the Gondola toolbar.
	Highlight Fixture in Floor Plan	This option is grayed out and unavailable on the Gondola toolbar.
	Highlight selected item in tree	This option is grayed out and unavailable on the Gondola toolbar.
	Find	This option is grayed out and unavailable on the Gondola toolbar.
	Options	This option is grayed out and unavailable on the Gondola toolbar.
	Refresh	This option refreshes the Object Browser with the latest information on fixtures and gondolas in the database.
	Show Attributes	This option shows the fixture attributes for any selected fixtures. Fixture attributes are customizable items of information assigned to specific fixtures.
	Promotional Fixtures	This option allows the user to assign or remove the Promotional Attribute and to highlight fixtures with the promotional attribute. This option has no effect in the merchandiser module.

The Hierarchy Window

The Hierarchy window displays the gondola hierarchy. To toggle between the hierarchies use the Blocks or Gondolas buttons respectively. The hierarchies are defined in the Fixture Studio environment and show all the fixtures and gondolas that can be added to a store plan. The hierarchy can be expanded using the plus control next to each item on the hierarchy. It can also be collapsed by using the minus control next to each item. An item in the hierarchy can be highlighted by clicking on the name of the gondola.



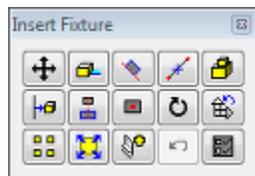
The icons preceding the fixture name identify the type of equipment - equipment of similar types will have the same icon.

The Properties Window

The Properties window will be blank while Gondolas are selected on the Fixturing tab

Adding Fixtures

To add a block to the store plan, highlight the required block in the hierarchy. Then either click **Add Fixture** on the tool bar, or drag and drop the fixture to the store plan drawing. When a block is added the Insert fixture dialog opens.



These controls allow blocks to be positioned accurately in the store plan. Pressing the left mouse button places the block in an initial position. Pressing the right mouse button or the <Esc> key finishes placing the block.

Note: for more information on these options, see the section on the **Add Fixture dialog box**.

Refreshing the Object Browser

The **Refresh** option refreshes both Fixtures and Gondola information in the respective hierarchical trees.



Refresh

This option refreshes the Object Browser with the latest information on fixtures and gondolas in the database.

Clicking on the Refresh button in the Fixturing tab will load the latest fixture information from the database into the Fixture hierarchy. At the same time, it will load the latest gondola information from the database into the Gondola Hierarchy. Dragging and dropping a fixture from the appropriate hierarchy after the refresh button has been pressed will add that fixture to the drawing using the latest definition from Fixture Studio. Similarly, using the Add button will also add a fixture to the drawing using the latest definition from Fixture Studio. If a drawing is already open then fixtures already placed in the drawing will not use any changes loaded during the refresh operation until the drawing is closed and reopened. However, new fixtures added to the open drawing will use the new data.

Deleting Fixtures

Deleting Fixtures is done from the Object Browser.

Note: Fixtures can also be deleted using AutoCAD tools.

Sequence of Actions Required

There are two potential ways of deleting fixtures. The first is to select the required fixture first.

1. Select required fixture or fixtures and right click to confirm selection.
2. Click the Delete icon.
3. The selected fixtures will be deleted.

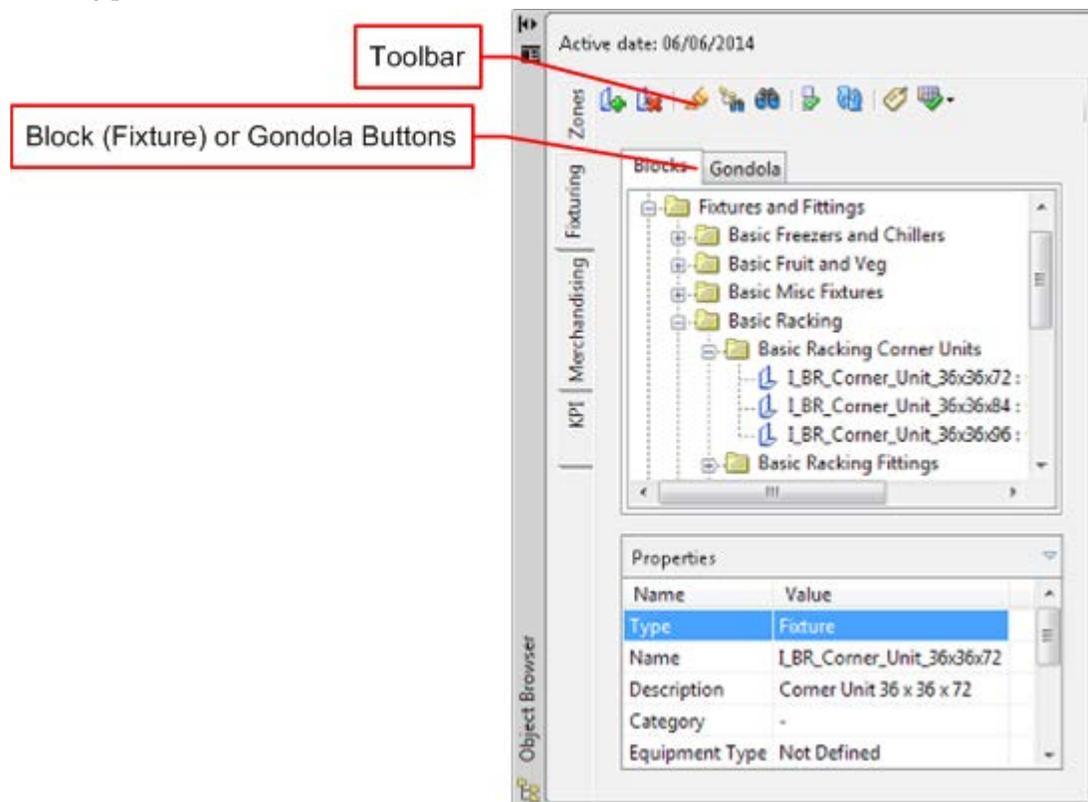
The alternative is to select the delete option first.

1. Click the Delete icon
2. Select required fixture or fixtures.
3. Right click to confirm selection and the fixtures will be deleted.

Either way is valid. This example will use the latter option of selecting the delete option first and the fixtures last.

Deleting Fixtures

Deleting products can be carried out as follows:



1. Select the Fixtures Button on the Merchandising tab of the Object Browser
2. Select the Delete option from the Toolbar
3. Selecting Fixtures

On clicking Delete Fixture, the command line in Planner will prompt users to select fixtures.

```
Command:
Select objects:
```

These can be selected by standard AutoCAD methods including left clicking individual fixtures or using window and crossing selection boxes. In this instance, four fixtures have been selected by left clicking, the information being reflected in the command line.

```
Select objects: 1 found, 4 total
Select objects:
```

Note: Clicking on the products themselves will not be effective - deleting products requires the user to select the parent fixtures for the products. Accordingly, users should left click on the fixture itself or use window and crossing selection boxes that encompass both the product and its parent fixture.

On right clicking to complete the selection, the fixtures will be deleted.

Fixture Highlighting Options

There are two highlighting options available on the Fixturing toolbar.

- Highlight Fixture
- Highlight Selected Fixture in Tree



	Highlight Fixture in Floor Plan	If selected, selecting a fixture in the Object Browser Fixture Hierarchy will cause the pertinent fixture to be highlighted in the floor plan. The exact nature of the highlighting will depend on selections made in the Fixturing Tab of the Configuration Module.
	Highlight selected item in tree	If selected, selecting a fixture in the floor plan will cause the pertinent fixture to be highlighted in the Object Browser Fixture Hierarchy.

Highlight Fixture

Highlight zone allows a user to find a fixture in the floor plan. The option has to be turned on by toggling the icon on the Fixturing toolbar so it is depressed. After the icon has been toggled on, highlighting any fixture in the fixture hierarchy will cause the selected fixture to be highlighted in the floor plan. The highlighting method will depend on setting in the Fixturing tab of the Configuration module.

Note: It is recommended that the Highlight Fixture option be left off until needed - leaving it on may have a marginal impact on performance in the floor plan.

Highlight Selected Item in Tree

Highlight Selected Item in Tree allows a user to select a fixture in the floor plan and have it highlighted in the Fixture Hierarchy in the Object browser. The option has to be turned on by toggling the icon on the Fixturing toolbar so it is depressed. Clicking on the boundary of the fixture in the floor plan will then cause that fixture to be highlighted in the hierarchy.

Note: It is recommended that the Highlight Fixture in Tree option be left off until needed - leaving it on may have a marginal impact on performance in the floor plan.

Finding Fixtures in the Hierarchy

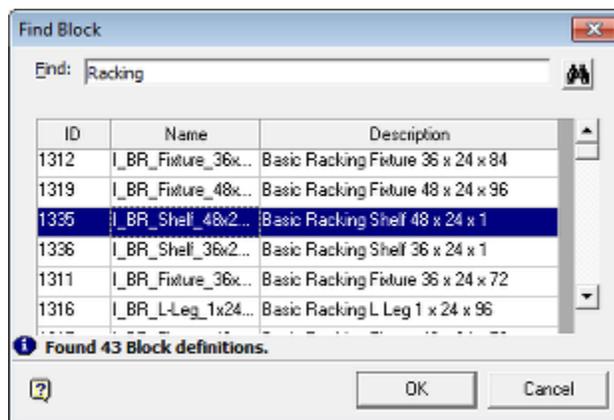
Find in Tree allows users to search for fixtures in the Fixture Hierarchy.



Find

This option brings up the Find dialog box, allowing users to search for objects in the Fixture Hierarchy.

Clicking the icon will bring up the Find Block dialogue box.



To use the dialogue box:

1. Type a text string into the text box
2. Click on the search Icon
3. Any fixtures with a name matching the search string will be listed
4. To select a fixture in the hierarchy, highlight it and click the OK button

Fixture Attributes

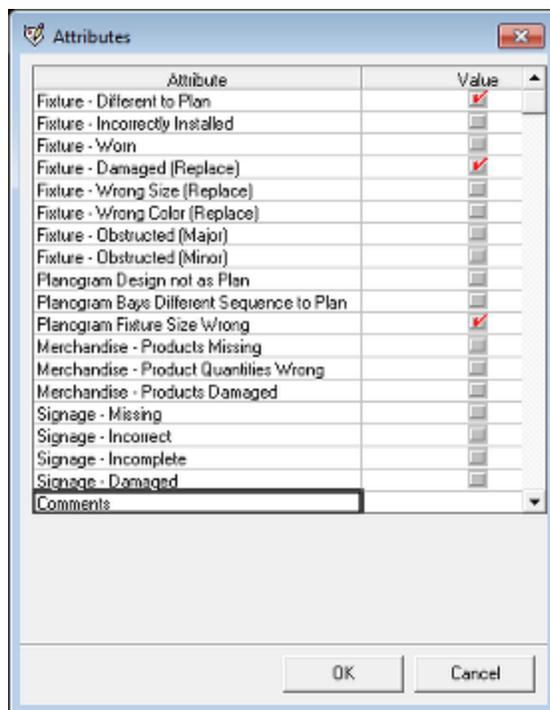
Fixture Attributes can be assigned by selecting a fixture or fixtures and clicking on the Fixture Attribute icon in the toolbar.



Show Attributes

This option shows the fixture attributes for any selected fixtures. Fixture attributes are customizable items of information assigned to specific fixtures.

This will bring up the Fixture attributes dialogue box. If multiple fixtures are selected, only fields with common data will display information. The list of Fixture Attributes that are displayed is configured in Fixture Studio and can be customized to suit an individual retailer's requirements.



Fixture attributes can have many uses. In the above screen shot, the fixture attributes are configured to check on in-store compliance. Macro Space Management's sister product in the Macro Space Planning suite (In-Store Space Collaboration) can be used on the floor of a store enabling a user to walk around and physically examine the fixtures. Fixtures that have problems relative to the current version of the floor plan can have the check boxes ticked.

The same data is visible in Macro Space Management (MSM) and In-Store Space Collaboration (ISSC). After a store survey using ISSC, MSM users can run a KPI to determine which fixtures have attributes assigned. This enables the floor plan to be updated by taking into account what is physically present in a store.

Promotional Fixtures

Certain fixtures with a store are known to generate high levels of profits. Examples include end caps on gondolas and displays by the checkout designed to increase impulse buying. Macro Space Planning allows specific fixtures in a floor plan to be designated as Promotional Fixtures. These fixtures can then be readily identified. They can then be used for special offers, promotions or the introduction of new products, etc.

Some retail chains also have a specific team responsible for merchandising promotional fixtures - designating the fixtures as such assists in identifying which fixtures that team is responsible for the merchandise on.

Assigning Promotional Fixtures

Once fixtures have been placed in a floor plan, they can be designated as promotional fixtures by using the **Promotional Fixtures** option from the Blocks toolbar of the Fixturing tab of the Object Browser.



Promotional
Fixtures

This option allows the user to assign or remove the Promotional Attribute and to highlight fixtures with the promotional attribute.

Identifying Promotional Fixtures

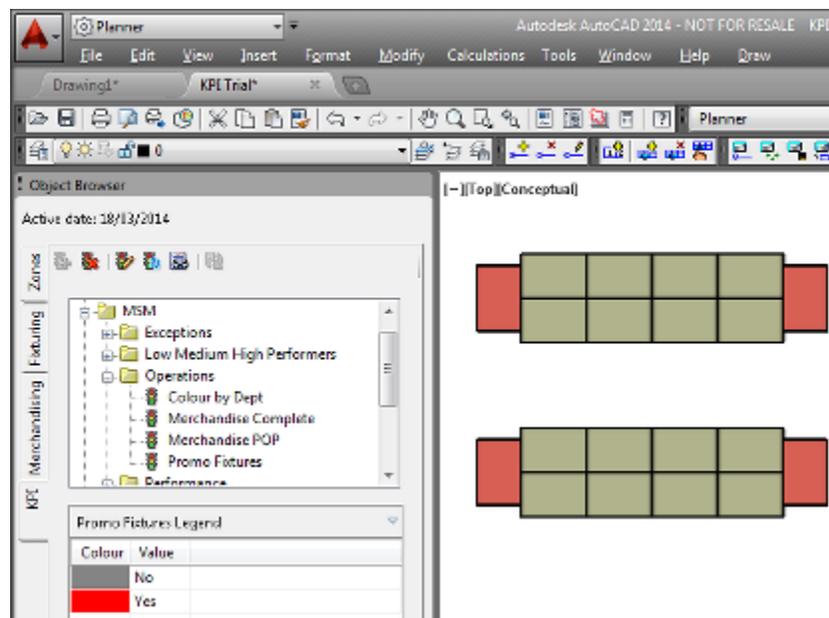
Once promotional fixtures are assigned, they can be identified in two ways in a floor plan.

Highlight

The **Promotional Fixtures** option includes a highlight option in the drop down list of options. This will cause any fixtures that have been designated as Promotional fixtures to be highlighted in the floor plan. The exact highlighting method will depend on the options selected in the Merchandising Tab of the configuration module.

Key Performance Indicator

Another way of identifying promotional fixtures is with KPI's. Without the KPI selected, the Promotional Fixtures are difficult to identify. With the KPI active, the promotional fixtures are readily apparent. In this case the end caps have been designated as promotional fixtures.



Note: one of the easiest ways of seeing fixture KPI's is to use the **Conceptual Visual Style** option from the **View > Visual Styles** menu. This causes the entire fixture to color, not just the outlines.

Using Promotional Fixtures

There are a number of ways of using promotional fixtures. One possible method is:

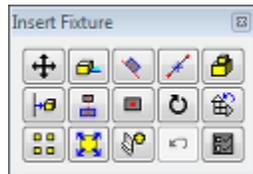
1. Identify fixtures that have a high visibility to shopper traffic. Such fixtures include end caps on gondolas, display on checkout, power wings and bins in the centre of aisles.
2. Use the Promotional Fixture on the Object Browser to designate those fixtures as promotional fixtures.
3. Bay number these fixtures differently from other fixtures in the floor plan - possibly with a P suffix.
4. It is then possible to report on and merchandise those fixtures separately to the other fixtures in the store - for example it would be possible to produce a weekly store plan showing promotional fixtures only that would allow a constantly changing program of special offers.

The Insert Fixture Dialog Box

Overview of Insert Fixture Dialogue Box

Options in the Insert Fixture Dialog Box

The **Insert/Edit Fixture** dialogue box appears when the Add Fixture icon is clicked on the Fixtures toolbar.



Note: The availability of some of these options depends on settings within the Fixturing tab of the Configuration Module. For example the arraying option will not be available if the Auto Reinsert option is checked.

This dialogue box contains a series of options for manipulating the fixture during placement.

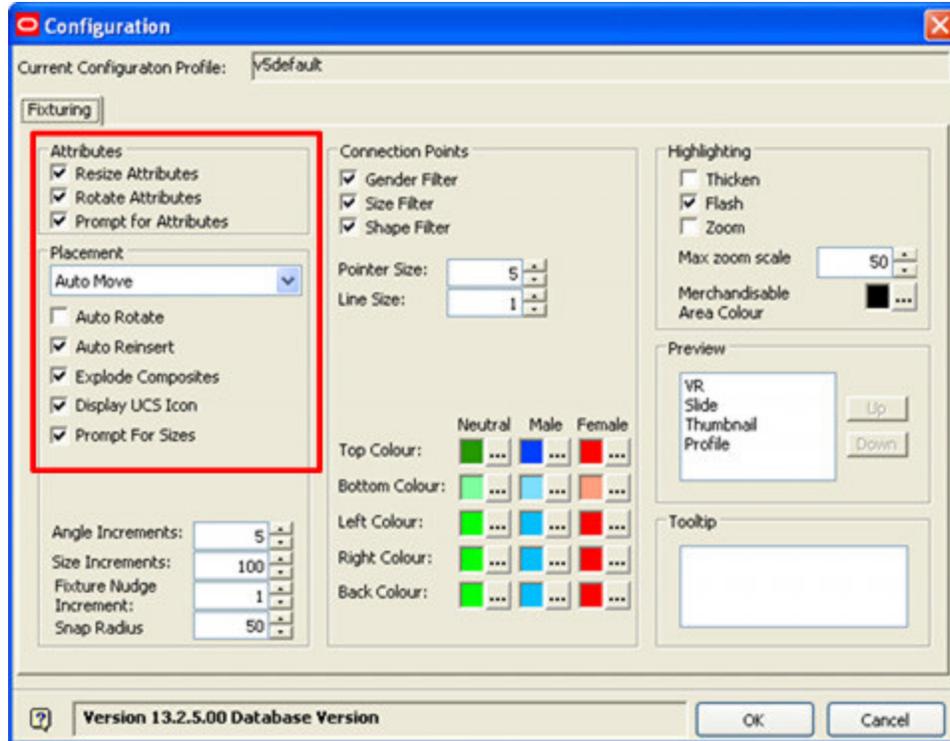
Icon	Description
	Move Fixture
	Attach Fixture to Another
	Move and Align Fixture
	Move Fixture to be between others
	Place Fixture on Top of Another
	Offset the Fixture
	Place Fixture In-Line with Another
	Change Justification
	Rotate the Fixture
	Rotate the UCS

Icon	Description
	Create an Array of Fixtures
	Change the Size of the Fixture
	Add the same fixtures as the last added
	Undo the last change
	Modify the Options for this Fixture

The Insert Fixture dialog box is used by toggling on the required option. Click on each button to activate the required option. When that operation is completed, select the next option if one is required. When the fixture placement options is satisfactory; complete insertion by clicking on the cross in the upper right corner of the Insert/Edit Fixture dialogue box, or press <Escape>.

Configuring Operation of the Insert Fixture Dialog Box

The exact way the Insert Fixture dialog box behaves is configured in the Fixturing Tab of the Configuration module. This can be accessed by clicking the Properties icon in the Fixturing toolbar on the Object Browser.



Placement Options

Placement Options determine which button in the Insert Fixture dialog box is active when it is first activated. There are three options in the drop down list:

- Auto Move makes the move button active.
- Auto Attach makes the Attach button active.
- Auto Align makes the Align button active.

Other Options

Other options can be selected by means of the check boxes.

- Auto Rotate requires the user to specify a rotation angle when the fixture is first inserted.
- Auto Reinsert allows the user to add additional copies of the fixture by left clicking in the floor plan.
- Explode Composites causes all blocks specified as composites in Fixture Studio to be exploded into their component blocks when inserted into the floor plan. (This feature is not currently active)
- Display UCS Icon controls display of the UCS icon in the floor plan. (This feature is not currently active).
- Prompt for Sizes will cause a dialog box to appear when a stretchable block is placed in the floor plan. This allows the user to select the specific size for the block.

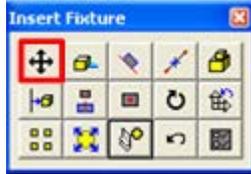
Recommended Options

New users may find the following settings easiest to use when first using the Insert Fixture dialog box.

- Placement option set to Auto Move.
- Auto Rotate and Auto Reinsert set to off.

- Explode Composites, Display UCS Icon and Prompt for Sizes set to on.

Move Fixture option

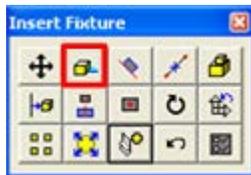


This option will be active when the Insert Fixture dialog box first opens if the Auto Move option has been chosen in the Fixturing tab of the configuration module.

If toggled on, the fixture being currently inserted will place in the floor plan where the cursor is left clicked. Clicking in the floor plan will also turn the move option off in the dialog box. If it is desired to move the fixture again, the Move button should be toggled on, whereupon the fixture can be moved and repositioned by right clicking in the floor plan again.

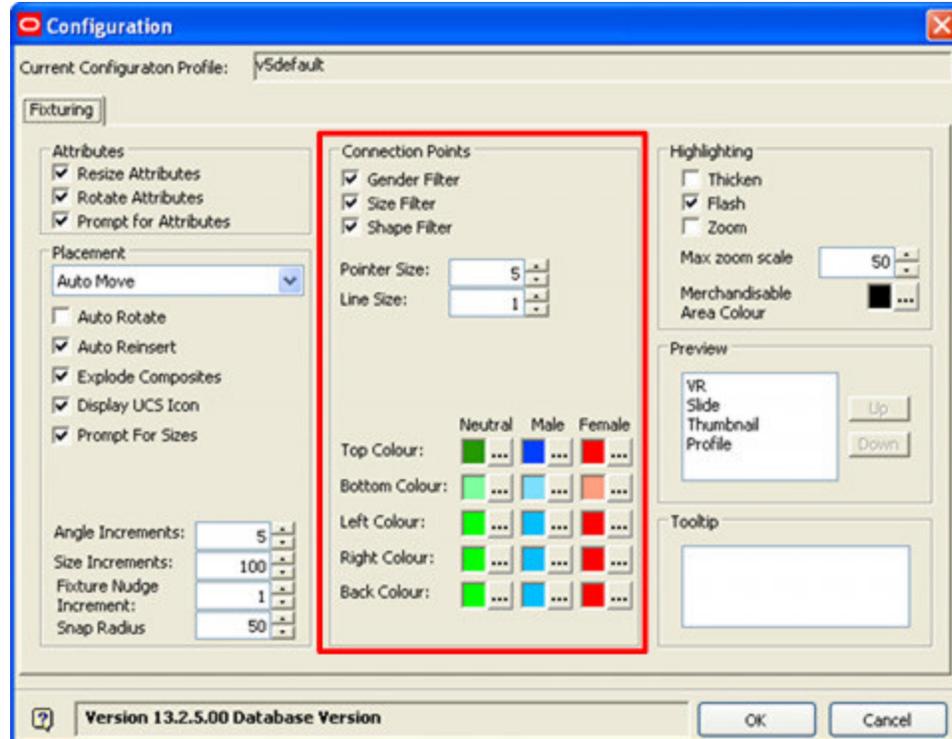
If, there are no further operations to carry out, placement is completed by clicking on the x in the upper right part of the Insert/Edit Fixtures dialogue box, or pressing <Escape>.

Attach Fixture to Another option



This option will be active when the Insert Fixture dialog box first opens if the Auto Attach option has been chosen in the Fixturing tab of the configuration module.

Auto Attach allows two fixtures to be snapped together in a precise alignment by means of connection points. Connection points are assigned to fixtures in the Connections Tab in the Block Details dialog box in Fixture Studio - see the Fixture Studio help file for more information. The behavior of the connection points is controlled by settings in the Fixturing tab of the Configuration module. This can be accessed by clicking the Properties icon in the Fixturing toolbar on the Object Browser.



The behavior of the connection points is provided by the three filtering options provided.

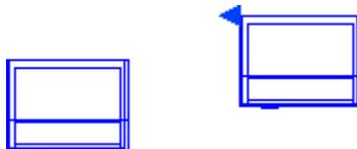
- If the Gender filter is on, male will only connect to female or neutral gender. Male (for example) cannot connect to male.
- If the Size filter is on, only connection points of similar or overlapping sizes will connect together. (This feature is currently not active).
- If the Shape filter is on, only connection points of similar shapes will connect together.

The appearance of the connection points is governed by further options.

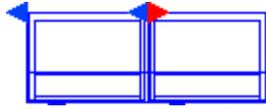
- The Pointer Size allows the display size of the connection points to be adjusted.
- Line Size affects the size of connection lines. This feature is only active in the Merchandise module.
- The colors affect the visual appearance of the connection point.

Using the Attach Fixture Option

In order to use the Attach Fixture option, there must already be at least one fixture with compatible connection points present in the floor plan. The default connection point will be active on the fixture being placed:



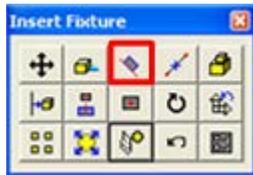
When the active fixture comes within a set proximity of any other fixture with compatible connection points, the two fixtures will snap together in an alignment determined by the position of the connection points.



If, there are no further operations to carry out, placement is completed by clicking on the x in the upper right part of the Insert/Edit Fixtures dialogue box, or pressing <Escape>.

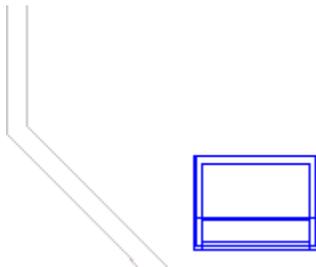
Move and Align Fixture option

Note: Move and Align can be used in conjunction with the Offset the Fixture option. See the section on this option for more information.

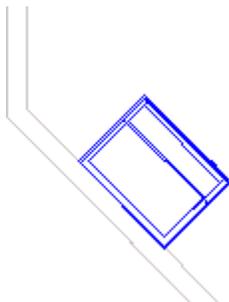


This option will be active when the Insert Fixture dialog box first opens if the Auto Align option has been chosen in the Fixturing tab of the configuration module.

This allows the fixture to be aligned with lines in the floor plan. An example of its use would be to align a fixture with a line representing a wall. In the example below, the fixture being placed in the floor plan is first brought into proximity with the line representing the wall. (In this instance the wall is in an associated architectural plan).

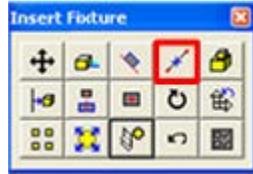


When the fixture reaches a sufficiently close proximity to a suitable line, it will automatically align to that line.



If there are no further operations to carry out, placement is completed by clicking on the x in the upper right part of the Insert/Edit Fixtures dialogue box, or pressing <Escape>.

Move Fixture to Between Others option



This option can only be selected after the fixture has been placed in the floor plan by another command from the Insert Fixture dialog box. It is used to place the fixture midway between two selected points.

Note: This command works well in conjunction with the AutoCAD Object Snap (OSNAP) option.

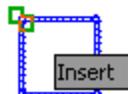
In this instance it is desired to place a fixture midway between the two existing fixtures in the floor plan.



After selecting the **Move Fixtures Between Others** option in the dialog box, it is then necessary to click once in the floor plan to return focus to the floor plan. A prompt will appear in the command line asking the user to select the starting point of the line from which the midpoint will be selected.

```
Move To?
Choose a position to calculate offset from ?
```

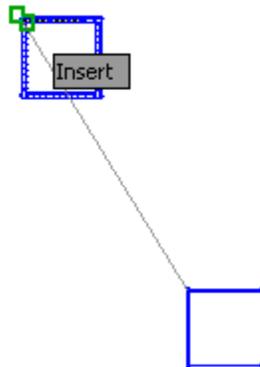
Clicking on this icon will bring up a dialogue at the cursor asking for the start position of the line on which the fixture will be placed at the midpoint. In this instance the insertion point of the first fixture has been selected by left clicking it.



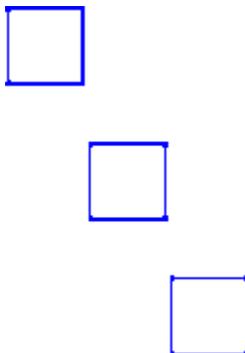
Another prompt will appear in the command line asking the user to select the end point of the line from which the midpoint will be selected.

```
Choose a position to calculate offset from ?
Choose a position to calculate offset to ?
```

The insertion point of the second fixture is selected by left clicking it.

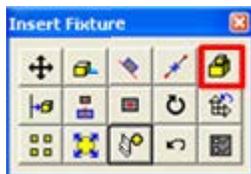


The insertion point of the fixture being placed will then be positioned exactly midway between the two selected points.

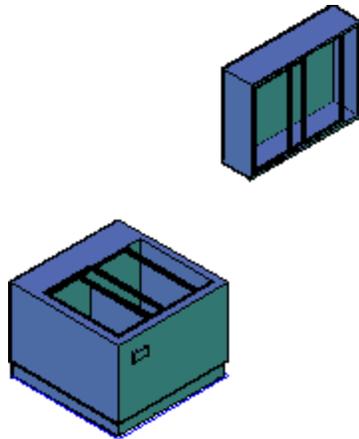


If there are no further operations to carry out, placement is completed by clicking on the x in the upper right part of the Insert/Edit Fixtures dialogue box, or pressing <Escape>.

Place Fixture on Top of Another option



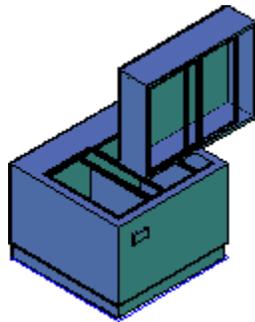
This option can only be selected after the fixture has been placed in the floor plan by another command from the Insert Fixture dialog box. It is used to place the active fixture on top of a selected object. In the example below, it is intended to place the condiment cabinet on top of the freezer.



After selecting the **Place Fixture on Top of Another** option, left click in the floor plan to transfer the focus to the floor plan. A prompt will appear in the command line

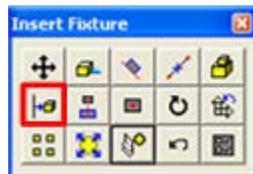
```
Move To?
Select an object.
```

On left clicking an object to select it, the insertion point of the object being placed on top will be placed in the centre of the selected object.

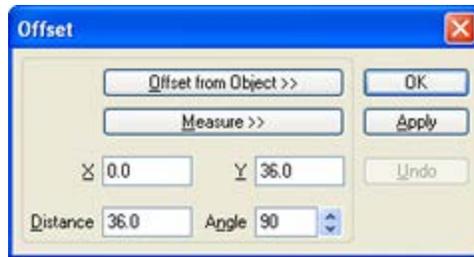


Note: In cases like the above example, further operations may be necessary to complete positioning the fixture.

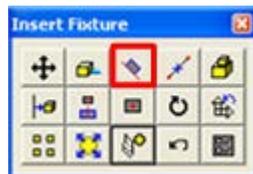
Offset the Fixture option



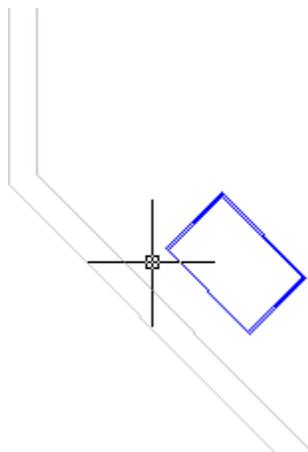
The Offset the Fixture option is used in conjunction with the Move and Align function. Move and Align will align the fixture being placed in the floor plan with a physical fixture such as wall. Additional use of the Offset the Fixture allows the user to align at a specific distance from the selected object. The initial stage is to place the fixture in the floor plan with a left click to temporarily position it. Clicking the Offset the Fixture icon will bring up the Offset dialog box.



This allows the required offset to be entered - all offsets being relative to the front. In the above example an offset of 36" in the Y axis will place the fixture 36" away from the wall that will be selected using the **Move and Align** option. Click OK and then select Move and Align.

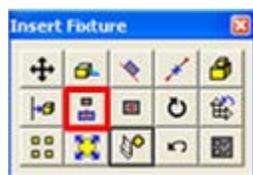


When the mouse cursor is close to a wall or other line, it will align relative to that wall at the specified offset. Left click to place the fixture.

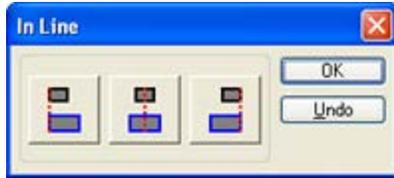


If there are no further operations to carry out, placement is completed by clicking on the x in the upper right part of the Insert/Edit Fixtures dialogue box, or pressing <Escape>.

In-Line the Fixture option



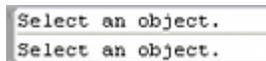
The In-Line the Fixture option allows users to align the fixture currently being placed with another fixture already in the floor plan. Clicking in In-Line the Fixture icon brings up the In-Line dialogue box.



The functionality is used as follows: in the example below, it is desired to align the blue fixture (in the process of being placed) with the already placed red fixture. Accordingly, one of the alignment buttons in clicked in the In-Line dialog box.



This will result in a prompt to select a fixture.



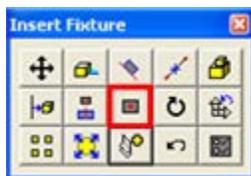
Click in the floor plan to change focus there and then click on the outline of the required fixture. The fixtures will be moved so they are in the desire alignment.



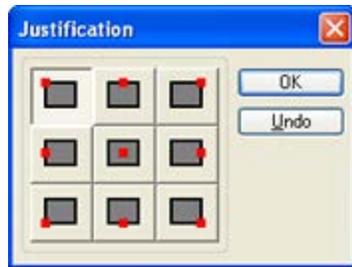
Control will also be returned to the In-Line dialog box. Click the OK button to confirm the placement and return to the Insert Fixture dialog box.

If there are no further operations to carry out, placement is completed by clicking on the x in the upper right part of the Insert/Edit Fixtures dialogue box, or pressing <Escape>.

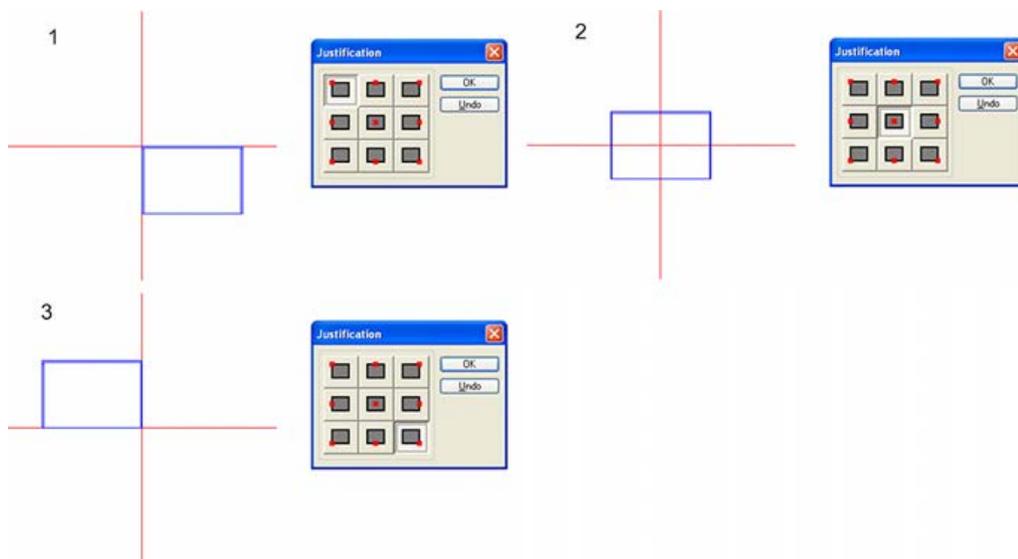
Change Justification option



Clicking on the Change Justification icon brings up the Justification dialogue box.

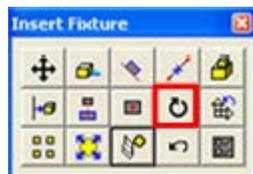


This dialog box allows the datum used for inserting the fixture to be temporarily modified. In diagram 1 below, a fixture with a 'back-left' insertion point has been inserted using the centre of the red cross as a datum. In diagram 2, the justification has been changed to 'centre' and the centre of the fixture has moved over the datum point. Similarly, in diagram 3, the justification has been changed to front right and the location of the fixture has changed again.

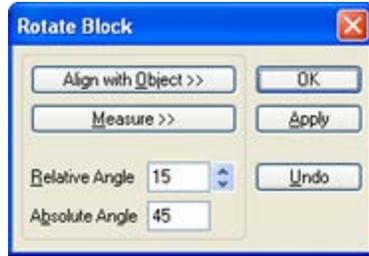


The Undo button will not be active until at least one change in justification has been made. Clicking undo will then return the fixture to its previous justification. Clicking OK will confirm the placement of the fixture and return the user to the Insert Fixture dialog box.

Rotate the Fixture option



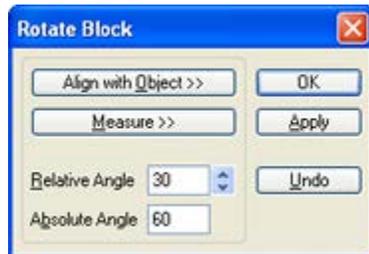
The rotate fixture option allows a fixture to be rotated during placement. Clicking the rotate icon brings up the Rotate Block dialogue box.



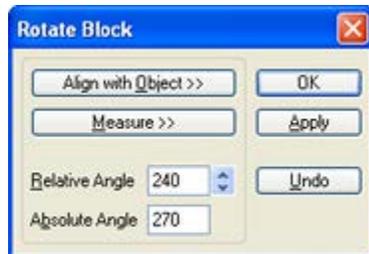
Relative and Absolute Angles

The **Relative Angle** is the angle the fixture will be rotated through each time the apply button is clicked. The **Absolute Angle** is the angle relative to the WCS that the fixture will be rotated to. Altering one of the values causes the result of the change to be reflected in the second value.

- **Relative Angle**
- If the relative angle is set, the value for the absolute angle is the angle of the fixture relative to the WCS after the rotation has been executed by clicking the Apply button.



- In the above example a 30 degree relative rotation will be applied. After the rotation the UCS will be at a 60 degree angle to the WCS.
- **Absolute Angle**
- If the absolute angle is set, the relative angle is the angle the fixture will be rotated through to get to the specified absolute angle relative to the WCS.

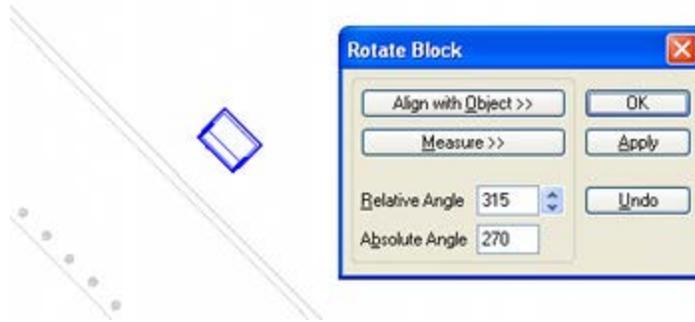


- In the above example, the UCS is to be set to an absolute angle of 270 degrees relative to the WCS. This will require a relative rotation of 240 degrees from its present position.

Align with Object

The usual use of the Align with Object option is to align with an object such as a wall in an architectural plan. In order to do so:

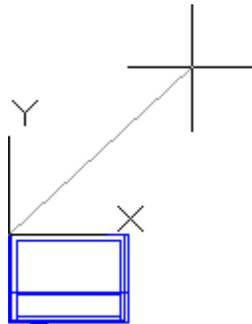
1. Click the Align with Object Button.
2. Click once in the floor plan to change the focus to the floor plan.
3. Click on an object to set the alignment for the fixture.
4. The fixture will rotate with the front face parallel to the selected object.



In the above example, the wall in the architectural plan has been used for alignment purposes, causing the fixture to rotate accordingly.

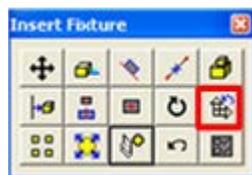
Measure

Clicking the **Measure** button allows the user to manually draw a line defining the rotation angle for the block. The initial point of the line has its origin at the insertion point of the block. The user sets the other end by left clicking at another point in the floor plan.



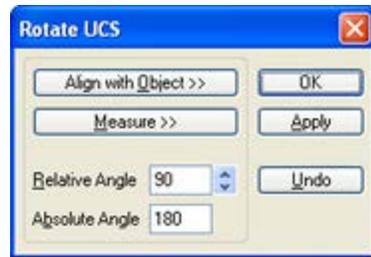
If there are no further operations to carry out, placement is completed by clicking on the x in the upper right part of the Insert/Edit Fixtures dialogue box, or pressing <Escape>.

Rotate the UCS option



This option allows users to rotate the UCS (Universal Coordinate System). Planner has a World Coordinate System (WCS) that has a fixed set of orientations. Using the UCS allows the user to set a custom set of XY coordinate specific to the fixture placement. An example would be aligning relative to a wall.

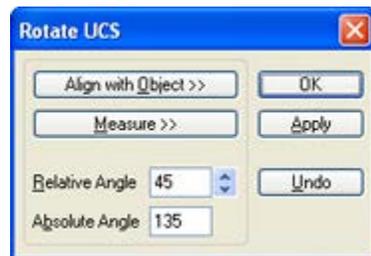
Clicking the Rotate the UCS icon brings up the Rotate UCS dialog box.



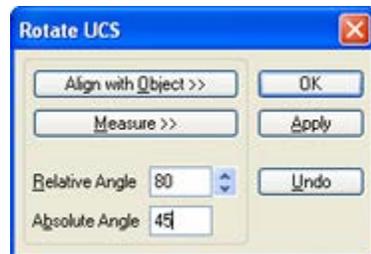
Relative and Absolute Angles

The **Relative Angle** is the angle the UCS will be rotated through each time the apply button is clicked. The **Absolute Angle** is the angle relative to the WCS that the UCS will be rotated to. Altering one of the values causes the result of the change to be reflected in the second value.

- **Relative Angle**
 - If the relative angle is set, the value for the absolute angle is the angle relative to the WCS after the rotation has been executed by clicking the Apply button.



- In the above example a 45 degree relative rotation will be applied. After the rotation the UCS will be at a 135 degree angle to the WCS.
- **Absolute Angle**
 - If the absolute angle is set, the relative angle is the angle the present UCS will be rotated through to get to the specified absolute angle relative to the WCS.



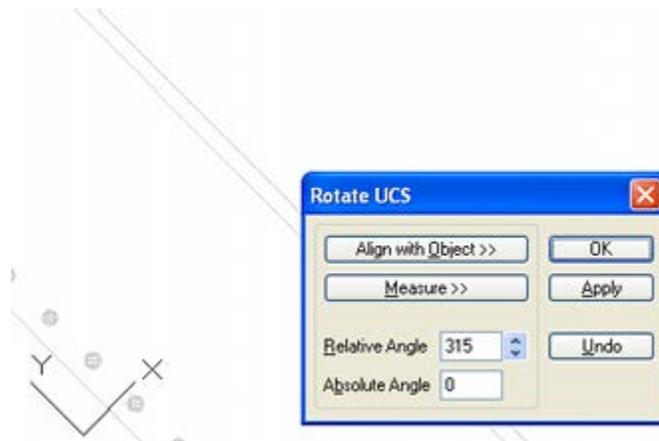
- In the above example, the UCS is to be set to an absolute angle of 45 degrees relative to the WCS. This will require a relative rotation of 80 degrees from its present position.

Align with Object

The usual use of the Align with Object option is to align with an object such as a wall in an architectural plan. In order to do so:

1. Click the Align with Object Button.
2. Click once on the floor plan to change the focus to the floor plan.
3. Click on an object to set the alignment for the UCS.

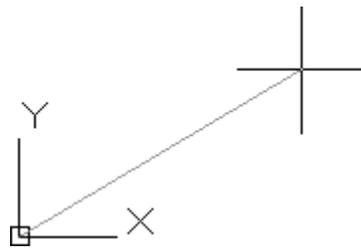
4. The UCS will be set with the X axis perpendicular to the selected object and the Y axis parallel to it.



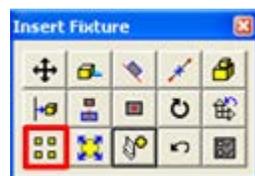
In the above example, the wall in the architectural plan has been used for alignment purposes, causing the UCS (lower left) to rotate accordingly.

Measure

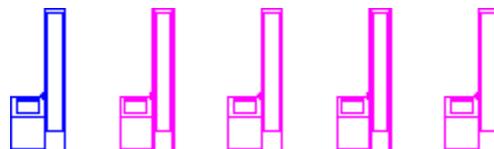
Clicking the **Measure** button allows the user to manually draw a line defining the X axis of the revised UCS. The initial point of the line has its origin at 0, 0 in the floor plan. The user sets the other end by left clicking at another point in the floor plan.



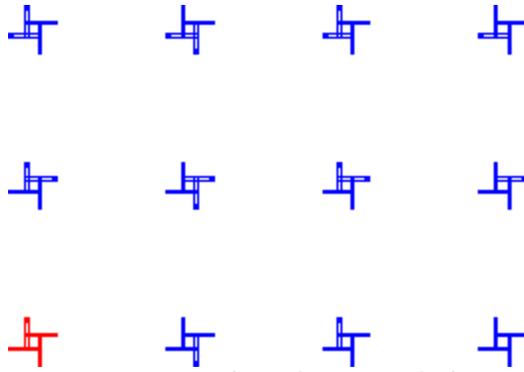
Create an Array of Fixtures option



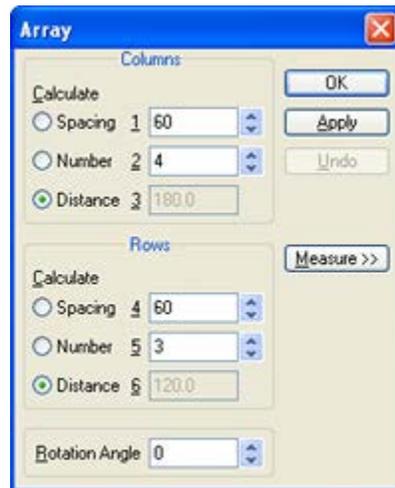
The Create an Array of fixtures option allows users to insert a single fixture into the floor plan then create a regular array of that fixture. In the example below the original checkout (in blue) has been arrayed to form a line of checkouts.



In the second example, a single 4-Way clothing fixture (red) has been inserted into the floor plan and then arrayed to lay out part of a clothing department.



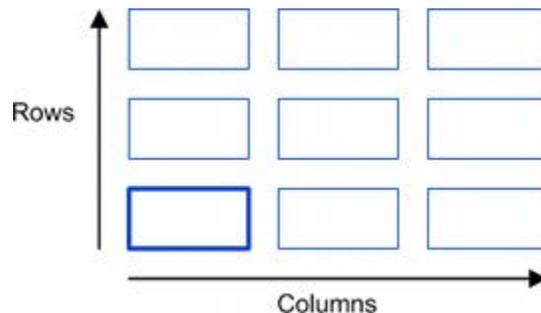
To create an array, first place a single fixture into the floor plan. On clicking the **Create an Array of Fixtures** option, the Array dialog box will appear.



Options

Columns and Rows

Row and columns refers to the number or rows and columns of fixtures that will be present after the array has been created.



Apply Button

The apply button will result in the current settings in the Array dialog box being applied to create a temporary array in the floor plan. Changing the setting in the Array dialog box and clicking apply again will result in the displayed array being changed to match the new settings.

Undo Button

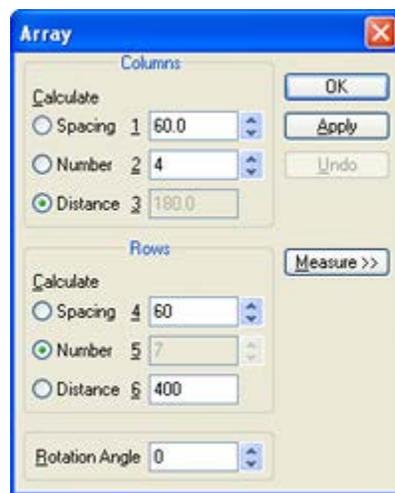
The Undo button will not be active until at least one trial version of an array has been placed in a floor plan. Clicking undo will take the use back to the previous version of the placed array. Clicking the Undo button will not change the settings in the Array dialog box.

OK Button

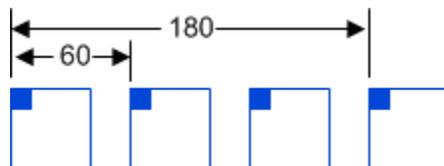
The apply button places a temporary version of the array in the floor plan. The OK button will make that array permanent and return the user to the Add Fixtures dialog box.

Spacing, Number and Distance

Spacing, number and distance are inter-related. The radio button selects the field that is the result of multiplying the other two fields together.

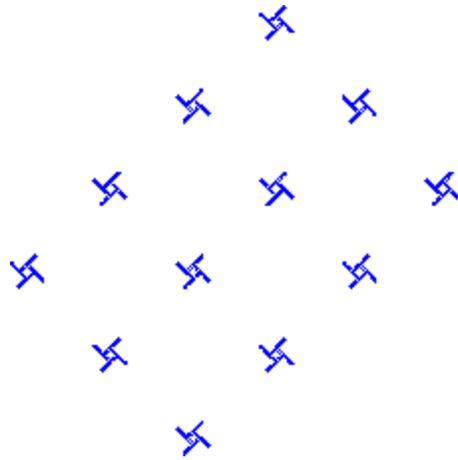


- Spacing is the distance between successive insertion points. If the fixture is 24 inches long and the spacing is 60 inches, the insertion points will be 60 inches apart with a 36 inch gap between fixtures.
- Number is the number of fixtures in that direction.
- Distance is the total distance the insertion points will occupy - this value does not take into account the dimensions of the fixture. Four fixtures with a spacing of 60 inches will therefore occupy a distance of 180 inches.



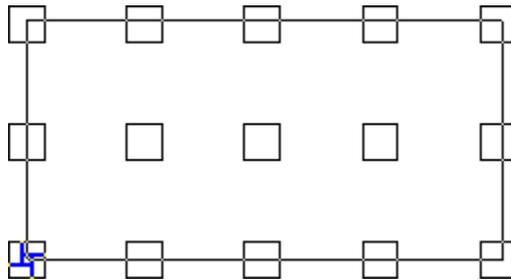
Rotation Angle

The rotation angle allows the array to be drawn at a specified angle.



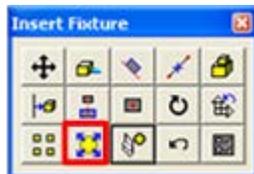
Measure

Measure allows the user to select an area to draw the array in. The fixtures will be spaced according to the current settings in the array dialog box. On clicking the Measure button, the user will be taken to the floor plan. The user can then draw a rectangle from the fixture that is the origin of the array. Fixture outlines will automatically populate the rectangle. On left clicking to specify the final dimensions of the rectangle, the user will be taken back to the Insert Fixture dialog box. Simultaneously, the distance values in the dialog box will be updated. The user should then click the Apply or OK buttons to draw the array.

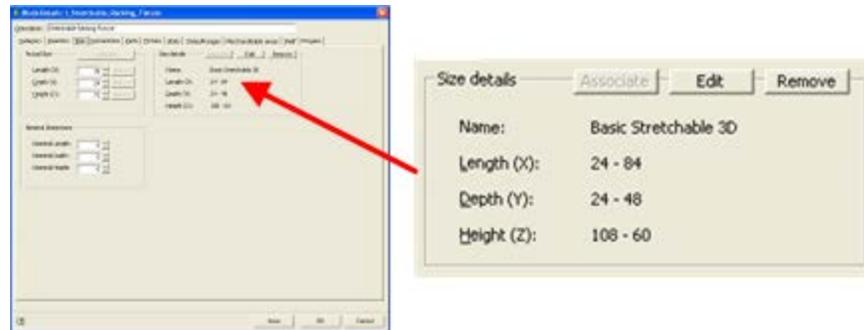


If there are no further operations to carry out, placement is completed by clicking on the **x** in the upper right part of the Insert/Edit Fixtures dialogue box, or pressing <Escape>.

Change the Size of the Fixture option



This button will allow the fixture to change in size during insertion. This will only work for specific fixtures - those that have a size assigned in the Sizes tab of the Block Details dialog box in Fixture Studio. Such blocks are called stretchable.

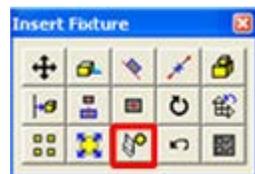


If the block being inserted is stretchable and the **Change the Size of the Fixture** option is active, the Size dialog box will appear. This allows the user to set the size of the stretchable fixture to any value within the parameters configured in Fixture Studio.



On clicking OK, the user will be returned to the floor plan with the Insert Fixture dialog box active. If there are no further operations to carry out, placement is completed by clicking on the x in the upper right part of the Insert/Edit Fixtures dialogue box, or pressing <Escape>.

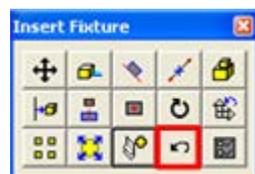
Insert a Copy of the Current Fixture



This option allows the user to insert another instance of the last block to be inserted by simply clicking on the icon. This removes the need to re-select the fixture from the Object Browser. On clicking the Insert a Copy of the Current Fixture icon, another instance of the fixture will appear in the floor plan and the button selected will default to that selected in the Placement options of the Fixturing tab of the Configuration module.

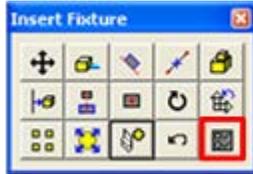
If there are no further operations to carry out, placement is completed by clicking on the x in the upper right part of the Insert/Edit Fixtures dialogue box, or pressing <Escape>.

Undo the Last Change option

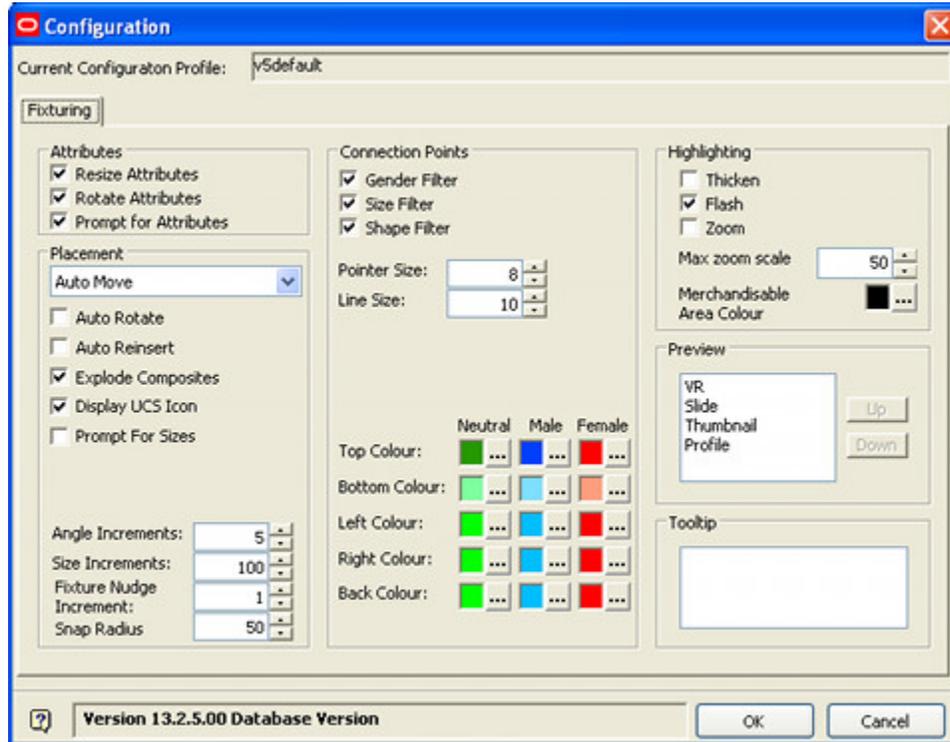


The Undo the Last Change option undoes the effect of the last action carried out in the Insert Fixture dialog box. It will not be active until the first action has been completed.

Modify the Options for this Fixture



Selecting this option brings up the Fixturing Tab from the Configuration Module.

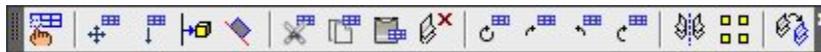


This allows users to configure some options determining how the Insert Fixtures dialog functionality will behave while the dialog box is active. Once changes have been made to the tab, it can be closed and another option selected on the Add Fixture dialog box.

Fixture Swap and Manipulation

Overview of Fixture Manipulation

The Planner module is integrated with AutoCAD. Experienced AutoCAD users can make use of the majority of AutoCAD functionality to lay out floor plans in the Planner module. However, AutoCAD is a complex program and some users carrying out store planning tasks may not be familiar with AutoCAD functionality. Accordingly, Planner has been provided with some Fixture Manipulation tools. These enable users to perform a variety of operations including moving, rotating and aligning fixtures. One way of accessing these is from the Fixturing toolbar.



Fixture Manipulation and Child Objects

One of the advantages of using the Fixture Manipulation tools is that they control child objects. The Planner floor plan is divided into layers, each containing a particular type of object - such as fixtures or products. The display or selection of objects is often controlled by turning off or locking layers. If purely AutoCAD tools are used, objects on the turned off or locked layers are not included in the selection. This can result in some objects being moved, while their child objects are left in their original location. Another problem that can occur when using AutoCAD selection tools is that it is possible to select objects that it is not intended to move. For example the selection set could include blocks representing pillars or columns in a store. Fixture Manipulation filters the selected objects so that only fixtures and merchandise are moved, together with their associated annotation and bay numbers.

The available Fixture Manipulation options are:

Group On or Group Off for Fixtures

Gondolas are items of equipment placed in a precise relationship to each other. When manipulating gondolas it is sometimes useful to manipulate them as a whole and it is sometimes useful to manipulate individual parts of a gondola. If Fixture Grouping is On, selecting one part of a gondola will select all parts of that gondola. If Fixture Grouping is Off, individual parts of a gondola can be selected without selecting the whole.

Move Fixtures

Move fixtures enables the user to move the selected items of equipment (together with any merchandise and annotation) any direction in the X and Y axes. The elevation of the equipment remains unchanged.

Slide Fixtures

Slide fixtures enables the user to move the selected items of equipment (together with any merchandise and annotation) at 90 degree increments to the present orientation and position of the fixture. This enables the user to move the selected fixtures left, right, forward or back. The elevation of the equipment remains unchanged.

Offset Fixtures

Align fixtures enables the user to take a selected set of equipment (and its merchandise and annotation) and align it relative to another object in the floor plan. It is also spaced a selected distance (offset) from that object. This might be used to take a gondola and place it a specific distance from a wall.

Match Rotation

Match Rotation enables the user to take a selected set of equipment (and its merchandise and annotation) and align it relative to another object in the floor plan.

Cut

Cut removes the selected equipment (and its merchandise and annotation) from the floor plan and pastes them to the clipboard. If a planogram has been 'exploded' (shows full detail of shelves and merchandise), this detail will also be pasted to the clipboard.

Copy

Copy takes details of the selected equipment (and its merchandise and annotation) from the floor plan and pastes the information into the clipboard. If a planogram has been 'exploded' (shows full detail of shelves and merchandise), this detail will also be pasted to the clipboard.

Paste

Paste takes the information from the clipboard and inserts it into the floor plan. If a planogram has been 'exploded' (shows full detail of shelves and merchandise), this detail will also be pasted to the floor plan.

Delete

Delete removes the selected equipment (and its merchandise and annotation) from the floor plan.

Rotate

Rotate takes the selected equipment (and its merchandise and annotation) and allows it to be rotated by any angle about the geometric center of the selected objects.

Rotate 90 Degrees Clockwise

Rotate 90 Degrees Clockwise takes the selected equipment (and its merchandise and annotation) and gives it a clockwise 90 degree rotation about the geometric center of the selected objects.

Rotate 90 Degrees Anti-clockwise

Rotate 90 Degrees Anti-clockwise takes the selected equipment (and its merchandise and annotation) and gives it an anti-clockwise 90 degree rotation about the geometric center of the selected objects.

Rotate 180 Degrees

Rotate 180 Degrees takes the selected equipment (and its merchandise and annotation) and gives it a 180 degree rotation about the geometric center of the selected objects.

Mirror

Mirror produced a mirror image of a selected set of equipment, merchandise and annotation. The selected objects are 'reflected' about a specified axis.

Array

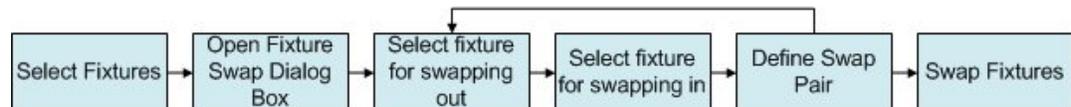
Array takes a selected set of equipment, merchandise and annotation and generates additional rows and columns of that set of objects.

Overview of Fixture Swap

The Fixture Swap functionality allows users to automatically swap selected fixtures in the active floor plan for replacements of a different type. Fixture Swap can be called from the Command Line (AVT_FIXTURESWAP) or from the Fixturing toolbar.



The process works as follows:

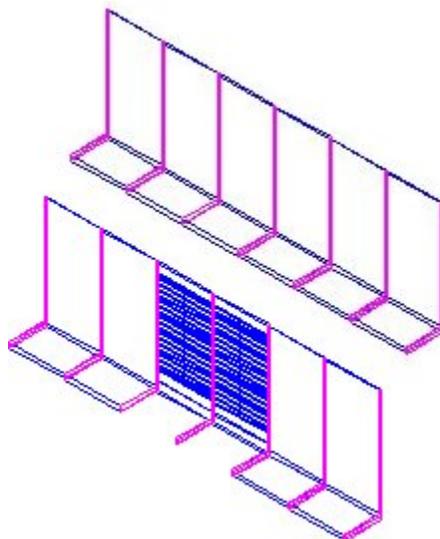


1. The Fixtures it is desired to swap in the floor plan are selected.
2. The Fixture swap dialog box is selected and will populate with the selected fixtures.
3. A fixture is selected to be swapped out.
4. The fixture to be swapped in (replacement fixture) is selected.
5. The two fixtures (in and out) are defined as a swap pair.
6. The user continues to define swap pairs as required.
7. When all swap pairs have been defined, the fixtures are swapped.

Note: it is possible to reverse the first two steps - i.e. open the dialog box first, then select the required fixtures.

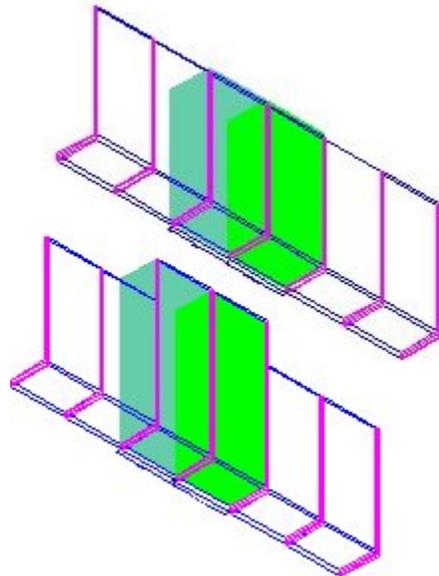
Examples of Fixture Swaps

One example of Fixture Swap is shown below, where it has been decided to replace two racking fixtures with slatwalls - allowing planograms involving hung products to be placed in the future.



Fixture swap also changes the size of planogram placeholders if they are on the fixtures being swapped. In the example below, the original planograms are shown on the rear

gondola run. Two fixtures have been resized - and the planogram placeholders have changed size accordingly. This can be seen in the front gondola run.



Accessing Fixture Swap and Manipulation Options

Fixture Swap

Fixture Swap can be initiated in the following ways:

- From the command line by typing AVT_FIXTURESWAP and pressing Return.
- From the Fixturing Toolbar.



Fixture Manipulation

Fixture Manipulation can be accessed in the following ways:

From the command line by typing in individual commands and pressing Return

Option	Command
Group On/Off	None
Move Fixtures	AVT_MOVE
Slide Fixtures	AVT_SLIDE
Offset Fixtures	AVT_OFFSET
Match Rotation	AVT_MATCH_ROTATION
Cut Fixtures	AVT_CUT
Copy Fixtures	AVT_COPY
Paste Fixtures	AVT_PASTE
Rotate Fixtures	AVT_ROTATE

Option	Command
Rotate Fixtures 90 Degrees Clockwise	AVT_ROTATE_90
Rotate Fixtures 90 Degrees Anticlockwise	AVT_ROTATE_270
Rotate Fixtures 180 Degrees	AVT_ROTATE_180
Mirror Fixtures	AVT_MIRROR
Array Fixtures	AVT_ARRAY

As a keyboard shortcut

Option	Shortcut
Group On/Off	Ctrl + Alt + G
Move Fixtures	Ctrl + Alt + M
Slide Fixtures	Ctrl + Alt + E
Offset Fixtures	Ctrl + Alt + O
Match Rotation	Ctrl + Alt + L
Cut Fixtures	Ctrl + Alt + X
Copy Fixtures	Ctrl + Alt + C
Paste Fixtures	Ctrl + Alt + V
Delete Fixtures	Ctrl + Alt + D
Rotate Fixtures	Ctrl + Alt + R
Rotate Fixtures 90 Degrees Clockwise	Ctrl + Alt + Right Cursor Arrow
Rotate Fixtures 90 Degrees Anticlockwise	Ctrl + Alt + Left Cursor Arrow
Rotate Fixtures 180 Degrees	Ctrl + Alt + Down Cursor Arrow
Mirror Fixtures	Ctrl + Alt + I
Array Fixtures	Ctrl + Alt + A

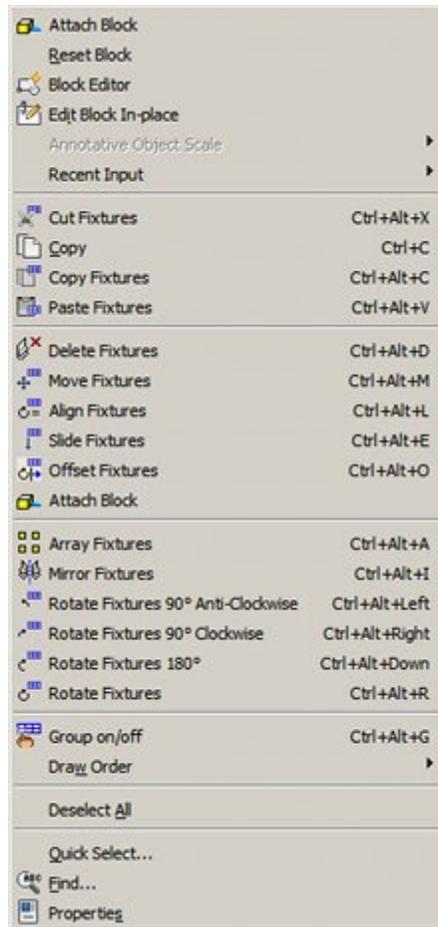
From the Fixturing toolbar



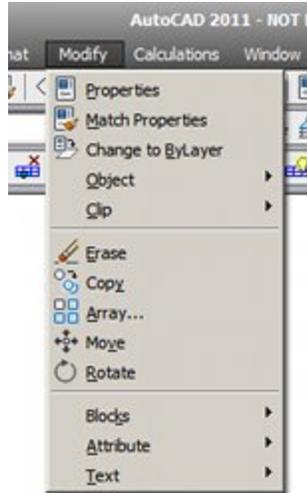
Option	Icon
Group On/Off	
Move Fixtures	
Slide Fixtures	

Option	Icon
Offset Fixtures	
Match Rotation	
Cut Fixtures	
Copy Fixtures	
Paste Fixtures	
Delete Fixtures	
Rotate Fixtures	
Rotate Fixtures 90 Degrees Clockwise	
Rotate Fixtures 90 Degrees Anticlockwise	
Rotate Fixtures 180 Degrees	
Mirror Fixtures	
Array Fixtures	

From the right click menu accessed in the floor plan



Note: these commands should not be confused with the pure AutoCAD commands available from (for example) the Modify menu.



Turning Grouping On or Off

Grouping affects how objects are selected for Fixture Manipulation or Fixture Swap. Grouping is Toggled on or Off using the icon on the Fixturing toolbar.



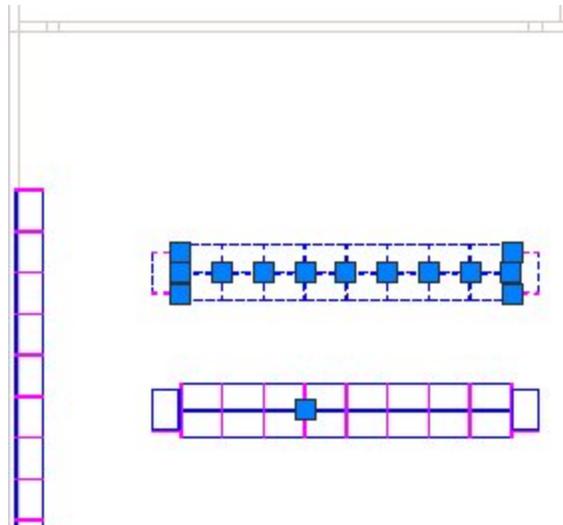
Grouping On

If Grouping is turned on, selecting a single item of equipment in a gondola selects all items of equipment in that gondola.

Grouping Off

If Grouping is turned off, items of equipment within a gondola must be individually selected; either by clicking on them, or by using Windows or Crossing selection boxes.

In the example below, one fixture in the upper double sided gondola has been clicked while grouping was turned on - resulting in all fixtures and fittings in the gondola being selected. Grouping was then turned off, and a single fixture clicked in the bottom double sided gondola. Because grouping was turned off, only a single fixture was selected.



Toggling Grouping On or Off has a significant effect on what is selected.

Factors Affecting Fixture Swap and Manipulation

Technicalities of Fixture Swap and Manipulation

Synchronization

Synchronization is used to ensure that the information in the database matches that held in the Planner floor plan. There are three forms of synchronization.

- Auto-Synchronization which can be used to ensure a floor plan is correctly synchronized when it is opened.
- Dynamic Synchronization which can be used to automatically write changes made by some AutoCAD commands immediately back to the database.
- Manual Synchronization which allows the user to select objects to synchronize and where the data is to be written.

Note: More information on these options can be found in the section on Synchronization.

Prior to carry out any fixture swap or manipulation operations, it is suggested the user ensure that synchronization is up to date.

Selection Sequence

There are generally two ways a command can be executed:

1. Select the objects first then issue the command.
2. Issue the command and then select the objects.

The examples given in this section are all based on selecting the objects first, then issuing the command. Issuing the command first, then selecting the objects is an equally valid way of working.

In this case the command is invoked from the Fixturing toolbar. In the example below, the Move command has been selected.



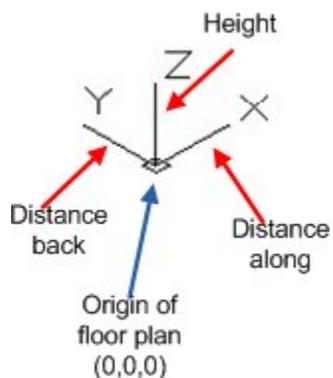
A prompt then appears in the command line. This identifies the command that has been invoked and prompts the user to select the objects the command is to be applied to.

```
Command: AVI_MOVE
Select objects:
```

Once the objects have been selected, the rest of the command is executed in a similar manner to when the objects were selected first and then the command invoked.

Object Height

The position of an object can be described relative to the origin of the floor plan by three coordinates:



The origin of the floor plan is by convention always (0, 0, 0).

1. The X axis is the distance along (to the left or right) of the origin.
2. The Y axis is back of or in front of the origin.
3. The Z axis is the height above or below the origin.

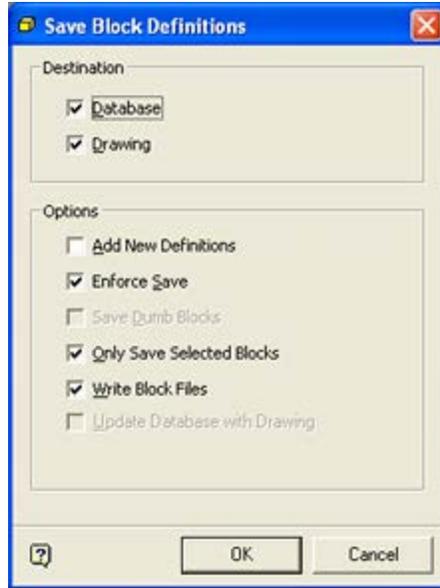
So, if an object is 20 feet to the left of the origin, 10 feet back from it and 3 ft above it, it would have Cartesian coordinates (expressed in feet) of (20, 10, 3).

Note: Cartesian coordinates are often expressed in inches or millimeters. If expressed in inches, the example above would be (240, 120, 36).

All the Fixture Manipulation and Fixture Swap operations will affect the distance along from and back from the origin (X and Y coordinates). They will not affect the height (Z coordinate).

Fixture Manipulation and XData

Fixture Manipulation relies on the block (fixture) having been registered in a specific manner in Fixture Studio. When saving a block, there is an option to Write Block Files.



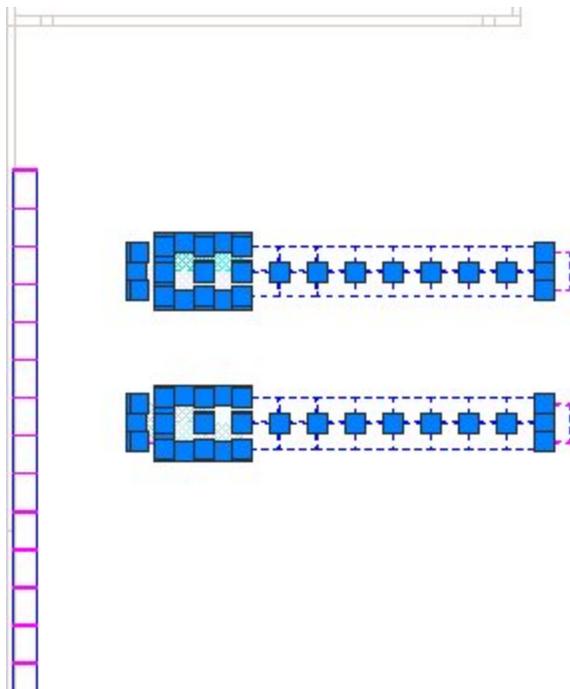
Note: Users require the appropriate permissions to access Fixture Studio.

This writes additional information into the block in the form of Extended Object Data (XData). XData is then referenced by the software when the fixture is manipulated by a user in the floor plan. If this data is absent - for example because the fixture is a raw AutoCAD block - then the fixture manipulation functionality will not be effective for that fixture.

Note: XData is embedded into the fixture in a way that is not accessible to users. If the fixture manipulation commands are failing for some blocks, it is recommended that the block be saved again from fixture studio ensuring that the **Write Block Files** option is used. See the *Fixture Studio User Guide* for more information on how to create fixtures.

Selection Methods

Before carrying out Fixture Manipulation or Fixture Swap operations, users must be able to select objects in the floor plan. Selected objects have a dotted outline and the insertion point shows as a small blue square.

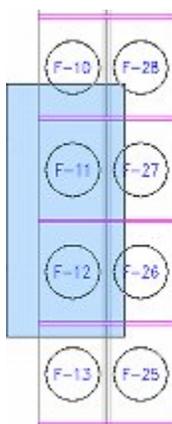


Individual Selection

Individual objects can be selected by left clicking a line belonging to that object. Additional objects can be added to the selection set by continuing to left click lines in other items in the drawing. When all objects have been selected, the selection is completed by right clicking in the floor plan with the mouse.

Window Selection Box

One way of selecting multiple fixtures is to use a window selection box. To do this click on a point in the floor plan, hold down the left mouse button and move the cursor to the right of the first point. A blue box will result. All objects completely enclosed by the box will be selected.

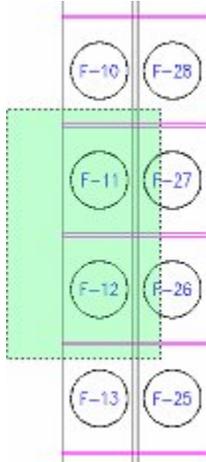


In the above example, fixtures F-11 and F-12 will be selected because they are completely enclosed, but fixtures like F-27 that are not completely enclosed will not be selected.

Multiple windows selection boxes may be used to select objects. The selection is completed by right clicking in the floor plan with the mouse.

Crossing Selection Box

One way of selecting multiple fixtures is to use a window selection box. To do this click on a point in the floor plan, hold down the left mouse button and move the cursor to the left of the first point. A green box will result. All objects fully or partially enclosed by the box will be selected.



In the above example, fixtures F-10, F-11, F-12, F-13, F-25, F-26, F-27, and F-28 will be selected because they are fully or partially enclosed.

Multiple crossing selection boxes may be used to select objects. The selection is completed by right clicking in the floor plan with the mouse.

De-Selecting Fixtures

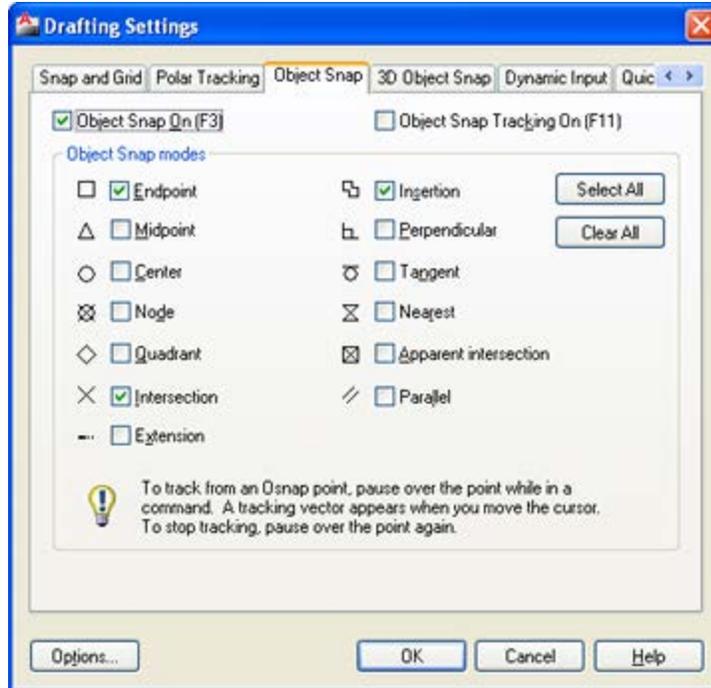
Any existing selection set can be de-selected by hitting the escape key.

AutoCAD's Object Snap Functionality

AutoCAD has Object Snap functionality. This can be toggled on or off by clicking the button on the AutoCAD status bar.



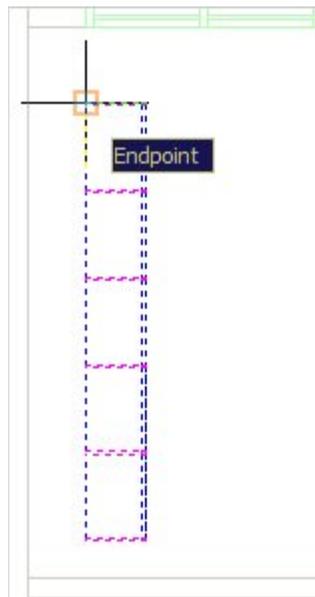
Right clicking the Object Snap icon and selecting **Settings** enables the settings to be defined. Check boxes can be ticked to specify points that the cursor can snap to when carrying out fixture manipulation options.



When carrying out a Fixture Manipulation command (for example Move), the user will be prompted to pick a base point in the selected objects.

```
Command: AVT_MOVE
Command: 11 found
Specify base point or [Displacement] <Displacement>:
```

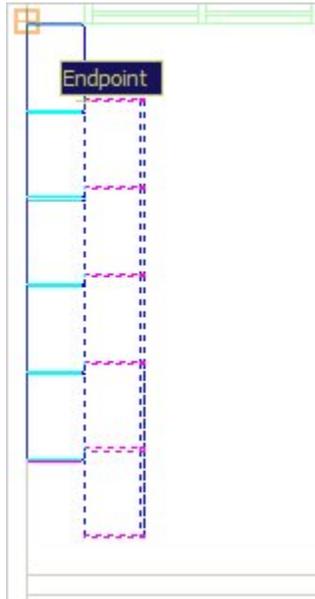
If Object Snap is on, the cursor will snap to any points that have been specified in the Settings dialog box. In the example below an Endpoint has been selected by clicking it.



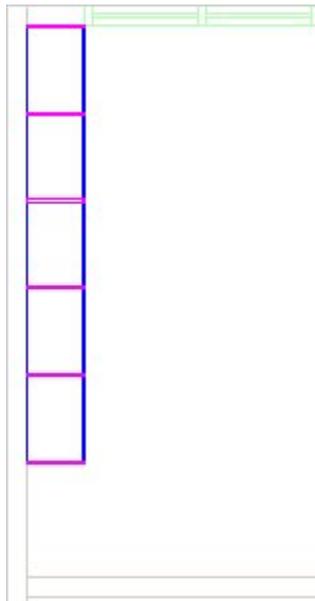
Once the first Object Snap point has been selected, the user will be invited to select a point to move to.

```
Specify base point or [Displacement] <Displacement>: Specify second point or <use first point as displacement>:
```

The user can then select another Object Snap point. In the example below, the corner of the wall in the architectural plan has been selected.



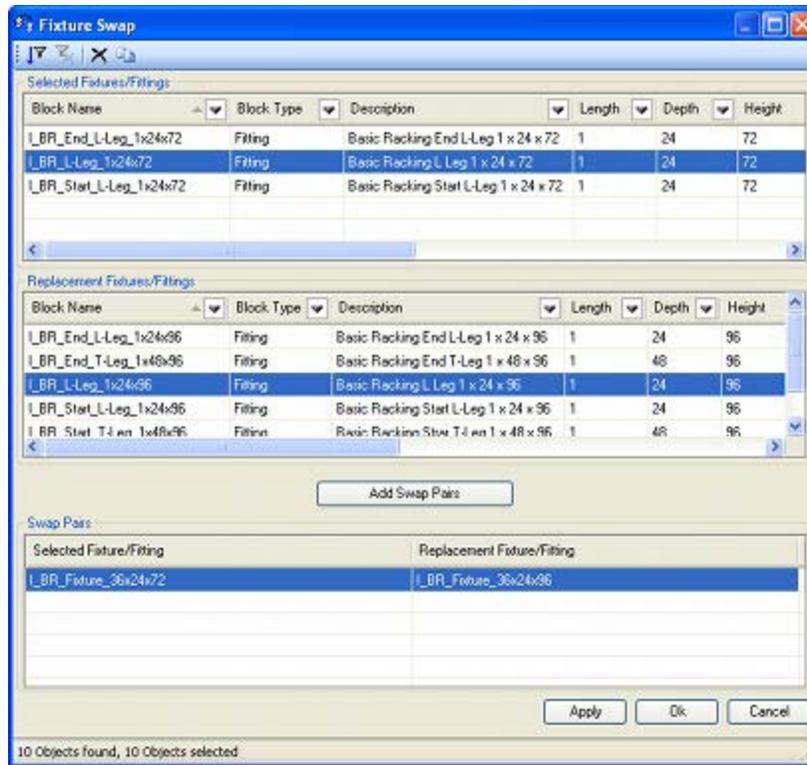
On clicking the second Object Snap point the selected objects will be moved to that point. In the example below, the fixtures have been moved precisely into the corner of the wall.



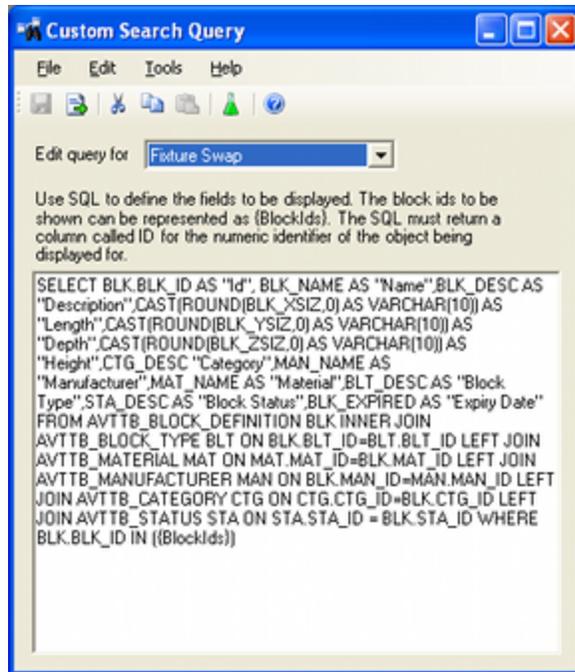
Note: for more information on using Object Snap or 3D Object Snap see the AutoCAD help material.

Fixture Swap and Custom SQL

The information in the **Fixture Swap dialog box** is controlled by via the Administration Module. For example, columns can be added or removed.



Modifying the list of information in the Fixture Swap dialog box is carried out in the Custom Query dialog box in the Administration module. This is accessed from the General menu.

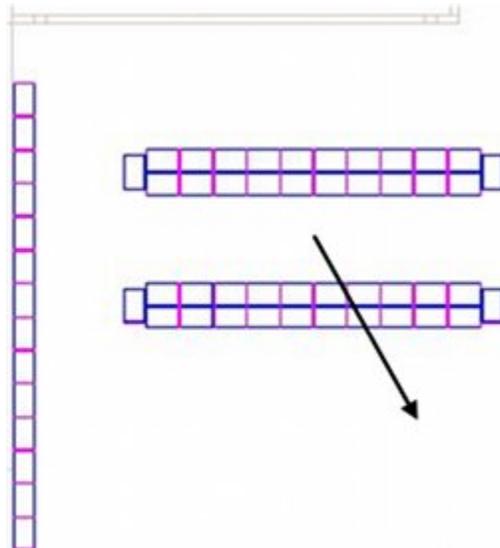


Fixture Manipulation

Move Commands

Move Fixtures

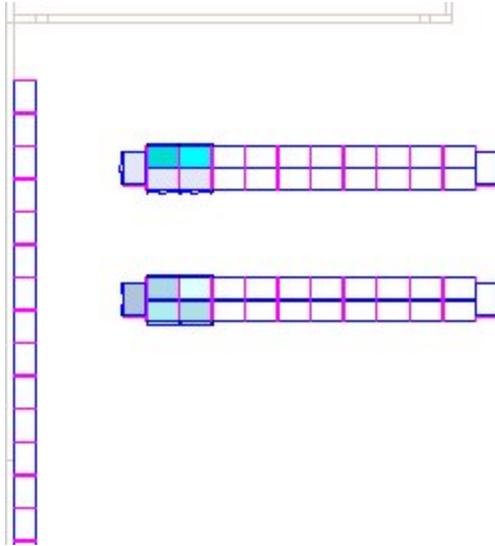
Move Fixtures allows the user to move the selected set of equipment, merchandise and annotation from one point to another in the floor plan.



The command is invoked from the Move option on the Fixturing toolbar.

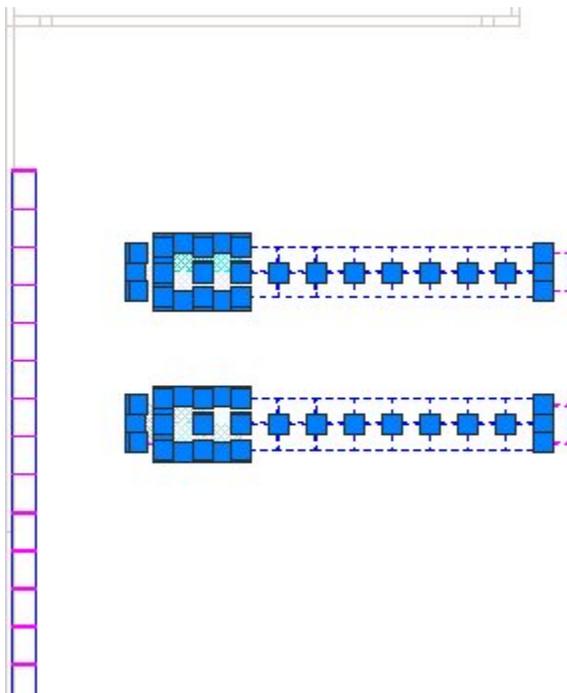


In the example below, the double sided gondolas are to be moved relative to the single sided gondolas along the wall.

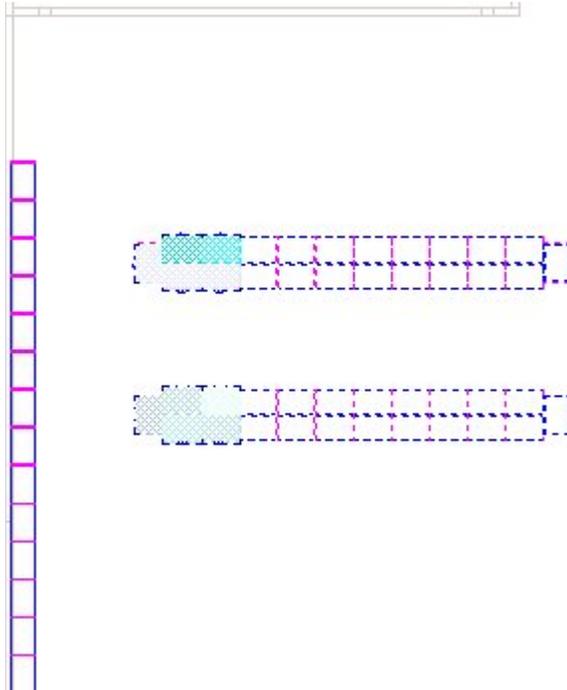


The initial stage is to select the gondolas to be moved. The outlines of the fixtures will turn dotted and the insertion points will show as blue boxes. (If using individual fixture selection, the selection set must be completed by clicking the right mouse button. If using Windows or crossing selection boxes, continue selecting until all required objects are in the selection set).

Note: Selection behavior will also be affected by whether Grouping is On or Off.



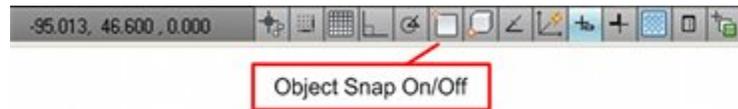
The user can then click the Move icon on the Fixturing toolbar. The Insertion points will disappear, but the fixtures will still remain as dotted outlines.



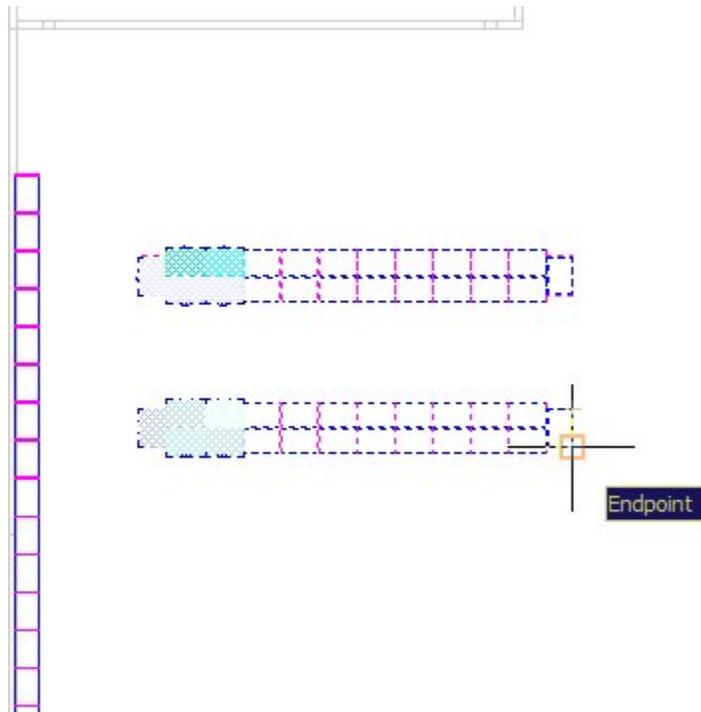
At the same time, the user will be prompted (via the command line) to select a base point for the move.

```
Command: 94 found
Specify base point or [Displacement] <Displacement>:
```

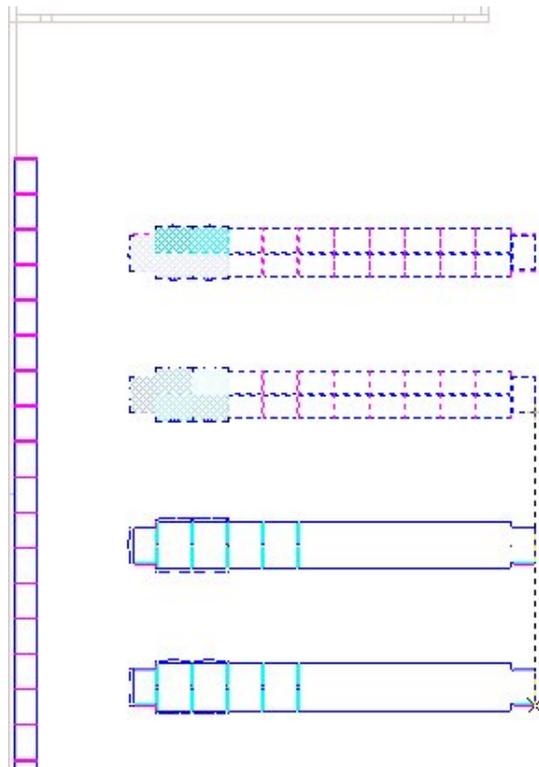
If Object Snap is turned on in the Status Bar, the user can 'snap' the cursor to a convenient point on one of the selected fixtures.



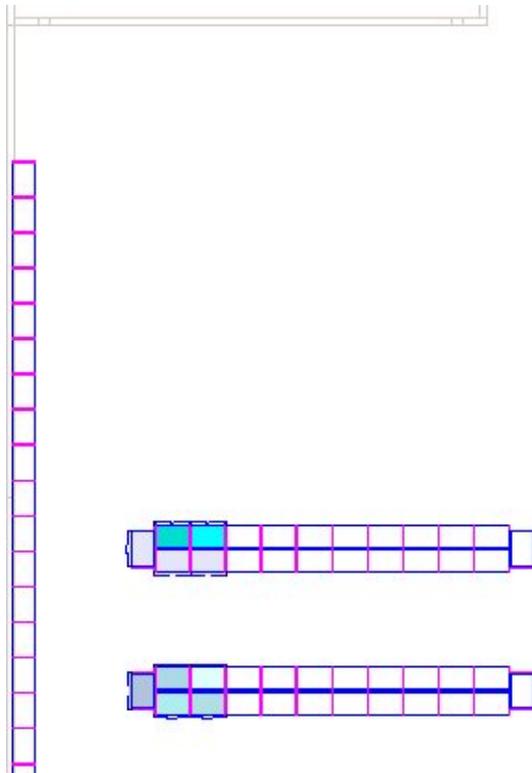
The cursor will then snap to a selected point on the fixture.



The fixtures can then be moved via the cursor to the point they are required in the floor plan. The fixtures will appear as a 'ghost' outline until finally placed.

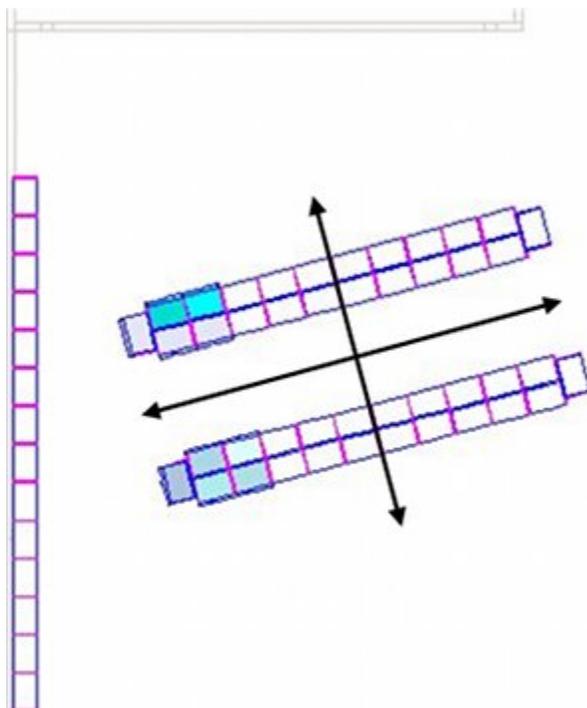


On left clicking at the selected point in the drawing, the fixtures will be moved to that point.



Slide Fixtures

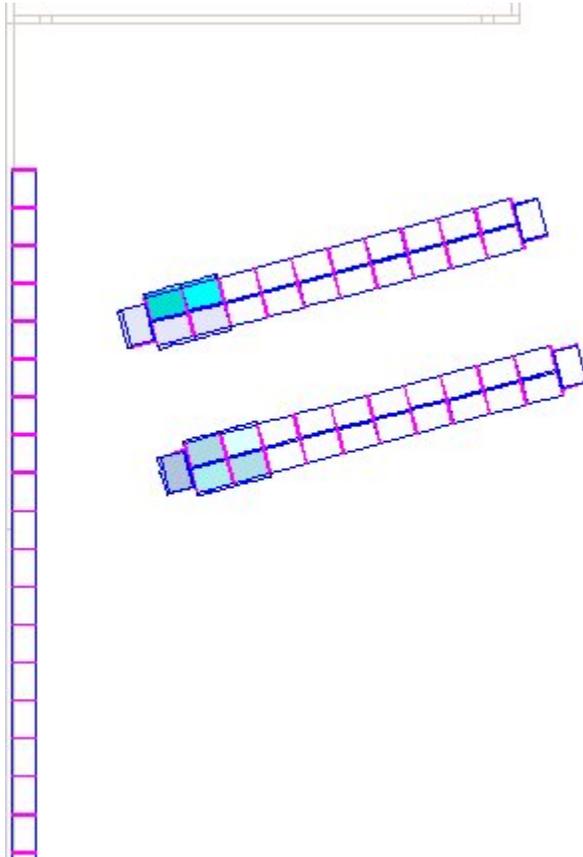
Slide Fixtures allows the user to move the selected set of equipment, merchandise and annotation from one point to another in the floor plan.



The command is invoked from the Slide option on the Fixturing toolbar.

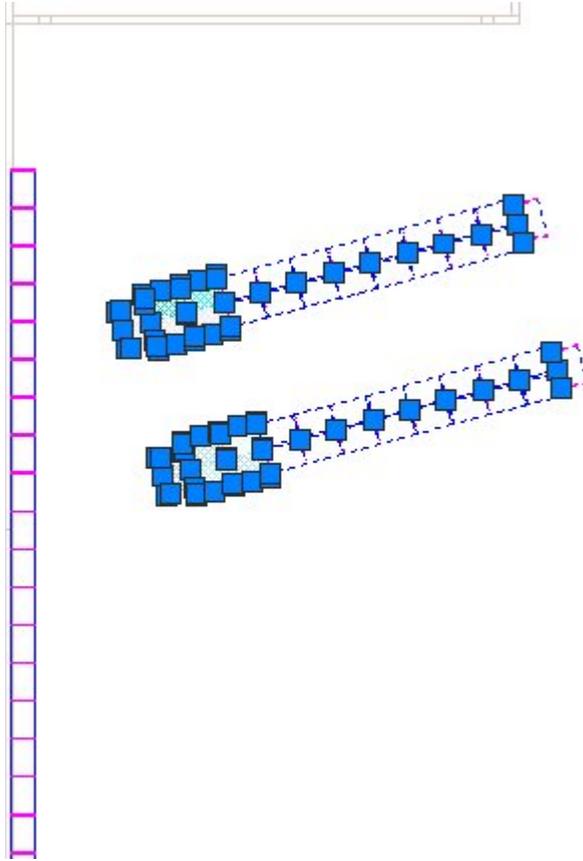


The Slide option is a more restricted form of the Move command. Fixtures can only be moved at 0, 90, 180 or 270 degrees relative to the selected fixtures. If it is desired to move the fixtures a precise distance in the specified direction, this distance can be entered into the AutoCAD command line. In the example below, the double sided gondolas are to be 'slid' relative to the single sided gondolas along the wall.

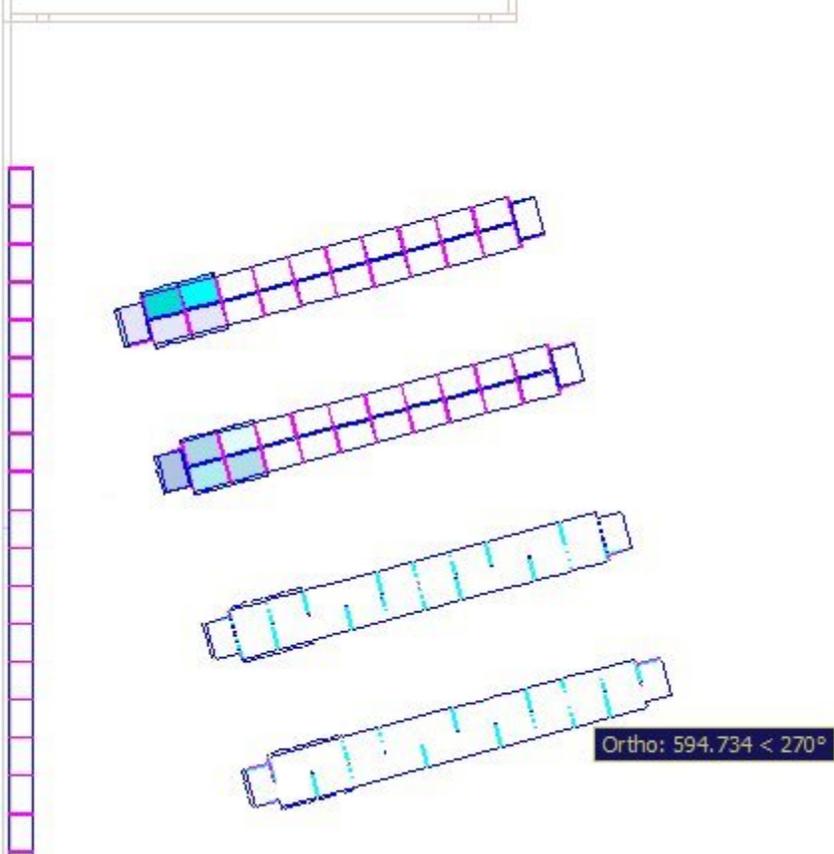


The initial stage is to select the gondolas to be moved. The outlines of the fixtures will turn dotted and the insertion points will show as blue boxes. (If using individual fixture selection, the selection set must be completed by clicking the right mouse button. If using Windows or crossing selection boxes, continue selecting until all required objects are in the selection set).

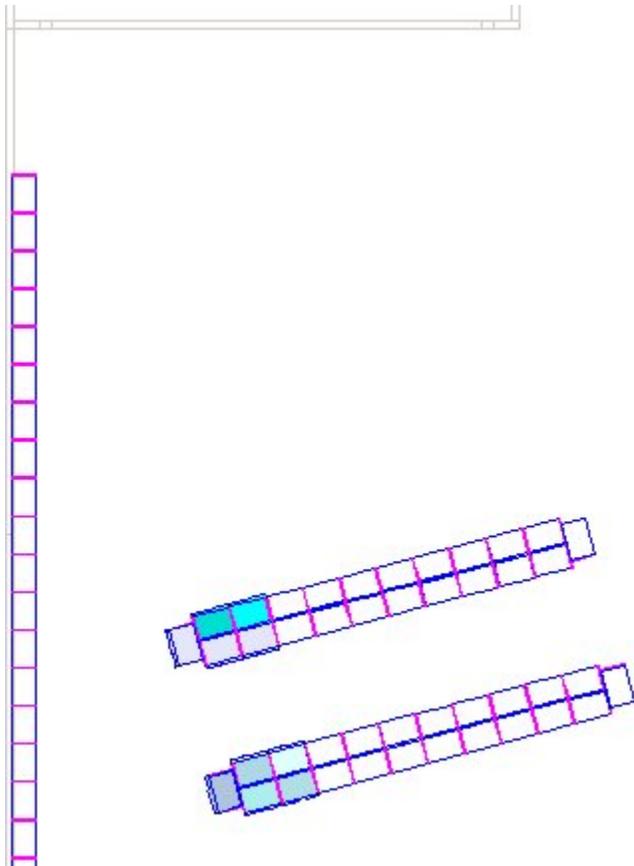
Note: Selection behavior will also be affected by whether **Grouping** is On or Off.



The user can then click the Slide icon on the Fixturing toolbar. The selected fixtures can be 'slid' along the permitted axes until they are in the correct position. The fixtures will appear as a 'ghost' outline until finally placed.

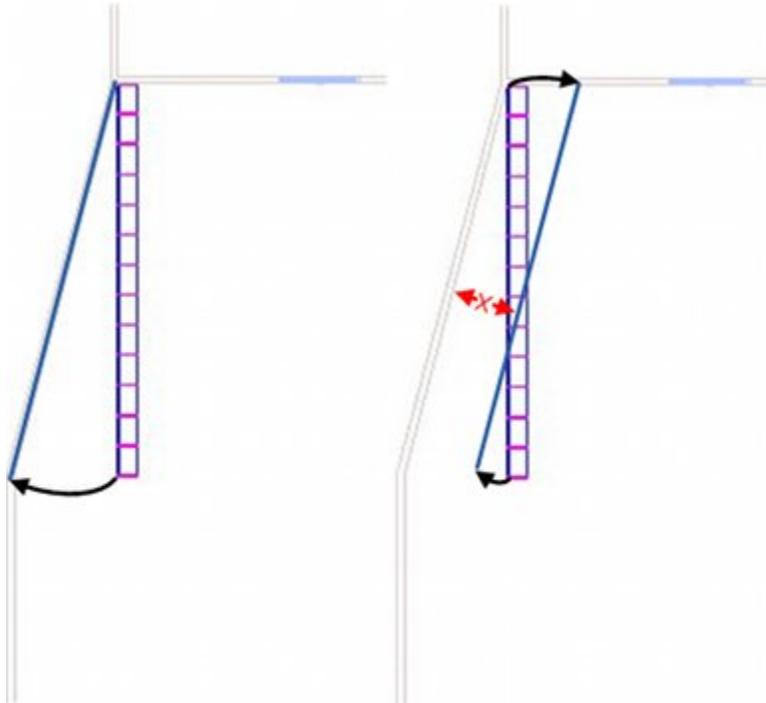


On left clicking at the required point, the fixtures will be repositioned.

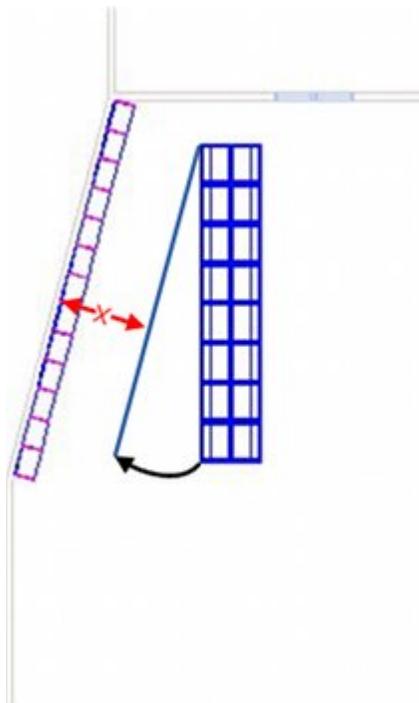


Offset Fixtures

Offset Fixtures allows the user to align the selected set of equipment, merchandise and annotation a set distance from a line (for example a wall) in the floor plan.



In the above diagram, the left hand example shows the effect of selecting a wall to offset from and setting an offset of 0: the selected objects will align directly along the wall. The right hand sample shows the effect of a positive offset: the selected objects have aligned a specific distance from the wall. In the diagram below, the double gondola is to be moved parallel to and 8 feet from the single gondola along the wall.

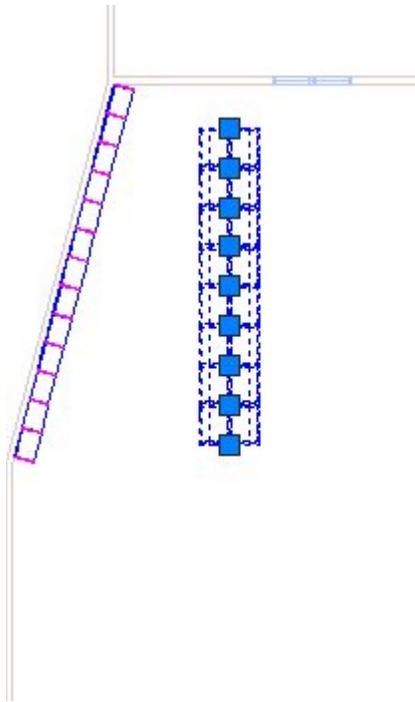


The command is invoked from the Offset option on the Fixturing toolbar.



The initial stage is to select the gondolas to be moved. The outlines of the fixtures will turn dotted and the insertion points will show as blue boxes. (If using individual fixture selection, the selection set must be completed by clicking the right mouse button. If using Windows or crossing selection boxes, continue selecting until all required objects are in the selection set).

Note: Selection behavior will also be affected by whether Grouping is On or Off.



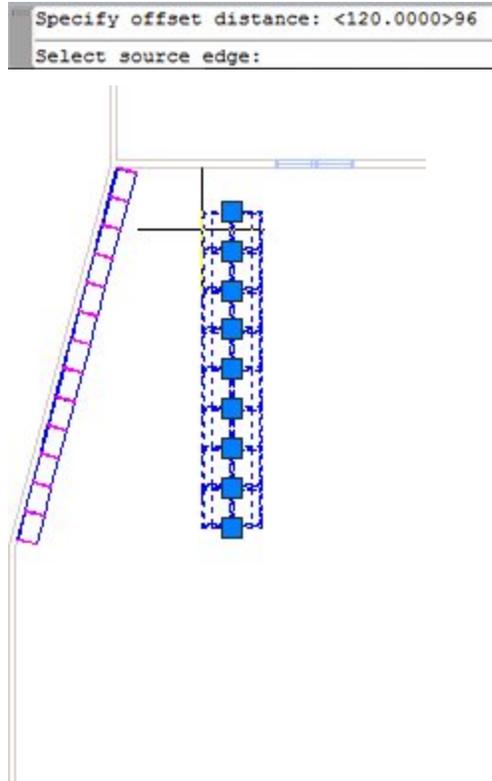
The user can then click the Offset icon on the Fixturing toolbar. The user will then be prompted to set the Offset distance - the distance the gondola will be from the selected wall, etc.

```
Command: AVI_OFFSET
Specify offset distance: <120.0000>96
```

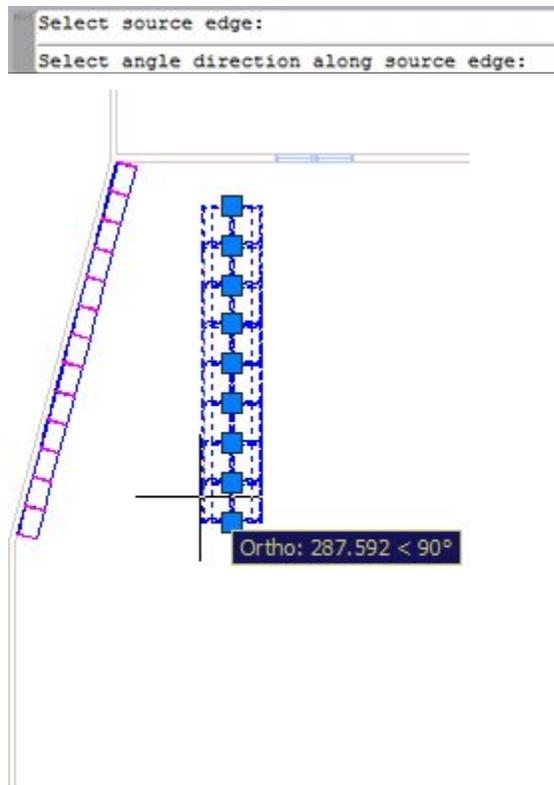
Alternatively, click two successive points in the floor plan. After clicking the first point, the user will be invited to click a second:

```
Command: AVI_OFFSET
Specify offset distance: <120.0000> Specify second point:
```

This method can be used to measure an existing distance between two objects in the floor plan (for example a gap between two other gondolas) and use it for the offset. The user will then be invited to select a source edge. This is the edge of the gondola that will be moved relative to another object.



The user will then be invited to select an angle along the source edge. This is done by clicking another point on the face of the gondola.

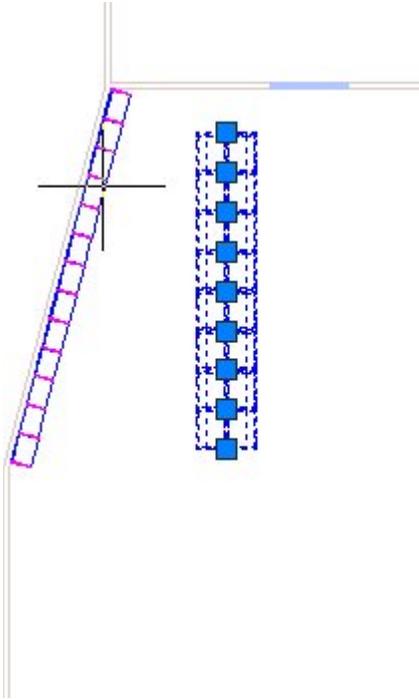


The user will then be invited to select an edge of the object to be aligned with.

Select angle direction along source edge:

Select reference edge:

In the example below, the user has selected the front edge of the single gondola along the wall.

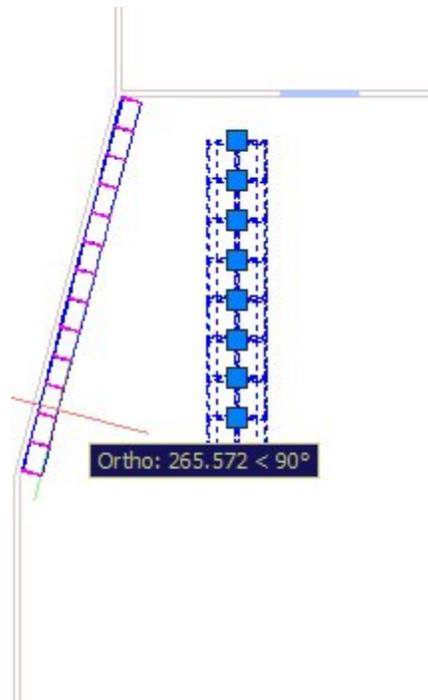


The user will then be invited to select an angle along the reference edge.

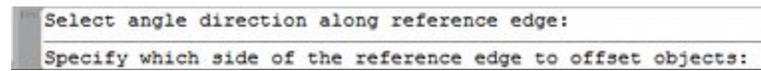
Select reference edge:

Select angle direction along reference edge:

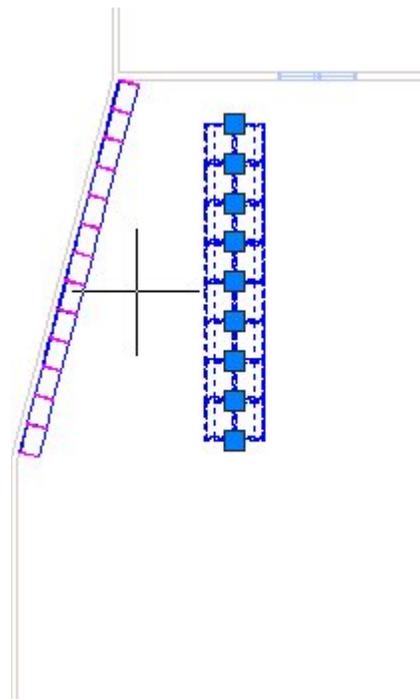
This is done by clicking on another point on the front edge of the single gondola along the wall.



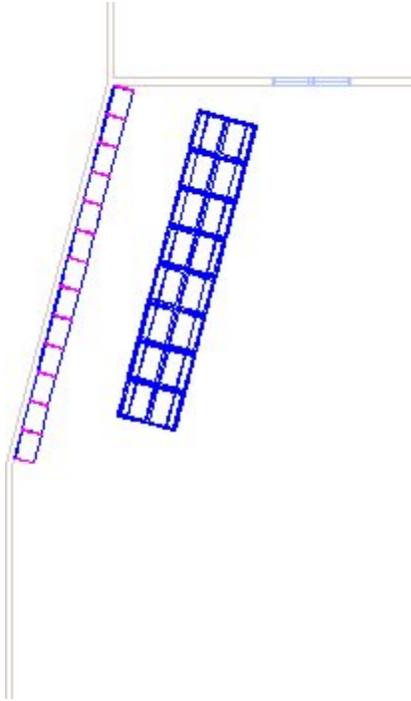
The user will be invited to select the side of the reference line the double gondola is to be offset to.



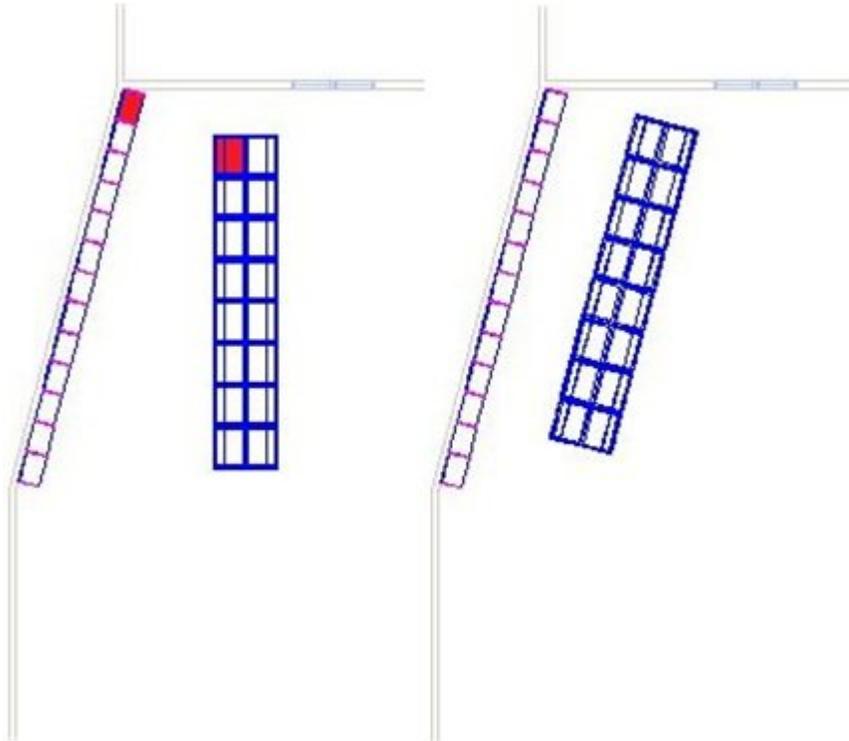
This is done by clicking on the side of the single gondola we wish the double gondola to be offset to.



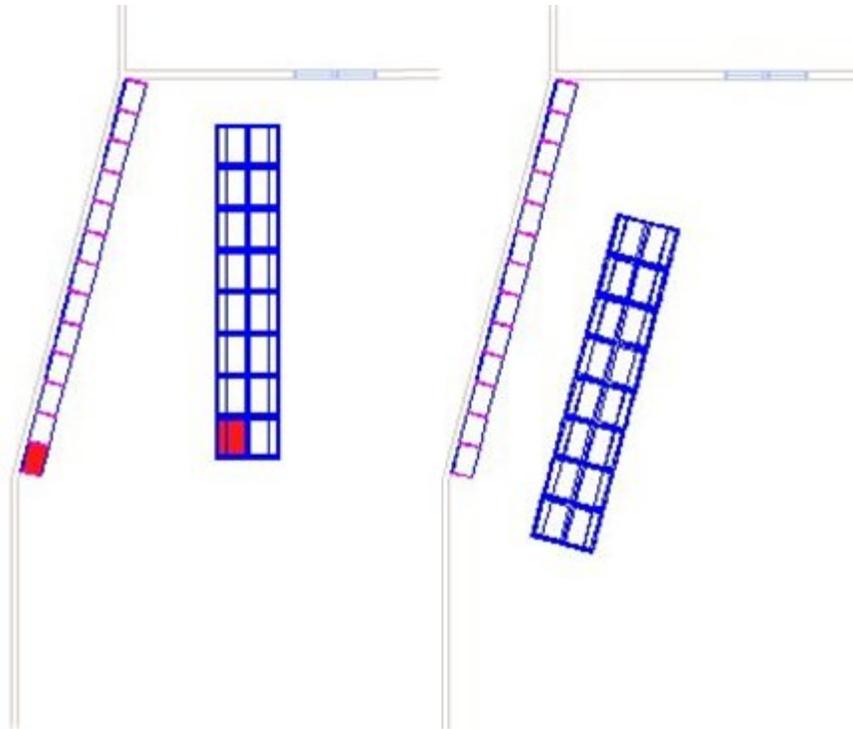
As soon as this point is clicked, the selected equipment, merchandise and annotation will rotate until they are aligned with the selected edge.



If Grouping is On, how the offset fixtures line up to their datum fixtures depends on the fixture clicked on to select the fixtures to offset and the fixture selected to specify the fixtures to offset to. When the fixtures to be offset move, the insertion points of the two selected fixtures will align. In the example below, the top left fixture of the double gondola was clicked when selecting the objects to offset, and the top fixture was selected in the gondola to offset to (left hand diagram). The result is shown in the right hand diagram.



In the example below, the bottom left fixture of the double gondola was clicked when selecting the objects to offset, and the bottom fixture was selected in the gondola to offset to (left hand diagram). The result is shown in the right hand diagram.

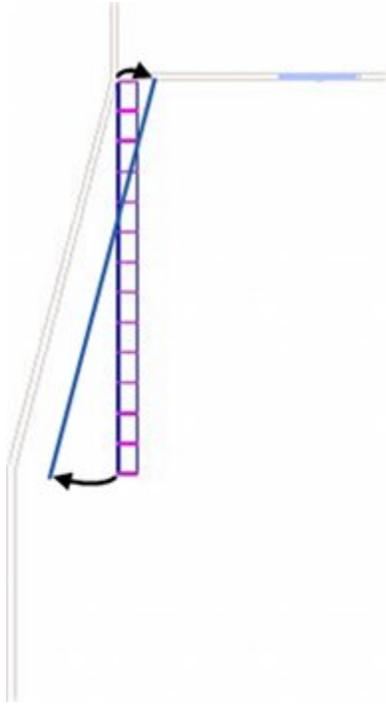


Match Rotation

Match Rotation allows the user to align the selected set of equipment, merchandise and annotation with a line (for example a wall) in the floor plan.

Note: If it desired to align the selected equipment, merchandise and annotation against a wall, etc., use the Offset command with an Offset of 0.

In the example below, the single sided gondola is to be aligned with the wall behind it.

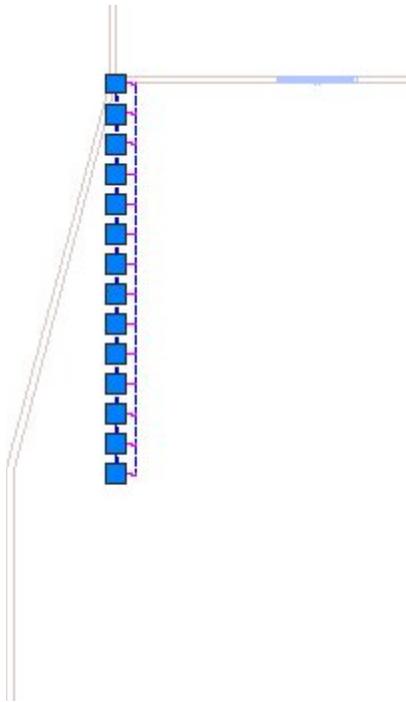


The command is invoked from the Match Rotation option on the Fixturing toolbar.



The initial stage is to select the gondolas to be moved. The outlines of the fixtures will turn dotted and the insertion points will show as blue boxes. (If using individual fixture selection, the selection set must be completed by clicking the right mouse button. If using Windows or crossing selection boxes, continue selecting until all required objects are in the selection set).

Note: Selection behavior will also be affected by whether **Fixture Grouping** is On or Off.



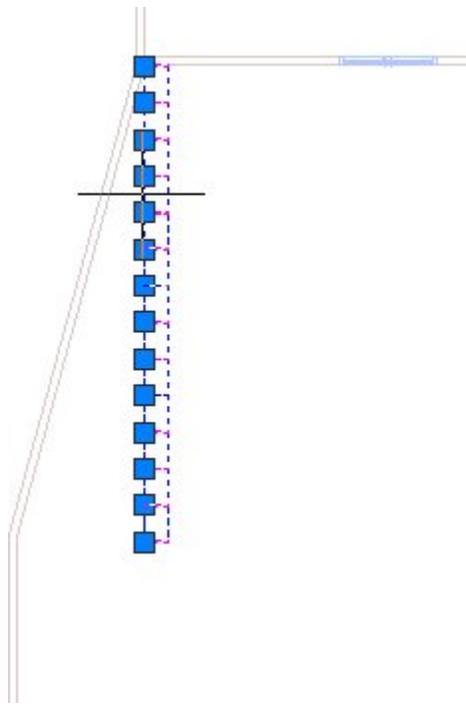
The user can then click the Match Rotation icon on the Fixturing toolbar. The user will then be invited to select a source edge. This is the edge of the gondola that will be rotated relative to another object.

```
Command: AVI_MATCH_ROTATION
```

```
Select source edge:
```

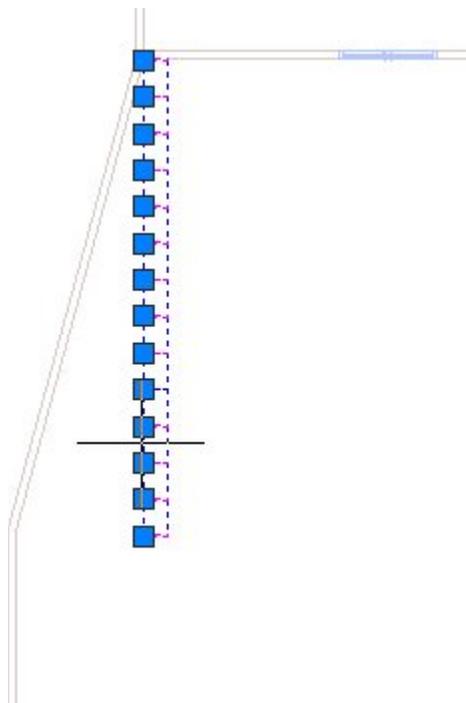
This is done by clicking a point on the required edge of the gondola.

Note: It is not possible to select an edge by clicking an insertion point. You must click on an edge of a fixture.



The user will then be invited to select an angle along the source edge. This is done by clicking another point on the face of the gondola.

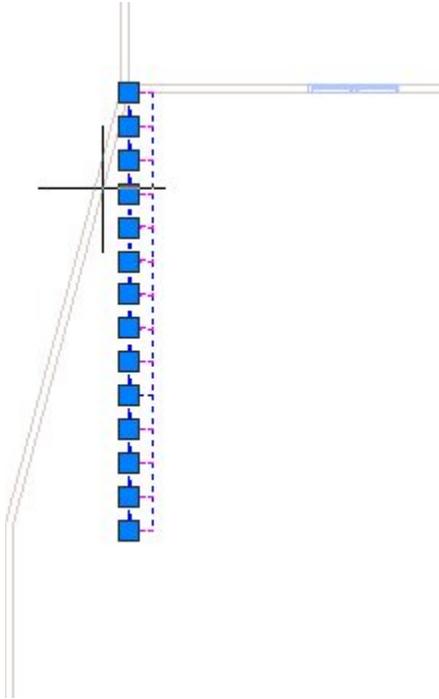
Select source edge:
Select angle direction along source edge:



The user will then be invited to select an edge of the object to be aligned with.

Select angle direction along source edge:
 Select reference edge:

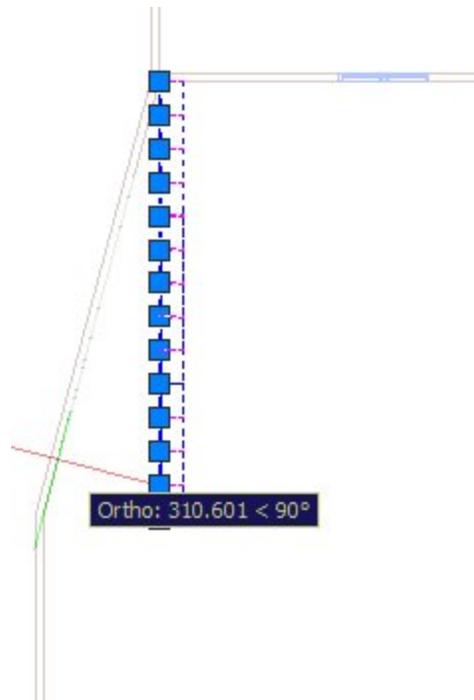
In the example below, the user has clicked on the face of the wall the gondola run is to be aligned to.



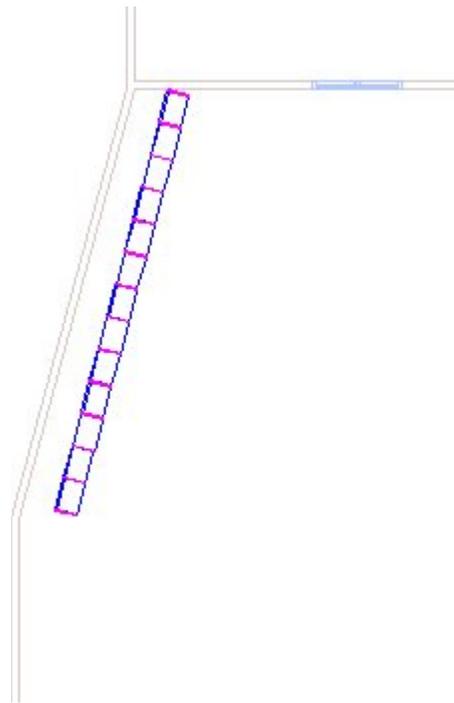
The user will then be prompted to select the direction for the edge.

Select reference edge:
 Select angle direction along reference edge:

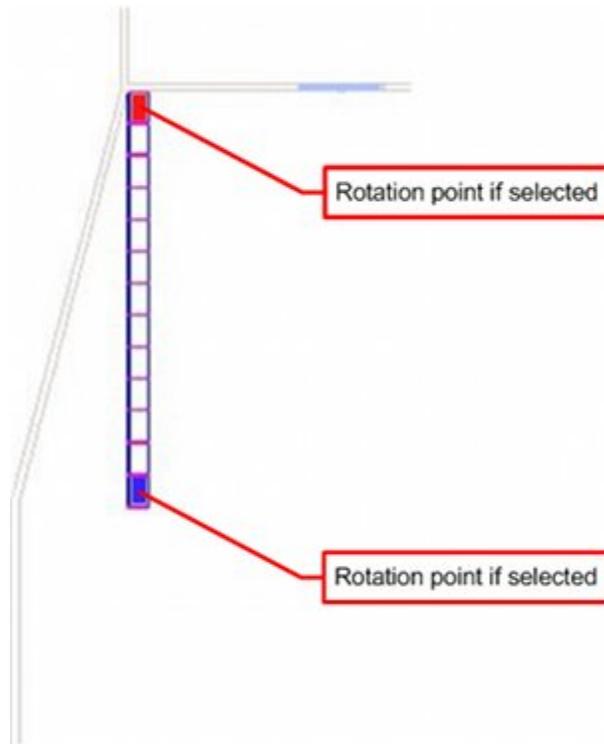
This is done by clicking on another point on the face of the wall.



As soon as the second point is clicked, the selected equipment, merchandise and annotation will rotate until they are aligned with the selected edge.



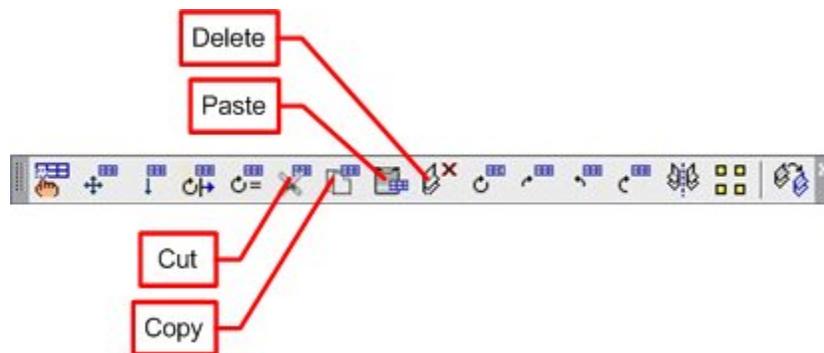
If Grouping is On and the required fixtures are selected by clicking on an individual fixture, the insertion point of that fixture will serve as the point around which the fixtures will rotate. In the example below, if the top fixture (colored red in this example) is selected, the gondola will rotate about its insertion point. If the bottom fixture (colored blue in this example) is selected, the gondola will rotate about that insertion point.



Cut, Copy and Paste Commands

Cut, Copy and Paste Commands

The Cut, Copy and Paste commands take a selected set of equipment, merchandise, annotation and bay numbers and move them to or from the clipboard. The Delete command removes the selected set of equipment, merchandise, annotation and bay numbers from the floor plan. The commands are invoked from the Fixturing toolbar.

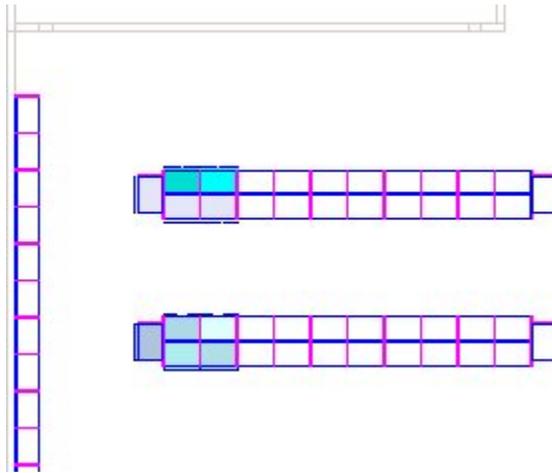


Cut or Copy Commands

The Cut Command removes the selected equipment, merchandise, annotation and bay numbers from the floor plan and places the information into the clipboard. Any previous information in the clipboard is overwritten.

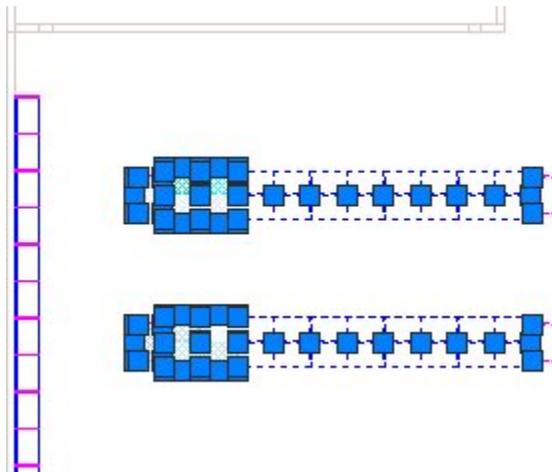
The Copy Command takes a copy of the selected equipment, merchandise, annotation and bay numbers from the floor plan and places the information into the clipboard. Any previous information in the clipboard is overwritten.

In the example below, the two double sided gondolas are to be either cut or copied from the floor plan and placed on the clipboard.

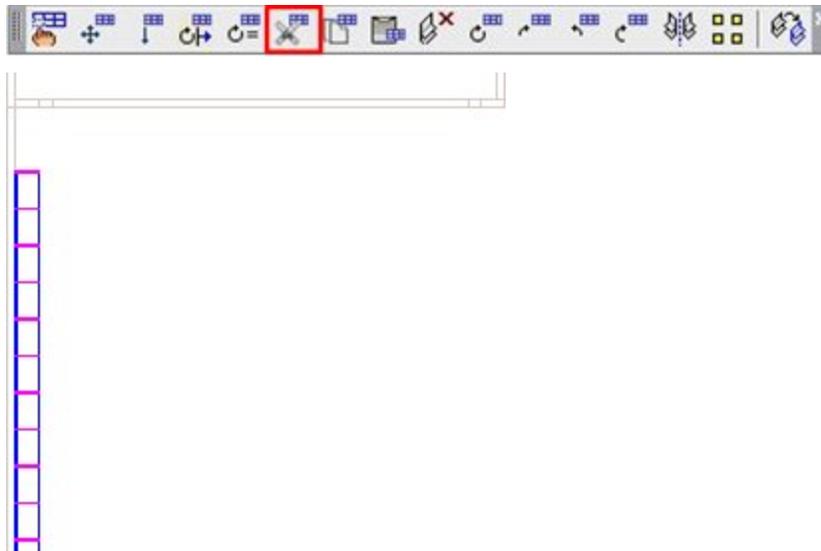


The initial stage is to select the required fixtures. The outlines of the fixtures will turn dotted and the insertion points will show as blue boxes. (If using individual fixture selection, the selection set must be completed by clicking the right mouse button. If using Windows or crossing selection boxes, continue selecting until all required objects are in the selection set).

Note: Selection behavior will also be affected by whether **Grouping** is On or Off.



If the Cut command is clicked on the fixturing toolbar, the selected equipment, merchandise, annotation and bay numbers will be removed from the floor plan and placed into the clipboard. Any previous information in the clipboard is overwritten.



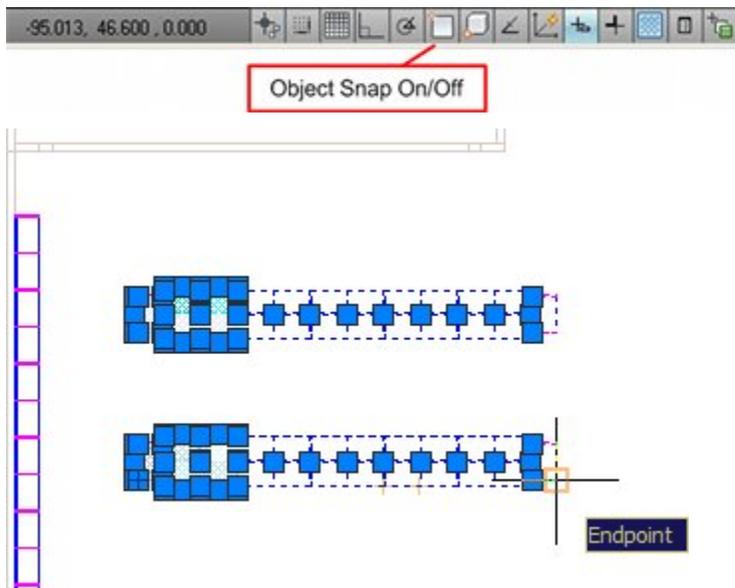
If the Copy command is clicked on the fixturing toolbar, the command Line will prompt the use to specify a base point.



```

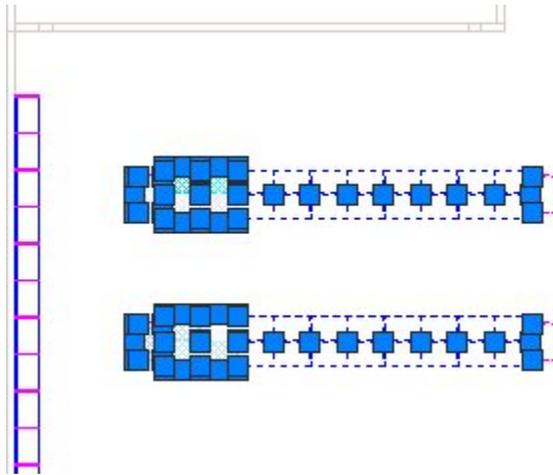
Command:
Command: AVI_COPY
Command:
Specify base point:
    
```

If Object Snap is turned on in the Status Bar, the user can 'snap' the cursor to a convenient point on one of the selected fixtures.



After clicking on the selected point, a copy of the selected equipment, merchandise, annotation and bay numbering will be taken from the floor plan and placed into the

clipboard. Any previous information in the clipboard is overwritten. In addition, the equipment, merchandise and annotation remains in the floor plan and remains selected.

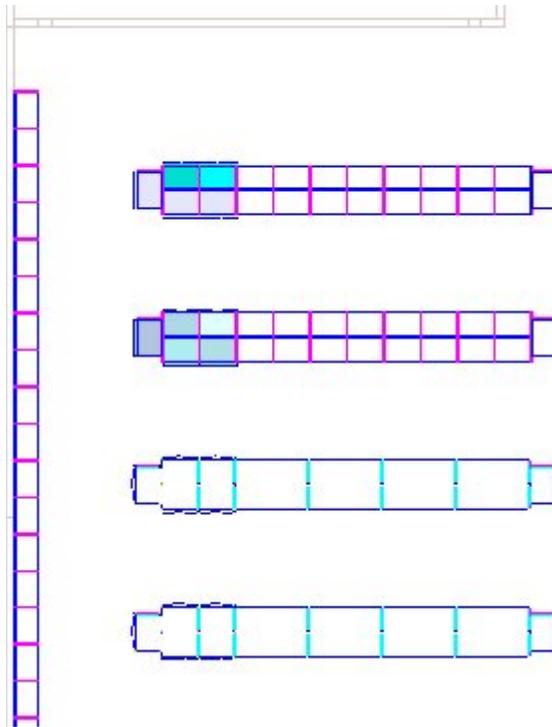


Paste

Paste takes the information from the clip board and inserts it into the floor plan. The Paste command is invoked from the Fixturing toolbar.



After clicking the Paste button, the equipment, merchandise, annotation and bay numbering will be taken from the clip board and placed in the floor plan relative to the mouse cursor.



Copying Between Floor Plans

The **Copy** function also allows users to take information from one floor plan and transfer it to another floor plan. This is done as follows:

1. Open or make active the floor plan it is desired to take the information from.
2. Select the required equipment and merchandise
3. Use the Cut or Copy commands to place a copy of the information in the clipboard. This information will include annotation, bay numbering, etc.
4. Open or make active the floor plan it is desired to transfer the information into
5. Use the paste command to add the information into the floor plan.

The information will automatically be synchronized with the information in the database.

Delete Command

The **Delete** command can be used to delete fixtures, together with their associated shelves, merchandise, annotation and bay numbers. This is because the display or selection of objects is often controlled by turning off or locking layers. If purely AutoCAD tools are used, objects on the turned off or locked layers are not included in the selection. This can result in some objects being moved, while their child objects are left in their original location.

The Delete function is found on the fixturing toolbar.



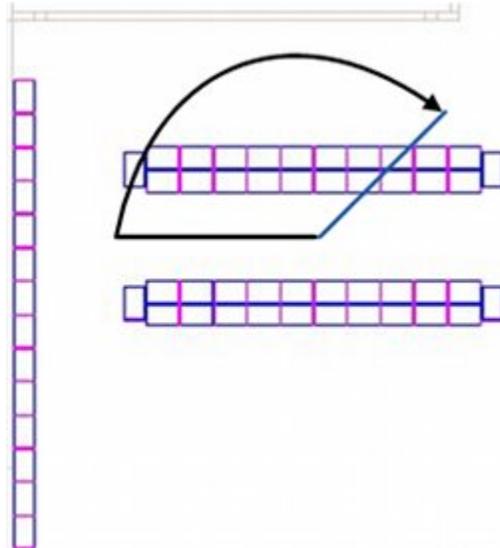
In order to delete fixtures and their associated child objects:

1. Select the required fixtures in the floor plan
2. Click the Delete command on the Fixturing toolbar or on the Toolbar of the Fixturing Tab of the Object Browser
3. The fixtures and their child objects will then be deleted.

Rotate Commands

Rotate Fixtures

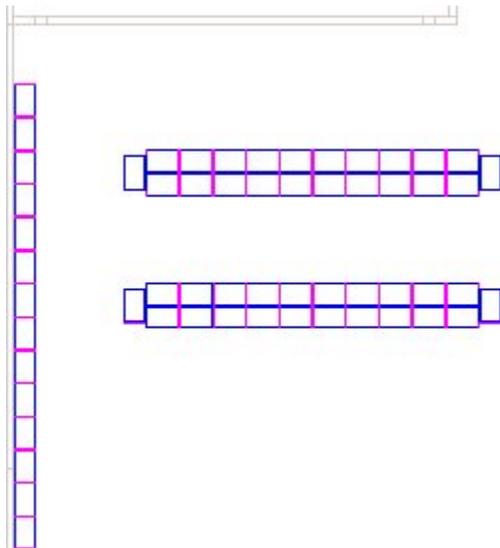
Rotate Fixtures takes a selected set of equipment, merchandise and annotation and rotates them about the center of the selected objects.



The command is invoked from the Rotate option on the Fixturing toolbar.

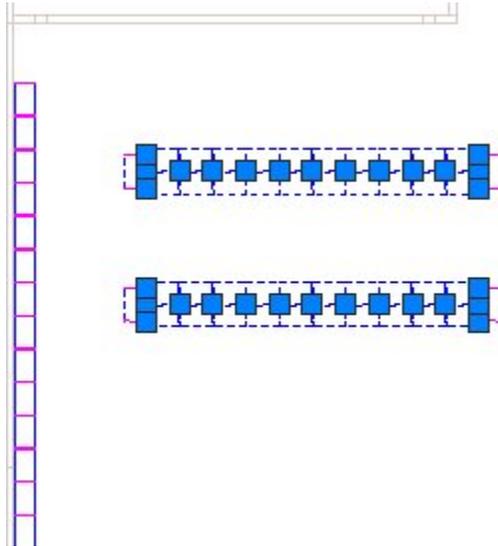


In the example below, the double sided gondolas are to be rotated to through 80 degrees relative to the single sided gondola along the wall.

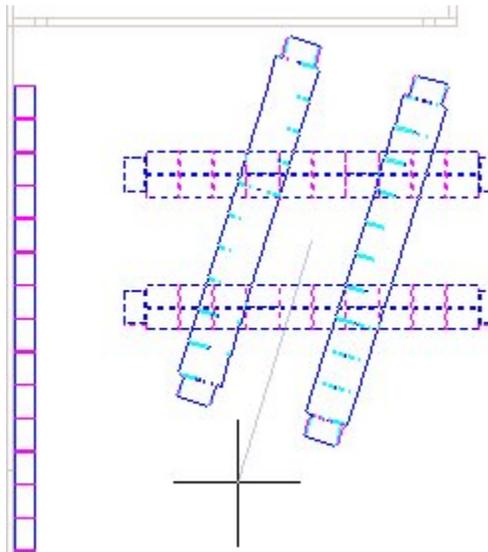


The initial stage is to select the gondolas to be rotated. The outlines of the fixtures will turn dotted and the insertion points will show as blue boxes. (If using individual fixture selection, the selection set must be completed by clicking the right mouse button. If using Windows or crossing selection boxes, continue selecting until all required objects are in the selection set).

Note: Selection behavior will also be affected by whether Grouping is On or Off.



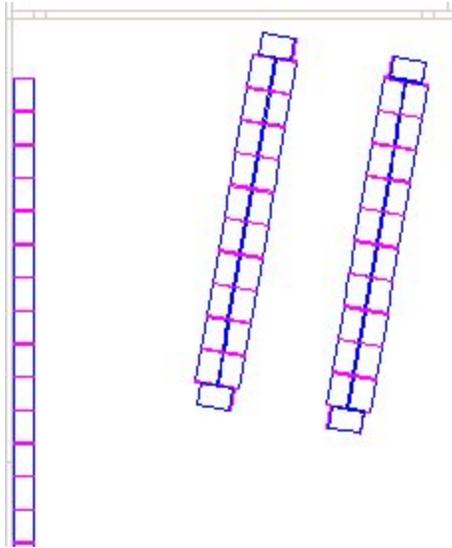
Once the fixtures have been selected and the Rotate button has been clicked on the Fixture Manipulation toolbar, they can be rotated around the center of the selected objects by means of the mouse cursor. The new position of the fixtures will be shown as a 'ghost' outline. If this method of rotating the fixtures is being used, the fixtures will be drawn in their final position after a left mouse click in the floor plan.



Alternatively, a precise rotation angle can be entered into the Command line. If this method of rotating the fixtures is being used, the fixtures will be drawn in their final position when Return is pressed.

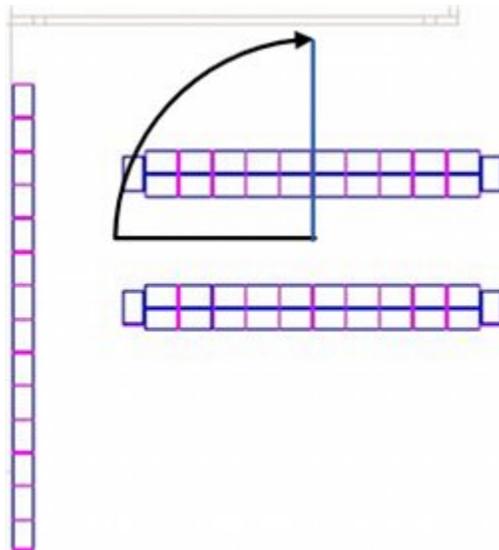
```
Current positive angle in UCS: ANGDIR=counterclockwise ANGBASE=0
74 found
Specify base point:
Specify rotation angle or [Copy/Reference] <310>: 80
```

The fixtures have been rotated as required. Other options (such as the Move or Slide commands) can then be used to further adjust their position).



Rotate Fixtures 90 Degrees Clockwise

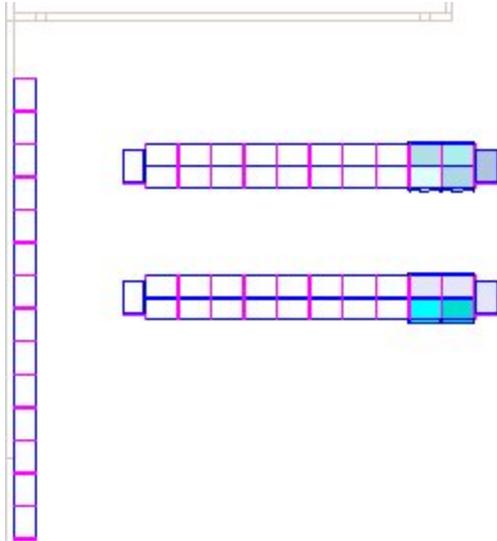
Rotate Fixtures 90 Degrees Clockwise takes a selected set of equipment, merchandise and annotation and rotates them 90 degrees clockwise about the center of the selected objects.



The command is invoked from the Rotate 90 degrees Clockwise option on the Fixturing toolbar.

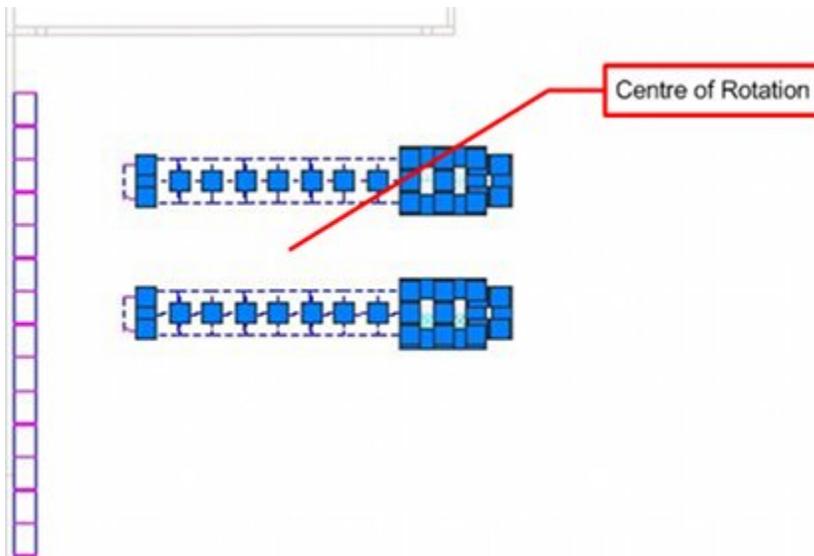


In the example below, the double sided gondolas are to be rotated 90 degrees clockwise.

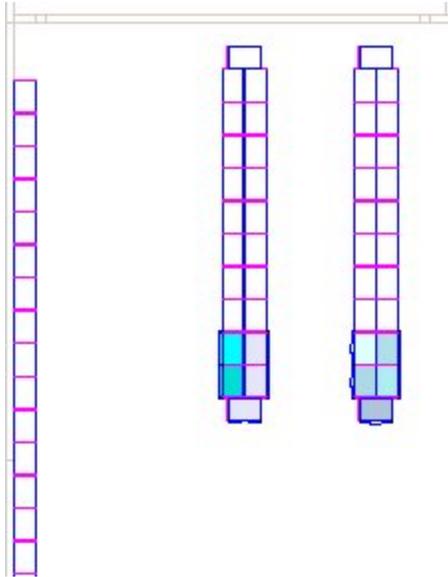


The initial stage is to select the gondolas to be rotated. The outlines of the fixtures will turn dotted and the insertion points will show as blue boxes. (If using individual fixture selection, the selection set must be completed by clicking the right mouse button. If using Windows or Crossing selection boxes, continue selecting until all required objects are in the selection set). The fixtures will be rotated about the center of the selected objects.

Note: Selection behavior will also be affected by whether Grouping is On or Off.

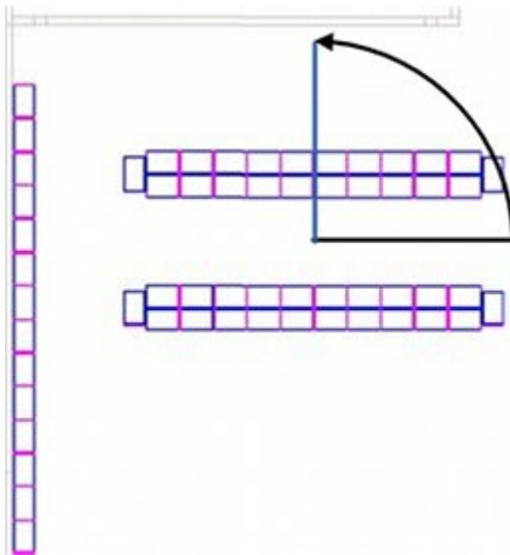


Once the fixtures have been selected, the Rotate 90 Degrees Clockwise button is clicked on the Fixture Manipulation toolbar. The fixtures will then be drawn in their final position in the floor plan.



Rotate Fixtures 90 Degrees Anticlockwise

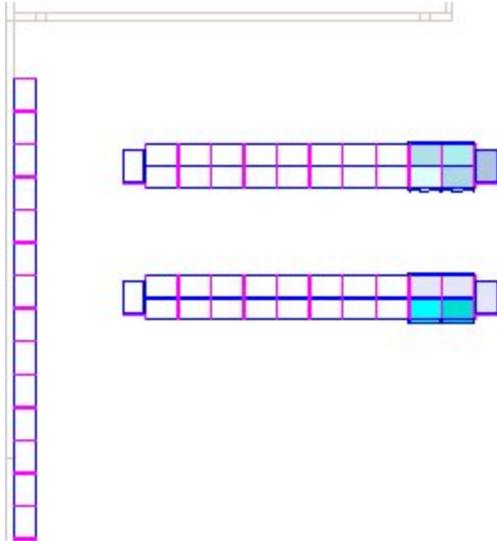
Rotate Fixtures 90 Degrees Anticlockwise takes a selected set of equipment, merchandise and annotation and rotates them 90 degrees anticlockwise about the center of the selected objects.



The command is invoked from the Rotate 90 degrees anticlockwise option on the Fixturing toolbar.

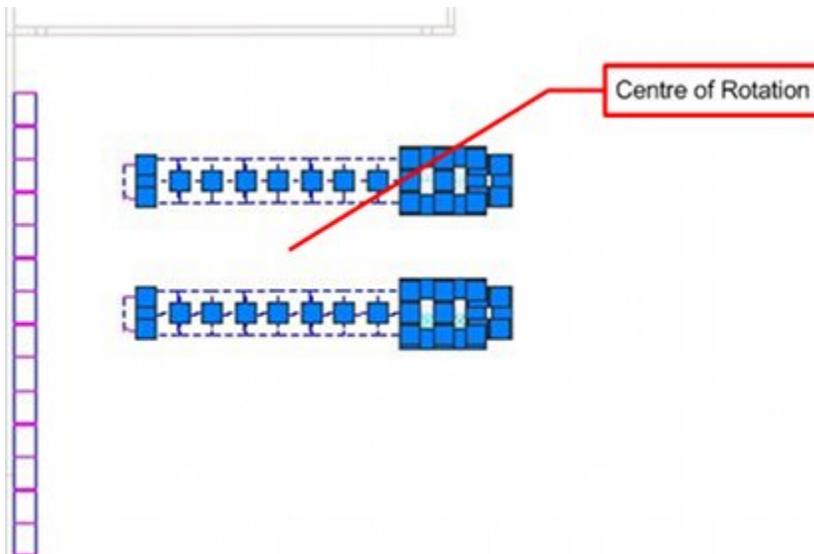


In the example below, the double sided gondolas are to be rotated 90 degrees clockwise.

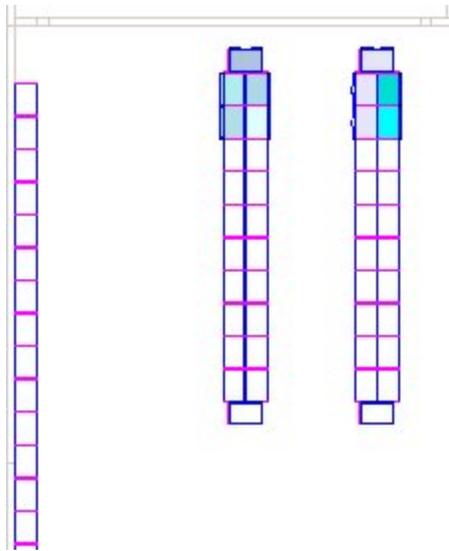


The initial stage is to select the gondolas to be rotated. The outlines of the fixtures will turn dotted and the insertion points will show as blue boxes. (If using individual fixture selection, the selection set must be completed by clicking the right mouse button. If using Windows or crossing selection boxes, continue selecting until all required objects are in the selection set). The fixtures will be rotated about the center of the selected objects.

Note: Selection behavior will also be affected by whether Grouping is On or Off.

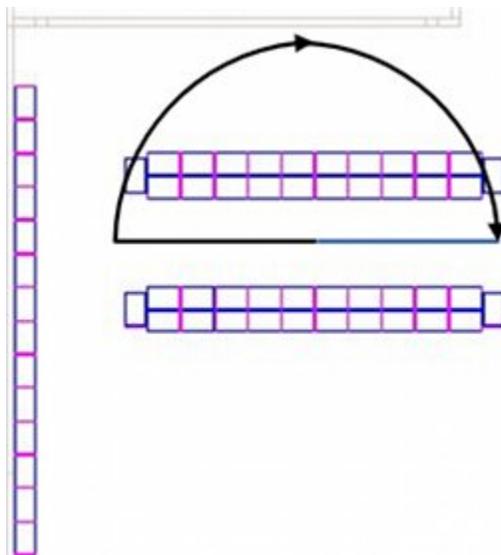


Once the fixtures have been selected, the Rotate 90 Degrees Anticlockwise button is clicked on the Fixture Manipulation toolbar. The fixtures will then be drawn in their final position in the floor plan.



Rotate Fixtures 180 Degrees

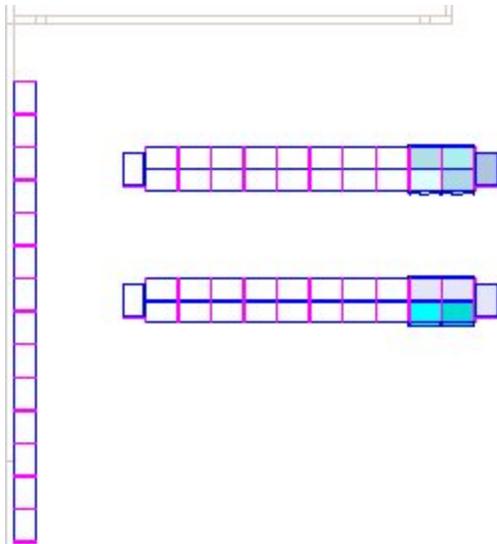
Rotate Fixtures 180 Degrees takes a selected set of equipment, merchandise and annotation and rotates them 180 degrees about the center of the selected objects.



The command is invoked from the Rotate 180 degrees option on the Fixturing toolbar.

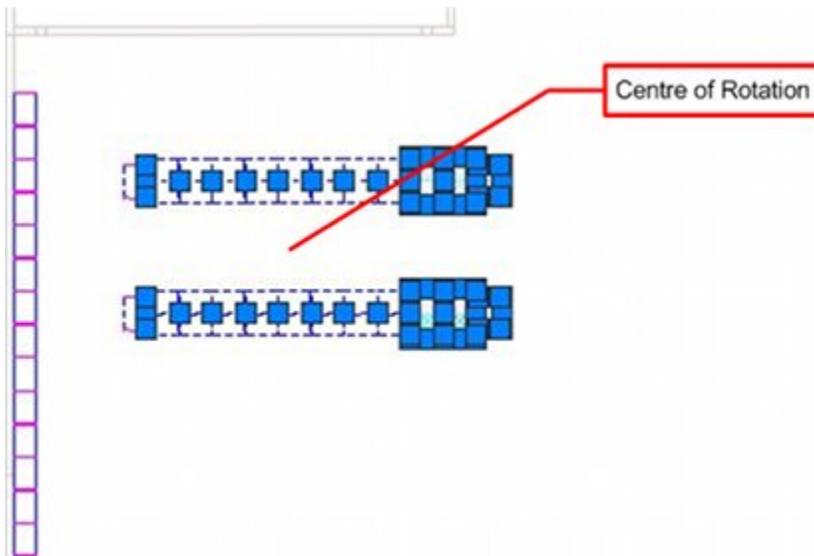


In the example below, the double sided gondolas are to be rotated 180 degrees.

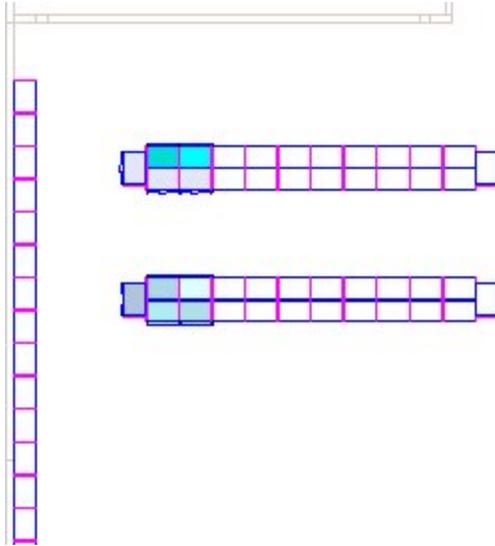


The initial stage is to select the gondolas to be rotated. The outlines of the fixtures will turn dotted and the insertion points will show as blue boxes. (If using individual fixture selection, the selection set must be completed by clicking the right mouse button. If using Windows or crossing selection boxes, continue selecting until all required objects are in the selection set). The fixtures will be rotated about the center of the selected objects.

Note: Selection behavior will also be affected by whether Grouping is On or Off.



Once the fixtures have been selected, the Rotate 180 Degrees button is clicked on the Fixture Manipulation toolbar. The fixtures will then be drawn in their final position in the floor plan.

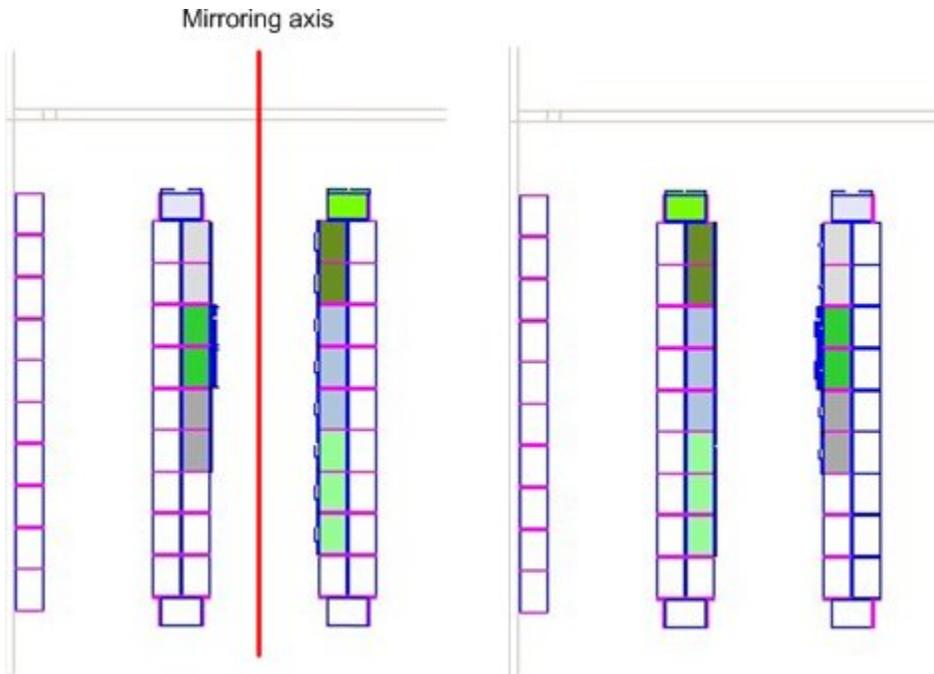


Other Commands

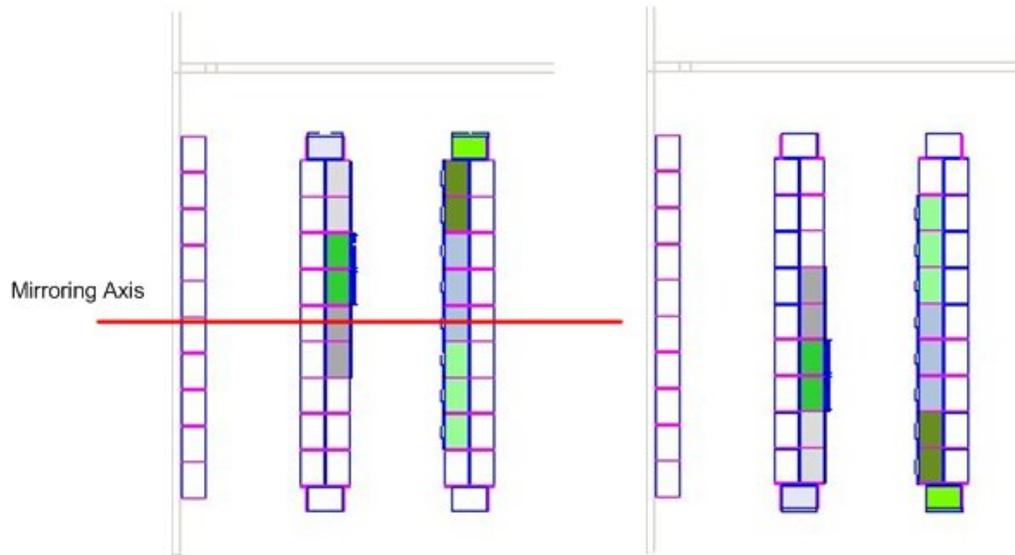
Mirror Fixtures

Mirror Fixtures enables users to produce a mirror image of the selected fixtures.

In the example below, the merchandiser has decided to swap the equipment and merchandise to opposite sides of the aisle. The left hand side of the diagram below shows the aisle before mirroring and the axis about which the aisle will be mirrored. The right hand side of the diagram shows the aisle after mirroring.



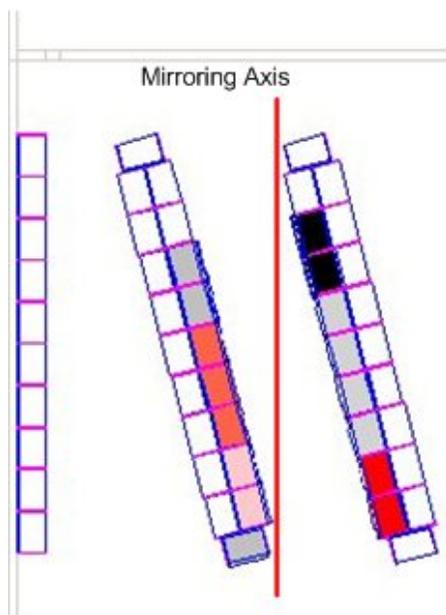
In the example below, the merchandiser has decided to swap the equipment and merchandise about the center of the aisle. The left hand side of the diagram below shows the aisle before mirroring and the axis about which the aisle will be mirrored. The right hand side of the diagram shows the aisle after mirroring.



The command is invoked from the Mirror option on the Fixturing toolbar.

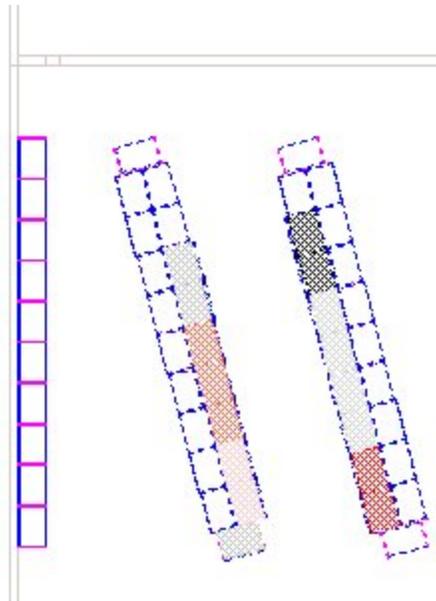


In the example below, the equipment and merchandise in the two double gondolas is to be mirrored about the specified axis.



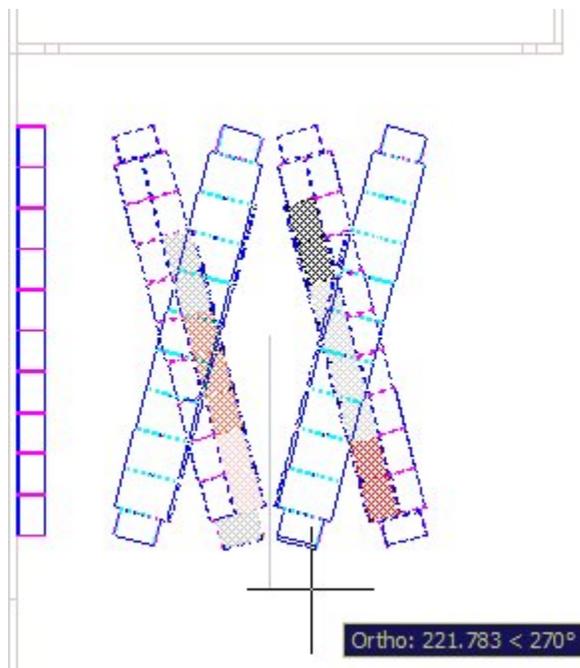
The initial stage is to select the objects to be mirrored. The outlines of the fixtures will turn dotted and the insertion points will show as blue boxes. (If using individual fixture selection, the selection set must be completed by clicking the right mouse button. If using Windows or Crossing selection boxes, continue selecting until all required objects are in the selection set). The fixtures will be mirrored about the center of the selected objects.

Note: Selection behavior will also be affected by whether Grouping is On or Off.

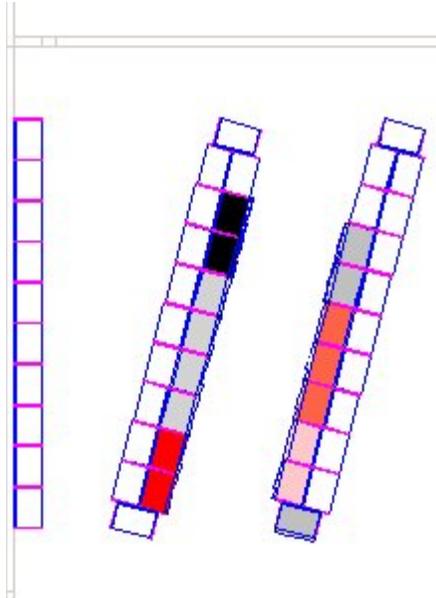


Note: Care must be taken to select only the fixtures and merchandise it is intended to mirror.

Click the **Mirror** command on the fixturing toolbar. The cursor will be returned to the floor plan and (if not already on) the AutoCAD Ortho command will be turned on. This restricts the permissible angle the fixtures can be mirrored through to 0, 90, 180 and 270 degrees. Moving the cursor about will select the varying possible angles. At the same time a 'ghost' image will show where the fixtures are to be mirrored to.



On left clicking in the floor plan, the selected objects will be mirrored.



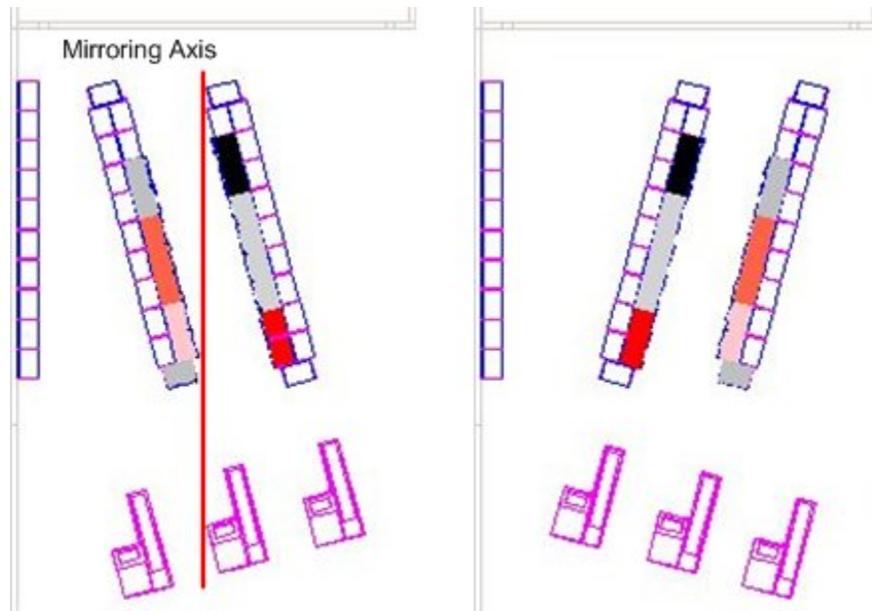
Note: if it is desired to mirror at any other angle than 0, 90, 180 and 270 degrees, it is possible to manually turn off the AutoCAD Ortho command during the mirroring operation. The blocks can then be mirrored about any specified angle.

Fix Mirrored Blocks

Because the blocks have been mirrored, they are a precisely inverted reflection of the original block. This includes the insertion points. The **Mirror** command automatically calls the Fixed Mirrored Blocks command and (provided the block is symmetrical) the insertion points are adjusted to the correct position.

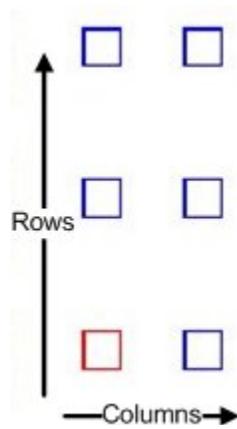
Non-Symmetrical Objects

The functionality is unable to fully mirror non symmetrical objects. An example would be the checkouts seen in the bottom of this diagram. The Mirroring axis is shown in the left hand part of this diagram. When the double sided gondolas and checkouts are mirrored, the double sided gondolas become a mirror image of each other. However, because the checkout are not symmetrical, they are 'reflected' to the new position, but the block itself remains 'un-reflected'.



Array Fixtures

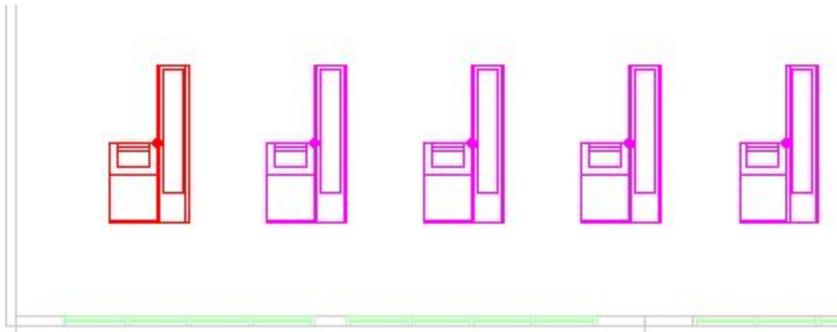
Array takes a selected set of equipment, merchandise and annotation and generates additional rows and columns of that set of objects. In the diagram below, the original red fixture has been used as the basis for an array of three rows and two columns of similar fixtures.



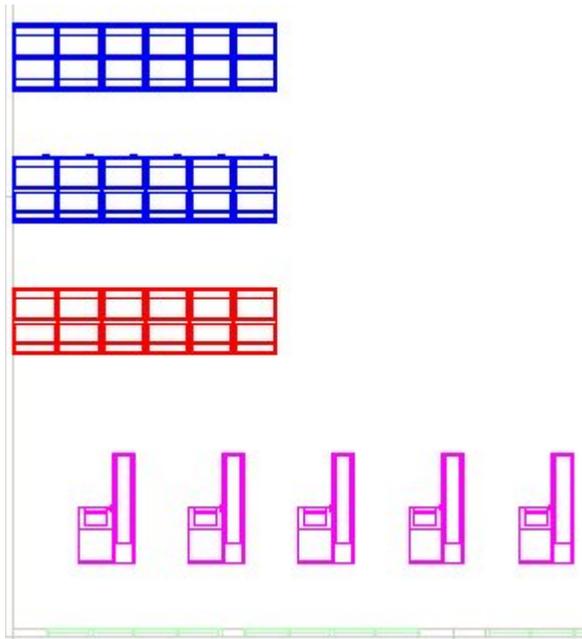
The command is invoked from the array option on the Fixturing toolbar.



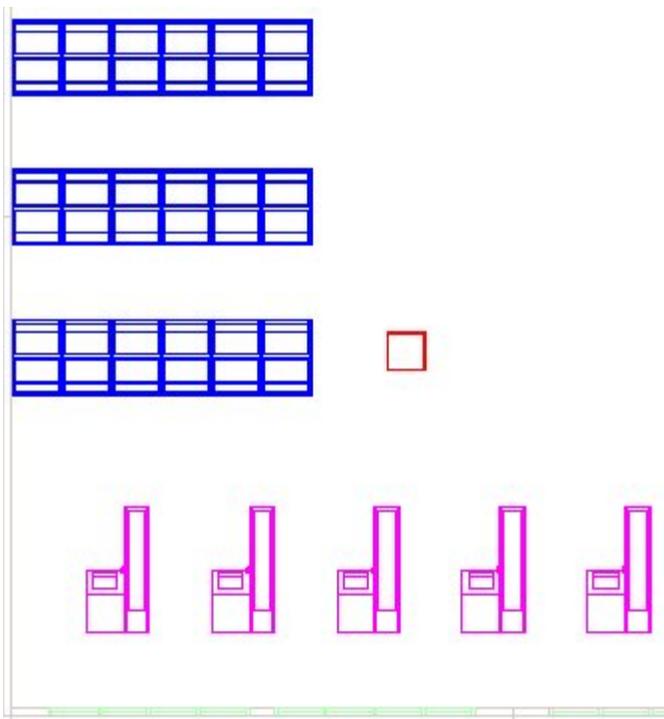
Arraying can be used to speed up laying out the arrangement of equipment in a store. In the example below, the original checkout (shown in red for clarity), has been extended into a row of checkouts by means of the array command.



Similarly, in the example below, the original gondola (shown in red for clarity), has been copied twice by means of the array command.

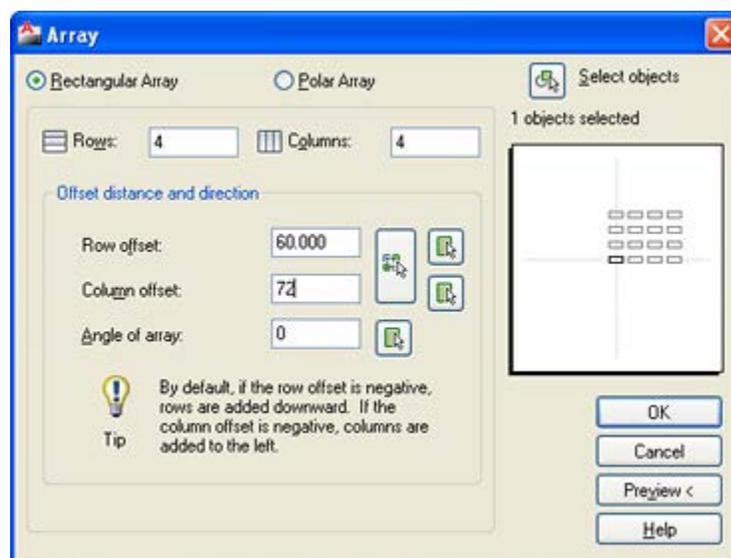


To use the array command, consider the following example:



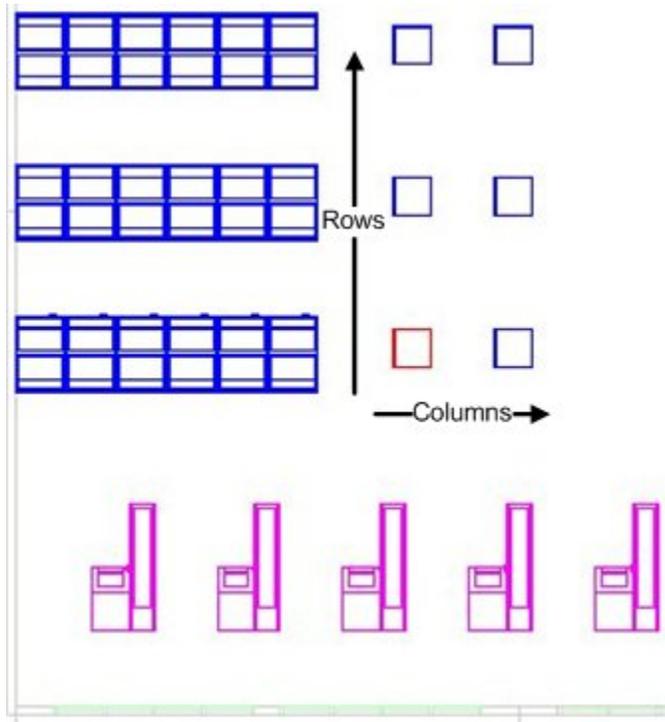
Having laid out some initial checkouts and gondolas, it has been decided to put down an array of bins for special offers. The initial bin (shown in red for clarity) has already been placed. The array command can then be used to space additional bins. The steps are as follows:

1. Establish the dimensions of the bin. In this example it is 36 inches square.
2. Establish the X and Y dimensions for the array. In this case it has been decided to leave a 5 ft gap between adjacent bins in the X axis, and to align the bins with the ends of the gondolas in the Y axis. The gondola runs are 12 ft between centers.
3. Select the bin and then click the Array command on the fixturing toolbar. This will cause the Array dialog box to appear.



4. The number of columns is set to 3 (to match the number of gondolas) and the row offset is set to 144 (to match the centers of the gondola runs).

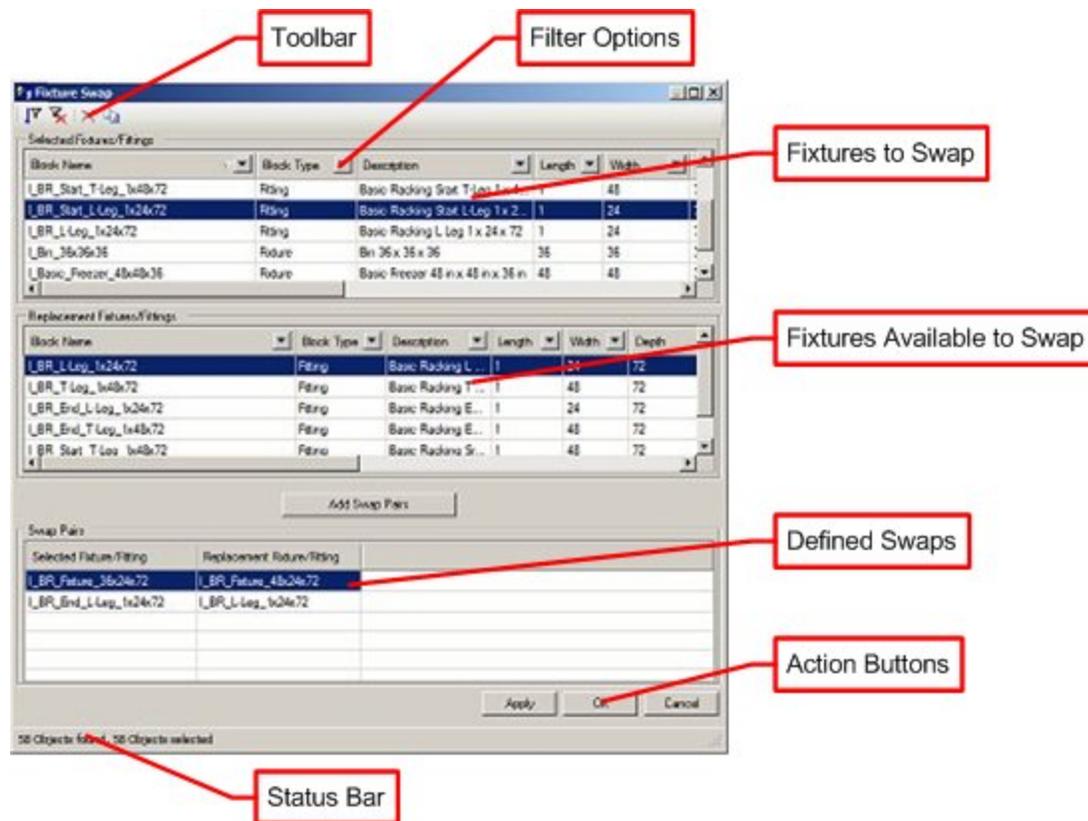
5. The number of rows is set to 2. As we want to leave 5 ft (60 inches) between the bins, the column offset is set to 96 (36 inches for the bin, plus 60 inches for the gap between them).
6. Clicking the Preview button will show a preview of the arrayed fixtures. Pressing Escape will return the user to the Array dialog box. Pressing Return will place the arrayed fixtures in the floor plan.



Fixture Swap

The Fixture Swap Dialog Box

The Fixture Swap dialog box is made up of a number of parts.



Options

Toolbar

The toolbar allows users to mirror (copy) and delete filter settings. It also allows users to delete defined swaps and to copy information to the clipboard.

Filter Options

Each column in the Selected Fixtures and Replacement Fixture sections of the dialog box can be filtered to refine the list of a available data.

Fixtures to Swap

The Selected Fixtures/Fittings section contains a list of all equipment that was selected in the floor plan when the Fixture Swap dialog box was activated.

Fixtures Available to Swap

The Replacement Fixtures/Fittings section contains a list of all equipment that could be used to replace the equipment in the floor plan.

Defined Swaps

This section of the dialog box contains a list of all the fixture swaps that have been defined.

Action Buttons

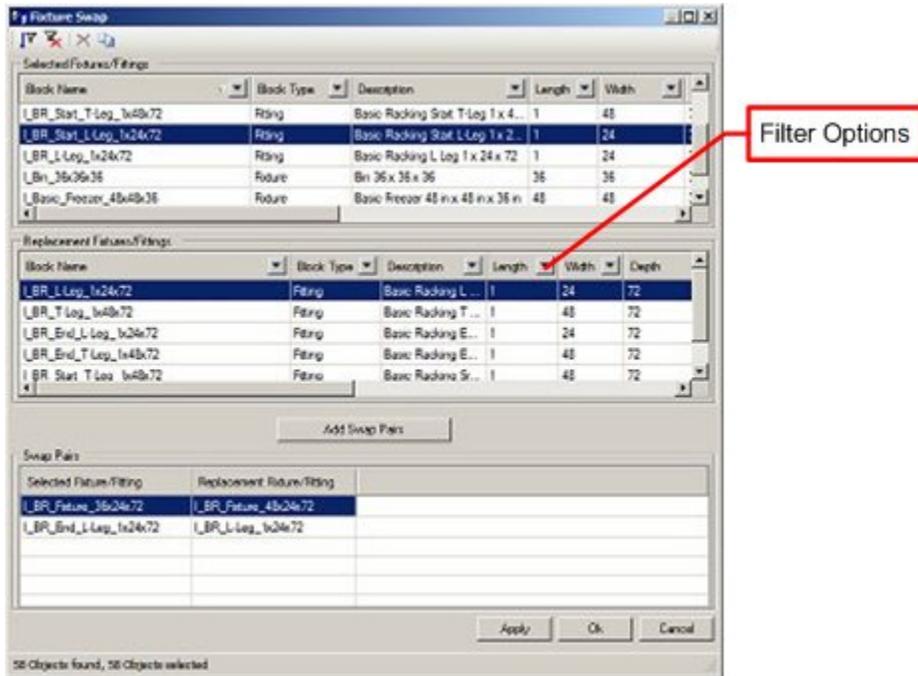
The action buttons allow the user to execute the currently defined swaps, execute the currently defined swaps and exit, and cancel the currently defined swaps and exit.

Status Bar

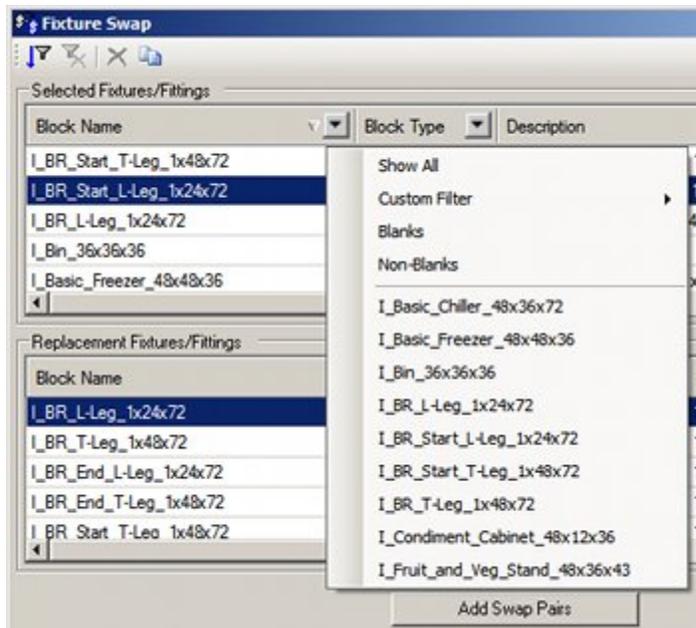
The status bar gives information in the number of objects found in the drawing, and the number selected.

The Fixture Swap Filters

Filters are available to reduce the number of fixtures displayed for selection in the Selected Fixtures/Fittings and Replacement/Fixtures/Fittings frames of the Fixture Swap dialog box. They can be activated by clicking on the arrow head by each column of data.



This will bring up a drop down menu with a number of options.

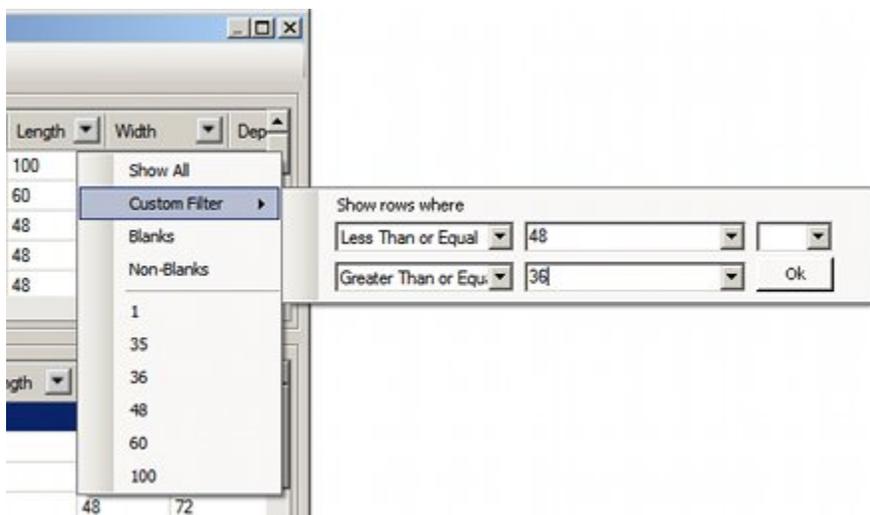


- Selecting Show All will remove the filters and show all rows of data.
- Selecting Custom Filter will bring up a custom filter allowing Boolean operations on the data (see below).
- Selecting Blanks will reduce the data to those rows that have blank values in that column.
- Selecting Non-Blanks will reduce the data to those rows that have a value in that column.

In addition, the lower part of the drop down menu contains a list of the individual items of data in that column. Clicking an item reduces the rows to that item of data.

Custom Filters

The custom filter option is invoked from the filter drop down menu.



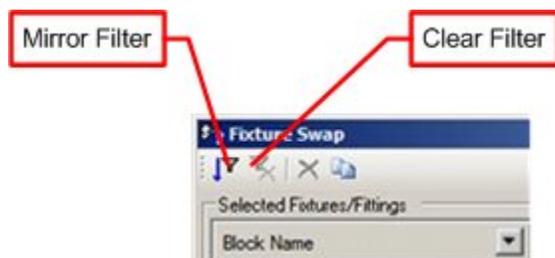
It enables users to use Boolean logic. In the above example (with numerical data selected), the lengths will be filtered to find all fixtures with lengths between 36 and 48 inches. (This filtering logic also applied to Date values).

Condition	Description
Equals	Values must be exact: for example select all rows with a value of 48
Does Not Equal	Values will exclude that value: for example select all rows that do not have a value of 48.
Greater Than	Selects all values above a specific value: for example Greater Than 48 will return 49, 50, 51, etc.
Less Than	Selects all values below a specific value: for example Less Than 36 will return 35, 34, 33, etc.
Greater Than or Equal	Selects all values equal to or above a specific value: for example Greater Than or Equal to 48 will return 48, 49, 50, etc.
Less Than or Equal	Selects all values equal to or below a specific value: for example Less Than or Equal to 36 will return 36, 37, 38, etc.
If a text value is selected, a different set of Boolean logic applies	
Condition	Description
Equals	Values must be exact: will return rows that are an exact match for the entered text.
Does Not Equal	Values will exclude that value: will return rows that do not match the text string
Contains	Will return rows where part of the data matches the text string. (Uses implied wild cards).
Does Not Contain	Will return rows where no part of the data matches the text string. (Uses implied wild cards).
Begins With	Will return rows where the text string is an exact match for the start of the data.
Does Not Begin With	Will return rows where the text string is an exact match for the end of the data.
Ends With	Will return rows there the text string is not an exact match for the start of the data.
Does Not End With	Will return rows there the text string is not an exact match for the end of the data.

Boolean logic also includes the use of And or Or.

- And means that both conditions must be met. A and B means the data returned must contain both A and B.
- Or means either condition can be met. A or B means the data returned can contain either A or B. It does not need to contain both.

Mirroring and Clearing Filters



1. Mirroring Filters

The Selected Fixtures/Fittings and Replacement Fixtures/fittings frames contain identical columns. If a filter is set in (for example) the Fixture Length column in the Selected Fixtures/Fittings frame, clicking Mirror Filter will also set that filter in the Replacement Fixtures/fittings frame. (The reverse case also applies).

2. Clearing Filters

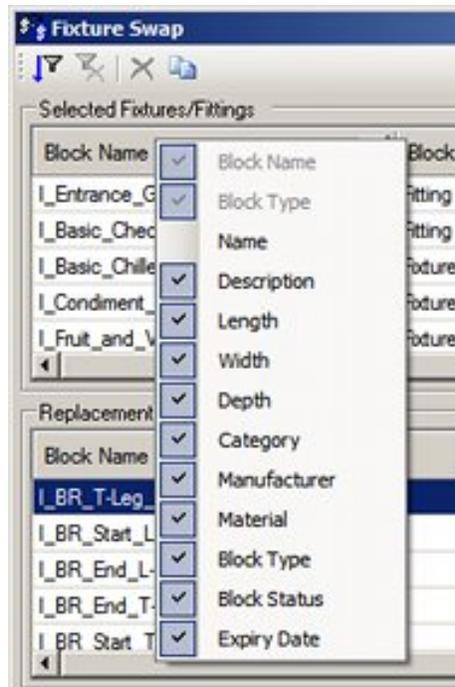
Clicking the Clear Filters icon will clear all the filters set in the Fixture Swap dialog box.

Other Data Manipulation Options

There are two other ways data can be ordered in the dialog box.

Selecting Columns to Display

Right clicking on the column header area in either the Selected Fixtures Fitting or the replacement Fixtures/fittings frames allows the users to select which columns of data are displayed.



Note: Block Name and Block Type are mandatory columns and cannot be deselected.

Sorting Columns of Data

Columns of data can be sorted in ascending or descending order by clicking the header. When the data in a column has been sorted, a small triangle will appear in the header - the direction of the triangle indicating whether the data is sorted ascending or descending.

Length	Width	Depth
35	1	72
48	12	36
35	23	3
1	24	72
1	24	72

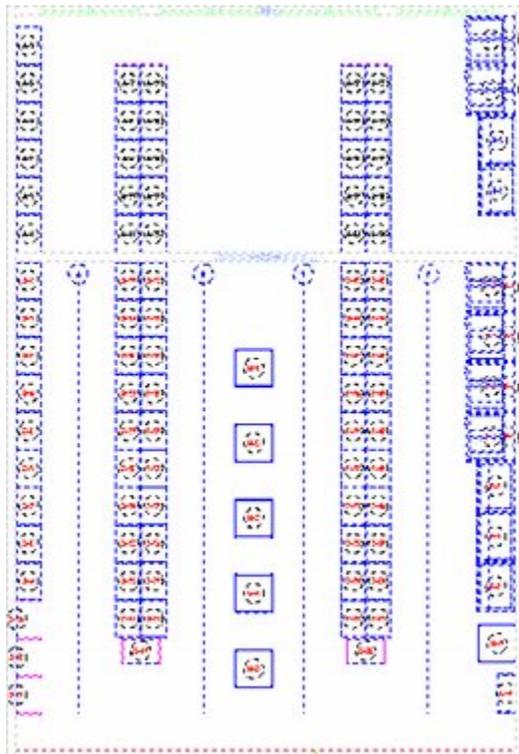
In the above example, the Width column has been sorted in ascending order.

Note: the Width column can be compared to the Length column, where data has not been sorted.

Carrying Out Fixture Swaps

Carrying out Fixture Swaps is achieved as follows:

1. The Fixtures are selected



2. Fixture Swap is called

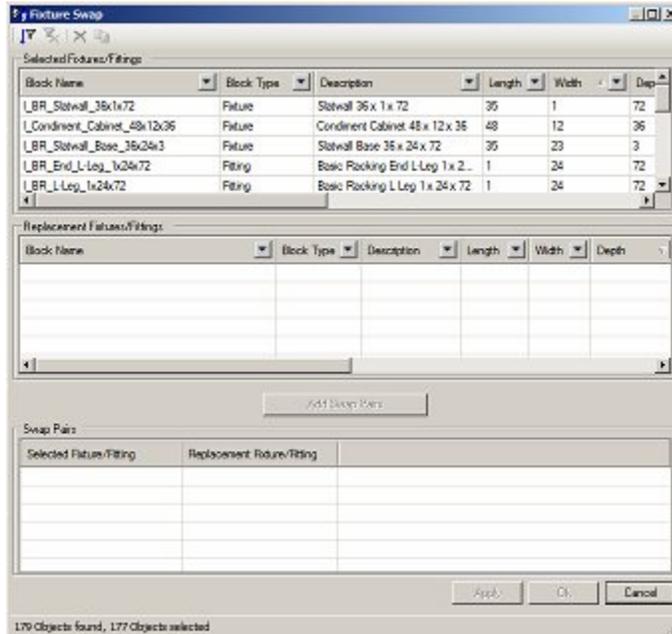
This can be done from the Command Line (AVT_FIXTURESWAP) or from the Fixturing toolbar.



Note: Selecting the Fixtures and Invoking Fixture Swap can be done in either order.

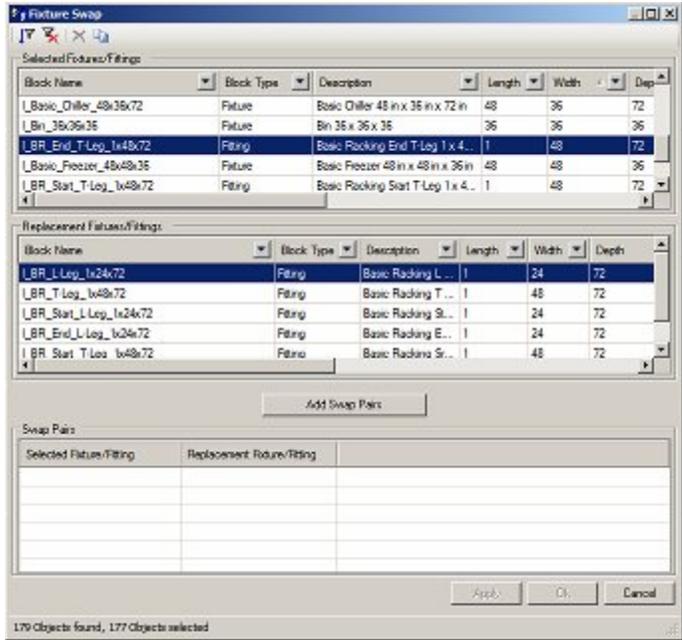
3. The Fixture Swap dialog box will open

When the Fixture Swap dialog box opens, only the Selected Fixtures/Fittings list of data is populated. Filters can be used to refine the list.



4. Select the Fixture or Fitting to be replaced

The fixture or fitting to be replaced is selected in the list of Fixtures and fittings. This causes the list of replacement fixtures and fittings to populate.

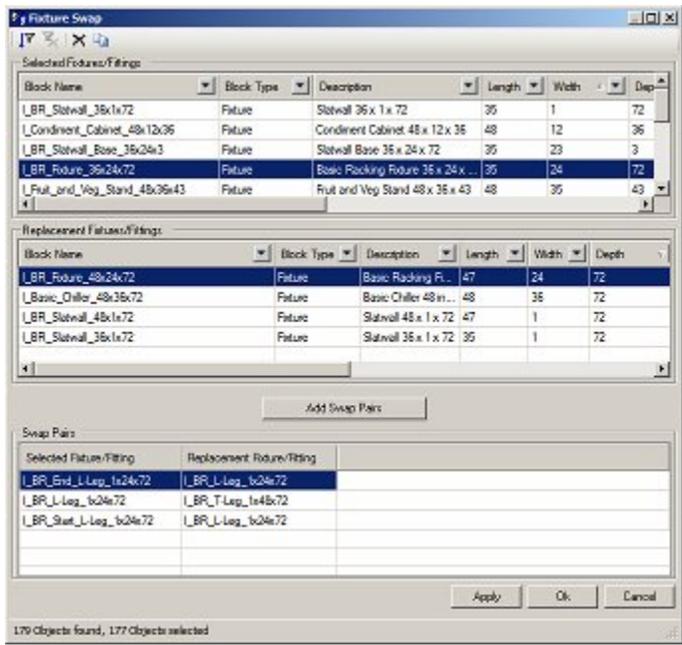


It is possible to select multiple fixtures for replacement by holding down the Control Key and left clicking on additional rows.

5. Select the Replacement Fixture or Fitting

A replacement fixture or fitting is selected. (Filters can be used to refine the list of available replacements). Clicking the Add Swap Pairs button causes the Swap Pairs pane to populate.

Once a fixture has been added to a swap pair, the entry will be removed from the top (Selected Fixtures / Fittings) frame to prevent multiple swap types being defined for that fixture. If the swap pair is subsequently deleted, the fixture will be added back to those in the Selected Fixtures / Fittings frame.



6. Make the Swap

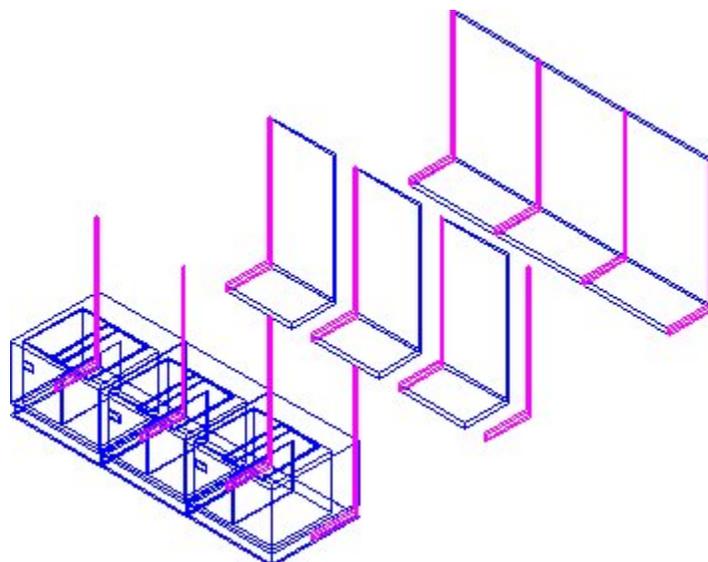
Click the Apply button to cause all the defined swaps to execute and leave the dialog box open to define further swaps. Click the OK button to make all the defined swaps and exit the dialog box.

Limitations of Fixture Swap

The Fixture Swap functionality is useful for making large scale changes to equipment within a store plan, but there are some limitations on what it can achieve. These limitations are explained below.

Size and Type

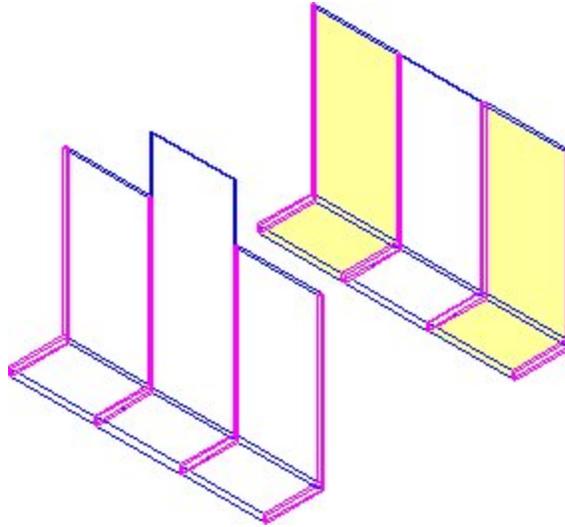
Fixture Swap does not place any restrictions on the size of the equipment that can be swapped. In the example below, the back gondola run is the original gondola. The middle gondola run represents what would happen if 4 foot long fixtures were replaced by 3 ft long ones. The front gondola run shows what would happen if fixtures are replaced by inappropriate ones: in this instance racking has been replaced by freezer units.



Effect of Planograms

If exploded (3D) planograms have been placed on fixtures in Merchandiser, they will not be visible in Planner. However, as the information is held in the database on what fixtures do contain exploded planograms, fixture swaps will not be carried out on those fixtures.

In the example below, the back gondola run has two planograms. The fixtures containing these planograms have been color coded yellow in this diagram. It would not be immediately apparent to a user in Planner that these fixtures contain planograms because they will not contain product blocks - unlike if the planogram was in 2D (imploded) form.



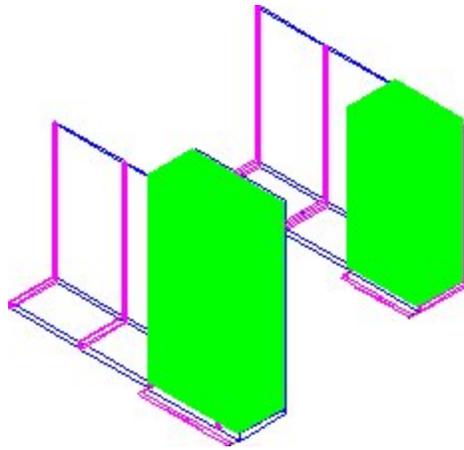
If the fixtures are selected for a fixture swap operation, only the fixture that does not have a planogram placed will be swapped, despite all fixtures being included in the selection. The effect of this can be seen in the front gondola run. The user will be given a warning in the AutoCAD command line - although the fixtures containing planograms are not identified.

```
These fixtures contain child shelves or display style products and cannot be swapped using the Fixture Swap feature.
7 Objects found, 7 Objects selected
```

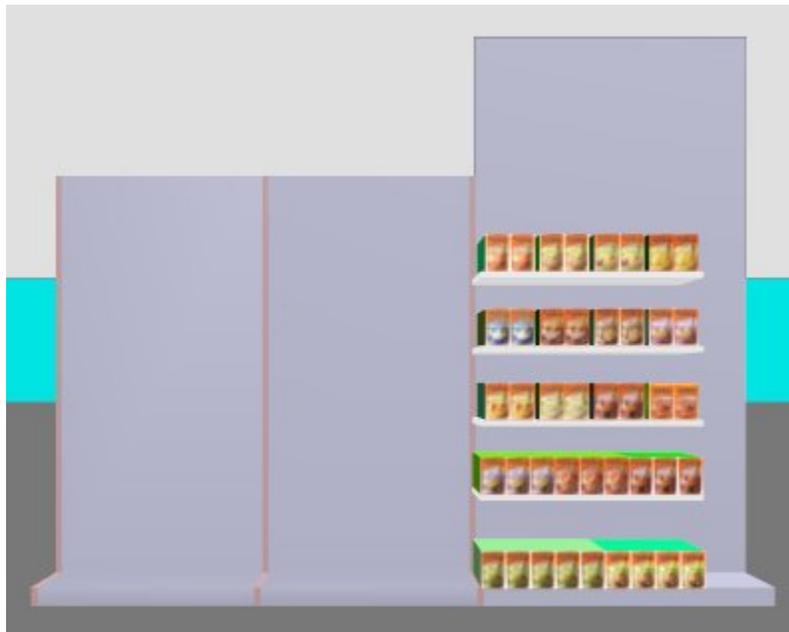
Note: one solution for this limitation is to create a KPI (Key Performance Indicator) to color code all fixtures containing planograms. It is then possible to determine which planograms are not merchandised (and which can be subjected for Fixture Swap) and which are merchandised and cannot be swapped.

Effect on Planograms

If planograms are present as placeholders (2D form), they are visible in the Planner module. If a fixture is swapped for one of a different size, the planogram placeholder is scaled to suit. However, the planogram design is not changed. In the example below, the rear gondola run has the planogram placed on a fixture of the intended size. In the front planogram run, the correctly sized fixture has been swapped for one that is both higher and wider.



The effect of this can be seen when the planogram is viewed in exploded (3D) form in the merchandiser module. As can be seen in the example below, both the shelving and merchandise fail to correctly fill the larger fixture that was swapped in.



When swapping fixtures, it may be necessary to subsequently swap the existing planograms for ones of a more appropriate size for the replacement fixture.

Note: planograms on inappropriately sized fixtures can be identified by means of KPI's and Reports.

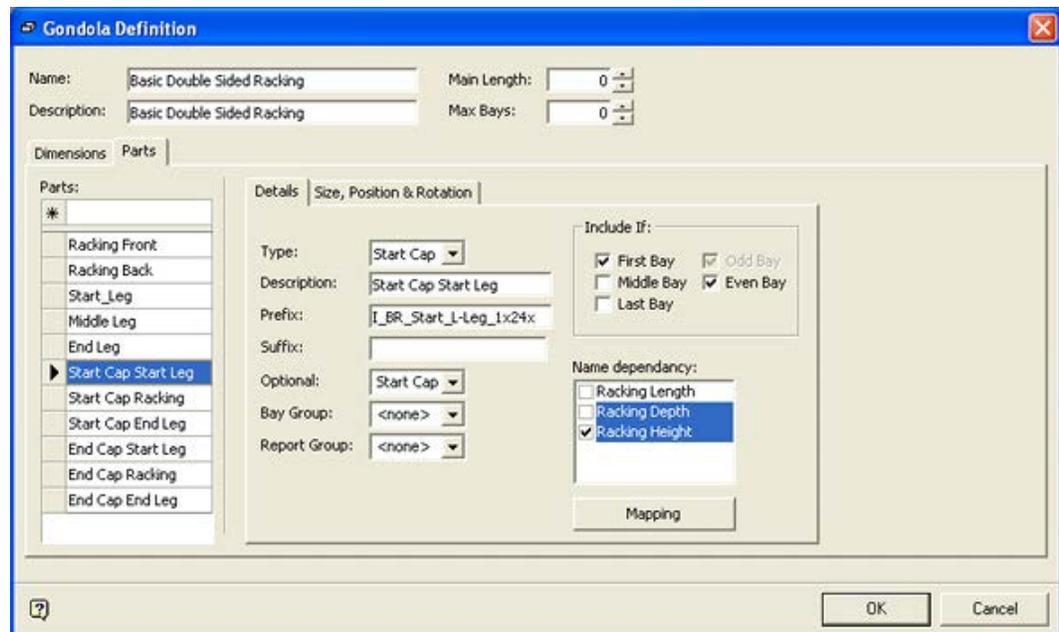
Gondolas on the Object Browser

Overview of Gondolas

Gondolas are pre-defined arrangements of fixtures and fittings. This enables long runs of fixtures to be put down quickly, making it easy to lay out or modify equipment in a floor plan.

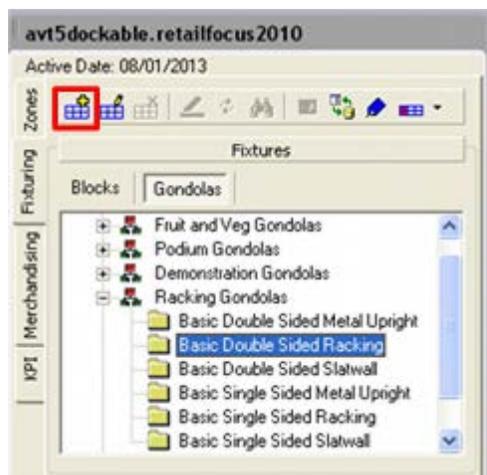
Fixture Studio

Gondolas are configured in the Fixture Studio Module in the Gondola Definitions dialog box. This enables all details of the gondola to be configured including which options will appear in the Add Gondola dialog box in the Planner and Merchandiser modules.

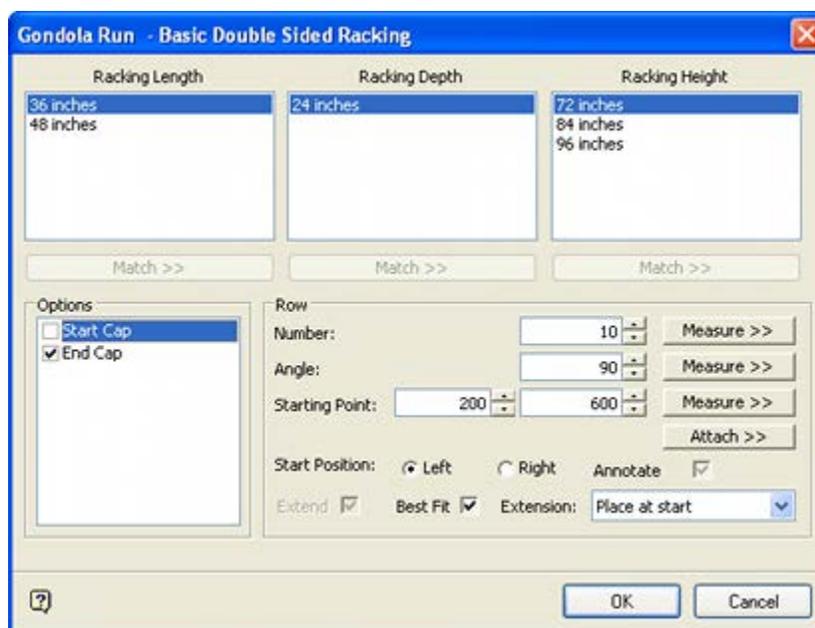


Planner Module

Gondolas are placed in the Planner module by selecting a Gondola from the Object Browser and clicking the Add Gondola option on the toolbar.



After being invited to select a start position, the Add Gondola dialog box will appear.



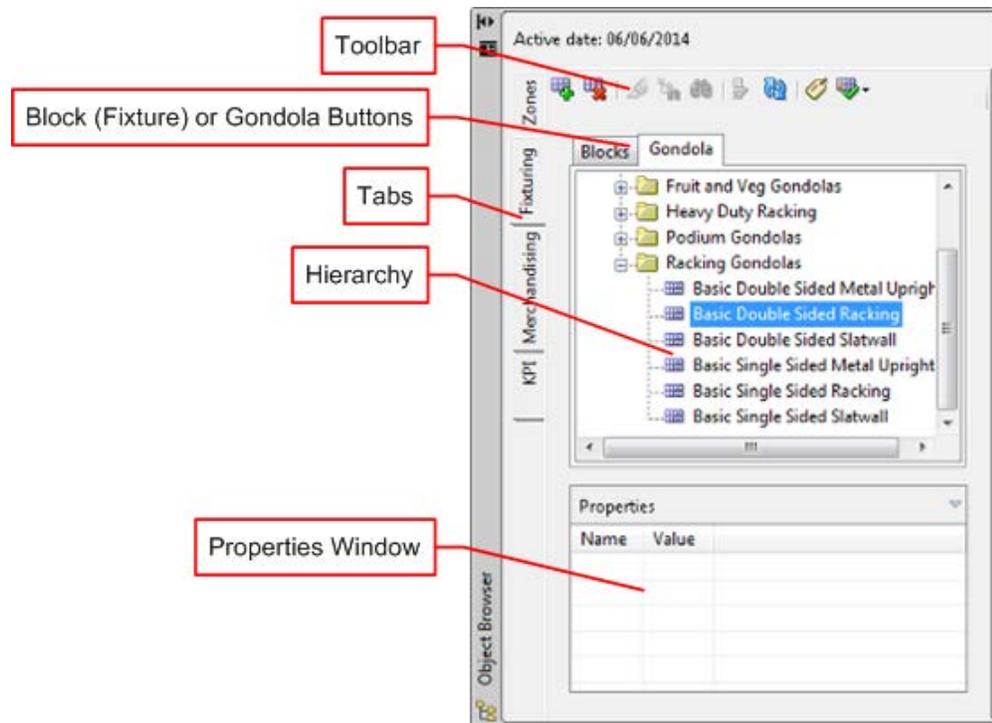
Users can select from a variety of options including:

- Gondola Dimensions: in the above example users can select from six combinations of length and height.
- Number of Bays: Users can select the number of bays to place.
- Optional Parts: Some parts may be optional. In the above example users can opt whether to have Start and End Caps.
- Origin and Placement Angle: Users can select where the gondola starts from and what angle to place it at.

After selecting the appropriate options, click OK and the gondola will be placed.

Overview of Gondolas on the Object Browser

Clicking on the Fixturing Tab on the Object Browser brings up a series of options for adding, editing and deleting Fixtures and Gondolas.



- The Toolbar gives access to a series of options concerning gondolas.
- The Buttons allow the user to toggle between Fixtures (Blocks) and Gondolas.
- The Hierarchy Window allows users to select fixtures (or gondolas) from the list available.
- The Properties Window shows the properties assigned to the selected fixture. This will be blank for gondolas.

Note: The Summary Window has been removed from the Object Browser and is now called from the **View** menu.

Using the Object Browser for Gondola Operations

The **Gondolas tool bar** is found on the Object Browser. It is selected by clicking on Gondolas in the Fixturing window.

Overview of the Fixturing Tab

The Fixturing tab allows users to add fixtures, fittings, gondolas and other equipment to the store plan. It is divided into five parts as follows:

- The toolbar – provides controls that allow users to add, edit, and delete fixtures and gondolas
- The Fixtures window – shows a hierarchy of available blocks and gondolas
- The Properties window – after selecting a block from the hierarchy, this window shows the details for the selected block. The content of this window is customizable.

A fourth option - the Fixtures Summary Window – shows details of the zones based on the currently active floor plan. This is now called from the **View** menu but can be docked in the Object Browser if required.

The **Fixturing Tab Toolbar** in the Object Browser enables the user to control all aspects of adding, editing and deleting fixtures and gondolas within the Planner and Merchandiser environments.

Clicking on the Switch Buttons will determine whether the Fixturing or Gondola options are active.

Fixturing Toolbar



Icon	Option	Description
	Add Fixture	Add a fixture to a floor plan. This will cause the Add Fixture dialog box to appear.
	Delete Fixture	Delete the selected fixtures from the floor plan.
	Highlight Fixture in Floor Plan	If selected, selecting a fixture in the Object Browser Fixture Hierarchy will cause the pertinent fixture to be highlighted in the floor plan. The exact nature of the highlighting will depend on selections made in the Fixturing Tab of the Configuration Module.
	Highlight selected item in tree	If selected, selecting a fixture in the floor plan will cause the pertinent fixture to be highlighted in the Object Browser Fixture Hierarchy.
	Find	This option brings up the Find dialog box, allowing users to search for objects in the Fixture Hierarchy.
	Options	This option brings up the Fixturing Tab of the Configuration module, allowing users to customize their settings.
	Refresh	This option refreshes the Object Browser with the latest information on fixtures and gondolas in the database.
	Show Attributes	This option shows the fixture attributes for any selected fixtures. Fixture attributes are customizable items of information assigned to specific fixtures.
	Promotional Fixtures	This option allows the user to assign or remove the Promotional Attribute and to highlight fixtures with the promotional attribute.

Gondola Toolbar



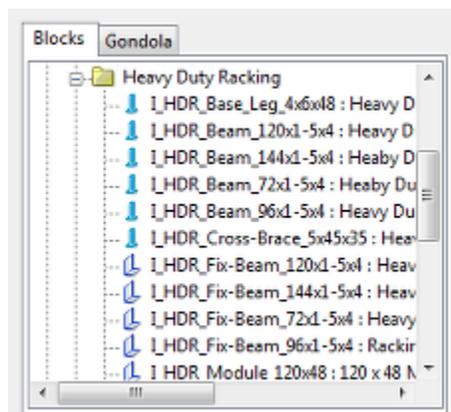
Icon	Option	Description
	Add Fixture	This option is grayed out and unavailable in Merchandiser.
	Delete Fixture	This option is grayed out and unavailable on the Gondola toolbar.
	Highlight Fixture in Floor Plan	This option is grayed out and unavailable on the Gondola toolbar.
	Highlight selected item in tree	This option is grayed out and unavailable on the Gondola toolbar.
	Find	This option is grayed out and unavailable on the Gondola toolbar.
	Options	This option is grayed out and unavailable on the Gondola toolbar.
	Refresh	This option refreshes the Object Browser with the latest information on fixtures and gondolas in the database.
	Show Attributes	This option shows the fixture attributes for any selected fixtures. Fixture attributes are customizable items of information assigned to specific fixtures.
	Promotional Fixtures	This option allows the user to assign or remove the Promotional Attribute and to highlight fixtures with the promotional attribute. This option has no effect in the merchandiser module.

The Hierarchy Window

The Hierarchy window displays both the block and the gondola hierarchies. To toggle between the hierarchies use the Blocks or Gondolas buttons respectively. The hierarchies are defined in the Fixture Studio environment and show all the fixtures and gondolas that can be added to a store plan.

The hierarchy can be expanded using the plus control next to each item on the hierarchy. It can also be collapsed by using the minus control next to each item.

An item in the hierarchy can be highlighted by clicking on the name of the block or gondola.

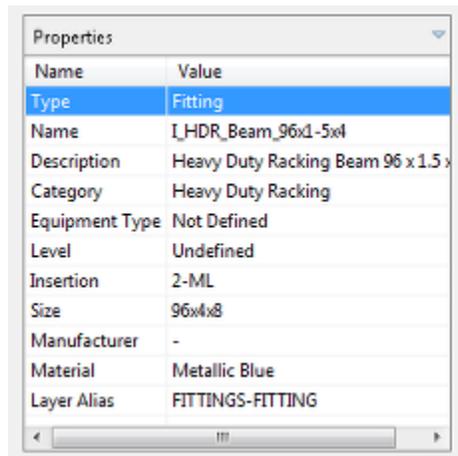


The icons preceding the fixture name identify the type of equipment - equipment of similar types will have the same icon.

The Properties Window

The Properties window displays information for the block that has been selected in the blocks hierarchy. The content of this window is by modifying the Custom SQL in the database. This allows an implementer to specify the information that appears in the window.

Note: See the *Oracle Retail Macro Space Planning Data Model* for information on Custom SQL.



Name	Value
Type	Fitting
Name	I_HDR_Beam_96x1-5x4
Description	Heavy Duty Racking Beam 96 x 1.5 x
Category	Heavy Duty Racking
Equipment Type	Not Defined
Level	Undefined
Insertion	2-ML
Size	96x4x8
Manufacturer	-
Material	Metallic Blue
Layer Alias	FITTINGS-FITTING

The Summary Window

The Summary window displays information on the equipment placed in the currently open floor plan. The content of this window is by modifying the Custom SQL in the database. This allows an implementer to specify the information that appears in the window. As an example, the window could include a comparison between the equipment in the currently open floor plan and any designated prototype store.

Note: See the *Oracle Retail Macro Space Planning Data Model* for information on Custom SQL.

This window is now called from the **View** menu, although it can be docked in the Object Browser once called.

Placing Gondolas

To add a gondola to the store plan, highlight the required gondola in the hierarchy. Press the Add Gondola button on the toolbar or drag and drop the gondola to the store plan drawing.

The user is prompted to select a start point for the gondola. Pressing the left mouse button opens the Gondola Run dialog box.

The Gondola Run dialog box allows the user to select the dimensions of the blocks to use in the gondola. It also allows the number of bays or length of the gondola to be set. Once the desired options have been set, pressing the OK button closes the dialog and places all the blocks required for the gondola run in to the store plan.

Refreshing the Object Browser

The **Refresh** option refreshes both Fixtures and Gondola information in the respective hierarchical trees.



Refresh

This option refreshes the Object Browser with the latest information on fixtures and gondolas in the database.

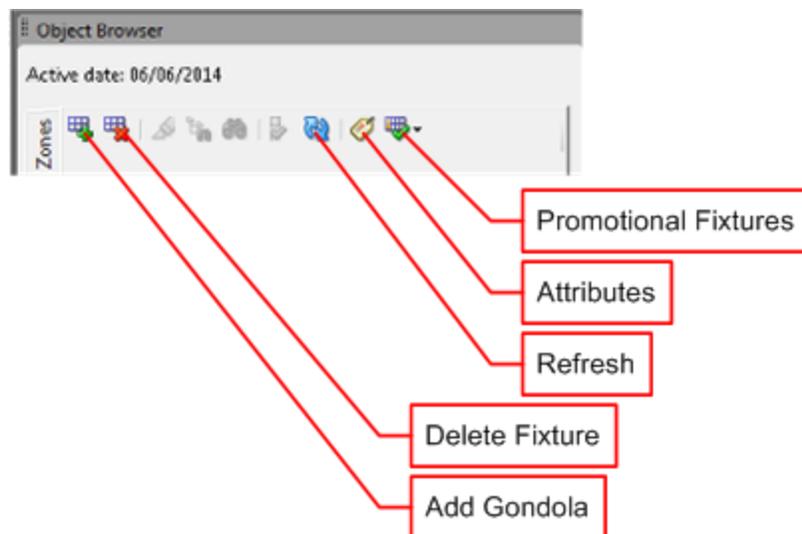
Clicking on the Refresh button in the Fixturing tab will load the latest fixture information from the database into the Fixture hierarchy. At the same time, it will load the latest gondola information from the database into the Gondola Hierarchy.

Dragging and dropping a fixture from the appropriate hierarchy after the refresh button has been pressed will add that fixture to the drawing using the latest definition from Fixture Studio. Similarly, using the Add button will also add a fixture to the drawing using the latest definition from Fixture Studio.

If a drawing is already open then fixtures already placed in the drawing will not use any changes loaded during the refresh operation until the drawing is closed and reopened. However, new fixtures added to the open drawing will use the new data.

Functional Options for Gondolas

The functional options on the gondola toolbar are as follows:



Add Gondola

This option allows users to add a gondola by highlighting it in the hierarchy and clicking the Add button. Alternatively, a gondola may be highlighted and 'dragged and dropped' into the floor plan. This will result in the Add Gondola dialog box appearing, allowing the user to specify further details of the gondola to be added.

Delete Fixtures

This option allows the user to delete selected fixtures in the floor plan. Which fixtures are selected will depend on whether **Grouping** is on or off in the Fixturing toolbar.

- If Grouping is turned On, selecting a single fixture in the gondola will select all fixtures. These can then be deleted together by clicking the Delete icon.
- If Grouping is turned Off individual fixtures in the gondola can be selected and then be deleted by clicking the Delete icon..

Refresh

The **Refresh** option refreshes both Fixtures and Gondola information in the respective hierarchical trees. Clicking on the Refresh button in the Fixturing tab will load the latest fixture information from the database into the Fixture hierarchy. At the same time, it will load the latest gondola information from the database into the Gondola Hierarchy. If a gondola definition has been updated in Fixture Studio, all gondolas placed after refresh will use the new information. However, any gondolas already placed in the floor plan will still conform to the old definition.

Attributes

Attributes only apply to fixtures. The option is available on the Gondolas toolbar as fixtures may require attributes to be assigned as part of the workflow immediately after the gondola has been placed in a floor plan.

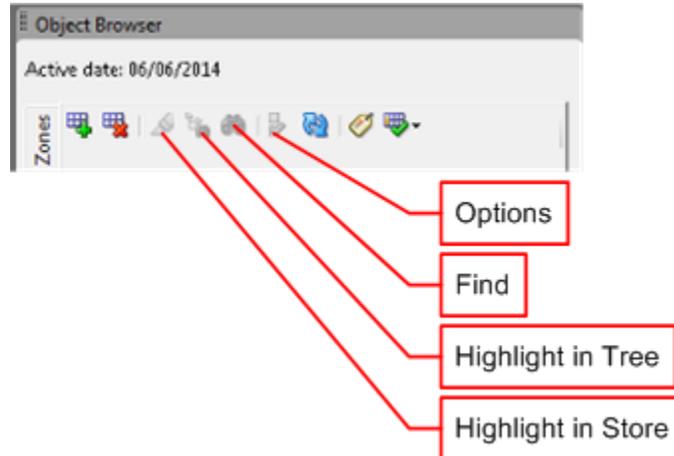
Promotional Fixtures

Promotional Fixtures can be assigned by selecting a fixture or fixtures and clicking on the Promotional Fixture icon in the toolbar. The option is available on the Gondolas toolbar

as fixtures (such as end caps) may be required to be designated as promotional fixtures as part of the workflow immediately after the gondola has been placed in a floor plan.

Non Functional Options for Gondolas

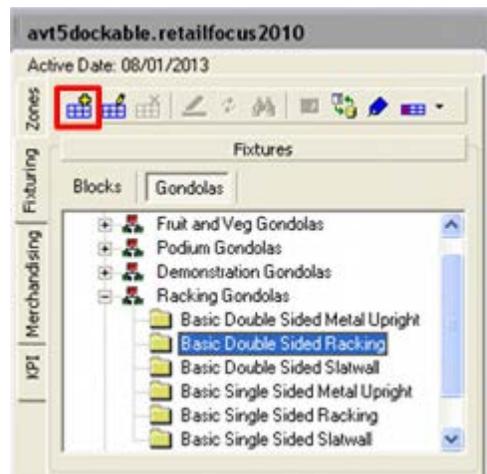
Several options are grayed out and non-available for gondolas.



This is because gondolas are treated as collections of fixtures once placed in a floor plan. In addition they can be modified by addition, changing or deletion of fixtures once placed. The Highlight in Store, Highlight in Tree, Find and Options icons are thus not appropriate for gondolas and have been disabled.

Placing a Gondola - Basic Options

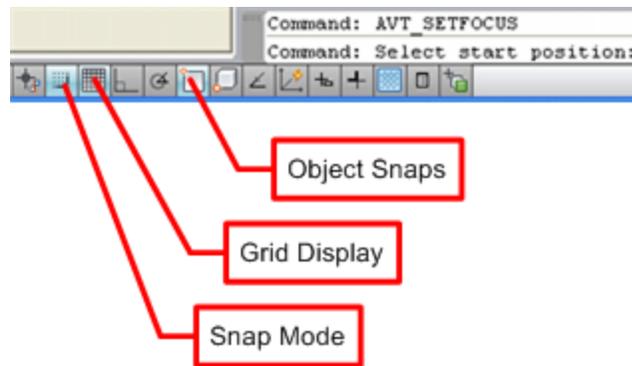
Gondolas are placed in the Planner module by selecting a Gondola from the Object Browser and clicking the Add Gondola option on the toolbar. Alternatively, a gondola can be selected from the hierarchy, then 'dragged and dropped' into the floor plan.



Users will then be invited to select a start position in the AutoCAD command line.

```
Command: AVT_SETFOCUS
Command: Select start position:
```

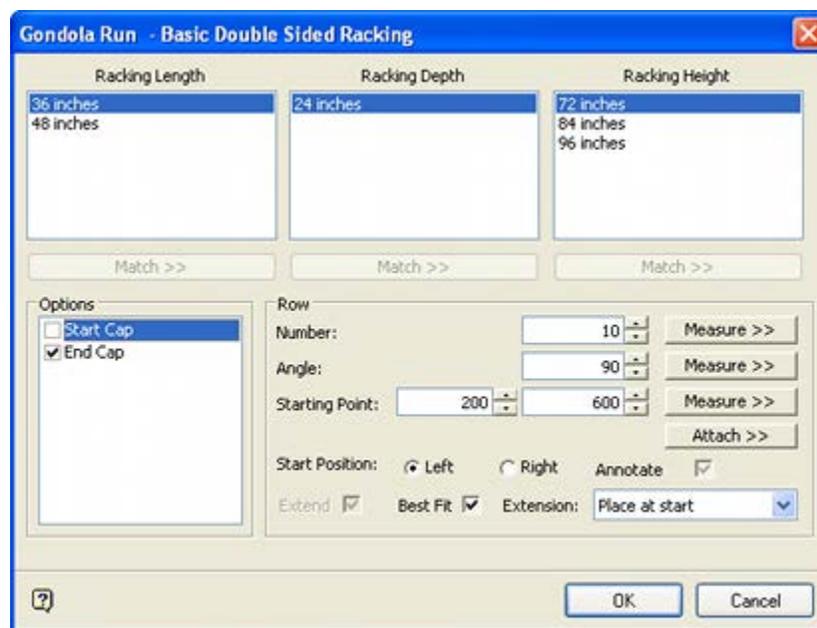
Some AutoCAD options may help in selecting the start point.



- The Snap Mode can be turned on or off. If turned on, the cursor will snap to a grid of points in the floor plan.
- The Grid Display turns display of the snap grid on or off.
- Object Snaps (OSNAP) allows the cursor to snap to specific points in the floor plan (like the corner of another fixture).

Note: See the AutoCAD help file for more information.

Once the Start Position has been selected, the Add Gondola dialog box will appear.



Gondola Dimensions

Users can select the dimensions of the fixtures for the gondola. For many gondolas, the option will exist to select length, depth and height - although other options are possible. If a combination of sizes is selected that does not reference an existing fixture, an error message will appear.



Note: this problem can be prevented by careful configuration of the gondola options when defining the gondola in Fixture Studio.

Options

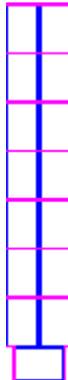
Some gondola parts can be made optional. These parts can be selected or deselected by means of the check boxes in the Options frame.

Number and Angle

The number of bays can be selected using the spin control, while the angle the gondola will be drawn at can also be specified.

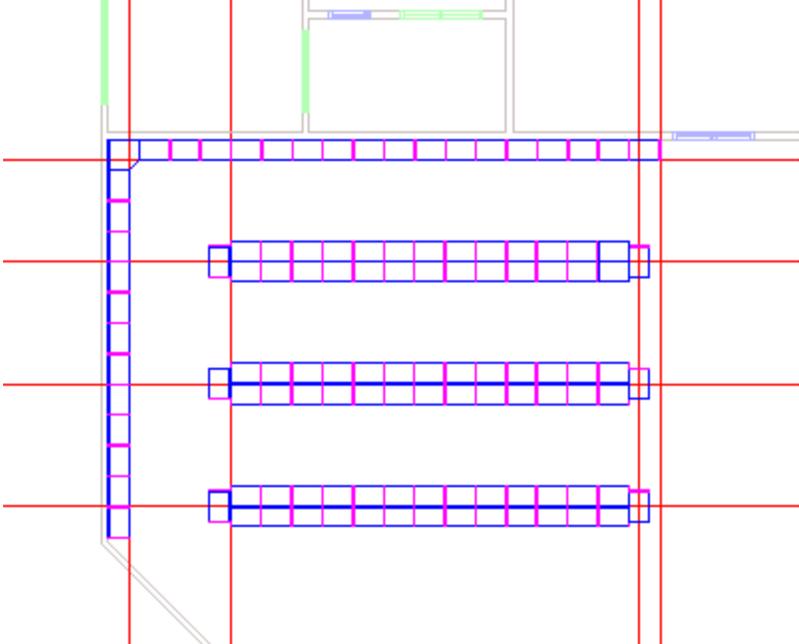
Placing the Gondola

Click the OK button to place the gondola. It will then draw in the floor plan.



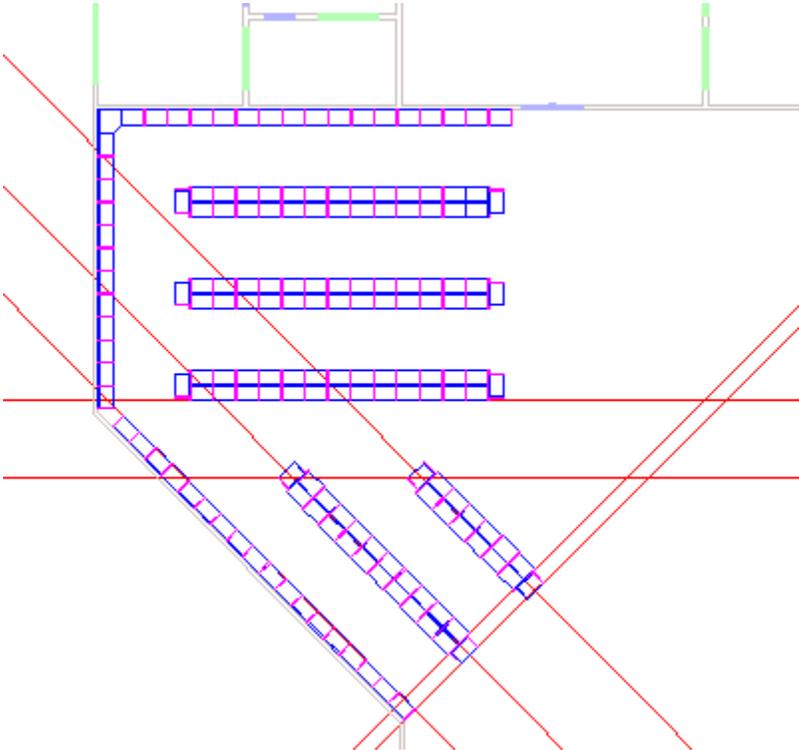
Placing Island Gondolas

Island Gondolas are placed using similar techniques. One useful technique is using AutoCAD construction lines and offsets.

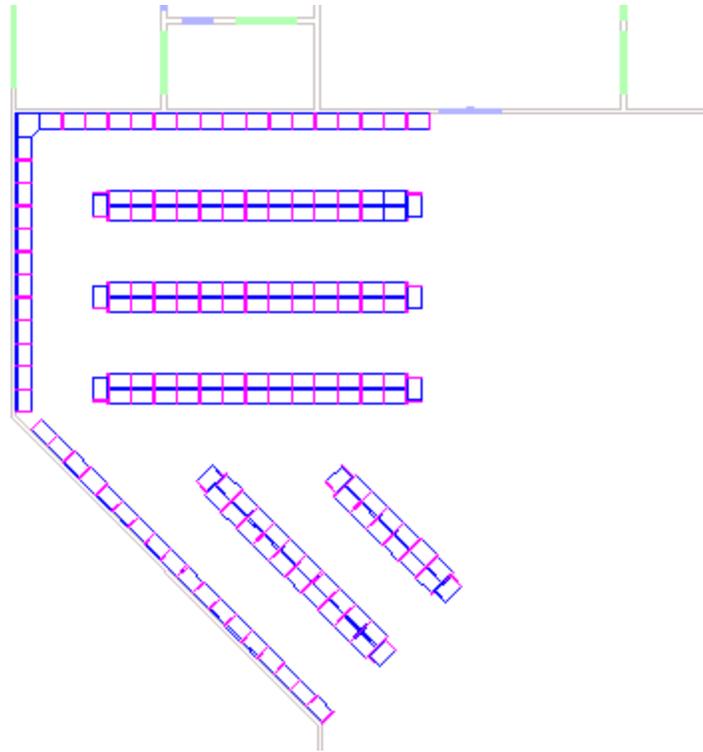


In the example above, construction lines (the red lines in the screen shot) were drawn along the edges of the wall gondolas. Additional construction lines were then offset from the originals to give the correct spacings. In the above example, the construction lines were used to ensure the aisles were a precise 8 feet in width. After the gondolas have been placed, the construction lines will be deleted.

Similar construction lines have been used to place the next sequence of gondola runs.

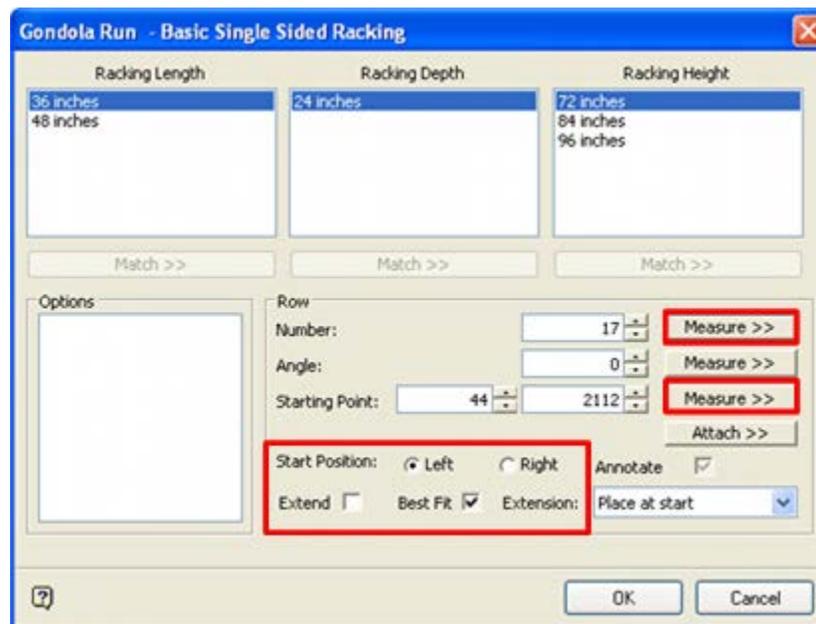


After the construction lines are deleted, this leaves the new gondola runs precisely positioned with minimum aisle widths maintained.



Placing a Gondola - Advanced Options

Gondolas running along walls will often require the specific number of bays required to fill a specified distance - for example from the corner of a wall to the edge of a door frame. The measure options allow users to place that gondola run quickly and accurately.



- Number (Measure) allows the user to draw a line in the floor plan. This specifies the length of the gondola and which end of the line the first bay of the gondola will be drawn at.

- Starting Point (Measure) enables the user to specify point in the drawing which will be the origin from where the gondola will be drawn.
- Start Position (left or right) specifies whether the first bay of gondola at the left end or right end of the gondola run.
- Extend or Best Fit determines whether the number of bays drawn will fit entirely inside the line or partially extend outside of the line.

Once these options are understood, it is simple to draw gondolas fast and accurately in plan view. When learning how to use the options, it is sometimes easier to draw some gondolas in isometric view to see how those options work.

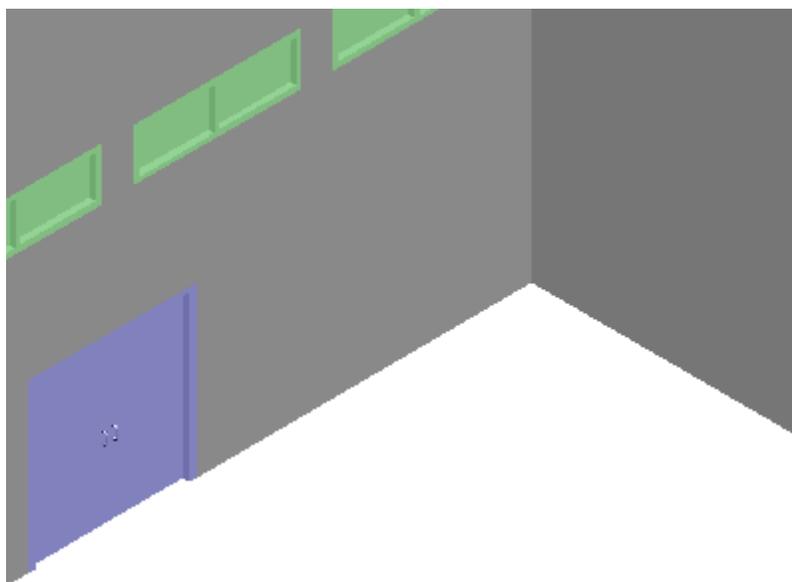
Worked Example

AutoCAD Settings

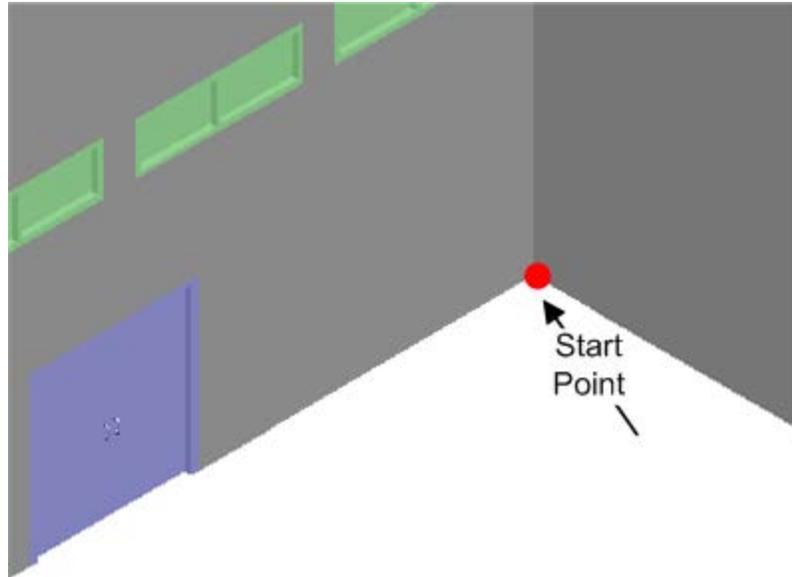
It is suggested that AutoCAD's Object Snaps (OSNAP) are turned on. This makes it easy to select corners, adjacent fixtures, etc as the starting point for the gondola. Ortho can be used if it is desired to draw the gondola at precise right angles in the floor plan. The snap grid and other options should be turned off.

Placing the Gondola

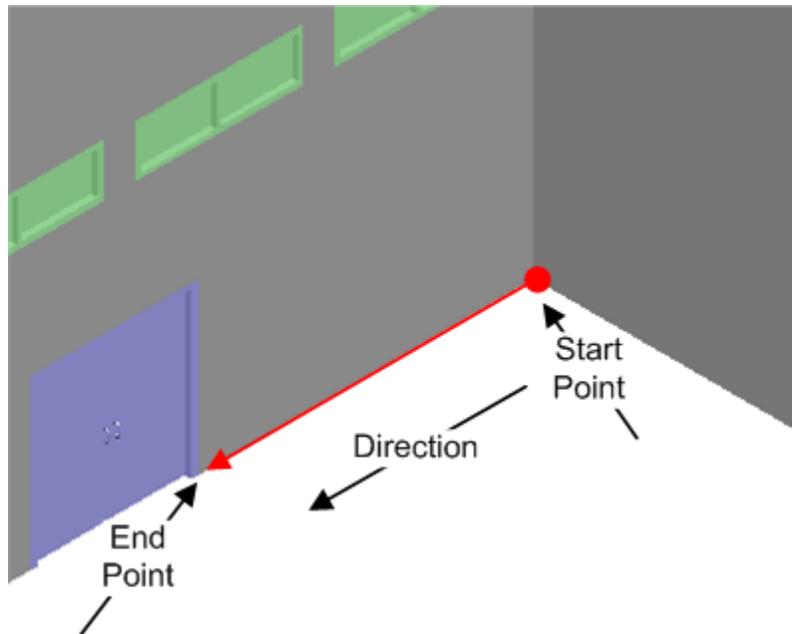
In the worked example below, it is desired to draw a gondola with its start point in the corner of the wall and extending up to the edge of the door.



Select the required gondola in the object browser and click the Add Gondola icon. The user will be taken to the floor plan and requested (AutoCAD command line) to pick a start point. Click in the corner of the wall. This sets the coordinates for the starting point.

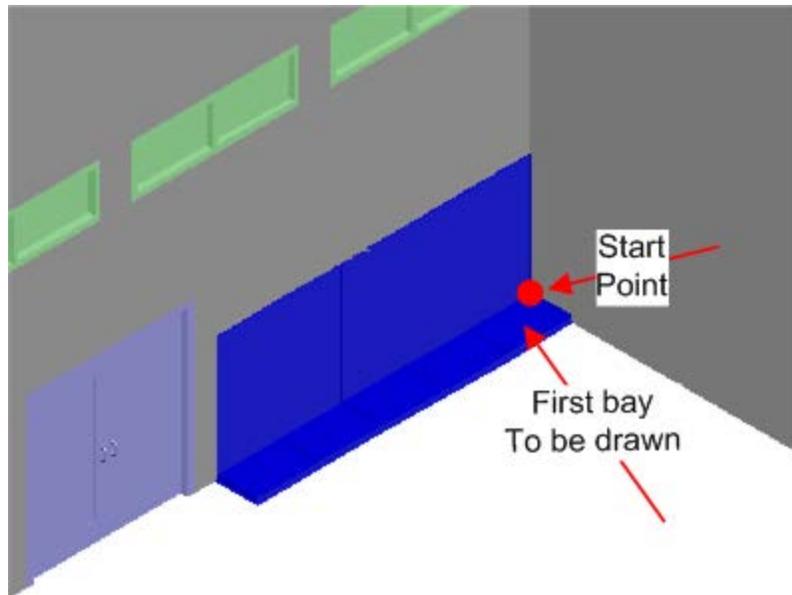


The Add Gondola dialog box will then appear. The initial stage is to click the **Number (Measure)** button. The user will be taken back to the floor plan. It is then necessary to click two points that will define the start point and end point of the gondola.

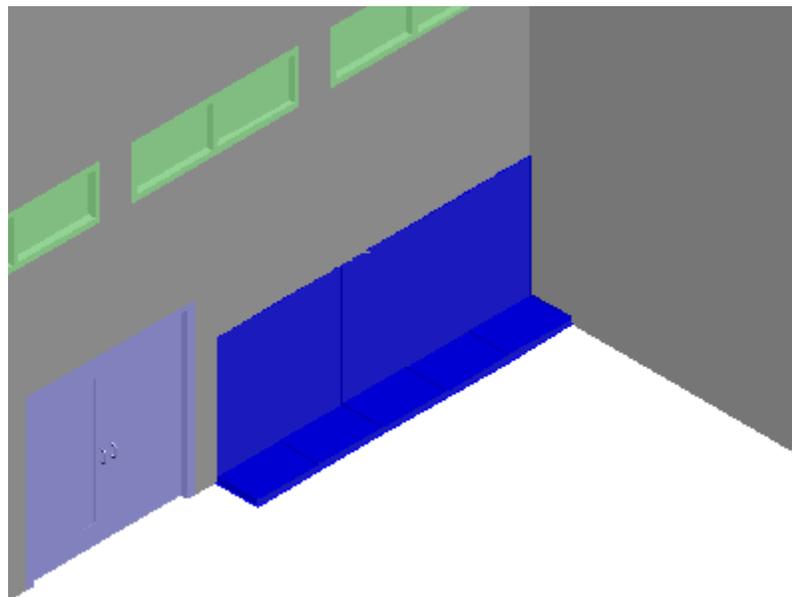


On clicking the end point, the user will be returned to the Add Gondola dialog box. The Best Fit check box should be selected because that will ensure the maximum number of gondola bays will be drawn without obstructing the door.

The other option to be selected is the Left/Right button for the start point. This is determined by which bay of the gondola will be drawn first. It will be at the start point of the line that was drawn to define the gondola length. In this case **viewed from the front of the gondola** the first bay to be drawn is on the right hand end of the gondola.

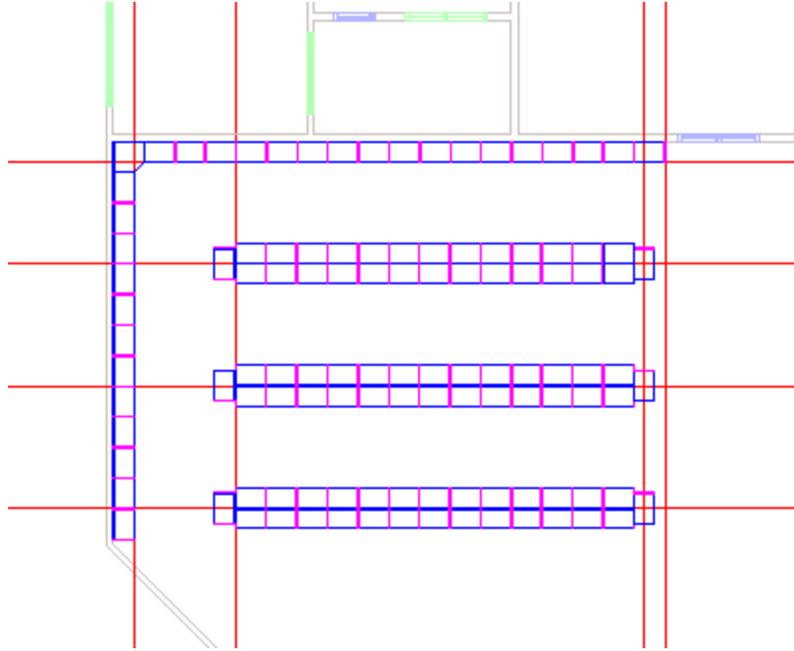


The start point is set to **Right**. On clicking the **OK** button the gondola will be drawn.

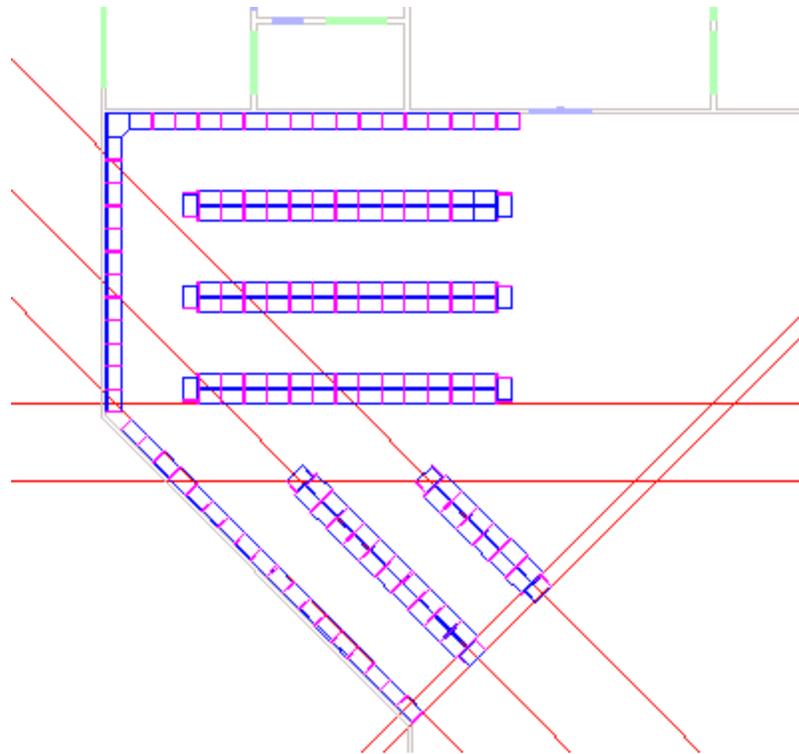


Placing Island Gondolas

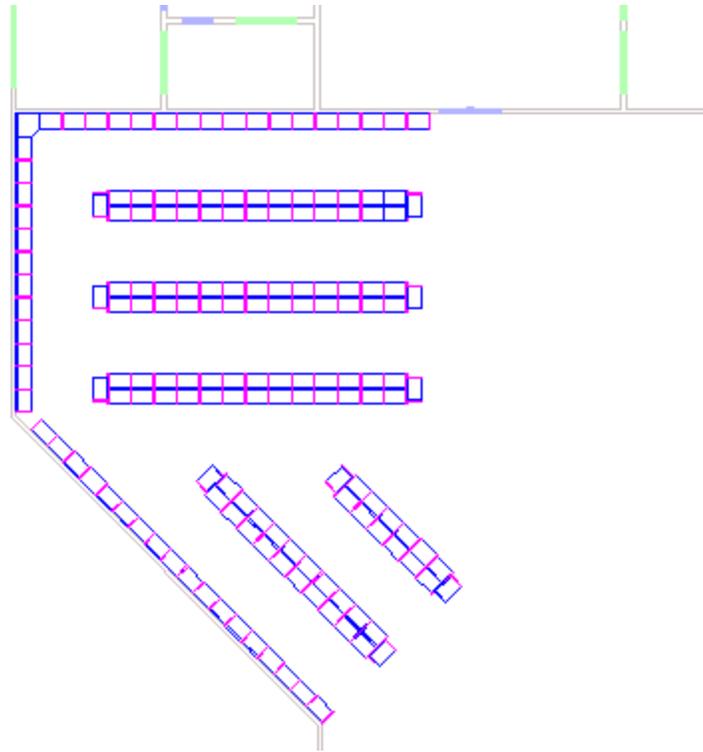
One useful technique for placing island gondolas is using AutoCAD construction lines and offsets.



In the example above, construction lines (the red lines in the screen shot) were drawn along the edges of the wall gondolas. Additional construction lines were then offset from the originals to give the correct spacing. In the above example, the construction lines were used to ensure the aisles were a precise 8 feet in width. The intersections of the construction lines can be used to specify the start and end points of the line defining the gondola position that is required after the **Measure** button is clicked in the **Add Gondola dialog box**. After the gondolas have been placed, the construction lines will be deleted. Similar construction lines have been used to place the next sequence of gondola runs.



After the construction lines are deleted, this leaves the new gondola runs precisely positioned with minimum aisle widths maintained.

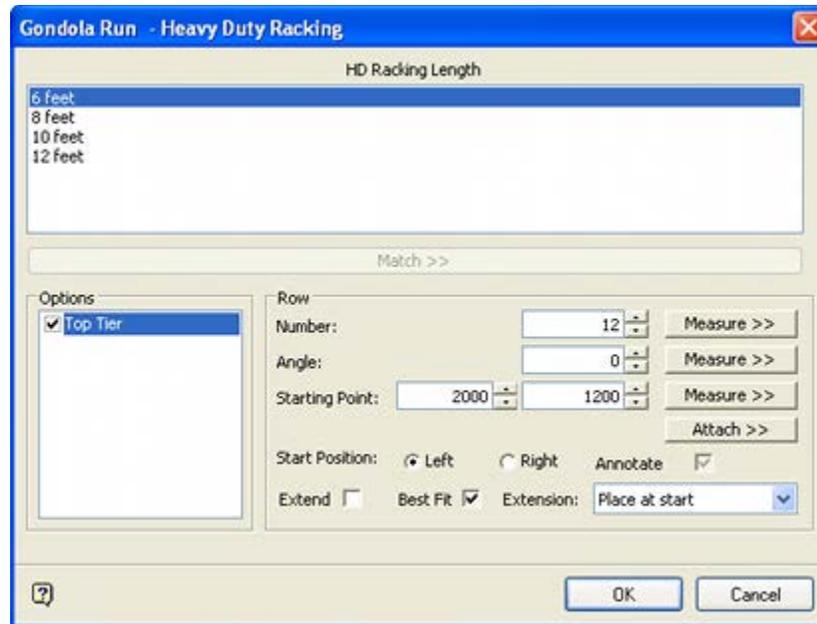


Placing a Gondola - Other Considerations

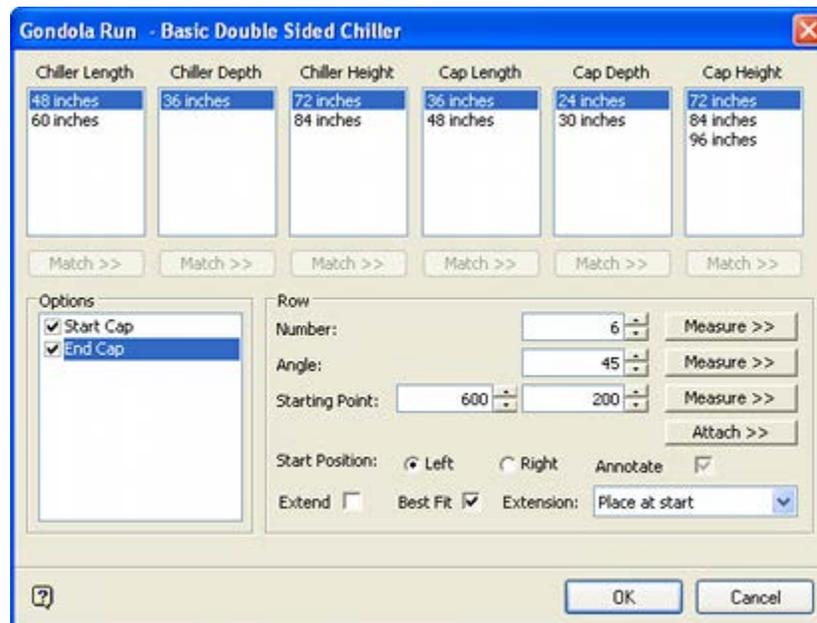
The section of help explains the more advanced options for gondola placement. This section should be read in conjunction with the section on basic options.

Dimensions

Gondolas can be assigned varying numbers of dimensions. The gondola definition in the example below is used to draw heavy duty racking used in storage areas. This racking comes in a standard depth and height, but in varying lengths. Accordingly, store planners are only required to select the length.



More complex gondolas can have up to six dimensions. In the example below the dimensions of both the main part of the gondola and the start and end caps can be specified.



Dimensions do not have to be confined to physical sizes. In the example below, a gondola has been configured to allow the store planner to select the material as well as the physical dimensions. This would only be effective if the gondola parts come in similar sizes but different materials.



Extend and Best Fit

Extend and best fit determine the number of bays that will be drawn for a specific measured length.

- Best Fit: the number of bays drawn will be the maximum where the total length does not exceed the measured length.
- Extend: the number of bays drawn will be the maximum where the start position of the last bay is inside the measured length.

Extend will generally result in one more bay being drawn than best fit.



In the above example, the red line represents the measured length. The gondola at the top was drawn using Best Fit, the one at the bottom with Extend.

Gondolas and In-Store Space Collaboration

There is a limitation on placing gondolas in the In-Store Space Collaboration application (a companion application to Macro Space Management). It can only place gondolas with three dimensions of Length, Depth and Height. Accordingly, more complex gondolas should be placed in Macro Space Management. Their position can then be adjusted if necessary in In-Store Space Collaboration.

Editing and Deleting Gondolas

Editing Gondolas

Grouping

Once gondolas are placed, they effectively become a collection of associated fixtures. The behavior of a gondola for editing is determined by whether grouping is on or off. This is set using the Grouping option on the fixturing toolbar.



If grouping is on, selecting a single fixture on the gondola will automatically select all fixtures. If grouping is off, individual fixtures in the gondola can be selected.

Fixture Manipulation

Once gondolas have been selected, their position can be modified by use of some of the Fixture Manipulation tools such as slide, move and rotate.

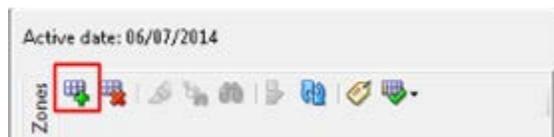
Note: Fixture Manipulation tools are most useful for users not familiar with AutoCAD functionality.

Editing using AutoCAD

Once placed, fixtures can be moved and rotated using standard AutoCAD functionality. If AutoCAD functionality is used for this purpose it may be necessary to use synchronization afterwards to ensure the information in the floor plan and database is identical.

Deleting Gondolas

Because Gondolas become a collection of associated fixtures when they are placed, there is no Delete Gondola option on the Gondola toolbar on the Object Browser. The way to delete gondolas using Macro Space Management tools is to turn on grouping on the fixturing toolbar, select the gondola required for deletion and then use the Delete fixture option on the Fixturing toolbar of the Object Browser.



Deleting using AutoCAD tools

It is also possible to delete gondolas using standard AutoCAD functionality. It may then be necessary to use synchronization afterwards to ensure the information in the floor plan and database is identical.

Bay Numbering

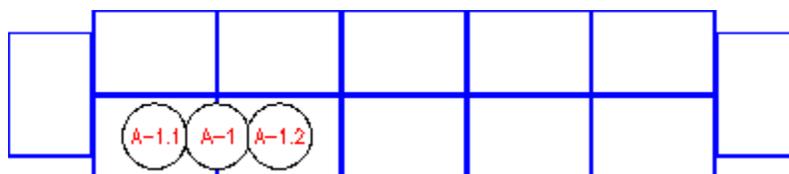
Overview of Bay Numbering and Bay Groups

Bay Numbering (used in conjunction with **Bay Groups**) allows each fixture within the floor plan to be assigned a unique identification code for reporting and identification purposes.

Note: Only fixtures can be assigned bay numbers. Fittings and shelves are automatically excluded from any selections made.

Bay Groups

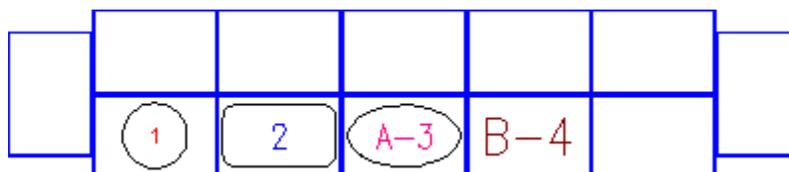
Bay Groups are a preliminary action before bay numbering is applied. They enable a group of fixtures to be treated as a single bay with sub-numbers applied to the individual fixtures.



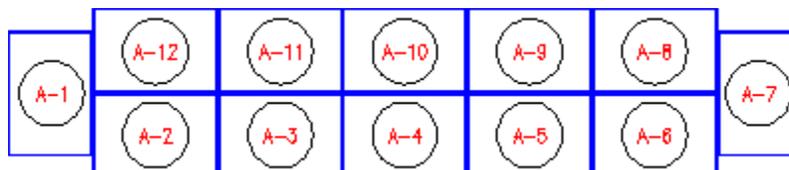
In the example above, two fixtures have been grouped together for bay numbering purposes. When bay numbering was applied, the fixtures were given a master bay number (A-1) and two sub numbers (A-1.1 and A-1.2)

Bay Numbering

Bay Numbering applies an identification number to a fixture or bay group. These have a number of different shapes, colors and prefixes.



When applied, bay numbering provides an easy way of locating specific fixtures in an electronic or printed copy of a floor plan.



Gondola Numbering

Gondola numbering is an alternative to bay numbering.

	1/4/0/5	1/4/0/4	1/4/0/3	1/4/0/2	1/4/0/1	
1/1/0/1	1/2/0/1	1/2/0/2	1/2/0/3	1/2/0/4	1/2/0/5	1/3/0/1

It is of the format: **Gondola Number/Gondola Side/Gondola Level/Fixture Number**. Thus 1/2/0/4 is gondola number 1 in the drawing, the second side of the gondola, level 0 (floor level) and the fourth fixture on that side.

Preparations for Bay Numbering

Synchronization

Before bay numbering is carried out, it is recommended that the floor plan be synchronized to ensure information in the database matches the information in the floor plan. Several factors affect synchronization.

Auto-Synchronization

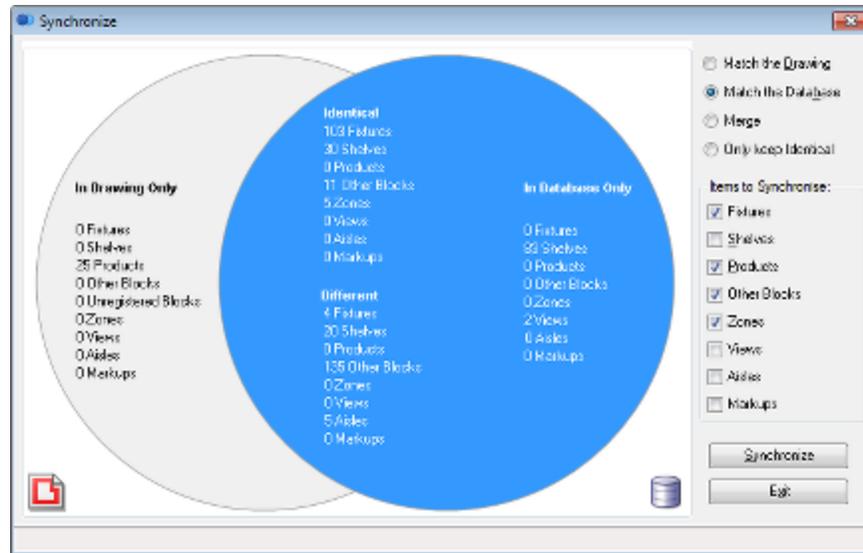
If auto-synchronization is on, the floor plan will automatically be synchronized when it is opened. Bay Numbering at this point will not require any further synchronization.

Dynamic Synchronization

If dynamic synchronization is on, changes made to **fixtures, products, planograms** and **other blocks** made with AutoCAD tools will be immediately written back to the database. The floor plan will not generally require any further synchronization before bay numbering is carried out.

Manual Synchronization

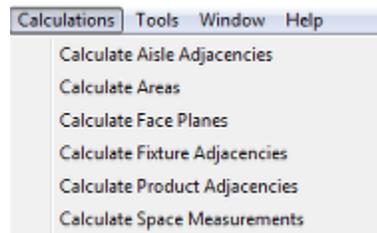
If auto or dynamic synchronization are turned off (or if the user suspects some other form of problem), the floor plan can be manually synchronized in order to ensure information in the database matches the information in the floor plan. This is done by means of the Synchronization dialog box. This can be invoked from the file Menu or the Retail toolbar.



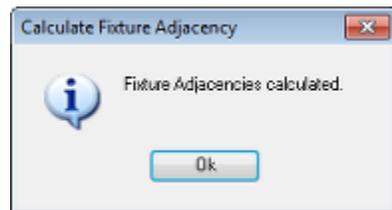
Note: See the help file section on Synchronization for further information.

Fixture Adjacency

Some features in the bay numbering dialog box rely on the Fixture Adjacencies to be up to date. To run Fixture adjacency, select Calculate Fixture Adjacency from the **Calculations** menu.

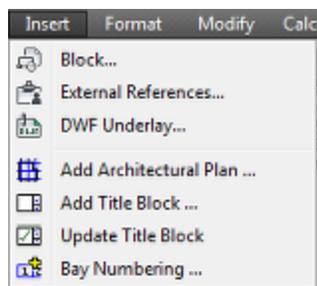


After the Fixture adjacencies have been updated, a confirmatory dialog box will appear.



Accessing Bay Numbering

The Bay Numbering dialog box can be accessed from the Insert Menu.

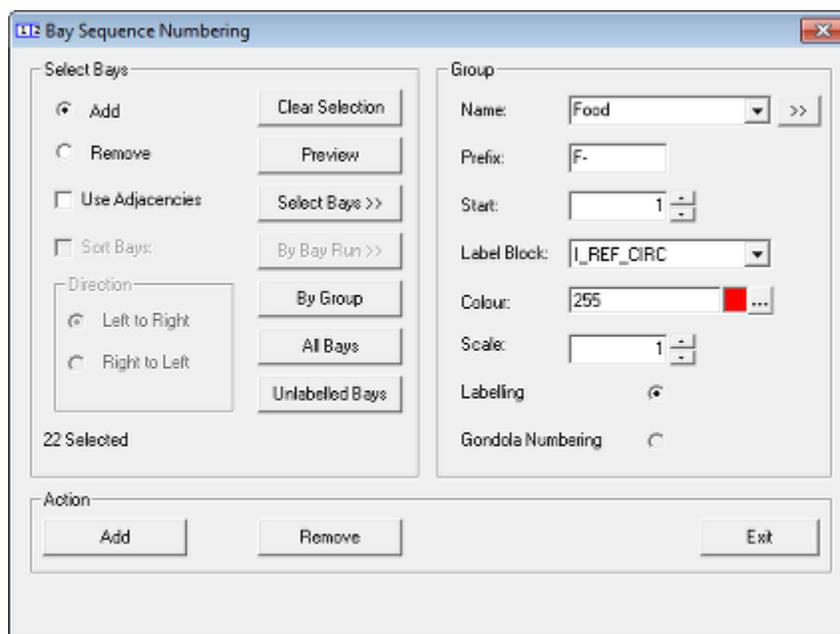


Alternatively, it can be accessed from the Bay Numbering toolbar.



The Bay Numbering Dialog Box

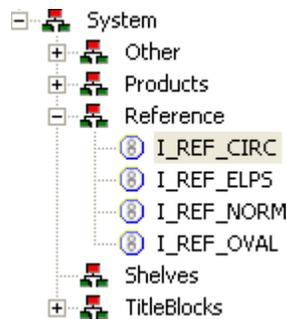
The Bay Numbering dialog box has three main parts:



- The Select Bays frame has the options for selecting some or all of the fixtures in the floor plan for bay numbering, together with some options as to the sequence they will be numbered in.
- The Group frame allows users to label sub-sets of fixtures and to specify the form of the text.
- The Action frame allows users to actually add or remove bay numbers.

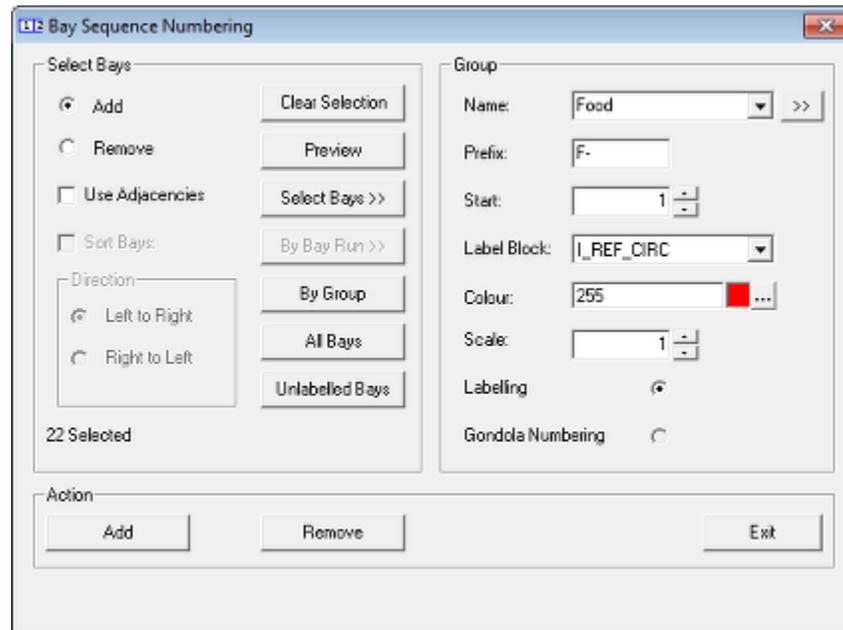
Reference Blocks

The blocks used for bay numbering are registered in Fixture Studio in the Reference section of the fixture hierarchy. It is not recommended that users make any changes to these blocks unless they understand how they are configured.



The Bay Numbering Dialog Box

The Bay Numbering dialog box has three main parts:



- The Select Bays frame has the options for selecting some or all of the fixtures in the floor plan for bay numbering, together with some options as to the sequence they will be numbered in.
- The Group frame allows users to label sub-sets of fixtures and to specify the form of the text.
- The Action frame allows users to actually add or remove bay numbers.

Select Bays Frame

Add or Remove Radio Button

The **Add** or **Remove** radio button determines whether the next selection of fixtures will be added to or removed from any already selected fixtures. In the above example, 54 fixtures have already been selected. Because the Add radio button is selected, and fixtures selected in the floor plan will be added to this total.

Use Adjacencies

If the **Use Adjacencies** option is selected, this will use the Fixture Adjacency information to decide what sequence to add bay numbers in. In order to use this option the **Fixture**

Adjacency option from the **Calculations** menu must first have been run. Once the Use Adjacencies check box has been selected, the Sort Bays and Direction options will become available.

- Sort Bays enables the direction Radio button to become active
- The Left to Right or Right to Left radio button causes fixtures selected in bulk with AutoCAD windows or crossing selection boxes to be numbered in the sequence specified by the Fixture Adjacency calculation.

If fixtures have not been selected in a specific sequence (for example with an AutoCAD **Fence** command) and the Use Adjacencies command is not selected, fixtures will number in the sequence the information was written to the database when they were placed in the floor plan. This may result in apparently random bay numbering sequences in the floor plan.

Selection Options

- Clear Selection will de-select all currently selected fixtures.
- Preview will cause all currently selected fixtures to highlight in the drawing - the highlighting method will depend on the options chosen in the Fixturing tab of the Configuration module.
- Select Bays takes users to the currently active floor plan and allows users to select the fixtures to be bay numbered using AutoCAD selection methods.
- By Bay Run will not be active unless the Use Adjacencies check box has been checked. Sort Bays and either Left to Right or Right to Left should also be selected. Providing Fixture Adjacencies has been run from the Calculate menu first, clicking By Bay Run will allow the user to select a gondola by clicking a fixture in it. All fixtures in the gondola will then be bay numbered.
- By Group can be used if named groups of numbered bays are already present in the floor plan. Selecting the required name from the drop down list in the Group frame and clicking the By Group button will cause those fixtures to be selected.
- All Bays will select all fixtures in the floor plan.
- Unlabeled Bays will select all bays that have not yet been assigned a bay number.

Group Frame

- Name enables users to specify a reference name for a group of fixtures that will be assigned bay numbers. Example of names would be Food and Drink, Clothing, Health and Beauty. The button to the right of the drop down list will take users to the floor plan. Clicking on a bay number will return users to the Bay Sequence Numbering dialog box with the name for that sequence of bay numbers selected.
- Prefix enables users to specify a letter, number or symbol to be added before the bay number. Adding a prefix of A- will result in fixtures being numbered A-1, A-2, a-3 etc.
- Start is used to specify the number that numbering will start at. Bay numbers may not be duplicated, so two bay numbers cannot both have the number 10 assigned. A-10 and B-10 are not regarded as duplicates.
- Label Block specifies that shape of the outline that will surround the bay number.
- Color specifies the color for the text of the bay number. The color of the Label Block cannot be specified.
- Scale specifies the size of the text. The bay number can be made larger or smaller by adjusting this value.

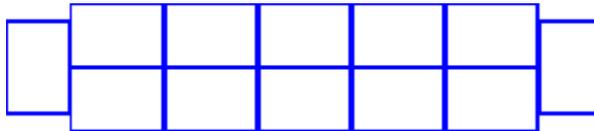
- Labeling/Gondola Numbering: This radio button specifies whether to apply bay numbering or gondola numbering.

Action Frame

- Add: selecting this option will add the specified bay numbering to the selected fixtures.
- Remove: selecting this option will remove the existing bay numbering from the selected fixtures.
- Exit: This option will close the Bay Numbering dialog box.

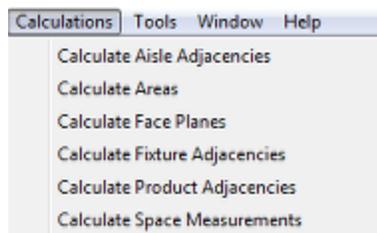
Adding Basic Bay Numbering

This worked example shows how to add basic bay numbering to a gondola.

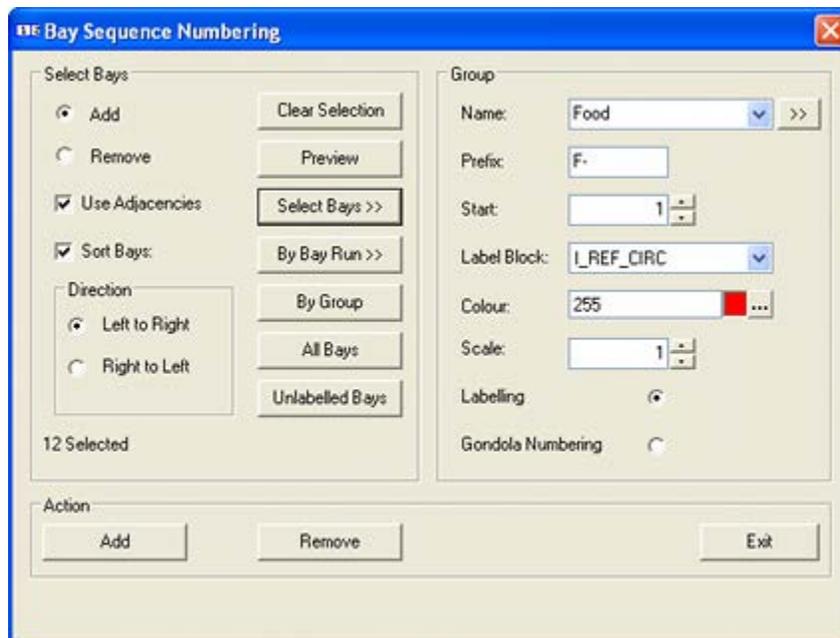


Running the Fixture Adjacency Calculation

To ensure the bay numbering follows a neat sequence, the first stage is to run the **Calculate Fixture Adjacencies** option from the **Calculations** menu. This ensures that the database contains current information on which fixtures are to the left, right, behind or above each other.



Operations in the Bay Numbering Dialog Box



Select Bays Frame - Options

The first stage is to set how the bays will be numbered when selected.

- The radio button is set to Add. At this stage there will be 0 bays selected. When we add bays at a later stage, we want them to be added to the selection.
- The Use Adjacencies, Sort Bays and Left to Right options are selected. This will ensure bay number in a logical sequence.

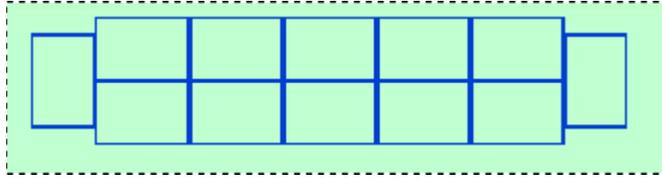
Group Frame

The next stage is to set some information as to the appearance of the bay numbering.

- The Name is what this group of bay numbers will be called. In this example it is Food. If it is intended to apply bay numbers to other gondola later, this set of bay numbers might be given a name like clothing.
- The Prefix will go before the bay number - in this case it will result in the fixtures being numbered F-1, F-2, F-3, etc.
- Start is the value of the first bay number. In this case the numbers will start at 1.
- The Label Block will result in a circular outline, while the Color for the text is set to Red.
- The Scale is left at 1 as this is a good size for the text, while Labelling is selected to place Bay Numbers.

Select Bays Frame - Selecting the Bays

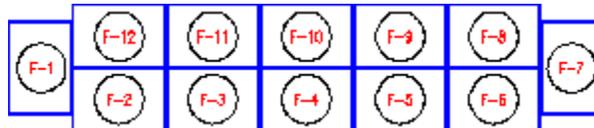
The next Stage is to select the bays. To do this, click the **Select Bays** button. This will take the user to the floor plan. Select the fixtures by standard AutoCAD methods and right click to finish the selection. In the example below, the fixtures are being selected by a Crossing Selection Box.



On right clicking to complete the selection, the user will be returned to the Bay Numbering dialog box.

Action Frame

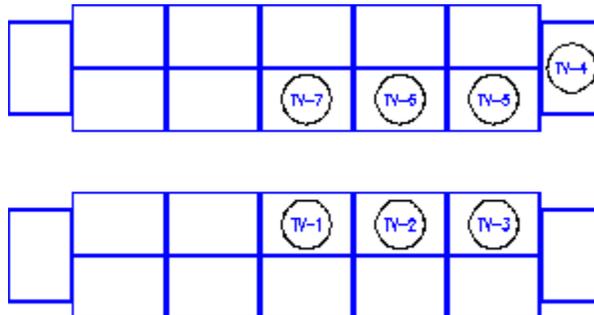
The Bay Numbering can now be added by clicking the **Add** button in the Action frame.



Advanced Bay Numbering

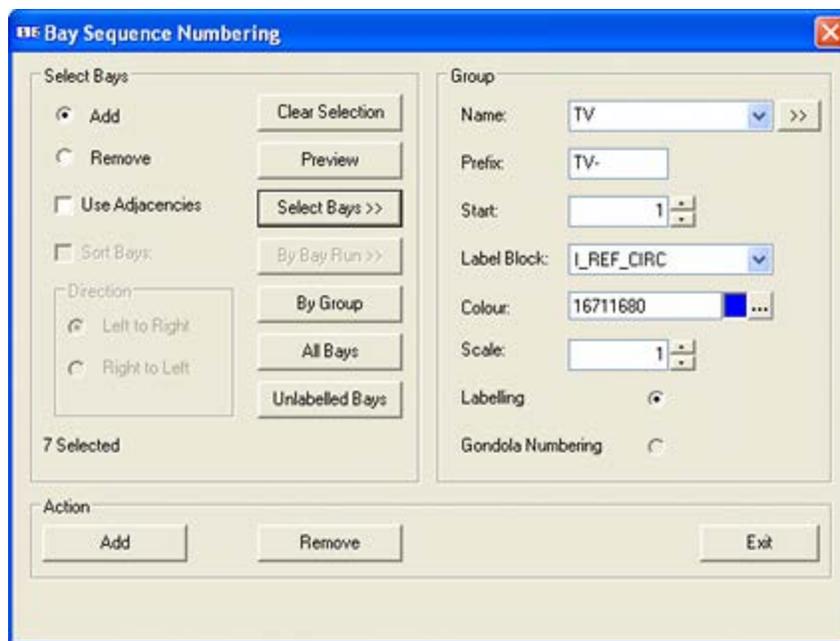
Note: Please refer to the **Adding Basic Bay Numbering** topic first before following this worked example.

It is possible to use the AutoCAD **Fence** command to exert precise control over the bays selected and the sequence they will number in. In the example below, a limited number of fixtures have been selected for numbering.



Bay Numbering Dialog Box

The first stage is to bring up the Bay Numbering dialog box.



Note: there is no need to run the Fixture Adjacency calculation - in this example the bays will be numbered in the sequence they are selected with the **Fence** command.

Select Bays Frame - Options

The first stage is to set how the bays will be numbered when selected.

- The radio button is set to Add. At this stage there will be 0 bays selected. When we add bays at a later stage, we want them to be added to the selection.
- The Use Adjacencies option is not selected. This will ensure that the fixtures bay number in the order they are selected.

Group Frame

The next stage is to set some information as to the appearance of the bay numbering.

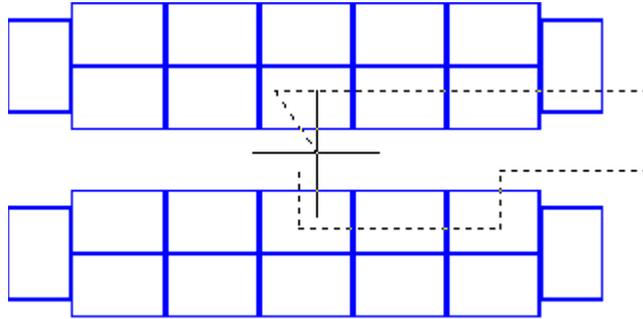
- The Name is what this group of bay numbers will be called. In this example it is TV. If it is intended to apply bay numbers to other gondola later, this set of bay numbers might be given a name like clothing.
- The Prefix will go before the bay number - in this case it has been set as TV-.
- Start is the value of the first bay number. In this case the numbers will start at 1.
- The Label Block will result in a circular outline, while the Color for the text is set to Blue.
- The Scale is left at 1 as this is a good size for the text, while Labelling is selected to place Bay Numbers.

Select Bays Frame - Selecting the Bays

The next Stage is to select the bays. To do this, click the **Select Bays** button. This will take the user to the floor plan. Type the word **Fence** into the AutoCAD command line.

```
Command:
Select objects: fence
```

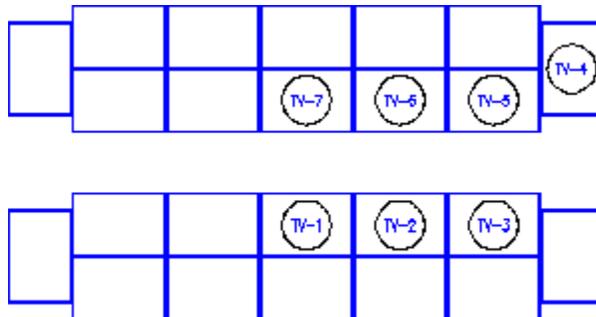
A fence is a line. Any fixtures the line passes through will be selected. The fence must start outside of the first fixture, only pass once through any selected fixture and finish outside of the last fixture.



Once the fence has been drawn, press **Return** to indicate the fence is complete and right click to complete the selection set. The user will be returned to the Bay Numbering dialog box. It will show 7 fixtures have been selected.

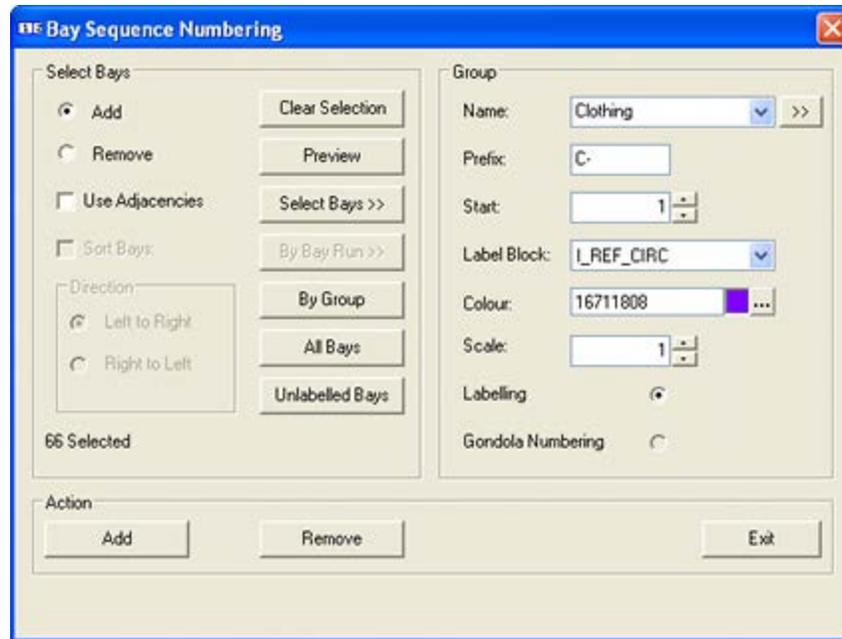
Action Frame

The Bay Numbering can now be added by clicking the **Add** button in the Action frame.



Removing Bay Numbering

Removing bay numbering is the reverse of adding it. Bay Numbering can be removed in various ways.



All Bays Option

This is the simplest way of removing bay numbers. Simply click the **All Bays** button in the Select Bays Frame. This will select all fixtures in the currently active floor plan. Click **Remove** in the Action frame and all bay numbering in the floor plan will be removed.

Select Bays Option

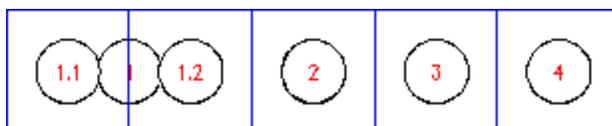
The **Select Bays** option allows the user to use standard AutoCAD selection methods such as windows and crossing selection boxes or the fence command. Once the required fixtures have been selected click **Remove** in the Action frame and the bay numbering will be removed from the specified fixtures.

Name Option

This method relies on the fact that specific bay numbers are associated with a name in the Name drop down list in the Group frame. The first stage is to set the name to that required. This can be done by manually setting the name to that required or by clicking the button to the right of the name drop down list. This will take the user to the floor plan. Click on a bay number and this will select its parent name. Next click the **By Group** button to select all fixtures associated with that name. Finally, click **Remove** in the Action frame and the bay numbering will be removed from the specified fixtures.

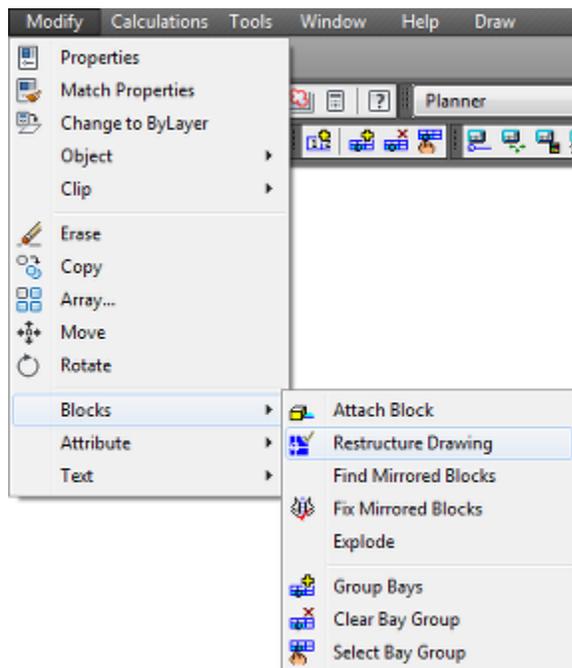
Bay Groups

Bay Groups can be used to group several fixtures together for reporting purposes. An example of this would be fixtures holding long products such as wooden dowel or electrical conduit in a DIY store. In the example below, the two left-most fixtures have been combined into a bay group with master bay number of 1 and sub bay numbers of 1.1 and 1.2.



Accessing the Bay Group Options

Bay Group options can be accessed from the **Modify > Blocks** menu or the Bay Numbering toolbar.



The can also be accessed from the **Bay Numbering** toolbar.



These give access to three options:

- Group fixtures (bays) to make them into a bay group.
- Clear the bay group so it reverts to individual fixtures for bay numbering purposes.
- Select the bay group by clicking on a member to show all other members.

Bay Group Operations

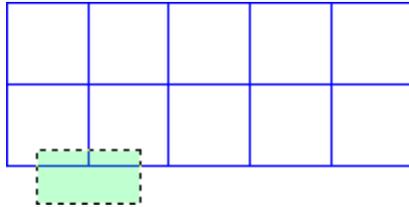
Grouping Fixtures to make them into a Bay Group

To make Bay Groups from Fixtures

1. From the **Modify > Blocks** menu, click the **Group Bays** option. Alternatively use the **Group Bays** option from the Bay Numbering toolbar.
2. A prompt will appear in the command line asking the user to select the required fixtures.

```
Command: Select blocks to be grouped:
Select objects:
```

3. Fixtures can be selected by standard AutoCAD selection methods including individual selection, selection windows or a fence. Selection must be terminated by the standard AutoCAD method of a right click.



The selected fixtures will now be treated as a bay group.

Clearing Bay Groups

To remove a bay group is done as follows:

1. From the Modify > Blocks menu, click the Clear Bay Group option. Alternatively use the Clear Bay Group option from the Bay Numbering toolbar.
2. A prompt will appear in the command line asking the user to select a fixture.

```
Command:
Command: Select a block
```

3. A single fixture can be selected by clicking it. This will cause the fixtures forming the bay group to be de-selected.

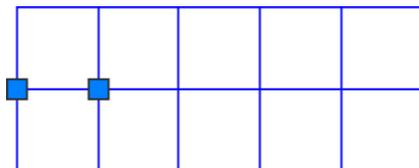
Selecting a Bay Group

Selecting the fixtures forming a bay group is done as follows:

1. From the Modify > Blocks menu, click the Select Bay Group option. Alternatively use the Select Bay Group option from the Bay Numbering toolbar.
2. A prompt will appear in the command line asking the user to select a fixture.

```
Command:
Command: Select a block
```

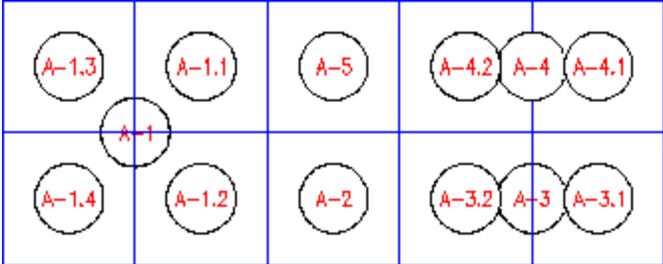
3. A single fixture can be selected by clicking it. This will cause all other fixtures in the bay group to be selected.



Note: It would also be possible to use a KPI to show fixtures in bay groups. The simplest way to do this would be to reference the FIX_BAYGROUP field in the AVTTB_FIXTURE table.

Bay Numbering and Bay Groups

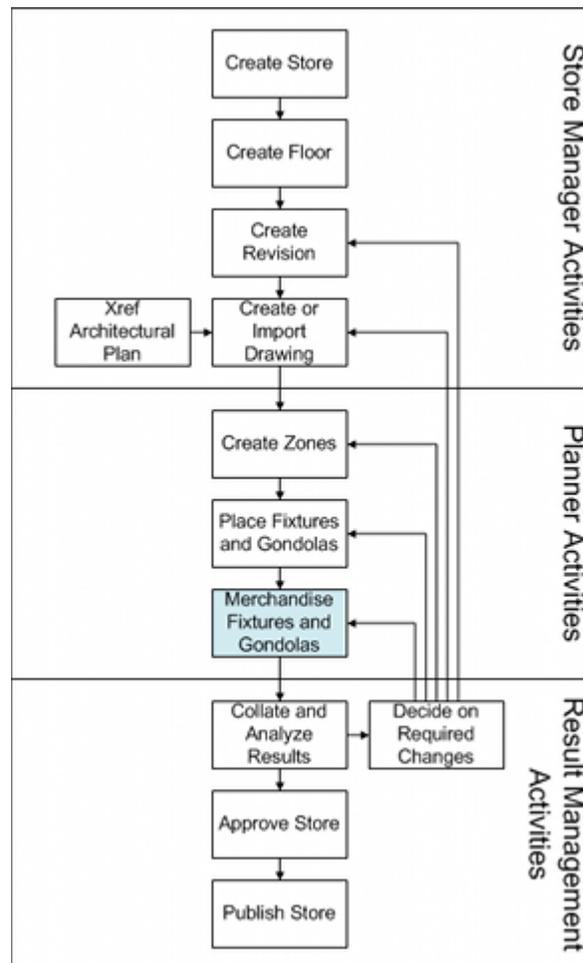
When fixtures are bay numbered, fixtures associated with a bay group will receive a master bay number and sub bay-numbers for individual fixtures. In the example below, there is one bay group of 4 fixtures; two bay groups of two fixtures each and two single bays.



Merchandise in Planner

Overview of Merchandising in Planner

The merchandising options in Planner allow users to place planograms or products.



Planner can be used to merchandise a store at placeholder level - it cannot be used to merchandise at display style level. Two forms of placeholders are possible:

- Products: Placeholders can be at any level in the hierarchy from SKU upwards.
- Planograms

In both cases, the placeholders indicate the presence of specific items of merchandise exists on a fixture. However, the placeholders themselves do not hold any information on the product quantity, position or orientation.

Using External Information to Plan Merchandise

Store planning is not done in isolation. A key objective is to take optimized data from other applications and use it to translate a list of tabulated requirements into an optimized spatial arrangement.

Product Targets and Prototype Stores

The flowchart below shows one method to achieve this.



1. Data on the quantities of required products is generated by an external application.
2. This information is imported into Macro Space Planning's Product Target table.
3. The product targets are used to create (or update) a prototype store. This translates a tabulated list of information into a spatial arrangement of products and planograms.
4. The prototype store is used as a basis for comparison for other stores. For example, stores in a specific cluster in Store Manager could be validated against the prototype before being put into service.

Using Product Targets

The Macro Space Planning Database contains a **Product Target** table.

COLUMN_NAME	DATA_TYPE
PRD_ID	NUMBER(19,0)
STR_ID	NUMBER(10,0)
SSN_ID	NUMBER(10,0)
PDT_MANDATORY	NUMBER(1,0)
PDT_PRIORITY	FLOAT
PDT_SIZE	FLOAT
PDT_MIN_SIZE	FLOAT
PDT_MAX_SIZE	FLOAT
UNT_ID	NUMBER(10,0)
PDT_RE_OPT_SIZE	FLOAT
PDT_GROSS_MARGIN	FLOAT

This table can be used to hold information from another application - such as Category Management. It can be populated imported data for base linear or shelf linear lengths for products at Category, Sub-Category or Segment level. This information can be both store and season specific, allowing the table to hold optimized information.

Product Targets and Quick Reports

Quick Reports can be accessed from the View menu. They are designed to give a continually updated view of specific aspects of the currently active floor plan. Macro Space Planning is supplied with a standard set of Quick Reports, but retailers can develop their own customized quick reports to suit their specific business processes. (This can be done by implementers or administrators making changes to the **Custom SQL** table in the database). In the example below a Quick Report has been developed to show the product targets for the currently active floor plan. It shows the **base linear** for products at Segment level, together with the average gross margin for those segments. This data can then be compared with data for merchandise actually placed in the store to ensure that the broad quantities of products placed fall within calculated criteria.

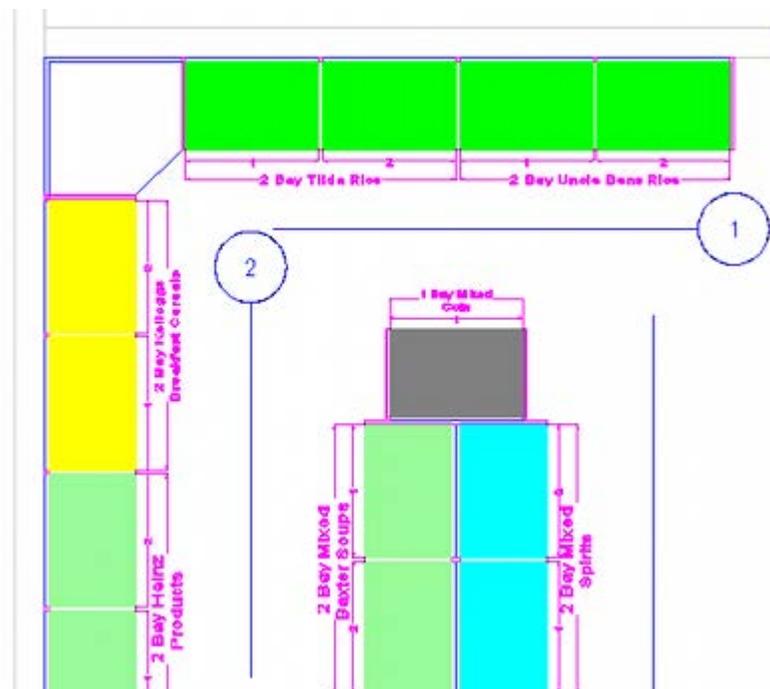
PRODUCT NAME	SEASON	MANDATORY	PRIORITY	CURRENT LENGTH	MIN LENGTH	MAX LENGTH	TARGET	GROSS MARGIN
Beers, Lagers and Ciders	All Seasons	YES	1	32 FT	28 FT	36 FT	32 FT	29.67%
Breakfast Cereals	All Seasons	YES	1	16 FT	16 FT	36 FT	24 FT	76.31%
Carbonated Drinks	Spring 2013 Season	NO	2	32 FT	32 FT	36 FT	36 FT	41.99%
Condiments	Spring 2013 Season	YES	1	36 FT	36 FT	40 FT	38 FT	96.23%
Newspapers	All Seasons	YES	1	36 FT	36 FT	36 FT	36 FT	37.04%
Rice	All Seasons	NO	3	24 FT	24 FT	36 FT	30 FT	59.65%
Spirits	Spring 2013 Season	NO	3	24 FT	20 FT	24 FT	22 FT	65.13%
Tinned Soup	All Seasons	YES	1	20 FT	12 FT	20 FT	16 FT	82.64%

110 Item(s) Spring 2013.DWG

Using Prototype Stores

Placing Merchandise

Prototype stores can be used to convert a list of product targets into a specific spatial arrangement. In the example below, aisles have been drawn to indicate traffic flow and planograms placed to meet the base linear targets. This information can be used by other store planners as a comparison when planning their stores. In the example below, once the prototype has been selected or planned, other store planners can see which planograms belong in which aisle and which sequence they are placed in.



Comparing with Quick Reports

It is also possible to use Quick Reports for comparison purposes: for example it is possible to produce a custom quick report that compares the base linear values of merchandise in the prototype store with that in the current store.

PRD ID	PRODUCTS	STORE	PROTOTYPE
1276	Batteries	3 FT	3 FT
13	Beers, Lagers and Ciders	18 FT	12 FT
17	Bread	6 FT	6 FT
138	Breakfast Cereals	18 FT	18 FT
1536	Carbonated Drinks	12 FT	12 FT
1639	Condiments	FT	8 FT
94	Frozen Pizza	4 FT	4 FT
1687	Newspapers	FT	3 FT
50	Rice	12 FT	12 FT
15	Spirits	24 FT	12 FT
81	Tinned Soup	12 FT	18 FT
20	Tinned Vegetables	12 FT	12 FT

13 Item(s) Summer 2013 Revision.d

Comparing with Store Comparison

The Store Comparison option can be used to establish what is the same, different, missing or present in larger quantities in one store compared to another.

Category	Planogram	Template	Store Base	Difference
Tinned Soup	00000051	70	35	Under
Beers, Ciders and Lager	00000037	35	70	Over
Beers, Ciders and Lager	00000040	35	70	Over
Tinned Soup	00000054	70	35	Under
Books and Newspapers	00000036	37	0	Missing
Sauces	00000026	48	0	Missing
Sauces	00000025	48	0	Missing
Spirits	00000024	0	140	Illegal
Wines	00000005	0	70	Illegal

Planogram Differences Prototype Store :Sum 9 Items

Note: For full information on the tables in this section see the *Oracle Retail Macro Space Planning Data Model*.

Planogram Forms

Planograms can exist in several forms in a floor plan.



In the above diagram:

- The planogram on the left is in 2D form. This is purely a placeholder and the database will not hold floor plan specific information on the position of the shelves or products in the planogram.
- The planogram in the centre is in 2.5D form. The shelves are accurately represented by the products are in placeholder form with no information on quantity, position or orientation.
- The planogram on the right is in 3D form. Shelves are accurately represented, as is the quantity, position and orientation of the products.

Planogram Placement in Planner

Planograms in Planner always place in 2D form. They can be exploded to 3D form in the Merchandiser module if full planogram details are required to be visible, but will still only appear as placeholders in Planner.

Note: If the planogram is in 2D form, it can be viewed in **Schematic Preview** in **In-Store Space Collaboration**, while if it is 3D form it can be viewed in **Front Graphical View**.

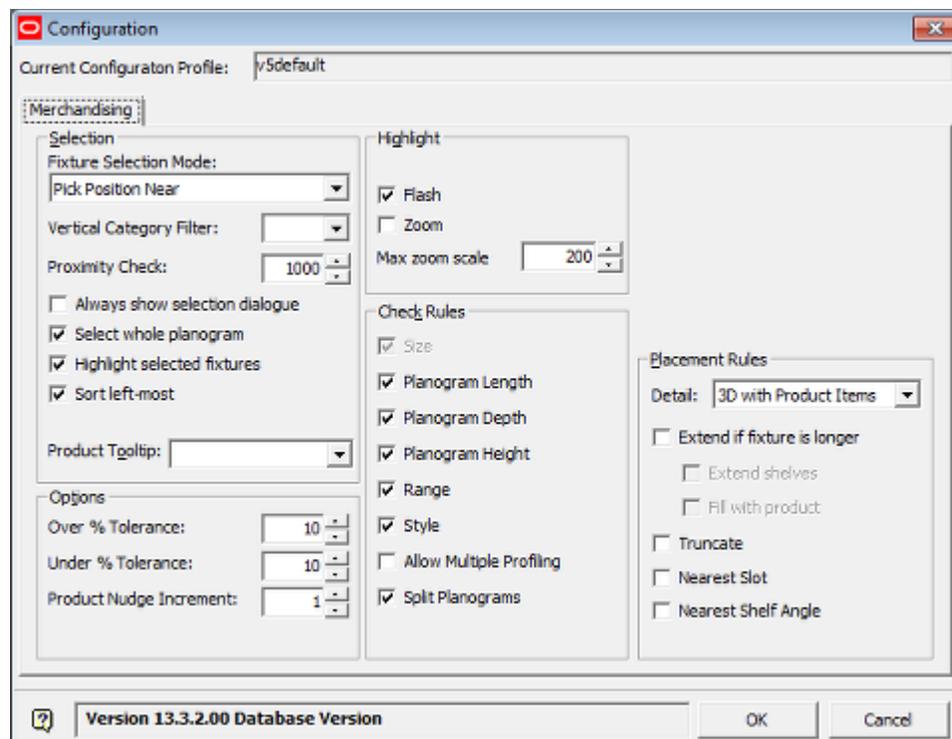
Shelf and Product KPI's and Reports

KPIs and reports need to take into account the form of the planogram. If it is in 2D form, full planogram details can only be found in the **Plano** table (and its Child tables). If the planogram has been exploded in Merchandiser, the KPI reports can use other tables in the database - for example the **Shelf** and **Product** tables. The form of the KPIs reports is thus dependent on how the application was configured when it was implemented.

Note: For more information on these tables see the *Oracle Retail Macro Space Planning Data Model*.

Effect of Settings in Configuration Module

Settings in the Merchandising tab of the Configuration module can have a significant effect on the way merchandise places.



Full information on each setting can be found in the Configuration Module User Guide, but the following basic settings are helpful for new users:

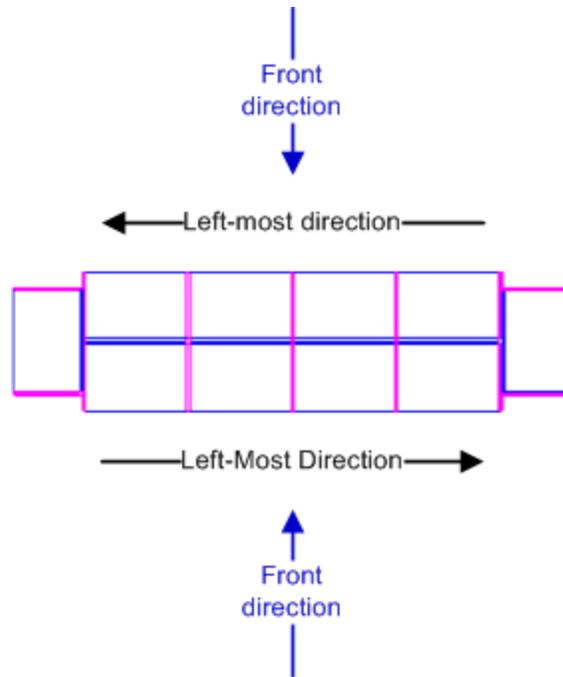
Selection Frame

This frame controls how fixtures are selected for placing merchandise on. Set the following:

- Fixture Selection Method to Standard Selection.
- Always Show Selection Dialog to On.
- Select Whole Planogram to On.
- Sort left-most to On.

Sort Left-Most

Sort left-most selects the fixtures in a left to right order, irrespective of the order in which they were selected. This is based on the fixtures as viewed from the front. The effect can be seen for the gondola in the diagram below.



If Sort Left-most is turned off, multi-bay gondolas will have the bays placed in the sequence the fixtures were selected, not the sequence they were designed for.

Highlight Frame

This frame controls how merchandise is highlighted in the floor plan.

- Set highlight method to Flash.

Check Rules Frame

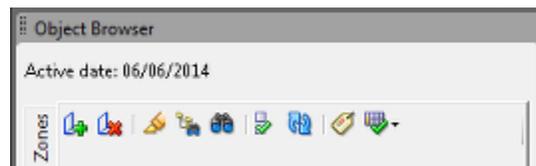
This frame controls the advisory warnings that occur when placing planograms.

- Set all Check Rules to On with the exception of allow Multiple Profiling.

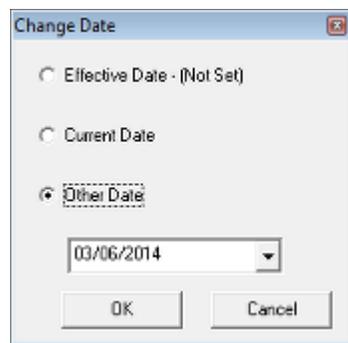
The Floor Plan Active Date

Overview of Floor Plan Active Date

The **Active Date** is intended as a filter to ensure that only appropriate merchandise is placed in a floor plan. It is visible at the top of the Object Browser.



It is set by double clicking on it. This will bring up the Change Date dialog box.



This can be set to one of three options:

- **Effective Date.** The Effective Date is the date the floor plan is scheduled to come into service. If the Effective Date has been set in the File Properties dialog box for the floor plan in Store Manager, the Active Date of the floor plan will be set to reflect this.
- **Current Date.** If selected, the active date will be set to today's date.
- **Other Date.** If selected, this allows the Active Date to be set to any required date.

MERCH_TREE_EFFECTIVE_DATE System Variable

The effect of the Active date can be turned on or off by means of the MERCH_TREE_EFFECTIVE_DATE system variable in the Administration Module. If turned on all products and planograms that have an Effective date after the Active Date of the currently active floor plan will be grayed out and unavailable for selection from the Object Browser.

Using the Floor Plan Active Date

If the MERCH_TREE_EFFECTIVE_DATE system is On, merchandise with:

- An Effective Date after the Active Date set for the floor plan will be grayed out and unavailable for placement. This is because the product or planogram is not scheduled to be available until after the date the floor plan is scheduled to go into service.
- An Expiry Date before the Active Date set for the floor plan will be grayed out and unavailable for placement. This is because the product or planogram will be removed from the list of available merchandise before the floor plan comes into service.

Limitations of the Floor Plan Effective Date

If a file has not been given an effective date, all products will be available. If products are copied from one drawing to another, they will be placed in the drawing even if their product dates are not valid for this file.

Display Style Products and Exploded Planograms

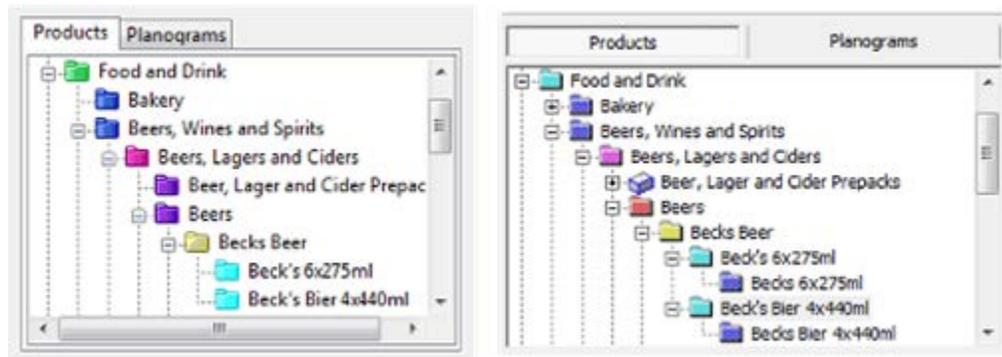
There are two forms of product that can be placed in the Merchandiser module, but which are not visible in the Planner module.

Products at Display Style Level

There are a number of possible levels in the product hierarchy. The lowest is Display Style. This is the physical form a SKU can adopt in the store. In the image below from the Merchandiser module, the physical form can be seen.



However, Display Styles cannot be placed in Planner, so they do not appear in the Object Browser. In the screenshot below, the same part of the product hierarchy is shown in the Object Browser in both the Planner and Merchandiser modules. The Merchandiser hierarchy (on the right) shows the display styles, while the Planner hierarchy does not.



Planner can only display products down to SKU level using product placeholders. It cannot display products at Display Style level. Accordingly, Display Style level products in Merchandiser will not be visible. This can result in an apparently empty fixture in Planner actually containing display styles.

Planogram Form

Planograms can exist in several forms in a floor plan.



In the above diagram taken from the Merchandiser module:

- The planogram on the left is in 2D form. This is purely a placeholder and the database will not hold floor plan specific information on the position of the shelves or products in the planogram.
- The planogram in the centre is in 2.5D form. The shelves are accurately represented by the products are in placeholder form with no information on quantity, position or orientation.
- The planogram on the right is in 3D form. Shelves are accurately represented, as is the quantity, position and orientation of the products.

Planogram Placement in Planner

Planograms in Planner always place in 2D form. They can be placed in 2D, 2.5D form or 3D form in Merchandiser. 2D and 2.5D planograms can also be exploded to 3D form. When in 2.5D or 3D form, the planograms will not be visible in Planner. This can result in an apparently empty fixture in the Planner module actually containing shelves and products.

Use of KPIs

Although neither display style products, nor 2.5D or 3D planograms show in the Planner module, the information exists in the database. It is therefore possible to create KPIs that will highlight apparently empty fixtures in planner that have in fact been populated in the Merchandiser module.

Promotional Fixtures

Certain fixtures with a store are known to generate high levels of profits. Examples include end caps on gondolas and displays by the checkout designed to increase impulse buying. Macro Space Planning allows specific fixtures in a floor plan to be designated as Promotional Fixtures. These fixtures can then be readily identified. They can then be used for special offers, promotions or the introduction of new products, etc.

Some retail chains also have a specific team responsible for merchandising promotional fixtures - designating the fixtures as such assists in identifying which fixtures that team is responsible for the merchandise on.

Assigning Promotional Fixtures

Once fixtures have been placed in a floor plan, they can be designated as promotional fixtures by using the **Promotional Fixtures** option from the Blocks toolbar of the Fixturing tab of the Object Browser.



Promotional
Fixtures

This option allows the user to assign or remove the Promotional Attribute and to highlight fixtures with the promotional attribute.

Identifying Promotional Fixtures

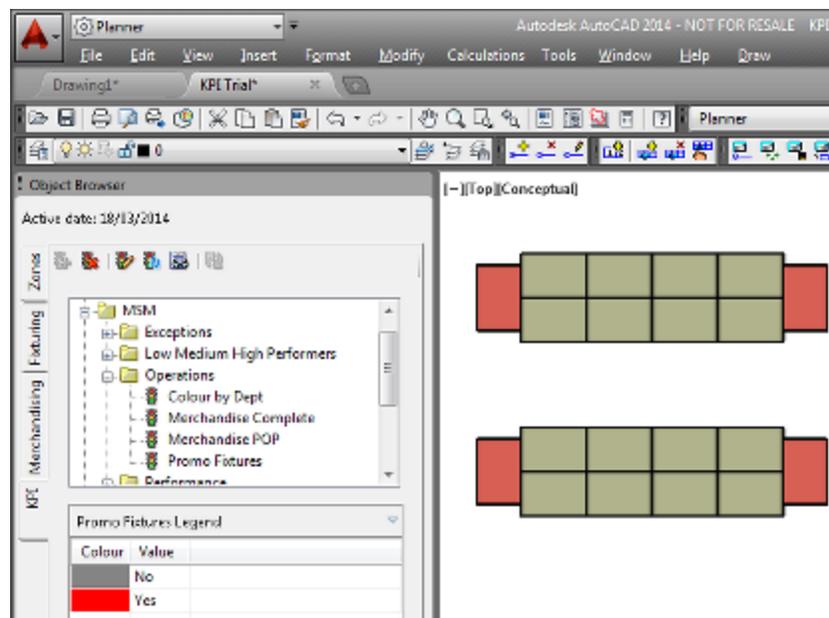
Once promotional fixtures are assigned, they can be identified in two ways in a floor plan.

Highlight

The **Promotional Fixtures** option includes a highlight option in the drop down list of options. This will cause any fixtures that have been designated as Promotional fixtures to be highlighted in the floor plan. The exact highlighting method will depend on the options selected in the Merchandising Tab of the configuration module.

Key Performance Indicator

Another way of identifying promotional fixtures is with KPI's. Without the KPI selected, the Promotional Fixtures are difficult to identify. With the KPI active, the promotional fixtures are readily apparent. In this case the end caps have been designated as promotional fixtures.



Note: one of the easiest ways of seeing fixture KPI's is to use the **Conceptual Visual Style** option from the **View > Visual Styles** menu. This causes the entire fixture to color, not just the outlines.

Using Promotional Fixtures

There are a number of ways of using promotional fixtures. One possible method is:

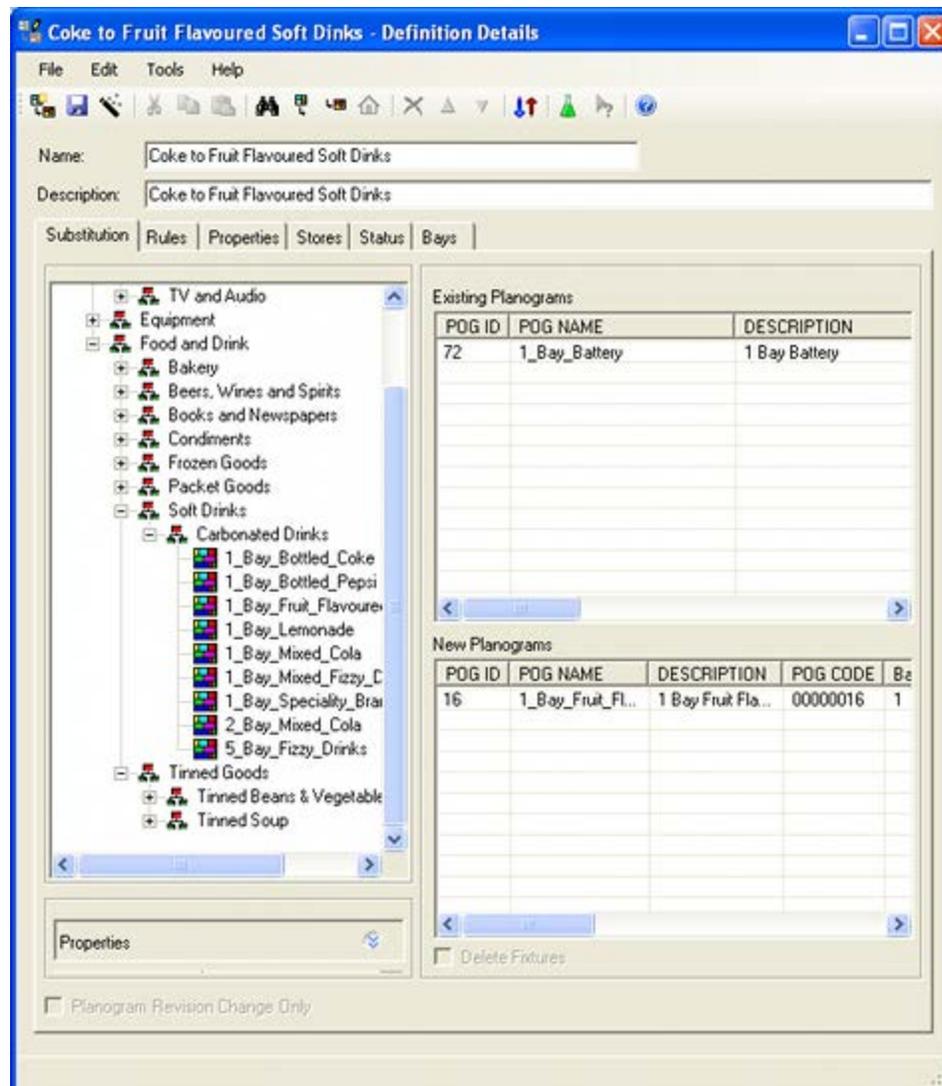
1. Identify fixtures that have a high visibility to shopper traffic. Such fixtures include end caps on gondolas, display on checkout, power wings and bins in the centre of aisles.
2. Use the Promotional Fixture on the Object Browser to designate those fixtures as promotional fixtures.
3. Bay number these fixtures differently from other fixtures in the floor plan - possibly with a P suffix.
4. It is then possible to report on and merchandise those fixtures separately to the other fixtures in the store - for example it would be possible to produce a weekly store plan showing promotional fixtures only that would allow a constantly changing program of special offers.

Planogram Substitutions

Planogram Substitutions can be used to automatically swap one planogram for another in single or multiple stores across the retail chain.

Configuring Planogram Substitutions

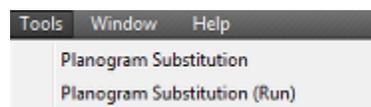
Planogram substitutions are configured in the Administration module - using the option assessed from the Merchandising menu.



Many planogram substitutions are then executed automatically using batch processes to modify the information held in the database. If this is the case, the Planner floor plan may require synchronization so that the information in it matches that held in the database.

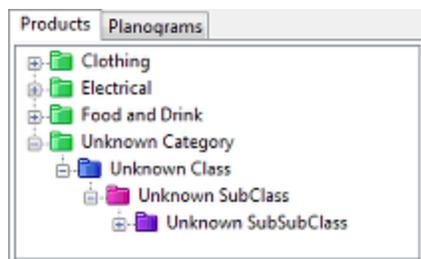
Manually Running Planogram Substitutions

Users with the correct privileges can also manually run planogram substitutions from the Tools menu for the currently active floor plan.



Unknown Category

The Product hierarchy in the Object Browser contains the products of "unknown" type.



These products are in the hierarchy as defaults for the planogram import process and should play no role in merchandising floor plans.

System Variables Used in the Merchandising Tab

There are four **system variables** that affect the Merchandising Tab in Planner:

1. **MERCH_DB_DETAIL** specifies whether 2D, 3D or full 3D information should be saved to the DB (Merchandising). The more detail that is specified, the more data storage capacity will be required.
2. **MERCH_DWG_DETAIL** specifies whether 2D, 3D or full 3D information should be saved to the drawing. Specifying more detail will result in larger drawing files.
3. **MERCH_TOLERANCE_OVER** specifies how much larger a planogram can be relative to the nominal size of a fixture and still be placed.
4. **MERCH_TOLERANCE_UNDER** specifies how much larger a planogram can be relative to the nominal size of a fixture and still be placed.

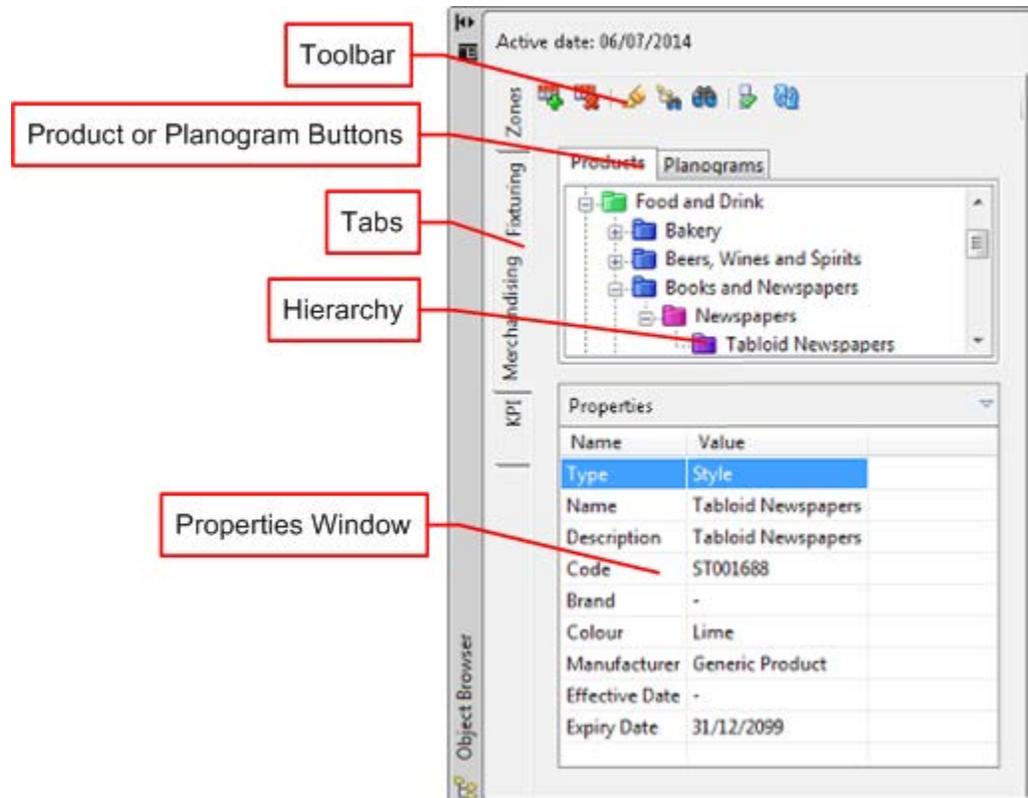
Note: The **MERCH_DB_DETAIL** system variable should be defined during the implementation stage and not changed frequently.

Note: Some of these system variables can be changed in both the Administration and Configuration Modules.

Products on the Object Browser

Overview of Products on the Object Browser

Clicking on the Merchandising Tab on the Object Browser brings up a series of options for adding, editing and deleting Products and Planograms.



- The Toolbar gives access to a series of options concerning products or planograms.
- The Buttons allow the user to toggle between products or planograms.
- The Hierarchy Window allows users to select specific products or planograms from the list available.
- The Properties Window shows the properties assigned to the selected object.

Using the Object Browser for Merchandising Operations

The **Merchandising tab** allows users to add product placeholders (products), and planogram placeholders (planograms) to the store plan. A product is any category, sub-category, or SKU that is included in the product hierarchy, i.e. any level in the hierarchy. Planograms are also organized in to a hierarchy of planogram groups. However, you can only place planograms in to the store plan. Planogram groups cannot be placed. Placeholders are markers that can be placed on to fixtures to indicate the product category, sub-category or planogram that will be used.

The Merchandising tab is divided in to 5 parts:

- The toolbar – provides controls that allow products and planograms to be added, edited, and deleted.
- The Merchandise window – shows a hierarchy of available products and planograms.
- The Properties window – shows details for the product that has been selected in the product hierarchy. Similarly, it will show details of a planogram that has been selected in the planogram hierarchy. The content of this window is customizable.
- The Summary window – shows details of products and planograms placed based on the active store plan. The content of this window is customizable.
- The Preview window – shows a sample picture of product display styles selected in the product hierarchy

Note: Product display styles (which show the physical form of the SKU) are only available in Merchandiser.

The **Merchandising Tab Toolbar** in the Object Browser enables the user to control all aspects of adding, editing and deleting products and planograms within the Planner and Merchandiser environments.

Clicking on the Switch Buttons will determine whether the Product or Planogram options are active.

Products Toolbar



Icon	Option	Description
	Add Product	This option is grayed out. Products can be added by dragging and dropping.
	Delete Product	Delete the planograms on the currently selected fixtures in the floor plan.
	Highlight in Store	If selected, selecting a product in the Object Browser Product Hierarchy will cause the pertinent product to be highlighted in the floor plan.
	Highlight in Tree	If selected, selecting a product in the floor plan will cause the pertinent product to be highlighted in the Object Browser Fixture Hierarchy
	Find	This option brings up the Find dialog box, allowing users to search for objects in the Fixture Hierarchy.
	Options	This option brings up the Merchandising Tab of the Configuration module, allowing users to customize their settings.
	Refresh	This option refreshes the Object Browser with the latest information on products and planograms in the database.

Planogram Toolbar



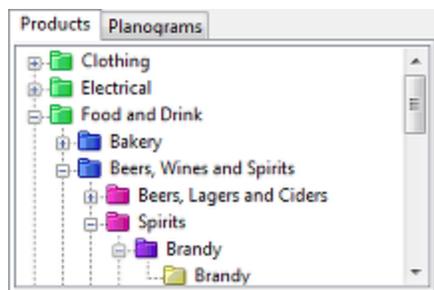
Icon	Option	Description
	Add Planogram	Planograms can also be added by dragging and dropping.
	Delete Planogram	Delete the planograms on the currently selected fixtures in the floor plan.
	Reverse Planogram Placement Direction	If toggled on, this reverses the sequence the planogram bays are placed.
	Highlight in Store	If selected, selecting a product in the Object Browser Planogram Hierarchy will cause the pertinent planogram to be highlighted in the floor plan.
	Highlight in Tree	If selected, selecting a planogram in the floor plan will cause the pertinent planogram be highlighted in the Object Browser Fixture Hierarchy
	Find	This option brings up the Find dialog box, allowing users to search for objects in the Fixture Hierarchy.
	Properties	This option brings up the Merchandising Tab of the Configuration module, allowing users to customize their settings.
	Refresh	This option refreshes the Object Browser with the latest information on products and planograms in the database.

The Hierarchy Window

The hierarchy window displays both the product and the planogram hierarchies. To toggle between the hierarchies use the Products or Planograms buttons respectively. The Product hierarchy is defined in the Product Studio module and shows all the products that can be added to a store plan. The Planogram hierarchy can be configured in Merchandiser and shows all the planograms that can be added to a store plan. The hierarchy can be expanded using the plus control next to each item on the hierarchy. It can also be collapsed by using the minus control next to each item.

Product Hierarchy

The product hierarchy is shown down as far as SKU level. Products at Display Style level are not shown in Planner because they can neither be placed nor seen.

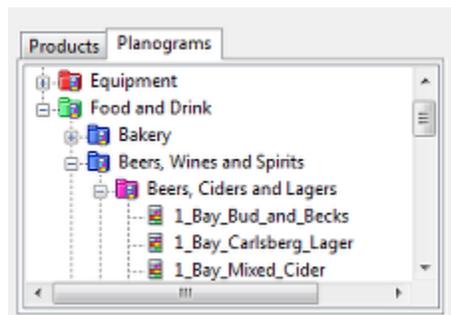


The different colored folders show the different levels in the hierarchy.

Icon	Description
	Product Company
	Product Group
	Product Division
	Product Department
	Product Class
	Product Sub-Class
	Product Item
	Product SKU

Planogram Hierarchy

Planograms are organized in a hierarchy of planogram groups, with planograms associated with a specific group.



The different colored folders show the different levels in the hierarchy.

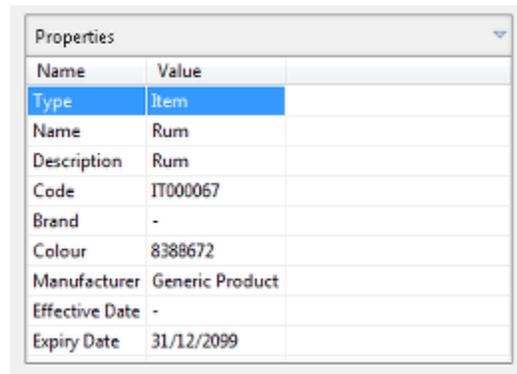
Icon	Description
	Planogram Company
	Planogram Group
	Product Division
	Product Department
	Planogram Class
	Planogram Sub-Class

Icon	Description
	Planogram

The Properties Window

The Properties window displays information for the merchandise that has been selected in the product or planogram hierarchy. The content of this window is by modifying the Custom SQL in the database. This allows an implementer to specify the information that appears in the window.

Note: See the Oracle Retail Macro Space Planning Data Model for information on Custom SQL.



Name	Value
Type	Item
Name	Rum
Description	Rum
Code	IT000067
Brand	-
Colour	8388672
Manufacturer	Generic Product
Effective Date	-
Expiry Date	31/12/2099

Refreshing the Object Browser

The **Refresh** option refreshes both Product and Planogram information in the respective hierarchical trees.

	Refresh	This option refreshes the Object Browser with the latest information on products and planograms in the database.
---	---------	--

Clicking on the Refresh button in the Merchandising tab will load the latest product information from the database into the Product hierarchy. At the same time, it will load the latest planogram information from the database into the Planogram Hierarchy.

Dragging and dropping a product or planogram from the appropriate hierarchy after the refresh button has been pressed will add that merchandise to the floor plan using the updated definition. If a floor plan is already open then merchandise already placed in the drawing will not use any changes loaded during the refresh operation until the floor plan is closed and reopened. However, new products or planograms added to the open drawing will use the new data.

Factors Affecting Product Operations

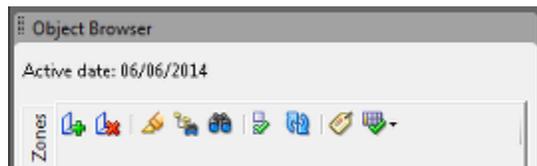
A number of factors affect product placement.

Object Browser and Object Grid

Products can either be added from the **Object Browser** or **Object Grid**. Which one will result in more efficient product addition depends both on the situation it is being used in and user preferences.

Active Date

The active date can be seen at the top of the Object Browser.

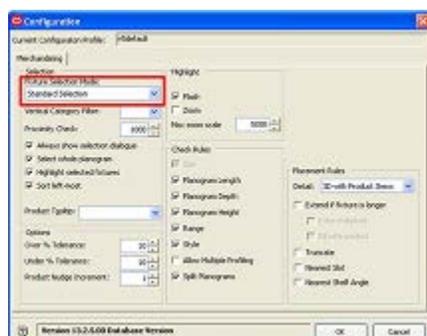


If the **MERCH_TREE_EFFECTIVE_DATE** system variable (Administration module) is set to on, this will place constraints on what products can be added:

- If the Effective Date of the product is after the Active date of the floor plan, the product cannot be placed because it will not be available when the floor plan is implemented.
- If the Expiry Date of a product is before the Active Date of the floor plan, the product cannot be placed because it will no longer be available when the floor plan is implemented.

Fixture Selection

There are two possible fixture selection methods. These can be set in the Merchandising Tab of the Configuration module - accessed by clicking the Properties Icon on the Products toolbar of the Object Browser.



There are two methods. **Standard Selection** is suggested for new users.

Grouping

When the fixtures were placed in the floor plan, if more than one fixture was placed at one (for example if a gondola was placed) it is possible to select all fixtures that were placed together, or individual fixtures. This is controlled by the Grouping option on the Fixturing toolbar.



It is recommended that Grouping be turned Off while placing products. That way individual fixtures can be selected. If Grouping is left On, when an individual fixture is selected from a gondola, all fixtures and fittings in that gondola will be simultaneously selected.

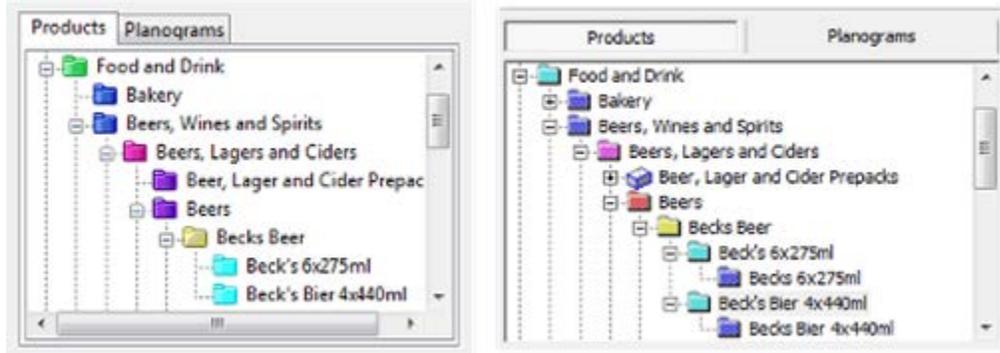
Fixtures and Fittings

The floor plan can contain a mixture of fixtures and fittings. Only fixtures can accept merchandise. If an attempt is made to merchandise a fitting, a warning will appear in the command line.

```
No valid empty fixtures were found in the database within the tolerance.
Command:
```

Product Type

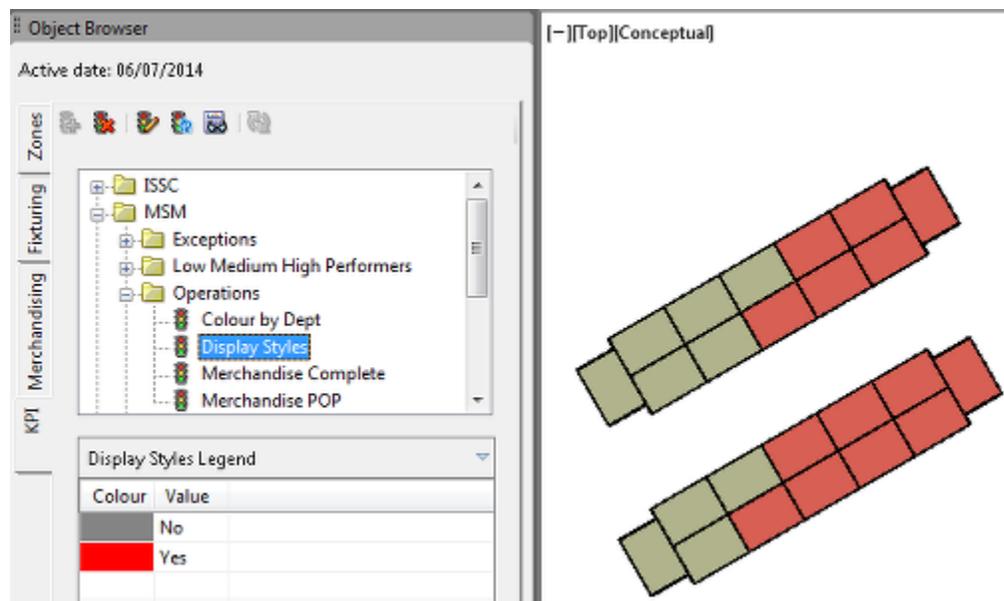
In Planner, products can only be added as placeholders. The floor plan will indicate that a specific type of product is present on the fixture, but no information on quantity, size or orientation can be determined from it. Product placeholders can be added from any level on the product hierarchy from SKU upwards. An example of use would be adding category level placeholders to get some preliminary reports on a new floor plan. Merchandiser allows a floor plan to be merchandised with an additional level of detail - Display Styles. These allow information on quantity, size or orientation for a specific product to be associated with a floor plan.



Display Styles cannot be placed in Planner and so cannot be seen in the Object Browser (left hand image). They can be seen in the Object Browser in the Merchandiser module (right hand image).

Visibility of Display Styles

If products are placed at Display Style level in Merchandiser (or if Planograms are exploded to 3D form), these forms of merchandise will not be directly visible in Planner.



Macro Space Management has the capacity to create custom KPI's. In the above example, a KPI has been created to show fixtures populated with Display Styles. In the example

above, fixtures containing products placed at display style level in either merchandiser or In-Store Space Collaboration are apparent.

Adding Product Placeholders from the Object Browser

Sequence of Actions Required

There are two potential ways of adding products. The first is to select the required fixture first.

1. Select required fixture or fixtures.
2. Select Product in Hierarchy in Object Browser or in List in Object Grid
3. Click the Add icon

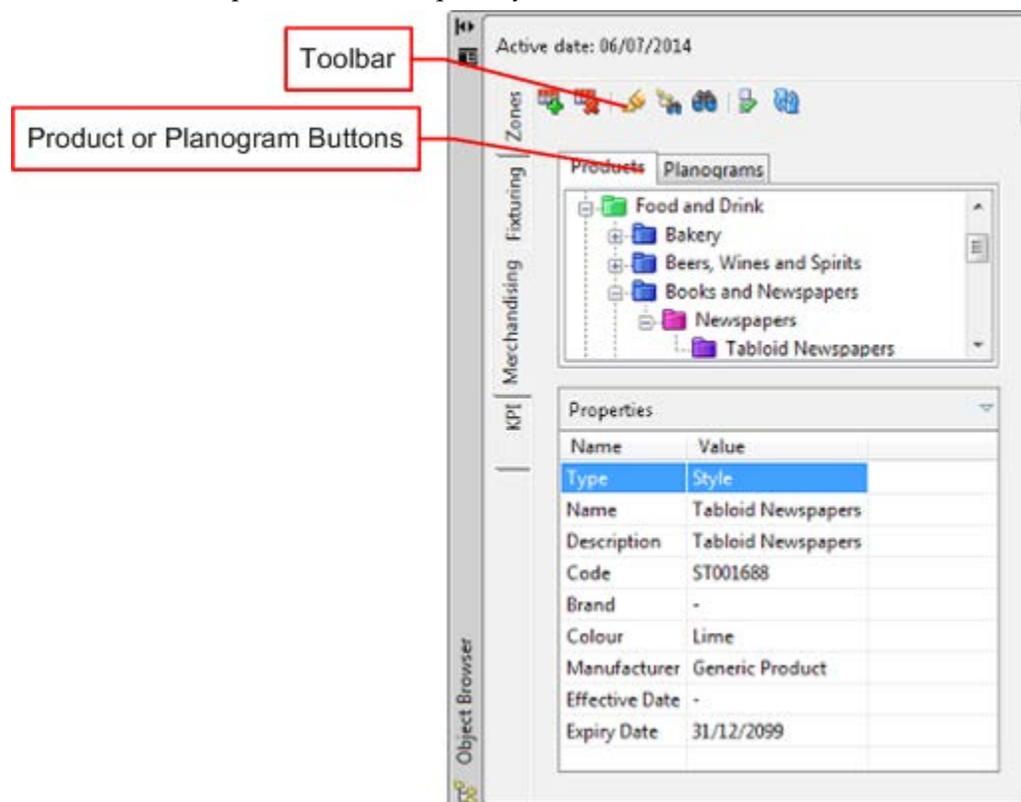
The alternative is to select the product first.

1. Select Product in Hierarchy in Object Browser or in List in Object Grid
2. Click the Add icon
3. Select required fixture or fixtures.

Either way is valid. This example will use the latter option of selecting the product first and the fixtures last.

Adding Product Placeholders

Product Placeholders only indicate the presence of an item of merchandise on a fixture. This can be at any level from SKU upwards. Product placeholders do not give any information on the product form or quantity.



Adding products can be carried out as follows:

1. Select the Products Button on the Merchandising tab of the Object Browser

2. Select Required Product from Hierarchy

The initial stage is to select the required product from the hierarchy.

Note: If products cannot be found by means of a manual search, there is a Find option available. (See below).

3. Select Add Option from Toolbar

4. Selecting Fixtures

On clicking Add Product, the command line in Planner will prompt users to select fixtures.

```
Command:
Select objects:
```

These can be selected by standard AutoCAD methods including left clicking individual fixtures or using window and crossing selection boxes. In this instance, four fixtures have been selected by left clicking, the information being reflected in the command line.

```
Select objects: 1 found, 4 total
Select objects:
```

On completing the selection with a right click (the standard AutoCAD way of finishing selecting objects) the selected fixtures will be populated with placeholders.

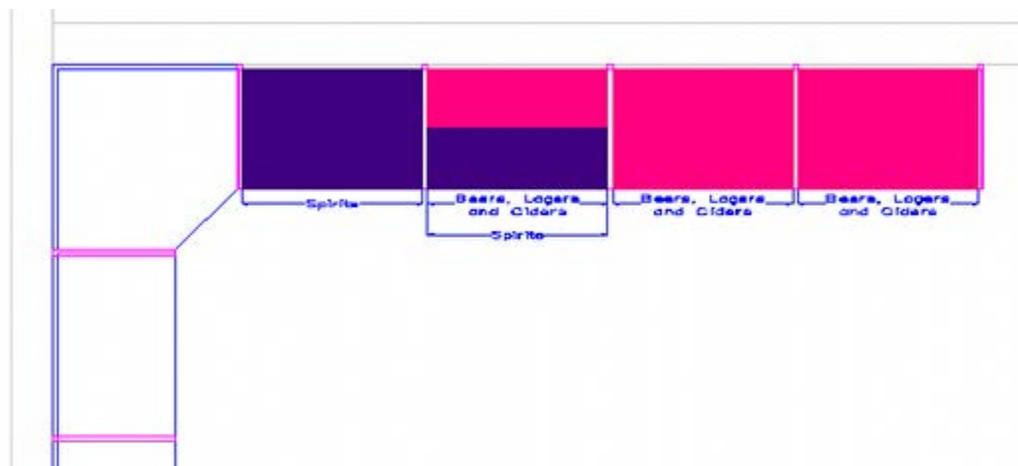


At the same time as the fixtures are populated, they will annotate with information on what products have been placed.

Note: Annotation is controlled using the Text Styles option accessed from the Planning Menu in the Administration Module.

Adding Multiple Product Placeholders to a Fixture

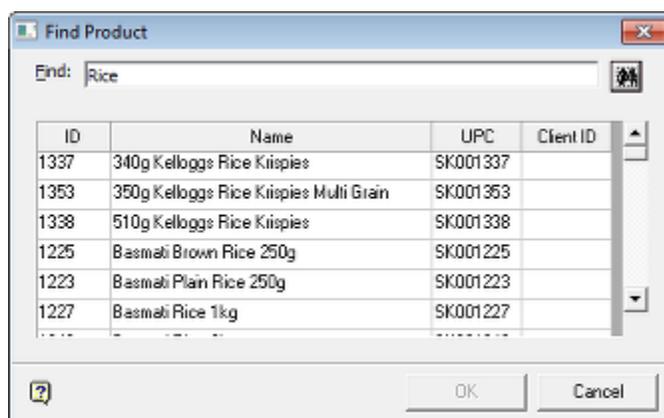
It is possible to add multiple Product placeholders to a single fixture. Once the fixture has been merchandised with the first placeholder, it can be merchandised with a second placeholder by following exactly the same procedure.



The second fixture from the left has been merchandised with a combination of Beers, Lagers and Ciders and Spirits placeholders. This situation might occur if a store planner was considering having the upper shelves on a fixture devoted to spirits and the lower to beers, lagers and ciders. The annotation can be set of offset so that the annotation for the second placeholder does not overwrite that for the first.

Using the Find Option

The **Find** option can be found on the Products toolbar. It can be used if a store planner does not know how to manually navigate to the required product. On clicking the Find icon, the **Find Product** dialog box will appear.



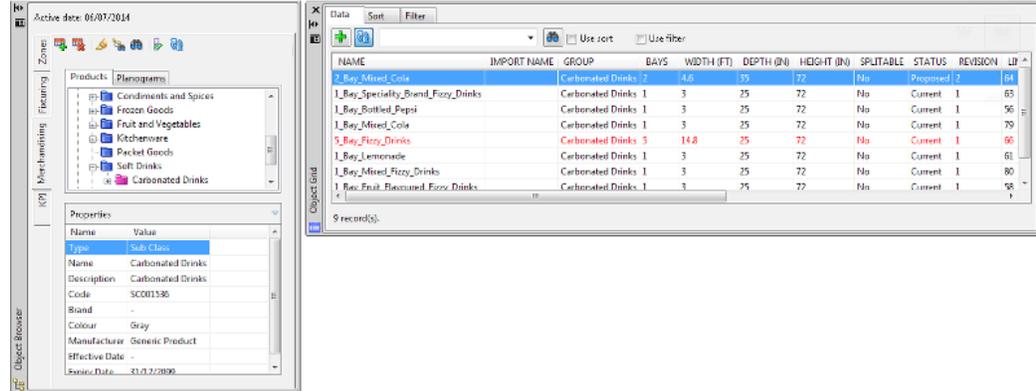
To use this dialog box:

1. Type a search string into the Find text box. (The text string used implied wild cards).
2. Click the Find icon
3. Highlight a product in the list returned.
4. Click OK to be taken to that product in the product hierarchy in the Object Browser.

Adding Product Placeholders from the Object Grid

The list of merchandise that is populated to the Object Grid depends on the Custom SQL. This can be configured by Administrators directly in the database to return either products or planograms. (It is not possible for the Object Grid to return both sorts of results in Planner). Generally, the Planner module is configured to return planograms corresponding to the node selected in the product or planogram hierarchy. In the

example below, clicking the Carbonated Drinks node in the Object Browser has caused the Object Grid to populate with planograms associated with that node.



Note: The planograms returned are all those whose products have that node in the hierarchy as a common parent.

Deleting Product Placeholders

Deleting Products can only be done from the Object Browser

Sequence of Actions Required

There are two potential ways of deleting products. The first is to select the required fixture first.

1. Select required fixture or fixtures.
2. Click the Delete icon
3. Confirm in the delete Planograms dialog box.

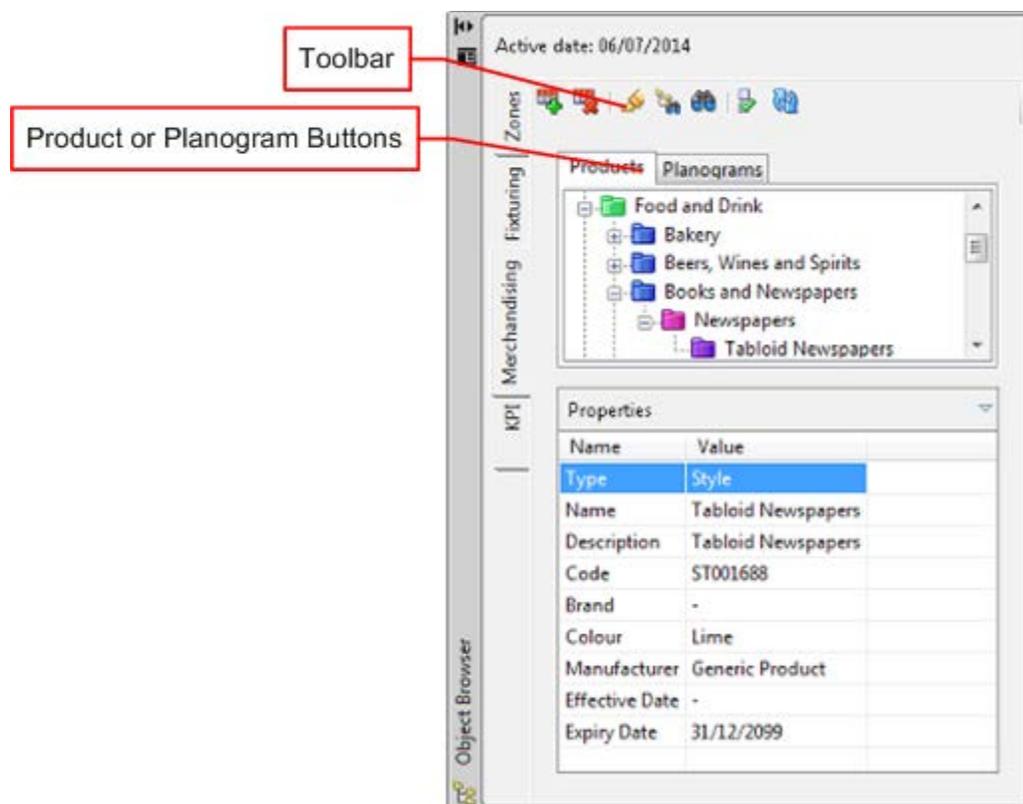
The alternative is to select the delete option first.

1. Click the Delete icon
2. Select required fixture or fixtures.
3. Confirm in the delete Planograms dialog box.

Either way is valid. This example will use the latter option of selecting the delete option first and the fixtures last.

Deleting Products

Deleting products can be carried out as follows:



1. Select the Products Button on the Merchandising tab of the Object Browser
2. Select the Delete option from the Toolbar
3. Selecting Fixtures

On clicking Delete Product, the command line in Planner will prompt users to select fixtures.

```
Command:
Select objects:
```

These can be selected by standard AutoCAD methods including left clicking individual fixtures or using window and crossing selection boxes. In this instance, four fixtures have been selected by left clicking, the information being reflected in the command line.

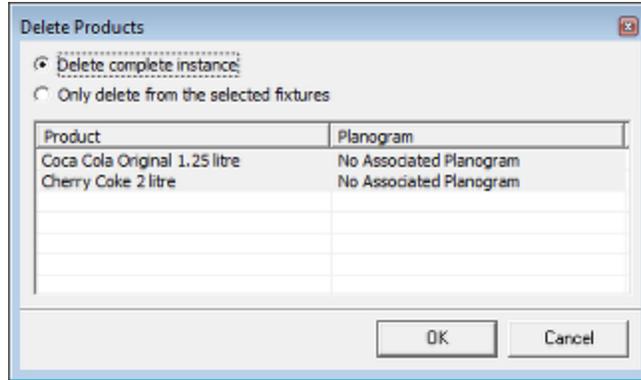
```
Select objects: 1 found, 4 total
Select objects:
```

Note: Clicking on the products themselves will not be effective - deleting products requires the user to select the parent fixtures for the products. Accordingly, users should left click on the fixture itself or use window and crossing selection boxes that encompass both the product and its parent fixture.

On right clicking to complete the selection, the Delete Products dialog box will appear.

4. Delete Products Dialog Box

The Delete Products dialog box allows users to confirm which products to delete.



- The Radio Button specifying whether to Delete complete instance or Only delete from the selected fixtures only applies to planograms.
- Select the required products to delete
- Click OK to delete the specified products.
- The specified products will be deleted and the Delete Products dialog box will close.

Note: The Delete Products dialog box will always appear if two or more products are selected. It will also appear if a single product is selected if the **Always show selection dialog** option is checked in the Merchandising tab of the Configuration module.

Highlighting Options for Products

There are two highlighting options available on the Product toolbar.

- Highlight Product
- Highlight Selected Product in Tree



	Highlight Product in Floor Plan	If selected, selecting a product placeholder in the Object Browser Product Hierarchy will cause the pertinent product to be highlighted in the floor plan.
<hr/>		
	Highlight selected item in tree	If selected, selecting a fixture in the floor plan will cause the pertinent product to be highlighted in the Object Browser Product Hierarchy.

Highlight Product

Highlight Product allows a user to find a product in the floor plan. The option has to be turned on by toggling the icon on the Product toolbar so it is depressed. After the icon has been toggled on, highlighting any product in the product hierarchy will cause the selected product to be highlighted in the floor plan. The highlighting method will depend on setting in the Merchandising tab of the Configuration module.

Note: It is recommended that the Highlight Product option be left off until needed - leaving it on may have a marginal impact on performance in the floor plan.

Highlight Selected Item in Tree

Highlight Selected Item in Tree allows a user to select a fixture in the floor plan and have it highlighted in the Product Hierarchy in the Object Browser. The option has to be turned on by toggling the icon on the Product toolbar so it is depressed. Clicking on the product in the floor plan will then cause that product to be highlighted in the hierarchy.

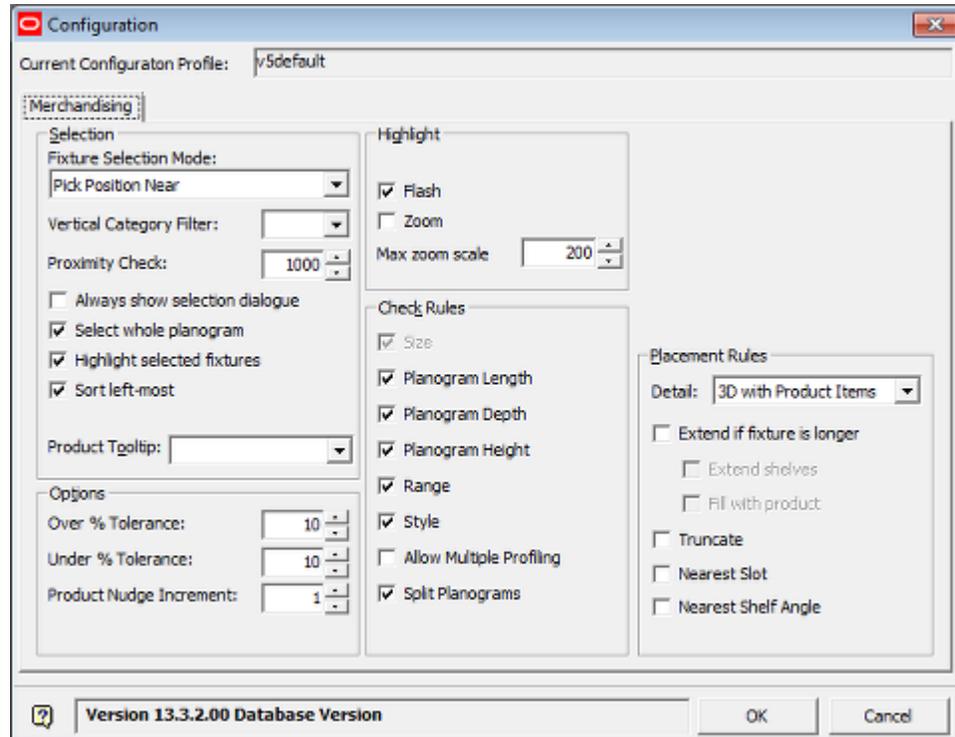
Note: It is recommended that the Highlight Product in Tree option be left off until needed - leaving it on may have a marginal impact on performance in the floor plan.

Configuring Merchandise Behavior

The way merchandise behaves can be configured in the Configuration module. To access the Zones tab, click **Options** on either the Products or Planograms toolbar in the Object Browser.

	Options	This option brings up the Merchandising Tab of the Configuration module, allowing users to customize their settings.
--	---------	--

This will bring up the Merchandising tab of the Configuration module. Settings in this tab can have a significant effect on the way merchandise places.



Full information on each setting can be found in the Configuration Module User Guide, but the following basic settings are helpful for new users:

Selection Frame

This frame controls how fixtures are selected for placing merchandise on. Set the following:

- Fixture Selection Method to Standard Selection.
- Always Show Selection Dialog to On.
- Select Whole Planogram to On.
- Sort left-most to On.

Highlight Frame

This frame controls how merchandise is highlighted in the floor plan.

- Set highlight method to Flash.

Check Rules Frame

This frame controls the advisory warnings that occur when placing planograms.

- Set all Check Rules to On with the exception of allow Multiple Profiling.

Find Product in Tree

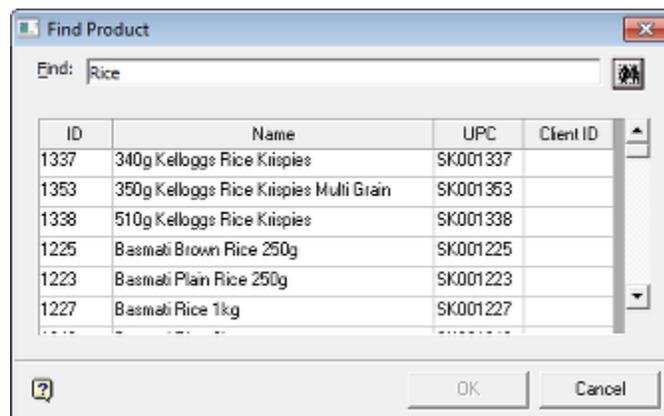
Find in Tree allows users to search for Products in the Product Hierarchy.



Find

This option brings up the Find dialog box, allowing users to search for objects in the Product Hierarchy.

Clicking the icon will bring up the Find Product dialog box.



To use the dialog box:

1. Type a text string into the text box
2. Click on the search Icon
3. Any products with a name matching the search string will be listed

4. To select a product in the hierarchy, highlight it and click the OK button

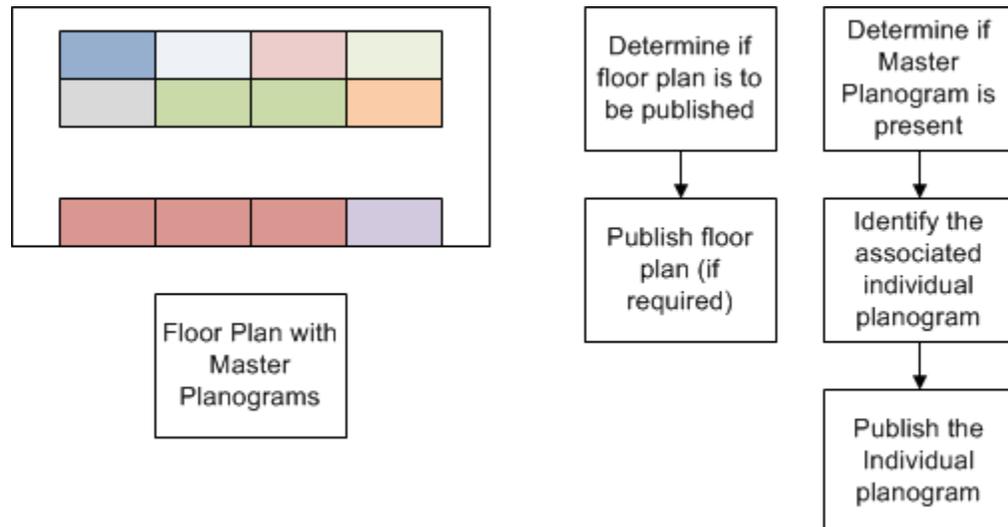
Master Planograms

Overview of Master Planograms

Master Planograms are a way of reducing the frequency with which floor plans need to be modified and published. They act as placeholders in a floor plan. The floor plan or planogram publishing batch processes are then run at intervals to determine if the floor plan or planograms need publishing. If master planograms are present in the floor plan, they will have a mapping to an individual planogram. The individual planogram is then published in place of the master planogram. As the underlying master planograms remain unchanged, this reduces the frequency with which floor plans need to be updated and published.

Overview of General Process

The basic process for using master planograms is seen below.



A floor plan has been created with master planograms present. A batch process is run at regular intervals.

- The floor plan publishing batch process determines if the floor plan has been superseded by a more recent design. If so the floor plan would be published (and later made current). If a floor plan contains purely master planograms, the general reason for revising the floor plan would be to change the position of those master planograms. If the position is not changed, there would be no need for a revised floor plan.
- The planogram publishing batch process identifies the individual planograms associated with each master planogram. If it identifies a new or revised planogram that has met or exceeded its publish date, the planogram will be published (and later made effective).

The advantage of master planograms can thus be seen: if individual planograms were used, the floor plan would need to be updated and republished each time a planogram was changed. With this method the floor plan only needs updating when the space

allocated to categories/sub-categories is changed. This saves effort in the store planning process.

Placing Master Planograms

Placing Master Planograms is identical to placing individual planograms. They are placed in the floor plan identically to individual planograms. The key difference is that master planograms are left in place until the location or amount of space allocated to product categories and sub-categories changes. As there is a mapping between master planograms and individual planograms, each time planogram publishing is executed, the specific individual planogram associated with each master planogram is published. If the individual planograms are updated, the updated versions will publish with no need to publish a revised floor plan.

Configuring Master Planogram Functionality

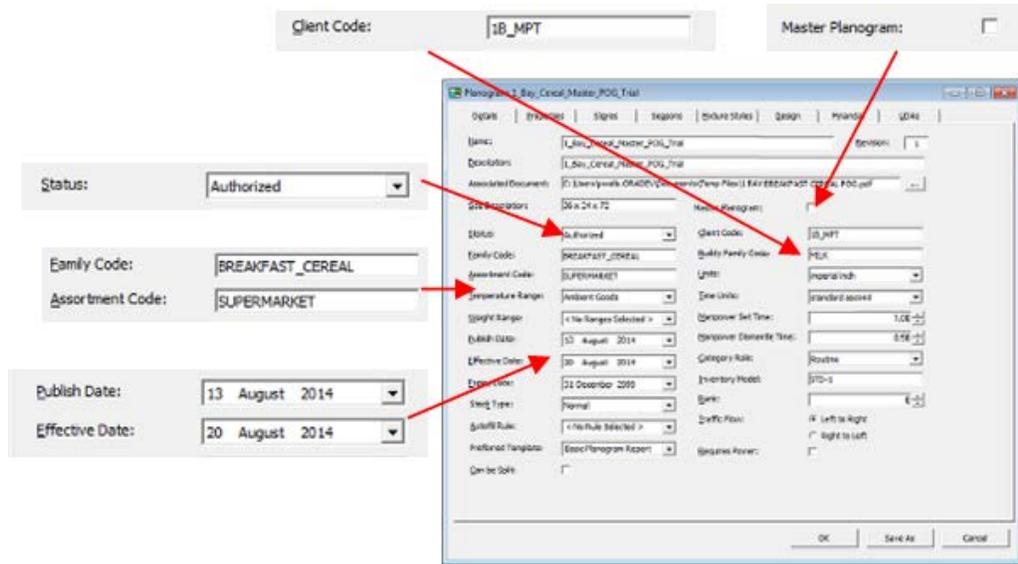
Master Planograms are placeholders placed in a floor plan. The planogram definition contains a number of fields that can be compared with similar fields in the individual planograms. If the fields in both the master planogram and the specific individual planogram match, the specific individual planogram will be substituted for the master planogram during the Planogram Publishing process. Other fields are used for more aspects of planogram functionality. For example the Publish date is used during the planogram publishing process to determine when it is appropriate to publish a planogram. Similarly, the status shows where the planogram is within its business life cycle.

Note: In order for the Master Planogram functionality to work, considerable configuration has to be carried out during the implementation of the software. If this has not been done, it will not be possible to use Master Planograms. Describing how to configure the functionality is outside the scope of this help file. The information is available in a white paper on My Oracle Support.

Information Used in Master Planogram Functionality

Some information associated with a planogram design is associated with the master planogram functionality. This can be seen on the Details and Properties tab of the Planogram Design dialog box accessed in the Merchandiser module.

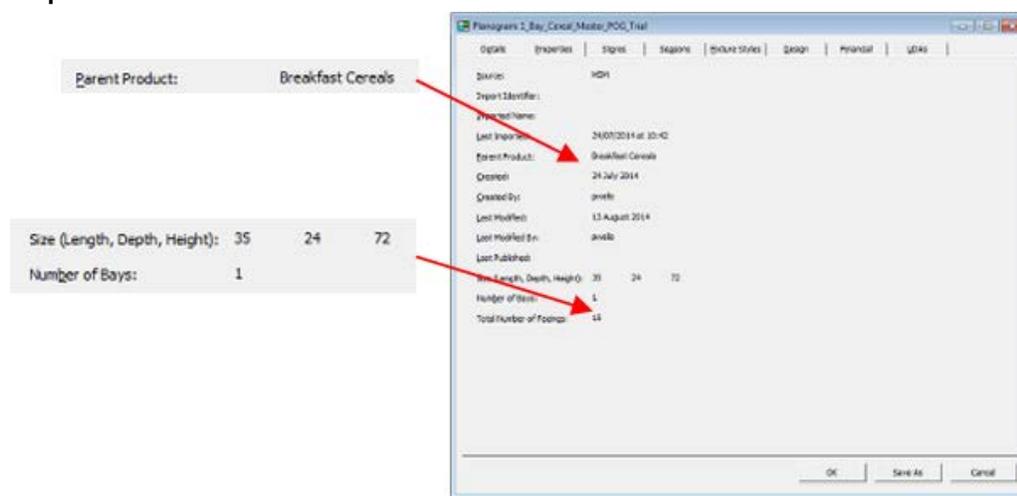
Details Tab



Information	Significance
Master Planogram	This is a flag indicating whether the planogram design is a mater planogram or an individual planogram.
Client Code	This is a code generally brought in during planogram import. Different revisions of the same planogram will have the same client code, enabling them to be identified. This field is not directly involved with the master planogram functionality, but enables the imported planograms in the MSP database to be related to the original information in the third party planogram design software.
Status	<p>This indicates where the planogram is in its business life cycle. A range of statuses are possible depending on the retailer’s business processes.</p> <p>If planograms are brought in by import, one option is for the status for an individual planogram to be Authorized. As the Publish Date and Effective Date are met and exceeded for individual planogram, the status will successively change to Published and then Current.</p> <p>Planogram designs could also be brought in from the planogram design software already at Current status as an indication the design has been approved for service.</p> <p>Finally, it is possible to configure additional planogram statuses in the Administration module. (See <i>the Oracle Retail Macro Space Planning Administration User Guide</i> for details). It would be possible to configure an entirely separate status for master planograms.</p> <p>Note: it is expected that there will only be one version of a master planogram for a specific category or sub-category in the database. This is because it acts as a placeholder and there is no need to modify the design.</p>
Publish Date	This is the assigned date at which the status of the planogram will change from Authorized to Published. It is generally changed automatically by the planogram publishing batch process.

Information	Significance
Effective Date	This is the assigned date at which the status of the planogram will change from Published to Current. There is no standard process for this in Macro Space Planning. It requires an implementer to set a mechanism like a stored procedure execute at intervals by a batch process.
Family Code	This is a code indicating the general family the planogram belongs to. It could indicate (for example) whether the planogram belongs to a Value, Standard or Premium range or products. Alternatively it could indicate that the planogram is designed for a convenience store, Metro store, Supermarket or Super Store. The nature of Planogram Families will vary from retailers to retailer.
Assortment Code	Many retailers create specific assortments for particular demographics, types of retail outlet and so on. This field holds the code identifying that assortment. It relates back to the retailer's category management system.

Properties Tab



Information	Significance
Parent Product	This indicates the node in the product hierarchy that is the parent for all products in the planogram. It will normally be a category or subcategory.
Size	This is the overall size of the planogram.
Number of Bays	This is the number of bays (fixtures) that the planogram is designed to be placed on.

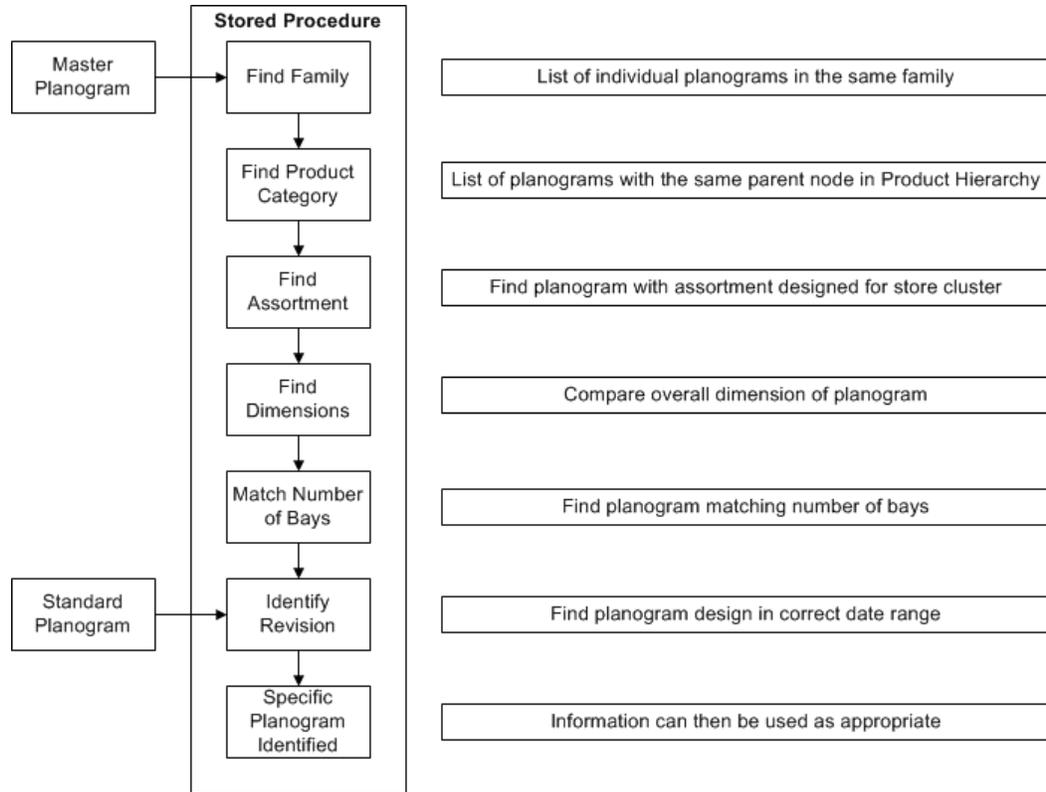
Overview of Selection Method for Individual Planograms

Note: The mapping process is configurable, so this section illustrates the process for the stored procedure supplied with the application.

The basic flow for selecting the individual planogram related to a master planogram is shown in the flowchart below. The core of the process is a stored procedure which is referenced by other parts of the application - for example the batch process for publishing planograms. This stored procedure is customizable. Providing the basic

parameters are left unchanged it can be modified to meet retail chain specific requirements.

Note: Individual aspects of the process will be discussed in more detail later.



Steps in Selection Method

Note: This is a simplified form of the flowchart used to explain the basic concepts. The information used will obviously vary from retail chain to retail chain.

1. Finding Planograms of a Common Family

The first stage of finding an individual planogram is to list all planograms that belong to the same family that has been assigned to the Master Planogram. This family is identified in the **Family Code** field of the Details tab of the Planogram Design dialog box.

2. Find Product Category Master Planogram Belongs To

The next stage is to find the subset of individual planograms that belong to both the same Family and Product Category as the Master Planogram. The Product Category is identified in the **Parent Product** field of the Properties tab of the Planogram Design dialog box.

3. Find Assortment

The sub-set of individual planograms can be further reduced in size by looking for planograms with a product assortment that matches the Master Planogram. This information is held in the **Assortment Code** field of the Details tab of the Planogram Design dialog box.

4. Find Dimensions

The Master Planogram will have been placed on one or more fixtures. The lengths of those fixtures will be summed to find the overall length for the planogram - for example 12 feet. The maximum depth and height will also be used. The subset of individual planograms is further reduced to match the cumulative dimensions of the fixtures the master planogram has been placed on. This information is displayed in the **Size** field of the Properties tab of the Planogram Design dialog box.

5. Find Number of Bays

As part of the continuing process of reducing the number in individual planograms in the sub-set matching the data for the master planogram, the number of fixtures the master planogram has been placed on is compared to the number of bays the individual planogram is designed for. This enables the software to differentiate between a 12 foot planogram made up for 3 x 4ft bays and a 12 foot planogram made up for 4 x 3ft bays. The number of bays is displayed in the **Number of Bays** field of the Properties tab of the Planogram Design dialog box.

Note: This check is only used if more than one planogram of the required length exists.

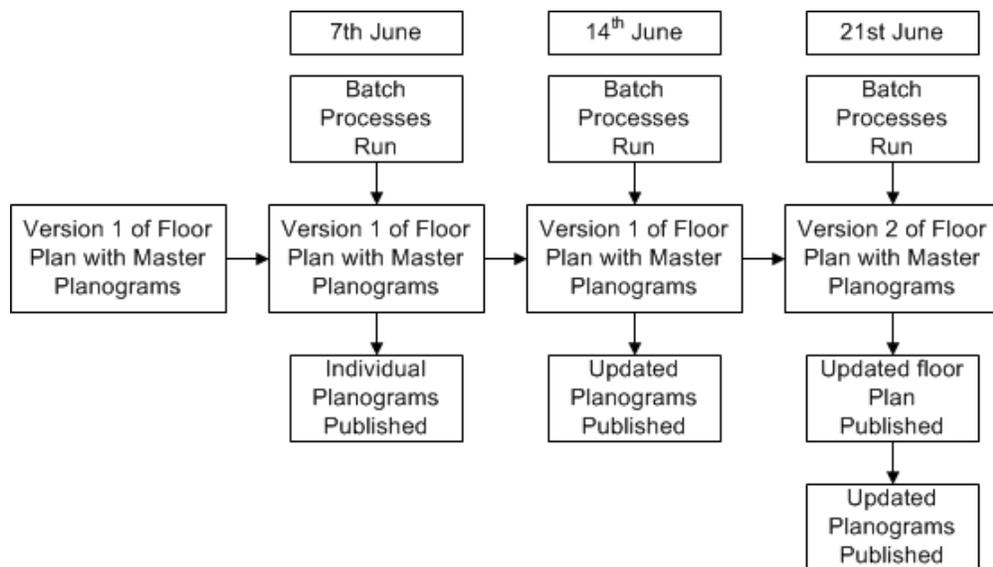
6. Identify Revision

The final stage in identifying the individual planogram to use relative to the Master Planogram is to look at the **Publish Date** and **Effective Date**. These are used to determine whether an existing planogram should be used or replaced by a newer one. If the Publish Date has been met or exceeded, running the batch process will result in the planogram being published.

Note: If no specific individual planogram could be identified, this should be identified by a process set up by the retailer. Failure to do so may result in problems with the replenishment system.

Example of Use

The following simplified example shows the Master Planogram functionality in use.



1. Version 1 of the floor plan is in service.

This version of the floor plan has been in service for some time.

2. Batch Processes Execute on 7th June.

The Floor Plan batch processes executes on the 7th June. It does not find a more recent floor plan with a Publish or effective date that has been met or exceeded, so the current version of the floor plan remains in force. The Planogram Publishing batch process also executes. It identifies any individual planograms associated with Master Planograms that have Publish Dates or Effective Dates met or exceeded and with publishes them or makes them current.

3. Batch Processes Execute on 14th June.

The Floor Plan batch processes executes again on the 14th June. It still does not find a more recent floor plan with a Publish or effective date that has been met or exceeded, so the current version of the floor plan remains in force. The Planogram Publishing batch process also executes. It identifies any individual planograms associated with Master Planograms that have Publish Dates or Effective Dates met or exceeded and updates as required.

4. Batch Processes Execute on 21st June.

The Floor Plan batch processes executes again on the 21st June. The floor plan publishing process finds another version of the floor plan with a Publish Date that has been met or exceeded, so the floor plan is published. The Planogram Publishing batch process also executes. It identifies any individual planograms associated with Master Planograms that have Publish Dates or Effective Dates met or exceeded and updates as required.

On the 7th June and 14th June the floor plan did not require modification and thus the use of master planograms streamlined the store planning process.

Creating an Example Master Planogram

Master Planograms can be created in a number of ways. These include:

Creation Method	Source of Information	Responsibility
Import from third party planogram software	Oracle documentation on planogram import	Implementer
Create using SQL statement	Oracle white paper on creating master planograms on My Oracle Support	Implementer
Create in Merchandiser	Merchandiser Help File	User

Configuration for using Master Planograms

This information is primarily for use by Administrators. It is intended to provide a point of reference for trouble shooting.

Configuration in the Database

Class Store Assortment Table

For the master planogram process to work, some configuration needs to be done directly in the database. The table is the **Class Store Assortment** table. This configuration can only be carried out by an administrator with direct access to the database.

Note: See the *Oracle Retail Macro Space Planning Data Model* for full details of the **Class Store Assortment** table.

PRD_ID	STR_ID	CSA_ASSORTMENT_CODE
138	32 SUPERMARKET	

This requires populating with several pieces of information.

Column	Description
PRD_ID	The identifier for the node in the product hierarchy that is the parent for the products in the master planogram.
STR_ID	The identifier for the store in which the master planogram will be placed.
CSA_ASSORTMENT_CODE	The information held in the Assortment Code field of the master planogram.

Store Specific Implementation Dates

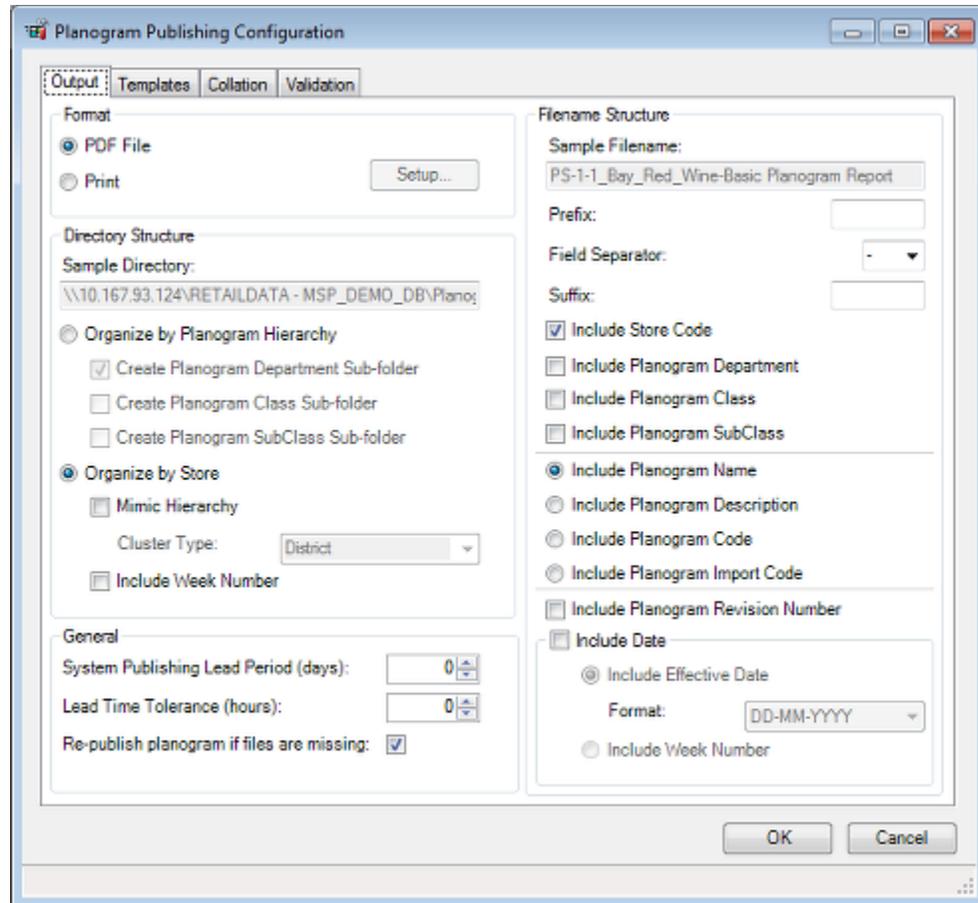
Store specific implementation dates allow the setting of a new planogram to be spread across a range of dates if required. This information is held in the **POG Store Date** table. Store specific dates should not be used if the generic effective and expiry dates for an individual planogram do not cover the entire life cycle of the planogram across all stores. If the generic effective and expiry dates do not cover this life cycle, it is possible to have gaps in the master planogram mapping where a store specific effective date is later than the generic expiry date of the planogram's previous revision. In this event no individual planogram will be mapped by the planogram publishing or printing processes.

Note: See the *Oracle Retail Macro Space Planning Data Model* for full details of the **POG Store Date** table.

Configuration in the Administration Module

Planogram Publishing

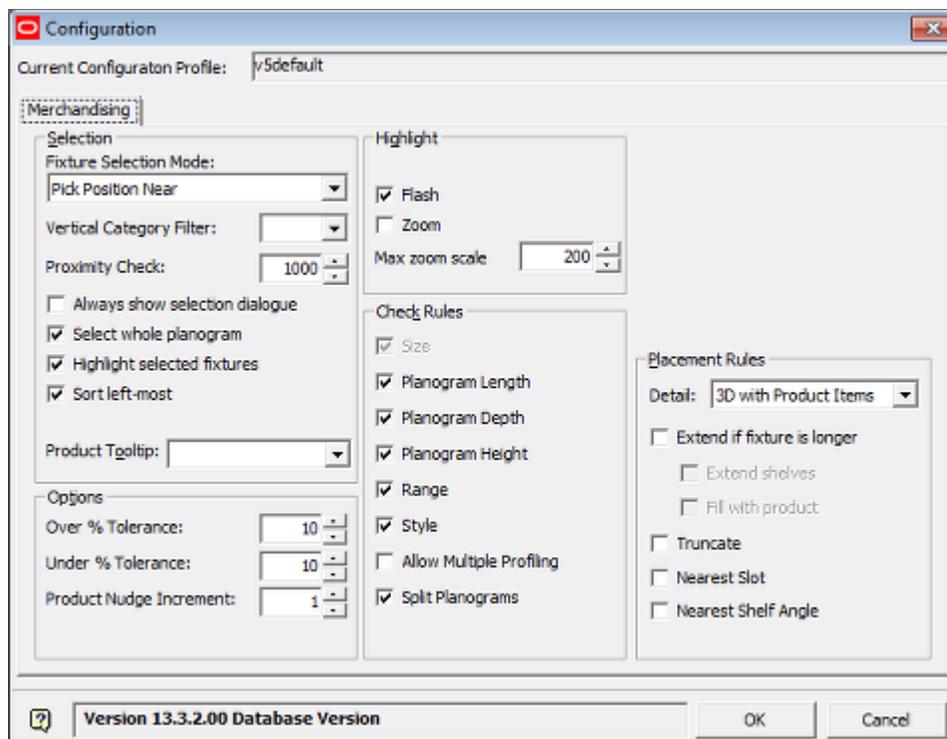
Planogram Publishing needs to be configured as following using the Planogram Publishing Configuration dialog box accessed from the File menu in the Administration module. The changes required are on the Output tab as the Template, Collation and Validation tabs can be configured when the Immediate Planogram Publishing functionality is invoked from the Planner and Merchandiser modules or from In-Store Space Collaboration.



Note: For the Master Planogram functionality to work, the output format must be set to **Organize by Store**.

Configuration Module

The Merchandising tab of the Configuration Module has a series of Check Rules. These govern the warnings given when planograms will be placed. Because the master planogram has to have a set of dimensions and a specific number of bays, if the master planogram (which is only a placeholder) is placed on different number of fixtures or on a fixture of a different dimension to the one it was created on, a warning might result. Accordingly, when placing master planograms, it is often best to deselect the Planogram Length, Planogram Depth and Planogram Height warnings.



Quick Reports

Because most users will not be able to access the database, it may be necessary to set up quick reports to show the data in specific tables for experimenting with Master Planogram. This example of a Quick Report shows the contents of the **Class Store Assortment** table. This enables someone experimenting in a floor plan to see the information held in the database and confirm it is appropriate for the planograms involved.

STORE NAME	PRODUCT NODE	ASSORTMENT CODE
Beilin	Breakfast Cereals	SUPERSTORE
Beilin	Pasta	SUPERSTORE
Beilin	Rice	SUPERSTORE
Bridgetown	Breakfast Cereals	CONVENIENCE
Bridgetown	Pasta	CONVENIENCE
Bridgetown	Rice	CONVENIENCE
Cairo	Breakfast Cereals	SUPERMARKET
Cairo	Pasta	SUPERMARKET
Cairo	Rice	SUPERMARKET
Canberra	Breakfast Cereals	SUPERMARKET

Note: For information on the **Custom SQL** table concerned setting up Quick Reports, see the *Oracle Retail Macro Space Management Data Model*.

Manually Running the Master Planogram Functionality

There are two ways of seeing the master planogram functionality in action: using the Immediate Planogram Publish functionality or using the Print Planogram functionality. Both ways are described below, together with some simple trouble shooting suggestions.

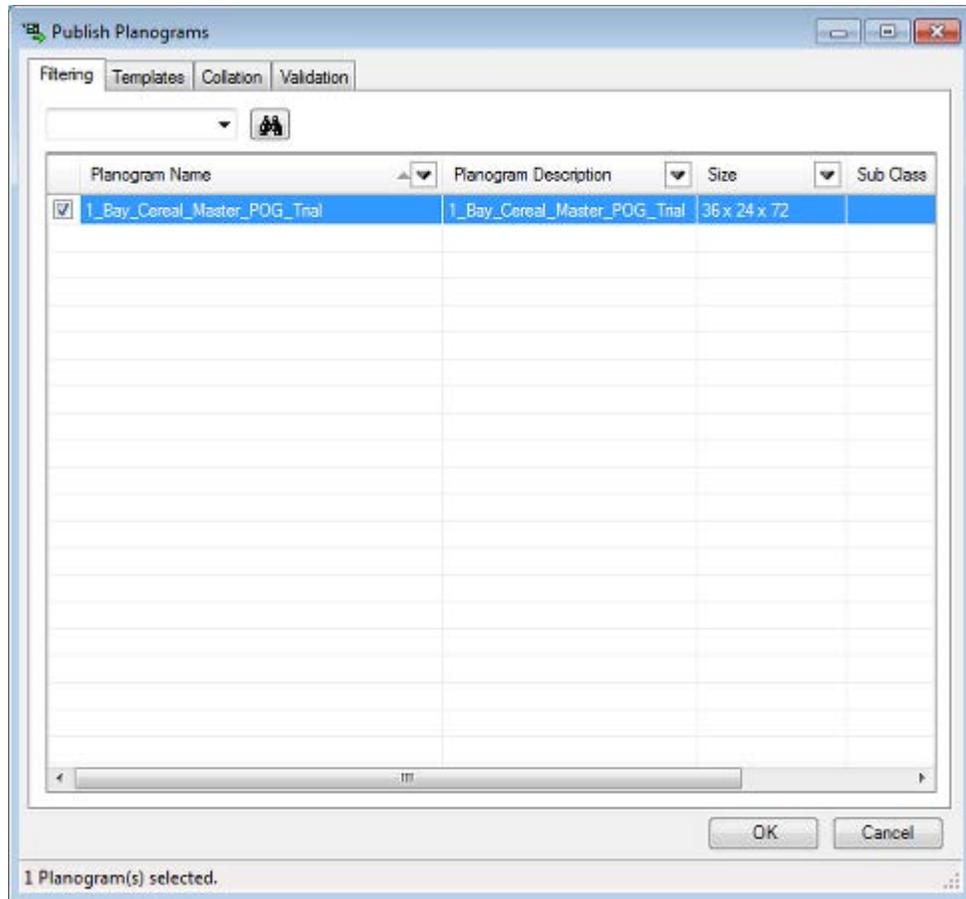
Placing the Master Planogram

The first stage is to place the master planogram. This needs to be placed in a floor plan within a store specified in the **Class Store Assortment** table. The master planogram functionality will reference this table, so if the store is not referenced within it, the master planogram functionality will not map to an individual planogram. The master planogram can be placed on one bay, in which case the one bay variant of the individual planogram will be published when required. Or it can be placed on two bays - in which case the two bay variant will be published.

Note: The information populated into the object grid is determined by Custom SQL held in the **Custom SQL** table. This custom SQL can be modified so only display master planograms pertinent for the active floor plan. For information on the custom SQL table see the *Oracle Retail Macro Space Planning Data Model*.

Print Planogram

The Print Planogram functionality is accessed from the File menu in the Planner and Merchandiser modules (Print > Print Planograms). This will bring up the Print Planogram dialog box. Ensure that the value in the **Floor Plan Date** field is set beyond the Publish Date of the planogram. The master planogram in the floor plan will have been substituted for by an individual planogram - the functionality having mapped the correct individual planogram to the master planogram. On clicking **Print**, the individual planogram will print to the designated printer.



Detailed information on what was published will also be in the **Publish Planogram Log** table in the database. Other information may be found in the **Error** table. (See the *Oracle Retail Macro Space Planning Data Model* for more information.) Users without access to the database will need access to reports showing the contents of those tables.

After Publishing the Planogram

When the planogram is published, that informs the store both of the planogram design and that it is to be implemented in the future. It is also an indication that the required merchandise needs to be ordered through the replenishment system. The date that the planogram is to be put into service is the effective date.

Implementing the Planogram

When the planogram is published, that informs the store both of the planogram design and that it is to be implemented in the future. It is also an indication that the required merchandise needs to be ordered through the replenishment system. The date that the planogram is to be put into service is the effective date. This can be in one of two places in the software: in the **Planogram design dialog box** and in the **Planogram Store Date** table.

Planogram Design Dialog Box

The screenshot shows a software dialog box titled "Planogram: 1_Bay_Soup_Example". It features a tabbed interface with the following tabs: Details, Properties, Stores, Seasons, Fixture Styles, Design, Financial, and LDAs. The "Details" tab is selected and contains the following fields:

- Name: 1_Bay_Soup_Example (Revision: 1)
- Description: 1 Bay Soup Example
- Associated Document: (empty)
- Size Description: 36 x 24 x 72
- Status: Authorized (dropdown)
- Family Code: ABC
- Assortment Code: DEF
- Temperature Range: < No Ranges Selected > (dropdown)
- Weight Range: < No Ranges Selected > (dropdown)
- Publish Date: 17 July 2014 (calendar)
- Effective Date: 27 July 2014 (calendar)
- Expiry Date: 31 December 2999 (calendar)
- Stock Type: Normal (dropdown)
- Autofill Rule: < No Rule Selected > (dropdown)
- Preferred Template: Basic Planogram Report (dropdown)
- Can be Split: (checkbox, unchecked)
- Master Planogram: (checkbox, unchecked)
- Client Code: 123
- Buddy Family Code: 456
- Units: imperial inch (dropdown)
- Time Units: standard second (dropdown)
- Manpower Set Time: 3.00 (spin box)
- Manpower Dismantle Time: 1.00 (spin box)
- Category Role: Destination (dropdown)
- Inventory Model: 789
- Rank: 1 (spin box)
- Traffic Flow: Left to Right (radio button selected)
- Requires Power: (checkbox, unchecked)

Buttons at the bottom include OK, Save As, and Cancel.

The effective date is shown in the **Effective Date** field. This is the global effective date and if no information pertinent to the planogram is in the **Planogram Store Date** table, the planogram will be put into service simultaneously across the entire retail network.

Planogram Store Date Table

This table can be used to override the global effective date assigned to the planogram. This holds the name of the planogram, the stores it is designed for and the date it is to be implemented. In the simple example below, the planograms are designed to go into service at one week intervals. This table would typically be populated by an import process. It holds a set of store specific effective dates.

Planogram Name	Store Name	Store Specific Effective Date
1 Bay Cereal	Cairo	21-AUG-14 14.06
1 Bay Cereal	Canberra	28-AUG-14 14.09
1 Bay Cereal	Oslo	04-SEP-14 14.10
2 Bay Cereal	Cairo	21-AUG-14 14.07
2 Bay Cereal	Canberra	28-AUG-14 14.09
2 Bay Cereal	Oslo	04-SEP-14 14.10

The planogram publishing functionality references this table during publishing. If there is no **Store Specific Effective Date** for the planogram, the planogram is published when its general **Effective Date** is reached. If there is a Store Specific Effective date, this

overrides the general effective date and the planogram is published using the store specific date.

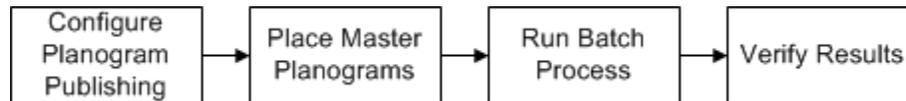
Note: For more information on the **Planogram Store Date** table, see the *Oracle Retail Macro Space Management Data Model*.

Signaling the Execution Date to the Store

Signaling the planogram implementation date to the store requires a retailer specific method. This would normally be set up on implementing the software.

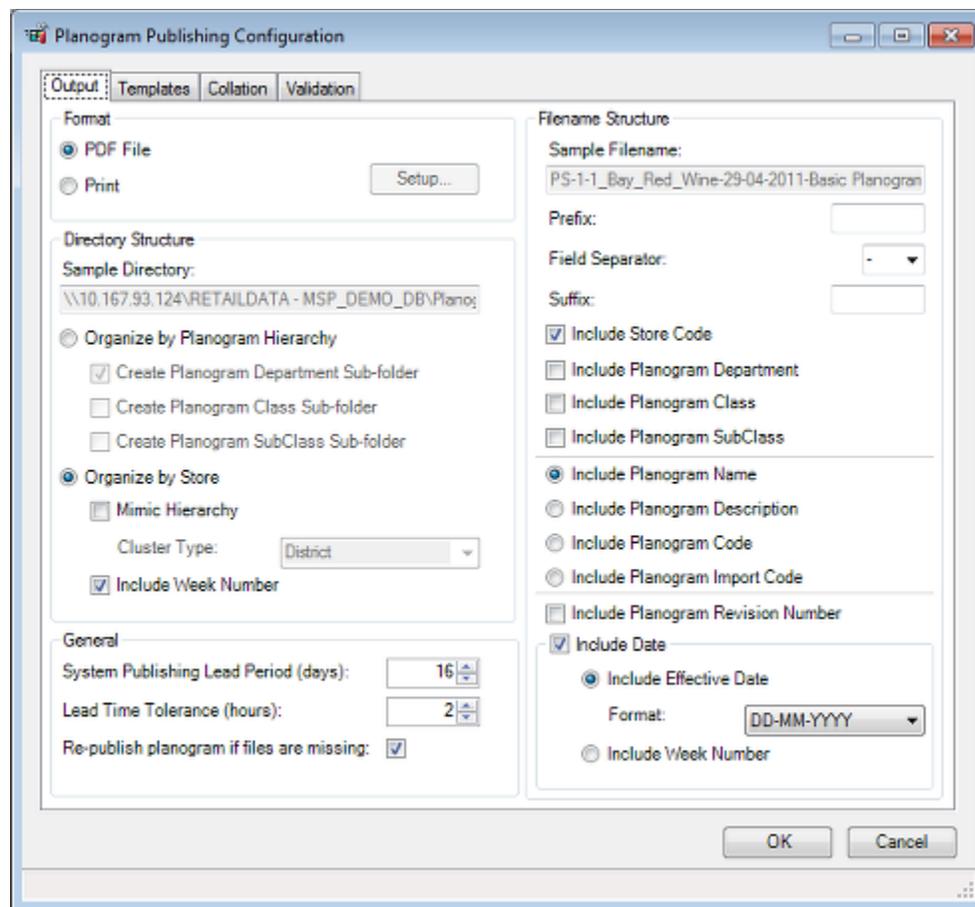
Master Planograms and Batch Processes

Master Planograms are intended to be a way of reducing the churn in floor plans. Instead of continually issuing updated floor plans when individual planogram designs are changed, the floor plan would have master planograms in it. These master planograms would not require updating until the space allocated to categories and sub-categories is changed. Retailers would run a planogram publishing process at intervals; typically through a batch process. The basic stages are as follows:



Configure Planogram Publishing

The planogram publishing process is configured in the Administration Module using the Planogram Publishing Configuration dialog box.



Note: See the *Oracle Retail Macro space Management Administration Module User Guide* for full details of how to configure this dialog box.

This determines the location planograms will be published to and the format they will be published in.

Place Master Planograms

Placing Master Planograms is identical to placing individual planograms. They are placed in the floor plan identically to individual planograms. The key difference is that master planograms are left in place until the location or amount of space allocated to product categories and sub-categories changes. As there is a mapping between master planograms and individual planograms, each time planogram publishing is executed, the specific individual planogram associated with each master planogram is published. If the individual planograms are updated, the updated versions will publish with no need to publish a revised floor plan.

Batch Process

Although planograms can be manually published, the most usual process is to publish using a batch process run at regular intervals. This identifies planograms that require publishing and publishes them in the required form to the required location. Running planogram publishing as a batch process requires an MSP tool called **Batchrunner.exe**.

This can be run manually or through a third party scheduling tool. The operation can be customized using command line switches.

Note: See the *Oracle Retail Macro Space Management Administration Module User Guide* for full details of how to use `Batchrunner.exe`.

Verifying Results

After the planogram has been published via the batch process, the results should be verified to see all planograms have been published successfully. There are two ways of doing this - these should be set up during implementation. The most common are:

Publish Planogram Log

All results from publishing planograms are written to the Publish Planogram Log table. During implementation a report should be configured to report on these results. This should include:

- **Any planograms that have failed to publish**
 - For a variety of reasons some planograms may fail to publish. These should be listed in the report and the reasons identified. Failure to publish planograms may mean that they will not be executed at the required time.
- **Any Master Planograms that have Published**
 - Each master planogram should have a specific individual planogram associated with it that should publish when the planogram publishing is run. If there is no associated specific individual planogram, or if any associated specific individual planogram does not meet the criteria to be published, the master planogram will be published instead. Any master planograms that have published should be listed and the reason investigated.

Note: For full details of the Publish Planogram Log table, see the *Oracle Retail Macro Space Planning Data Model*.

Planograms on the Object Browser

Factors Affecting Planogram Operations

A number of factors affect planogram placement.

Object Browser and Object Grid

Planograms can either be added from the **Object Browser** or **Object Grid**. Which one will result in more efficient product addition depends both on the situation it is being used in and user preferences.

Active Date

The active date can be seen at the top of the Object Browser.



If the **MERCH_TREE_EFFECTIVE_DATE** system variable (Administration module) is set to on, this will place constraints on what products can be added:

- If the Effective Date of the planogram is after the Active date of the floor plan, the planogram cannot be placed because it will not be available when the floor plan is implemented.
- If the Expiry Date of a planogram is before the Active Date of the floor plan, the planogram cannot be placed because it will no longer be available when the floor plan is implemented.

Fixture Selection

There are two possible fixture selection methods. These can be set in the Merchandising Tab of the configuration module - accessed by clicking the Properties Icon on the Products toolbar of the Object Browser.



There are two methods. **Standard Selection** is suggested for new users.

Grouping

When the fixtures were placed in the floor plan, if more than one fixture was placed at one (for example if a gondola was placed) it is possible to select all fixtures that were placed together, or individual fixtures. This is controlled by the Grouping option on the Fixturing toolbar.



It is recommended that Grouping be turned Off while placing products. That way, individual fixtures can be selected. If Grouping is left On, when an individual fixture is selected from a gondola, all fixtures and fittings in that gondola will be simultaneously selected.

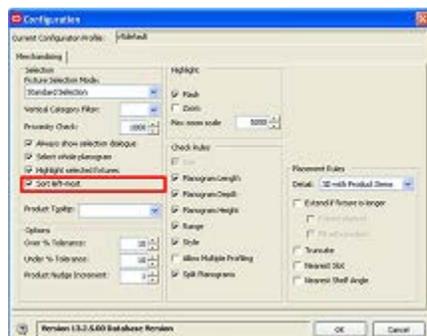
Fixtures and Fittings

The floor plan can contain a mixture of fixtures and fittings. Only fixtures can accept merchandise. If an attempt is made to merchandise a fitting, a warning will appear in the command line.

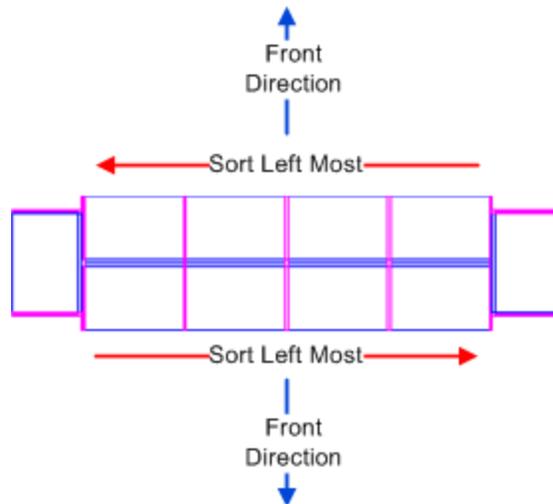
```
No valid empty fixtures were found in the database within the tolerance.
Command:
```

Sort Left Most

When selecting fixtures, if selecting by individual left clicks, the fixtures are added to the selection in the sequence they are selected. If the fixtures are selected by a Windows or Crossing selection box, the fixtures in the selection are ordered in the sequence they were placed in the drawing. For multi-bay planogram placement it is generally necessary to place the bays in a specified sequence; functionality called **Sort Left Most** can be activated from the Merchandising tab of the Configuration module. (This tab can be accessed by clicking the Options icon on the Planogram toolbar on the Object Browser).



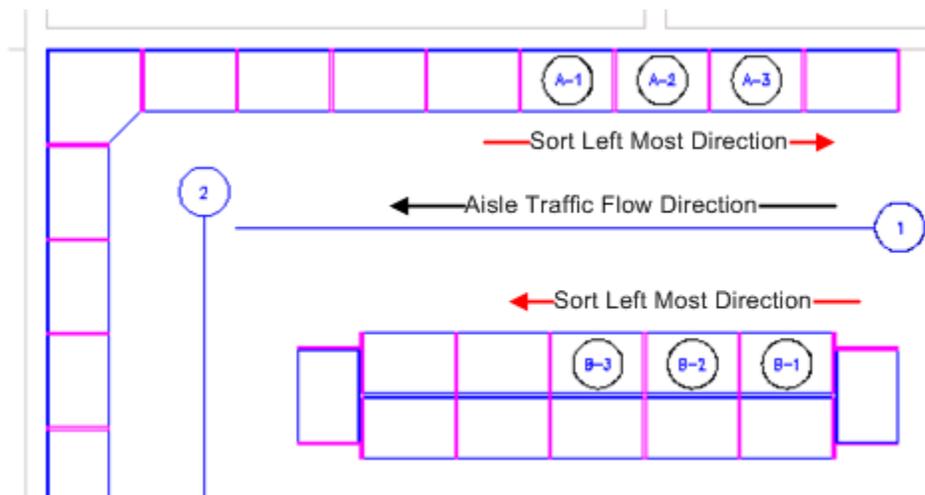
The selected fixtures will then be populated left most first.



The left-most fixture is based on when the fixtures are viewed from the front. The apparent front direction will change when the back face of a gondola is considered relative to the front.

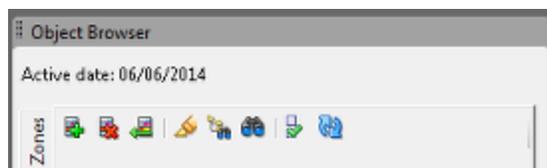
Planogram Reversal

Some multi-bay planograms are designed to be viewed from a specific direction. How the bays are placed depends on the traffic flow along an aisle.



When aisles are drawn, they can be used to show the direction of traffic flow along an aisle. It is from the head of the aisle (denoted by its name or number), to the other end. In the above diagram, traffic predominately flows from right to left. If it is desired to place a 3 bay planogram with Bay 1 the first to be viewed by shoppers, then how it is placed will depend on which side of the aisle it is placed. If it is placed on the island gondola (Bays B-1, B-2 and B-3) with sort left most on, it can be placed in its normal sequence.

If it is placed on the wall gondola (Bays A-1, A-2 and A-3) the effect of sort left most will be to place the first bay at A-1, where it will be the last bay to be seen by a customer following the normal direction of travel along an aisle. This can be corrected by using the Reverse Planogram option on the planogram toolbar.



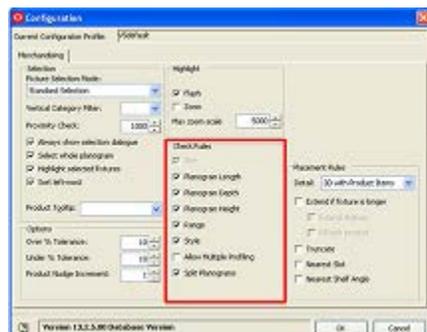
Reverse Planogram Placement Direction

Reverse the sequence the planogram bays are placed in.

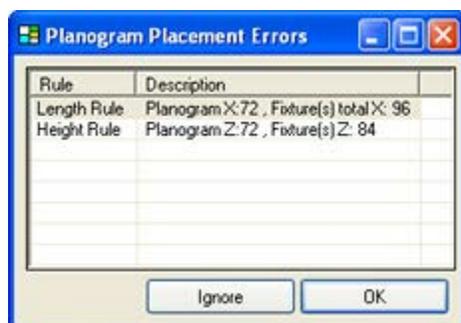
The effect of this is to reverse the sequence the bays are placed, with Bay 3 being placed first. Bay 1 will thus end up on fixture A-3 and will be the first bay seen by a customer.

Check Rules

Check Rules are used when planograms are placed. They provide a series of warnings if a planogram is being placed on inappropriate fixtures. The selection of the check rules is in the Merchandising tab of the Configuration module (accessed from the **Options** button on the Planogram toolbar).



Depending on the selections made, warnings will be given during planogram placement if the fixtures do not match the ones the planogram was designed from.



Selecting More or Less Fixtures than Bays

Multi-bay planograms are designed for a specific number of fixtures. If more or less fixtures are selected, the following will happen.

- If fewer fixtures are selected and the planogram is being placed in normal sequence, bays will be placed in number order until all selected fixtures are populated. For a four bay planogram with three fixtures selected, bays 1, 2 and 3 will place, with bay 4 not being placed.
- If less fixtures are selected and the planogram is being placed in reversed sequence, bays will be placed in reverse number order until all selected fixtures are populated.

For a four bay planogram with three fixtures selected, bays 4, 3 and 2 will place, with bay 1 not being placed.

- If more fixtures are selected, than there are bays in the planogram, the last bay to be placed will be repeated. For a four bay planogram being placed on five fixtures, the bay sequence will be bay 1, bay2, bay 3 bay 4, bay 4. If the planogram is placed in reverse, the bay sequence will be bay 4, bay3, bay 1 bay 1, bay 1.

Exploded Planograms

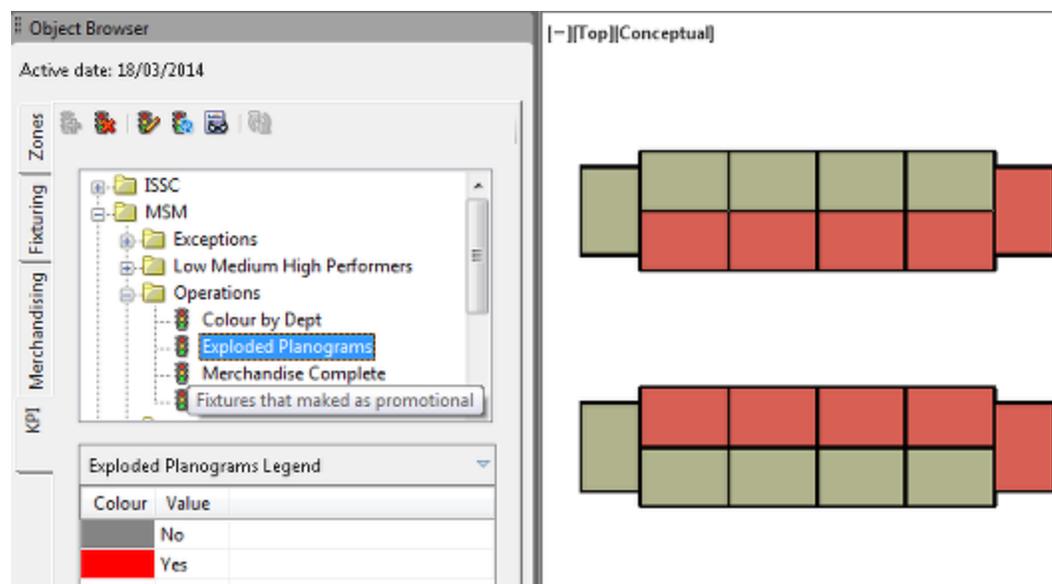
Planograms can be placed in two main forms: 2D (imploded) and 3D (exploded). In the diagram below, the planogram on the left is in 2D form and the one on the right is in 3D form.



Planograms placed in the planner module are always placed in 2D form, with no details of products or shelves visible. Planograms in the Merchandiser module can be toggled between 2D and 3D form. If exploded to 3D form in Merchandiser, the planograms will no longer be directly visible in Planner.

Visibility of Exploded Planograms

If products are placed at Display Style level in Merchandiser (or if Planograms are exploded to 3D form), these forms of merchandise will not be directly visible in Planner.



Macro Space Management has the capacity to create custom KPI's. In the above example, a KPI has been created to show fixtures populated with display styles and exploded planograms. In the floor plan to upper right, the fixtures are apparently unpopulated. When the KPI has been used (lower right), the populated fixtures become visible.

Master Planograms

Master planograms are a way of reducing the churn in floor plans. They act as placeholders and can have specific individual planograms mapped to them. When planograms are printed or published, the specific individual planogram is output. This removes the need to continually update the floor plan every time planograms are changed. For more information see the section on Master Planograms.

Adding Planograms from the Object Browser

Sequence of Actions Required

There are two potential ways of adding planograms. The first is to select the required fixture first.

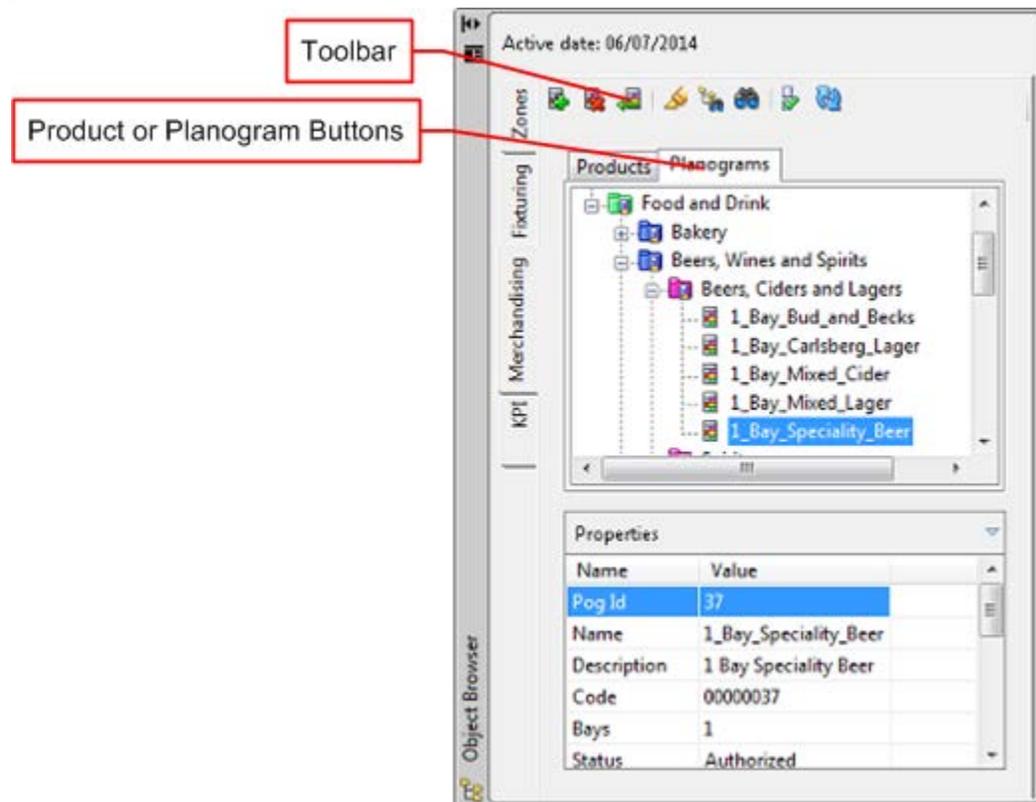
1. Select required fixture or fixtures.
2. Select Planogram in Hierarchy in Object Browser or in List in Object Grid
3. Click the Add icon

The alternative is to select the planogram first.

1. Select Planogram in Hierarchy in Object Browser or in List in Object Grid
2. Click the Add icon
3. Select required fixture or fixtures.

Either way is valid. This example will use the latter option of selecting the planogram first and the fixtures last.

Adding Planogram Placeholders

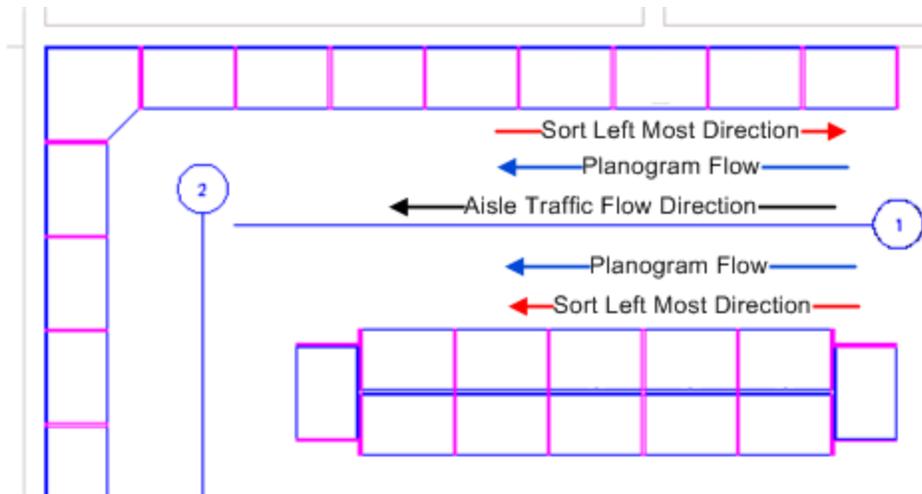


Adding planograms can be carried out as follows:



	Add Planogram	Planograms can be also be added by dragging and dropping.
	Reverse Planogram Placement Direction	If toggled on, this reverses the sequence the planogram bays are placed.

1. Select the Planograms Button on the Merchandising tab of the Object Browser
2. Decide if Planogram is to be placed Normally or Reversed
When multi-bay planograms are designed, they sometimes take traffic direction into account.



If Planner aisles have been drawn, these can be used to identify the predominant traffic flow in the real life aisle. In the above example traffic is flowing from right to left. If Sort Left Most is On (Merchandising tab in Configuration Module) the selected fixtures will be populated with the left most fixture first (as viewed from the front of the fixture).

In the above example, if the planogram is to be placed match its flow instructions, it can be placed normally on the lower (island) gondola, but must be placed reversed on the upper (wall) gondola.

3. Select Reverse Planogram if Required

If it is necessary to reverse the planogram, the Reverse Planogram option must be toggled **On** by depressing the icon on the toolbar.

Note: When the Reverse option is no longer needed it should be toggled off. This will prevent planograms being placed reversed when not required.

4. Select Required Planogram from Hierarchy

The initial stage is to select the required planogram from the hierarchy. In this example, the 2 Bay Tilda Rice Planogram is to be added. Useful information is displayed in the properties window.

Note: If planograms cannot be found by means of a manual search, there is a Find option available. (See below).

5. Select Add Option from Toolbar

The next stage is to click **Add Planogram** on the toolbar.

6. Selecting Fixtures

On clicking Add Planogram, the command line in Planner will prompt users to select fixtures.



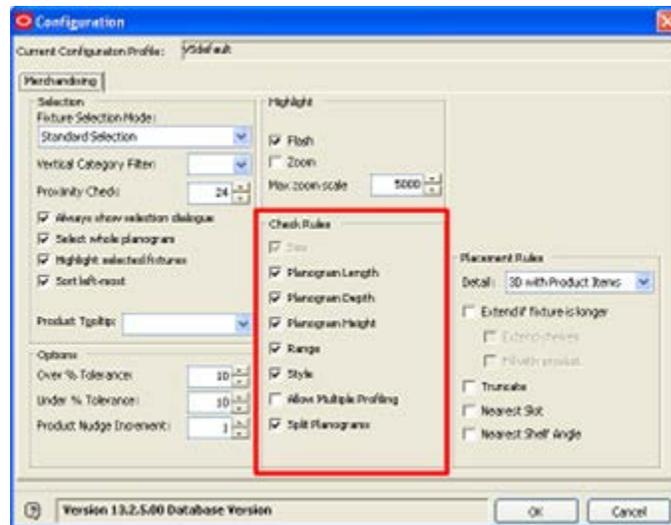
These can be selected by standard AutoCAD methods including left clicking individual fixtures or using window and crossing selection boxes. In this instance, four fixtures have been selected by left clicking, the information being reflected in the command line.

Select objects: 1 found, 4 total
 Select objects:

On completing the selection with a right click (the standard AutoCAD way of finishing selecting objects) the selected fixtures will be validated against information in the planogram design.

7. Check Rules

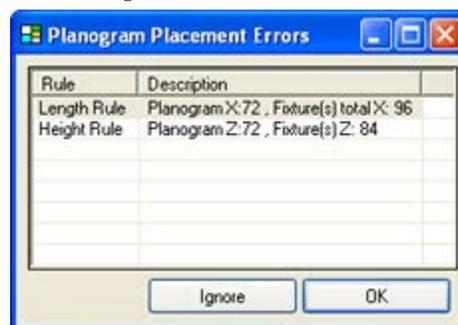
The check rules are set in the Merchandising Tab of the Configuration Module. This can be accessed by clicking Properties on the Planogram toolbar. This will bring up the Merchandising Tab from the Configuration Module. This allows the Check Rules to be set - settings being individual to each user.



Note: See the *Configuration Module Help File* for detailed information on these settings.

These settings determine which validation rules are applied. Any violations come up in the **Planogram Placement Errors** dialog box, otherwise the planogram is placed.

8. Planogram Placement Errors



If the validation process identifies problems, the **Planogram Placement Errors** dialog box will appear. This will identify problems based on the check rules selected. The user then has two options:

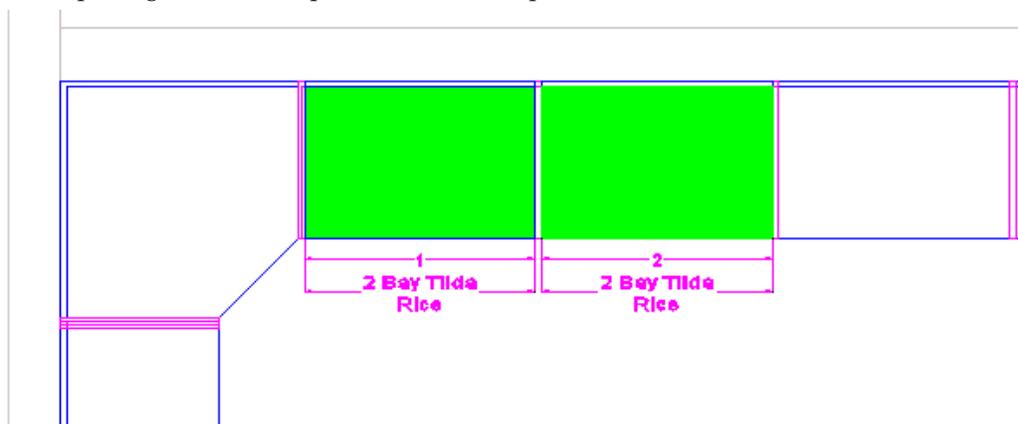
- Click OK. The planogram will not be placed.
- Click Ignore. The warnings will be overridden and the planogram placed.

Store planners should exercise caution when overriding the warnings. This will result in a planogram being placed on an inappropriate fixture in the real life store. Some of the potential consequences of this include:

- Planogram being placed on fixture of different dimensions to what it was designed for. The number of facings and total quantities of products on the shelf could be incorrect. For example, if there are fewer products on the shelves than the planogram designer intended, there could be frequent out of stocks and loss of sales.
- Planograms being placed on inappropriate fixtures - for example by overriding temperature warnings. If the planogram is designed for a chiller unit at standard chill temperature (0 - 1 degrees centigrade) and it is placed on a chiller set to a different temperature, product life should be shortened and losses incurred by having to throw away spoiled produce.
- Turning off the Multiple Profiling warning could result on two planograms being placed on a fixture when only one was intended.
- Turning off the Split Planograms warning could result in inappropriate planogram placement. For example a 2 bay planogram could be placed either side of a 3 feet wide pillar, impacting on sales for that planogram.

9. Planogram Placement

If there are no check rule violations, or if the Check Rule warnings are overridden, the planograms will be placed in the floor plan.



At the same time as the fixtures are populated, they will annotate with information on what planograms have been placed.

Note: Annotation is controlled using the Text Styles option accessed from the Planning Menu in the Administration Module.

There are two forms of annotation in the above example:

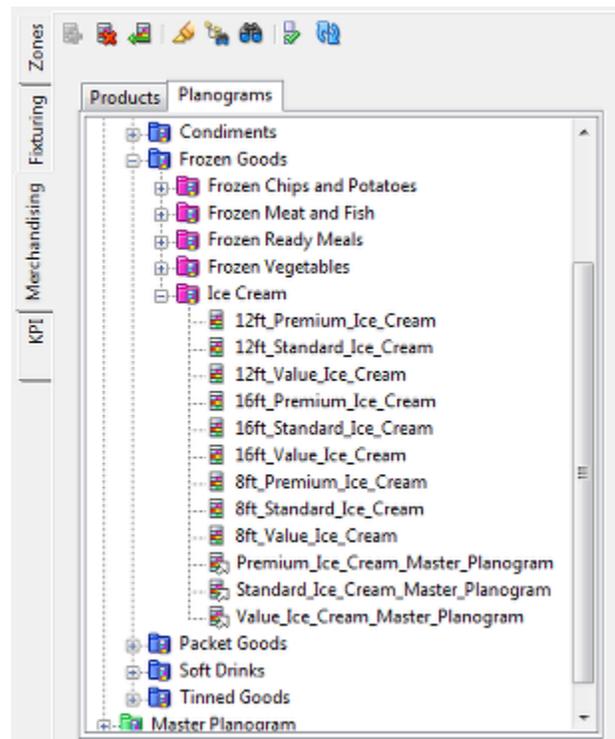
- Profile Annotation: These are numbers identifying the Bay of the planogram. These numbers can be used in conjunction with any aisles drawn in the floor plan to determine whether a planogram has been placed in normal or reversed order.
- Planogram Annotation: This is information identifying the planogram. A common way of doing this is via the planogram name.

Placing Individual or Master Planograms

There are two options for placing planograms - master planograms and individual planograms.

- **Master Planograms**
- Master Planograms act as placeholders. They can be placed on fixtures and then will remain in place. The intent is to stop churning of floor plans each time individual planograms are updated.
- **Individual Planograms**
- Individual planograms can be placed by themselves. Alternatively, if master planograms are in use, they can be mapped to those master planograms. If master planograms are in use, then when planograms are published the individual planograms mapped to each master planogram in a floor plan will be published.

In the example below (simplified for the purposes of this help file) there are a series of individual planograms. There are three types of planogram: Value, Standard and Premium. And they come in three lengths: 8ft, 12ft and 16ft. There are three master planograms supplied: Value, Standard and Premium.



If master planograms are in use, when planograms are published (via the MSP publishing process), the following will happen:

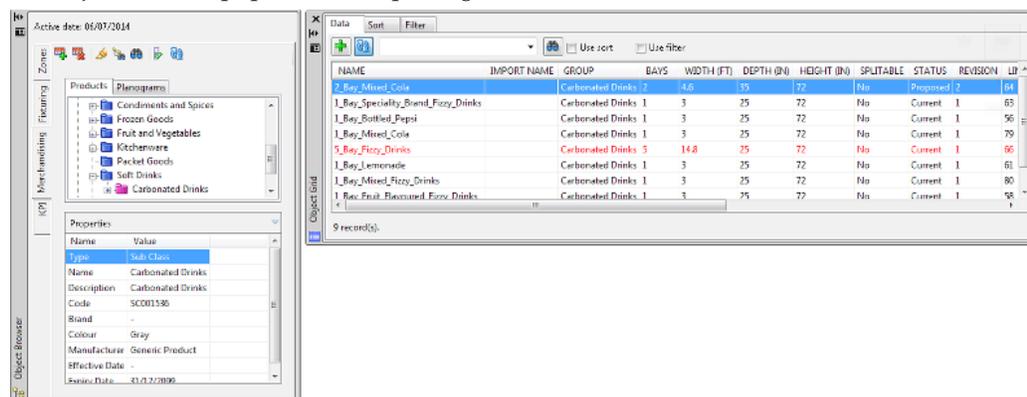
- If the Value Ice Cream master planogram has been placed on two 4ft fixtures, the 8ft Value Ice Cream planogram will be published.
- If the Premium Ice Cream Master Planogram has been placed on four 4ft fixtures, the 16ft Premium Ice Cream planogram will be published.

As individual planograms are progressively updated, providing the mapping remains between master planogram and individual planograms, the updated individual planograms will be published (via the MSP publishing process). This reduces the need to keep continually updating floor plans when planograms are updated.

Note: For more information see the section on Master Planograms

Adding Planograms from the Object Grid

The list of merchandise that is populated to the Object Grid depends on the Custom SQL. This can be configured by Administrators directly in the database to return either products or planograms. (It is not possible for the Object Grid to return both sorts of results in Planner). Generally, the Planner module is configured to return planograms corresponding to the node selected in the product or planogram hierarchy. In the example below, clicking the Carbonated Drinks node in the Object Browser has caused the Object Grid to populate with planograms associated with that node.



Note: The planograms returned are all those whose products have that node in the hierarchy as a common parent.

Sequence of Actions Required

There are two potential ways of adding products. The first is to select the required fixture first.

1. Select required fixture or fixtures.
2. Select Product in Hierarchy in Object Browser or in List in Object Grid
3. Click the Add icon

The alternative is to select the product first.

1. Select Product in Hierarchy in Object Browser or in List in Object Grid
2. Click the Add icon
3. Select required fixture or fixtures.

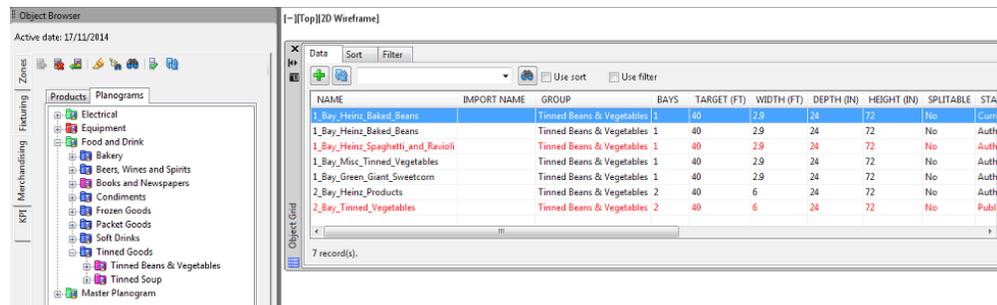
Either way is valid. This example will use the latter option of selecting the product first and the fixtures last.

Adding Planograms

Adding planograms can be carried out as follows:

1. Select the Planograms Button on the Merchandising tab of the Object Browser
2. Select Required Product Group in the hierarchy.

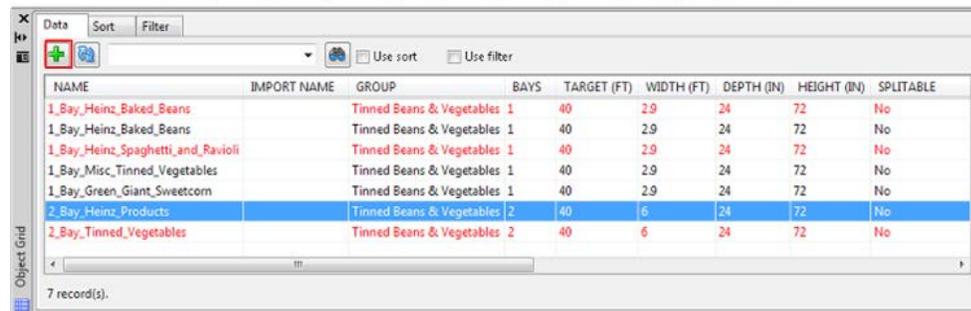
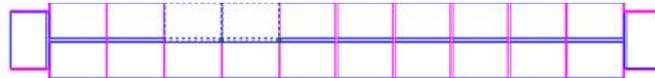
The initial stage is to highlight the required product group in the hierarchy.



toggling the Refresh button on in the Object Grid will then populate the Object Grid with a list of products associated with that Product Group. This list can be refined using the options in the Filter and Sort options in the Object Browser.

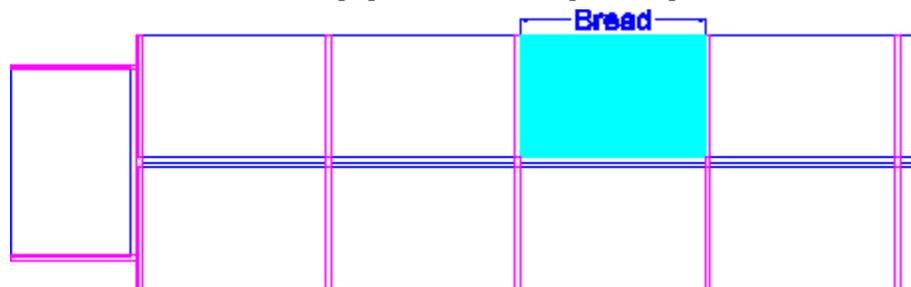
3. Adding the Product

To add the product, highlight the fixture the product will be added to, highlight the required product in the Object Grid and click the Add button. The product will then be added.



Note: If a fixture has not been selected, the user will be able to select it in the floor plan using standard selection methods.

The selected fixtures will be populated with the product placeholder.



Note: Annotation is controlled using the Text Styles option accessed from the Planning Menu in the Administration Module.

Deleting Planograms

Deleting Planograms can only be done from the Object Browser

Sequence of Actions Required

There are two potential ways of deleting planograms. The first is to select the required fixture first.

1. Select required fixture or fixtures.
2. Click the Delete icon
3. Confirm in the delete Planograms dialog box.

The alternative is to select the delete option first.

1. Click the Delete icon
2. Select required fixture or fixtures.
3. Confirm in the delete Planograms dialog box.

Either way is valid. This example will use the latter option of selecting the delete option first and the fixtures last.

Deleting Planograms

Deleting planograms can be carried out as follows:

1. Select the Planograms Button on the Merchandising tab of the Object Browser
2. Click the Delete option from the Toolbar
3. Selecting Fixtures

On clicking Delete Planogram, the command line in Planner will prompt users to select fixtures.

```
Command:  
Select objects:
```

These can be selected by standard AutoCAD methods including left clicking individual fixtures or using window and crossing selection boxes. In this instance, four fixtures have been selected by left clicking, the information being reflected in the command line.

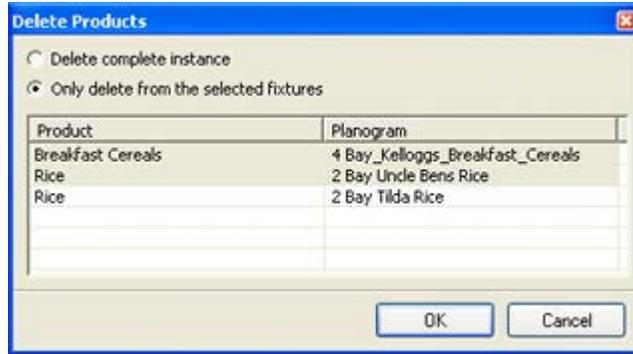
```
Select objects: 1 found, 4 total  
Select objects:
```

Note: Clicking on the planograms themselves will not be effective - deleting planograms requires the user to select the parent fixtures for the planograms. Accordingly, users should left click on the fixture itself or use window and crossing selection boxes that encompass both the planogram and its parent fixture.

On right clicking to complete the selection, the Delete Planograms dialog box will appear.

4. Delete Planograms Dialog Box

The Delete Planograms dialog box allows users to confirm which planograms to delete.



- The Radio Button specifying whether to Delete complete instance or Only delete from the selected fixtures only applies to planograms.
 - If Delete complete instance is selected, the entire planogram will be deleted, even if just a single bay of a multi-bay planogram has been selected.
 - If Only delete from the selected fixtures is selected, only those parts of the planogram on the selected fixtures will be deleted.

Note: Caution should be used when selecting the **Only delete from the selected fixtures** option. This could result in some bays of a multi-bay planogram being left in the floor plan while others are deleted.

- Select the required planograms to delete
- Click OK to delete the specified planograms.
- The specified planograms will be deleted and the Delete Planograms dialog box will close.

Note: The Delete Planograms dialog box will always appear if two or more planograms are selected. It will also appear if a single planogram is selected if the **Always show selection dialog** option is checked in the Merchandising tab of the Configuration module.

Highlighting Options for Planograms

There are two highlighting options available on the Planogram toolbar.

- Highlight Planogram
- Highlight Selected Product in Tree



	Highlight Planogram in Floor Plan	If selected, selecting a planogram in the Object Browser Planogram Hierarchy will cause the pertinent planogram to be highlighted in the floor plan.
	Highlight selected item in tree	If selected, selecting a planogram in the floor plan will cause the pertinent planogram to be highlighted in the Object Browser

Highlight Planogram

Highlight Planogram allows a user to find a planogram in the floor plan. The option has to be turned on by toggling the icon on the Planogram toolbar so it is depressed. After the icon has been toggled on, highlighting any planogram in the product hierarchy will cause the selected planogram to be highlighted in the floor plan. The highlighting method will depend on settings in the Merchandising tab of the Configuration module.

Note: It is recommended that the Highlight Planogram option be left off until needed - leaving it on may have a marginal impact on performance in the floor plan.

Highlight Selected Item in Tree

Highlight Selected Item in Tree allows a user to select a planogram in the floor plan and have it highlighted in the Planogram Hierarchy in the Object browser. The option has to be turned on by toggling the icon on the Planogram toolbar so it is depressed. Clicking on the planogram in the floor plan will then cause that planogram to be highlighted in the hierarchy.

Note: It is recommended that the Highlight Planogram in Tree option be left off until needed - leaving it on may have a marginal impact on performance in the floor plan.

Reverse Planogram

Some multi bay planograms are designed for being viewed from a specific direction of travel: left to right or right to left. The predominant direction of travel can be identified in an aisle. Based on this direction of travel and the side of the aisle chosen, the planogram may need to be placed in normal or reversed sequence.

— Direction of Travel —>

Normal Planogram

Bay 1	Bay 2	Bay 3	Bay 4
-------	-------	-------	-------

Reversed Planogram

Bay 4	Bay 3	Bay 2	Bay 1
-------	-------	-------	-------

Reversing Planogram is carried out by toggling the **Reverse Planogram** option in the Planogram toolbar On or Off.

- If toggled Off, planograms will place in normal bay sequence.
- If toggled On, planograms will place with the bays in reverse sequence.



Reverse Planogram Placement
Direction

Reverse the sequence the planogram bays are
placed in.

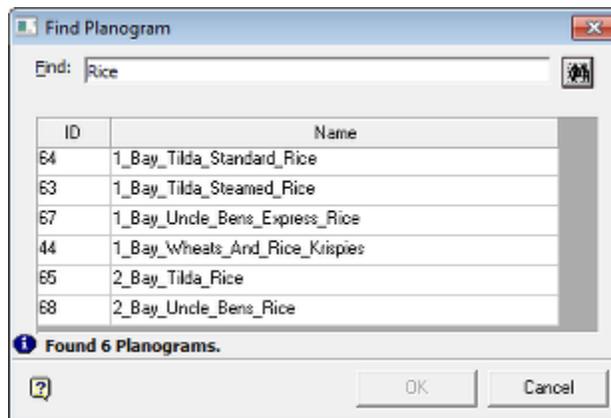
Find Planogram in Tree

Find in Tree allows users to search for Products in the Product Hierarchy.



Find This option brings up the Find dialog box, allowing users to search for objects in the
Planogram Hierarchy.

Clicking the icon will bring up the Find Product dialog box.



To use the dialog box:

1. Type a text string into the text box
2. Click on the search Icon
3. Any planograms with a name matching the search string will be listed
4. To select a planograms in the hierarchy, highlight it and click the OK button

Planogram Substitution

Configuring Access to the Planogram Substitution Functionality

Access to the planogram substitution functionality is configured in the Administration Module. Only users with access to the Administration module will be able to configure access to the Planogram Substitution functionality.

The steps can be summarized as follows:

User Group Role

The User Group the User belongs to (accessed from the Security menu > Functional Security dialog box > User Groups tab in the Administration Module) must have the Admin User role assigned.



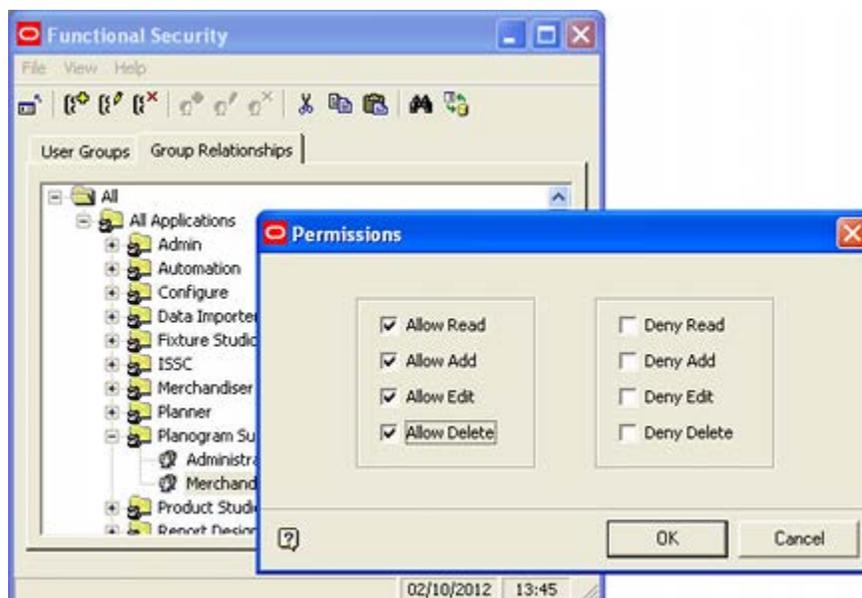
Add User Group to Planogram Substitution Command Group

While still in the Functional Security dialog box, switch to the Group relationships tab.



The User Group the User belongs to must be a member of the Planogram Substitution command group.

In addition, the permissions must also be set (right click menu) for that User Group.



When the above actions have been carried out, specific users will have been assigned the right to access the Planogram Substitution Functionality in the Planner Module and to run substitutions in the currently active floor plan.

Planogram Substitution Technicalities

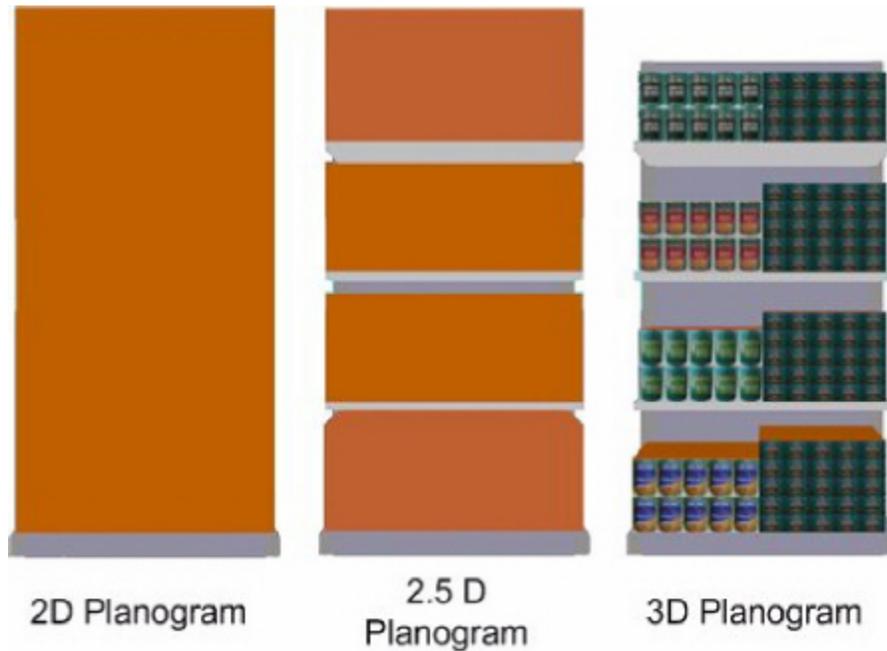
Forms of Planogram Representation

There are three forms that planograms can take.

- 2D Planogram (Placeholder)
- 3D planogram (called 2.5 D in the Merchandiser Module).

- 3D with Product Items (Full Detail).

These appear in the Merchandiser module as follows:



A 2D planogram is purely a placeholder. A 3D planogram (2.5 D in Merchandiser) shows the shelves and a simple product block to show the shelves are occupied. A 3D planogram with Product items shows the shelves, together with full details of the products.

Planograms can only be placed in 2D form in the Planner module and in In-Store space Collaboration. Users in the Merchandiser module have the option to place in 2.5D or 3D form (depending on settings in the Merchandising tab of the Configuration Module) and can explode 2D or 2.5D planograms to the 3D form.

Planograms are only visible in the Planner module if they are in 2D form. Planograms in 2.5D or 3D form will not be visible (but can be indicated by means of a KPI).

The `PLANOGRAM_SUBSTITUTION_PROCESS_EXPLODED` System Variable

The `PLANOGRAM_SUBSTITUTION_PROCESS_EXPLODED` system variable has a significant impact on the way planogram substitutions are carried out. It can be set to 0, 1, 2, 3 or 4 in the Administration Module (General menu).

System Variable Values

System Variable	Description
0	Only planograms in 2D form will be substituted - with planograms in 3D form being ignored. The substituted planograms will be placed in 2D form. No information on the planograms that have been ignored for substitution will be written to the Planogram Substitution Log.
1	Only planograms in 2D form will be substituted - with planograms in 3D form being ignored. The substituted planograms will be placed in 2D form. Information on the planograms in 3D form that have been ignored for substitution will be written to the Planogram Substitution Log.

System Variable	Description
2	Planograms in 2D form will be substituted with planograms also in 2D form. Planograms in 3D and 2.5D form will be placed in 2D form when substituted.
3	3D and 2.5D planograms will be substituted by 2D planograms. A warning will be written to the Planogram Substitution Log identifying the 3D and 2.5 D planograms that were placed in 2D form during the substitution.
4	Planograms in 3D form will be substituted with planograms also in 3D form. Planograms in 2D form will be placed in 3D form when substituted. Planograms in 2.5D form will be replaced by a 2D form if that is the way the planogram design has been defined. It will be replaced by a 3D form if the planogram design is in 3D format.

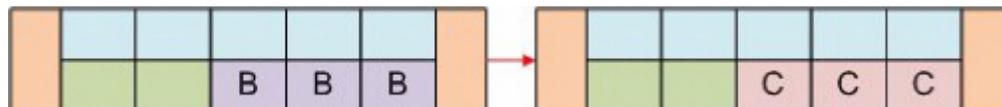
Examples of Planogram Substitution

Planogram Substitution can come in many forms. This allows users complete flexibility in selecting planograms to be substituted and defining the planograms that are to be inserted as their replacements.

Note: A number of examples are given below - in practice the validity of each substitution will be determined by rules selected on the rules tab of the Planogram Substitution Definition dialog box. For example, if the 'Length' rule is off, lengths will not be validated and planograms of unequal lengths can be substituted.

One to One

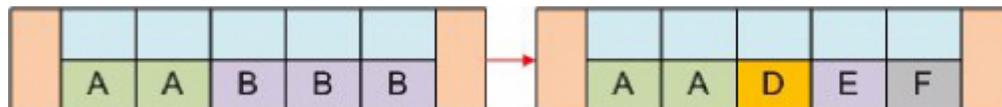
The simplest form of planogram substitution is a 'one to one' substitution. One planogram of a specified length is replaced by another planogram of equal length.



In the above example, the 12 foot planogram 'B' has been replaced with another 12 foot planogram 'C'.

One to Many

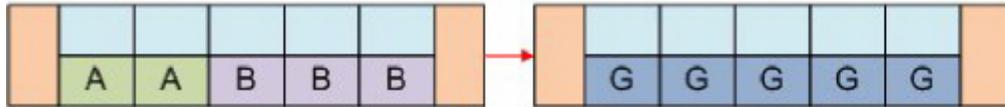
Another form of planogram substitution is a 'one to many' substitution. One planogram of a specified length is replaced by two or more planograms whose combined lengths are the same as that of the planogram they are replacing.



In the above example the 12 foot planogram 'B' has been replaced by the 4 foot planograms 'D', 'E' and 'F'.

Many to One

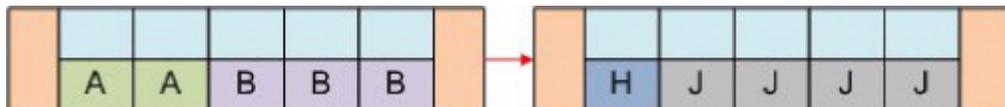
In Many to One planogram substitutions, several planograms are selected and replaced by a single planogram equal in length to the sum of the lengths of the planograms it is replacing.



In the above example, the 8 foot planogram 'A' and the 12 foot planogram 'B' are to be replaced by the single 20 foot planogram 'G'.

Many to Many

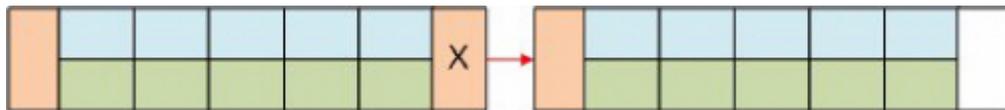
A 'Many to Many' planogram substitution occurs when multiple planograms are selected for replacement and are substituted for by multiple planograms occupying the same length as the planograms they are replacing.



In the above example, the 8 foot planogram 'A' and the 12 foot planogram 'B' are to be replaced by the 4 foot planogram 'H' and the 16 foot planogram 'J'.

One to None

It is possible to carry out a One to None Substitution - the removal of a planogram without specifying a replacement. This might be called for when a planogram has to be removed for legal reasons, etc., but no replacement has been decided on.

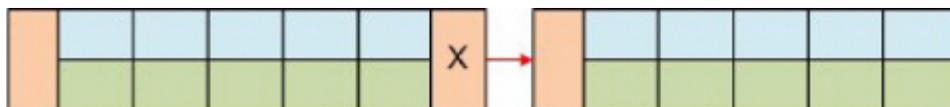


In the above example the planogram 'X' on the end cap of the gondola is to be removed without a replacement being specified.

Note: it is also possible to carry out 'Many to None' substitutions.

One to None with Fixture Removal

As well as a One to None substitution, it is also possible to remove the parent fixture. This might be because parts of a store are being assigned to a different purpose and the fixturing is changing as well as the planograms.



In the above example the planogram 'X' on the end cap of the gondola is to be removed along with its parent fixture.

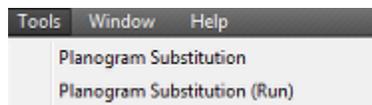
Revision Substitution

If no existing planograms have been selected for substitution, it is still possible to carry out Revision Substitution. Revision Substitution is when slight changes have been made to a planogram design and it has been saved as a new version rather than a new design. When planogram substitution is carried out, all other planograms in the store will be automatically be updated to the latest revision providing the Effective Date of the revision is less than the Active Date of the floor plan the Revision Substitution is being carried out in.

Accessing and Configuring Planogram Substitutions

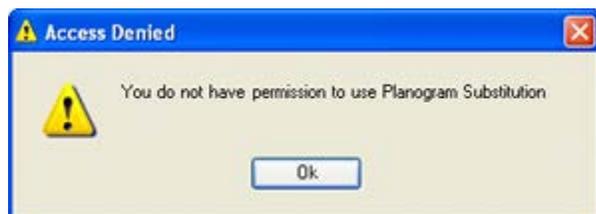
Accessing the Planogram Substitution Functionality

The Planogram Substitution functionality is accessed from the Tools menu.



Functionality	Source	Comment
Planogram Substitution.	Planogram Substitution module.	Pertinent permissions required.
Planogram Substitution (Run).	Planogram substitution module.	Pertinent permissions required.

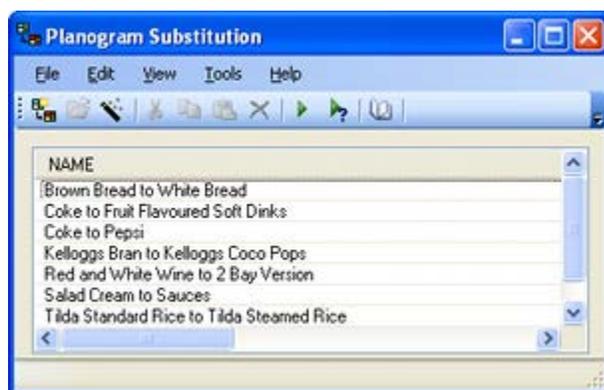
Permissions to access the planogram substitution functionality are set in the Administration module. If the appropriate permissions are not available, a warning message will result and access to the functionality will be denied.



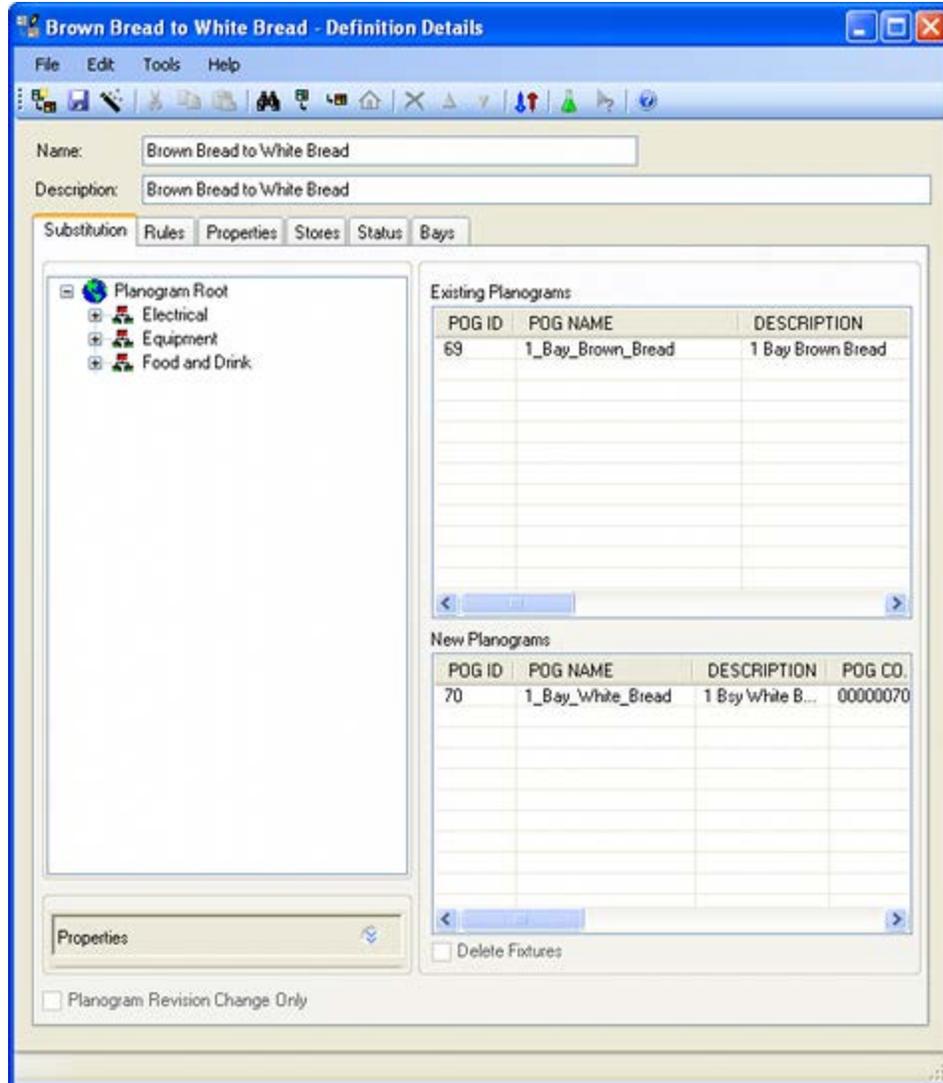
Configuring Planogram Substitutions

Note: For full details on the Planogram Substitution dialog boxes click the Help buttons on the dialog boxes.

Upon selecting Planogram substitution from the Tools menu, the first dialog box to open is the Planogram Substitution dialog box.



Double clicking any named planogram substitution will bring up the Planogram substitution definition dialog box.



Details of an individual planogram substitution can be configured in the dialog box.

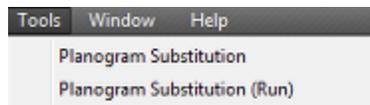
Note: Substituting Master Planograms should only be done on a one-to-one basis because the required length is not defined in the planogram definition.

Running Planogram Substitutions

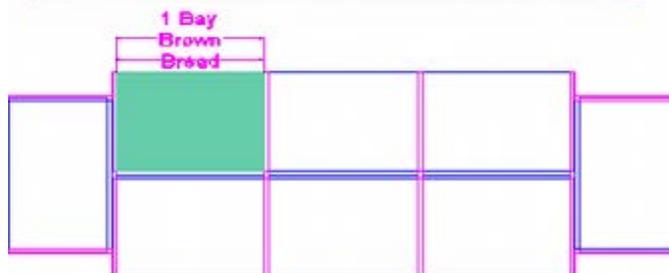
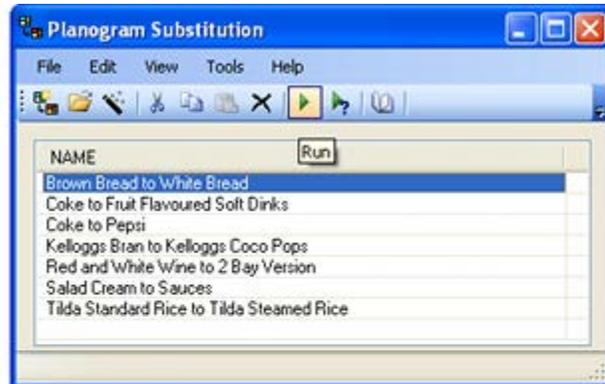
Note: Users will require permissions to be set in the Administration Module before they can access the Planogram Substitution functionality.

Initiating the Planogram Substitution

Planogram Substitutions can be initiated from the Tools Menu.



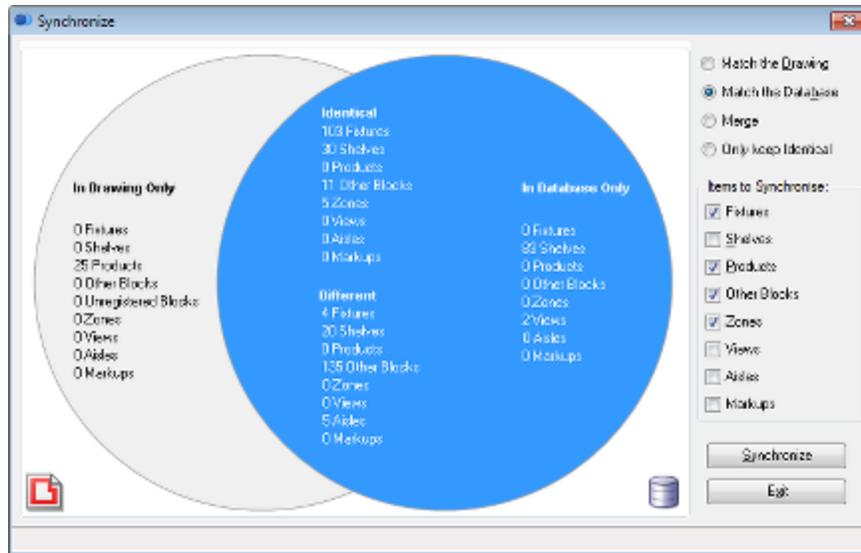
This will cause all valid substitutions to be run for the currently active floor plan. Alternatively, users can use the Run option in the Planogram Substitution dialog box.



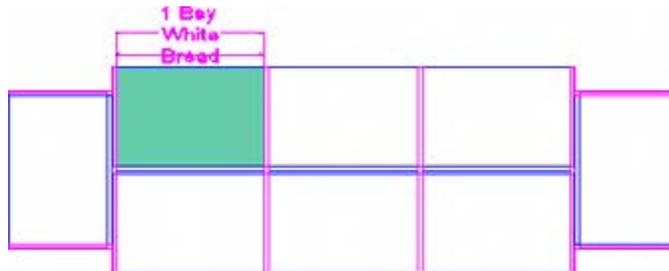
Only highlighted planogram substitutions will run - in the above example the **Brown to White Bread** substitution has been selected.

Actions after Running a Planogram Substitution

Planogram Substitutions execute in the database. In the example above, the database table will have been changed to indicate the currently active floor plan now contains a **White Bread** rather than a **Brown Bread** planogram. However, the information in the displayed in the Planner floor plan will remain unchanged. In order to make the floor plan match the information in the database, synchronization is required. This is done by calling the Synchronization dialog box from either the **File** menu or **Retail** toolbar.



After Synchronizing Match the Database, the planograms in the currently active floor plan will match those held in the database.

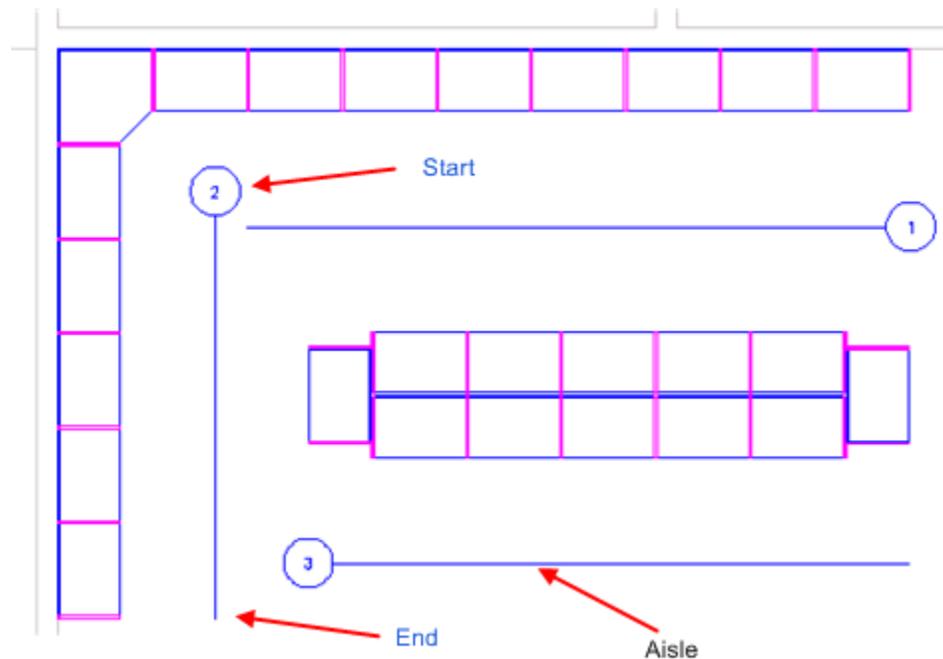


Aisles in Planner

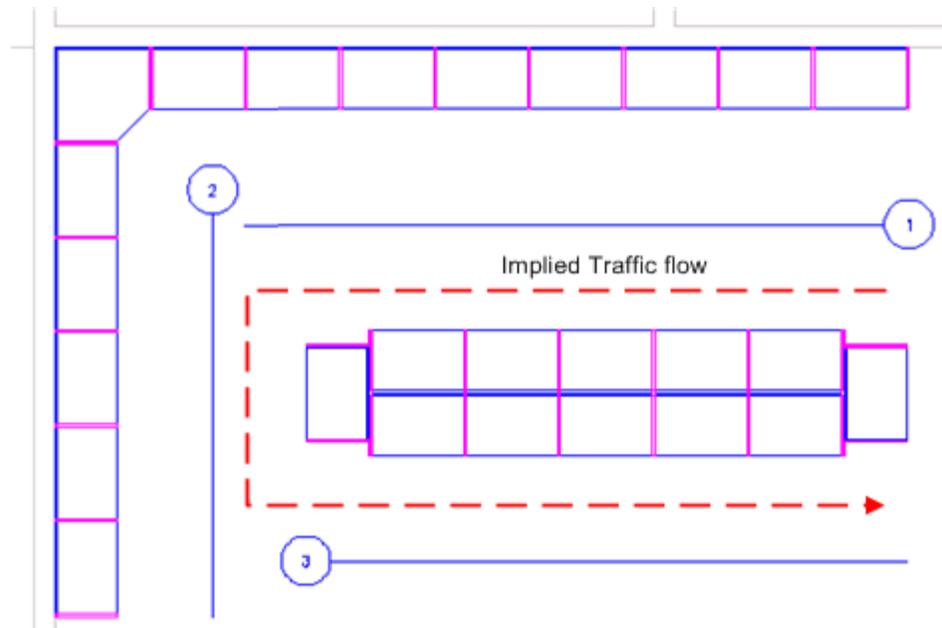
Overview of Aisles

Aisles are lines drawn in Planner to represent actual aisle in stores: They serve several purposes:

- They allow actual aisles in stores to be identified in a floor plan.
- They allow traffic flows to be specified
- They allow reports to be created showing the performance of specific aisles.



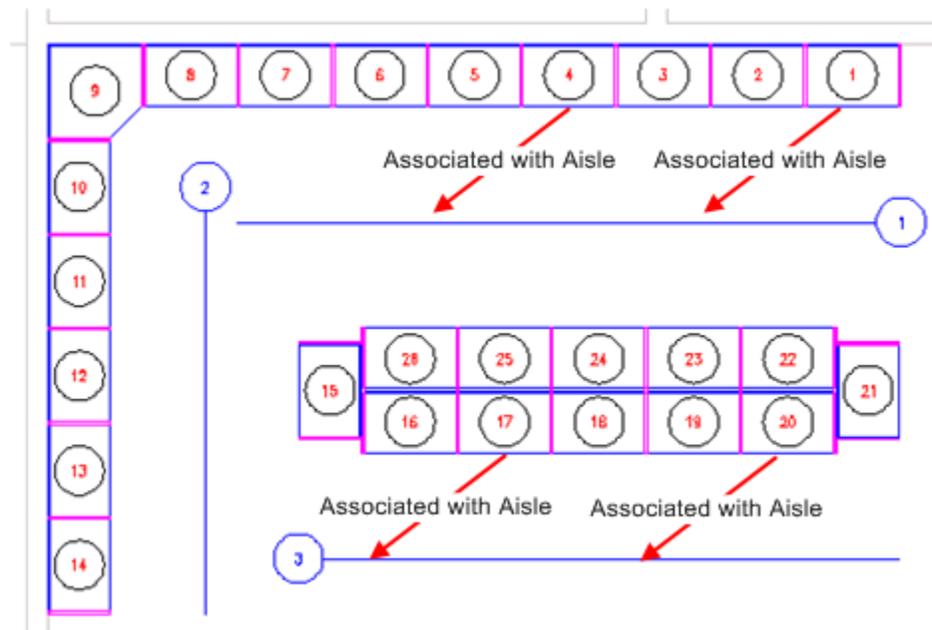
In the above diagram, each aisle is represented by a line identified by a number, letter or simple word. In the above diagram there are three aisles; numbered 1, 2 and 3. Aisles can be used to identify the general direction of traffic flow through a store. Shoppers are defined as starting at the head of an aisle and moving towards its end.



In the above diagram, the implied traffic flow is specified by the aisles placed in the floor plan.

Note: Actual traffic flows in a store will have to be determined by observation - possibly by use of observers or reviewing security camera footage.

After the aisles have been drawn, the **Calculate Aisle Adjacency** function (available from the Calculations menu) will cause fixtures to be associated with the nearest aisle within a specific distance.



In the above diagram the fixtures have been bay numbered for clarity. Each fixture (identifiable by its bay number) will associate itself with the nearest aisle. Once fixtures have been associated with aisles, this information can be used for reporting purposes. For

example, it would be possible to report on the performance of all planograms sharing an aisle.

Adding, Editing and Deleting Aisles

Adding, Editing and Deleting Aisles is controlled from the Aisles toolbar.

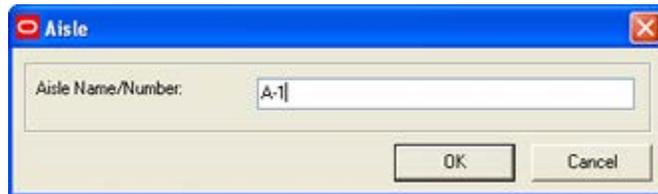


Adding Aisles

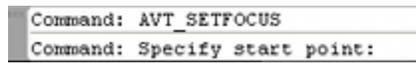
Adding Aisles is initiated by clicking **Add Aisle** on the Aisles toolbar.



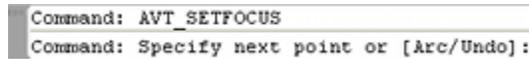
The Aisle dialog box will appear, allowing the name of the aisle to be specified.



After entering the aisle name and clicking OK, the command line will invite the user to select the start point.



After specifying the start point the user will be invited to select the next point.



The user may draw a straight aisle using just two points, or they may opt to add additional segments. Pressing Return will cause the aisle to be drawn.



Useful Ways of Drawing Aisles

Many of the standard AutoCAD methods can be used to draw aisles. Two useful ones are:

Mid of 2 Points (m2p)

The AutoCAD **Mid of 2 Points** command is initiated by entering m2p into the command line.

```
Command: AVT_SETFOCUS
Command: Specify start point: m2p
```

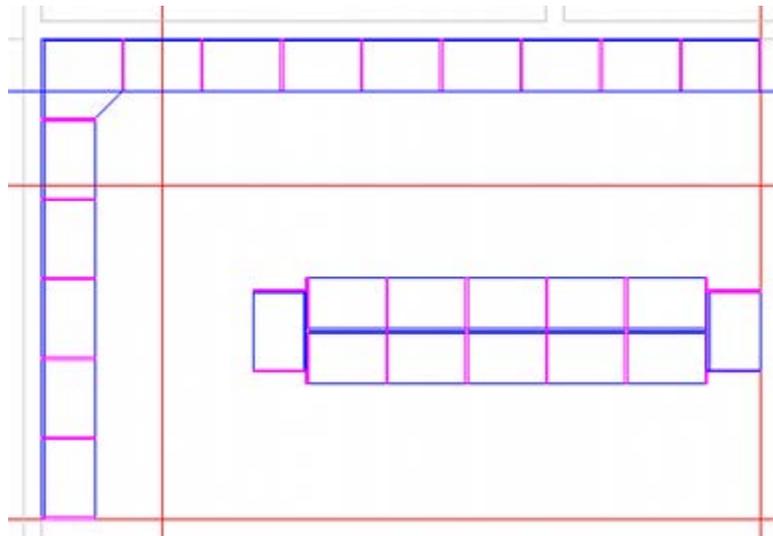
This will result in the user being invited to select 2 points. The aisle will be drawn initiating from the centre of a line connecting those two points.



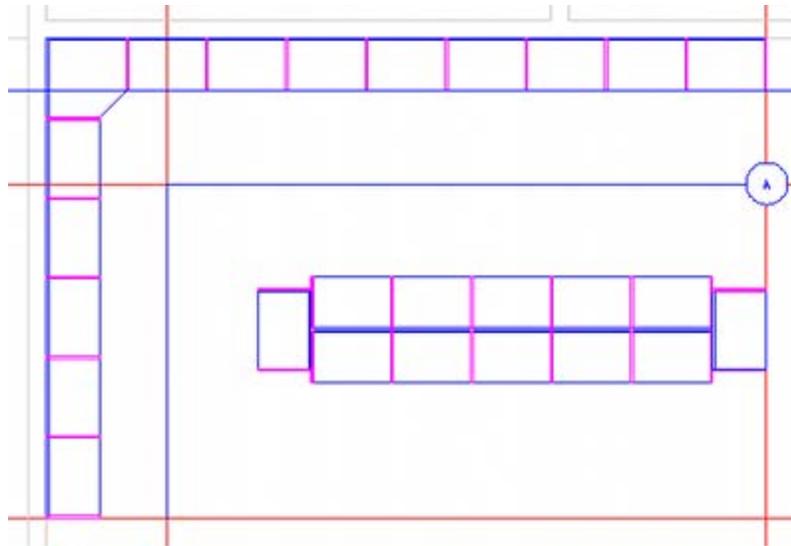
In the above example, the m2p command has been used for the start and the end of the aisle, resulting in an aisle drawn equidistant from both gondolas and neatly aligned with the ends.

Construction Lines

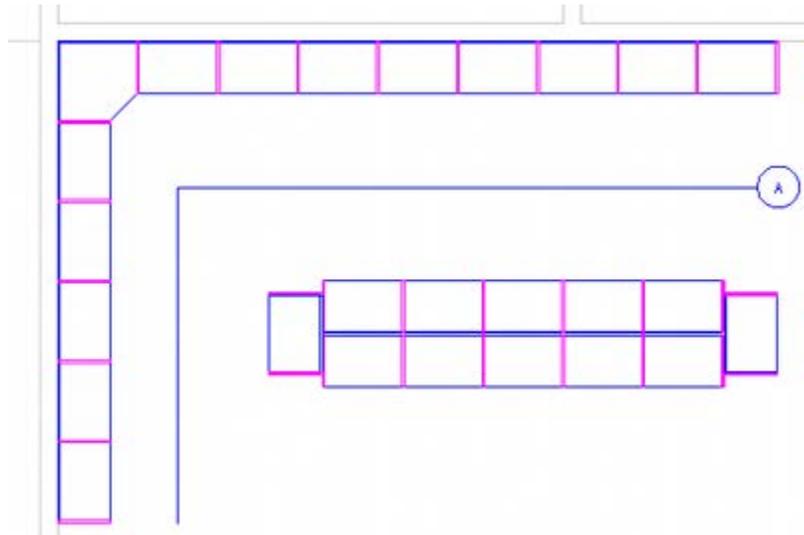
AutoCAD allows the use of construction Lines - infinitely long straight lines. There (in conjunction with other AutoCAD functionality such as Offsets and Object snaps) can be used to accurately lay out aisles. In the example below, construction lines have been added to the floor plan using Offsets and Object snaps.



The Aisle can then be drawn by snapping to the intersections.



When the construction lines are deleted, an accurately positioned aisle remains.

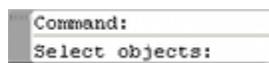


Editing Aisles

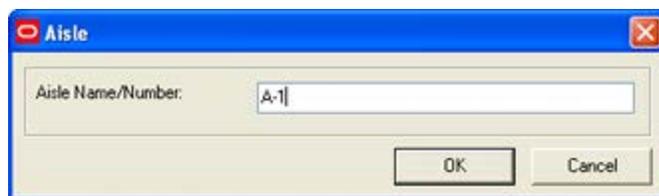
Editing Aisles is initiated by clicking **Edit Aisle** on the Aisles toolbar.



The command line will then invite a user to select an aisle.



This can be selected by left clicking on it to select it then right clicking (standard AutoCAD method to end selection). The aisle dialog box will then appear.



The name of the aisle can then be edited.

Editing Aisle Positions

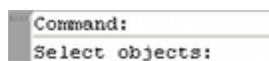
Aisle positions cannot be edited by Macro Space Management (MSM) functionality. Instead AutoCAD functionality must be used. For example, the position could be changed by means of the **Move** command. After the move command has been used, the MSM **Synchronize** functionality must be used to ensure the changes are written back to the database.

Deleting Aisles

Editing Aisles is initiated by clicking **Delete Aisle** on the Aisles toolbar.



The command line will then invite a user to select an aisle.



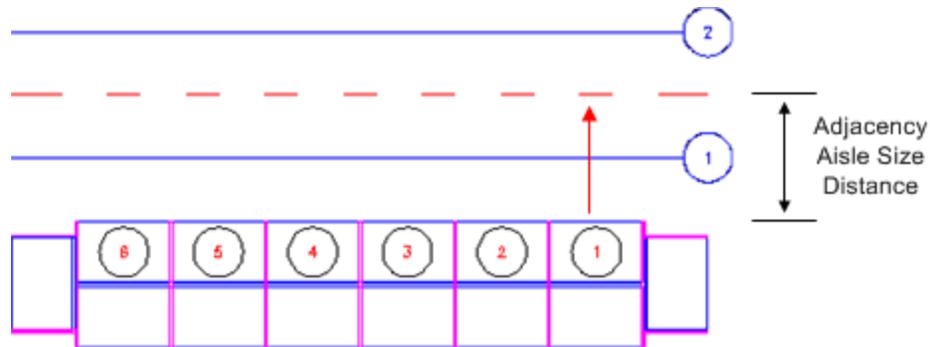
This can be selected by left clicking on it to select it then right clicking (standard AutoCAD method to end selection). Upon right clicking, the selected aisle or aisles will be deleted without further confirmation.

Aisles and Aisle Adjacency

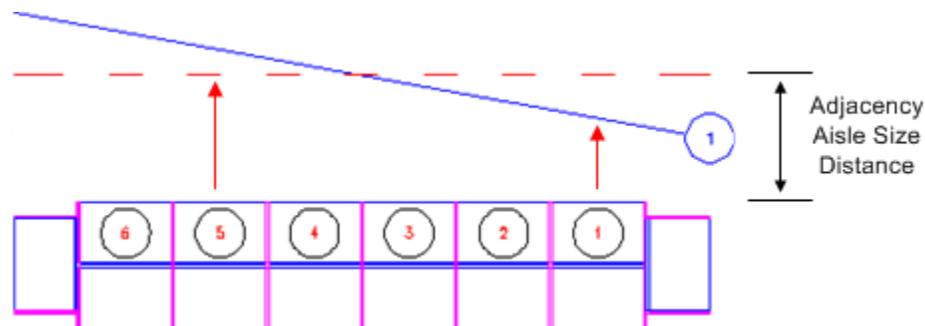
After aisles have been drawn in a floor plan, the **Calculate Aisle Adjacency** option (Calculations menu) will associate fixtures with aisles. This section of help explains that process.

ADJACENCY_AISLESIZE System Variable

The **ADJACENCY_AISLESIZE** system variable (set in the System Variables dialog box in the **Administration Module**) determines the maximum distance a fixture can be from a file and still be associated with it. When the **Calculate Aisle Adjacency** option is run, the distance perpendicular to the front of each fixture will be determined. Each fixture will be associated with the nearest aisle - provided it is within the maximum distance set by the **ADJACENCY_AISLESIZE** system variable



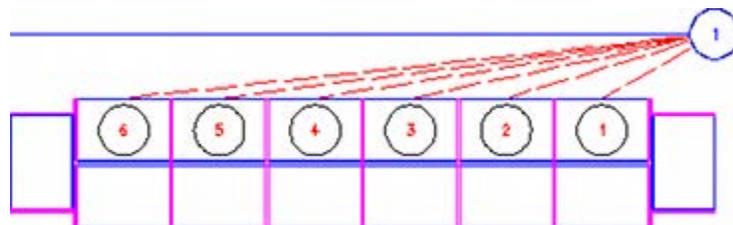
In the diagram above, the fixtures will be associated with Aisle 1 because that is the closest and within the maximum distance specified by the **ADJACENCY_AISLESIZE** system variable. If Aisle 1 did not exist, the fixtures would not be associated with Aisle 2 because that is outside the maximum distance specified in the **ADJACENCY_AISLESIZE** system variable.



Care needs to be taken if the aisle is not parallel to the front of the fixtures. In the above example, Fixture 1 will associate with Aisle 1, but Fixture 5 (which is outside the **ADJACENCY_AISLESIZE** distance) will not.

Ordering Fixtures for Reporting Purposes

Once the **Calculate Aisle Adjacencies** functionality has been run, information will be written to the **AVTTB_AISLE_ADJACENCIES** table. This contains several pieces of information useful for reporting including the distance from the start of the aisle and whether the fixture is on the left or right of the aisle.



Distance from Start

The distance from the start is measured from the start of the aisle to the centre of the front face of the fixture. In the above diagram, Fixtures 1 - 6 can be ranked in their sequence along the aisle.

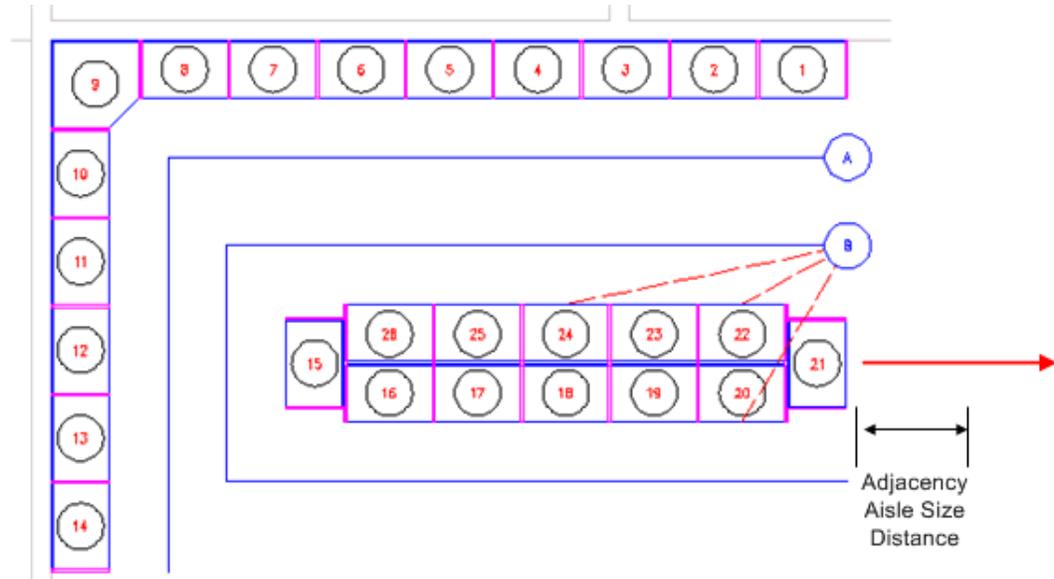
Location to Left or Right

Aisles are drawn to show the general direction of travel of shoppers. The start of the aisle is shown by the location of its name, with direction of travel towards the other end.

Fixtures associated with an aisle are shown to the left or right relative to the direction of travel.

Potential Problems with Aisle Adjacency

The diagram below shows a correctly drawn aisle and one with potential problems.



Aisle A

Aisle A has all fixtures within the distance specified within the `AVTTB_AISLE_ADJACENCIES` system variable and can be used for accurate reporting.

Aisle B

There are two problems with Aisle B:

- The aisle is in a 'U' shape. As distances are measured from the start of the aisle to the centre of the front of the fixture, Fixture 22 will be closest to the start. However, Fixture 20 will be shown as closer to the start than Fixture 24, leading to reports ranking the fixtures in an incorrect sequence along the length of the aisle.
- One end cap (Fixture 21) is not pointing at the aisle. It will 'feel out' to the maximum distance specified in the `AVTTB_AISLE_ADJACENCIES` system variable, fail to find the aisle and not be included in reports associated with that aisle.

When drawing aisles, care needs to be taken to ensure that fixtures will correctly associate with the pertinent aisles and the sequence they are reported on is correct.

Annotation in Planner

About Annotation

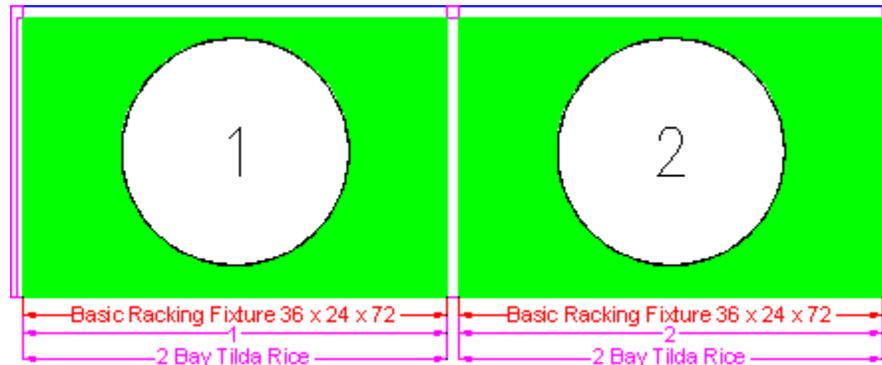
Annotation is used to label objects with text within a floor plan. This information then assists anyone reading the floor plan with identifying those objects. The example below is annotation for a zone.

Food and Drink Zone 20000 sqft



The example below shows two bay numbered fixtures that have been labeled with three forms of information:

- The fixture name
- The planogram
- The bay number for the planogram



The form of the annotation is configured using the **Text Styles Administration Tool** dialog box from the Planning Menu in the Administration Module.

The screenshot shows the 'Text Styles Admin Tool' window. It has a menu bar with 'File', 'Edit', 'View', and 'Help'. Below the menu bar is a toolbar with icons for font color, background color, bold, italic, underline, and a refresh icon. The main area contains a table with the following data:

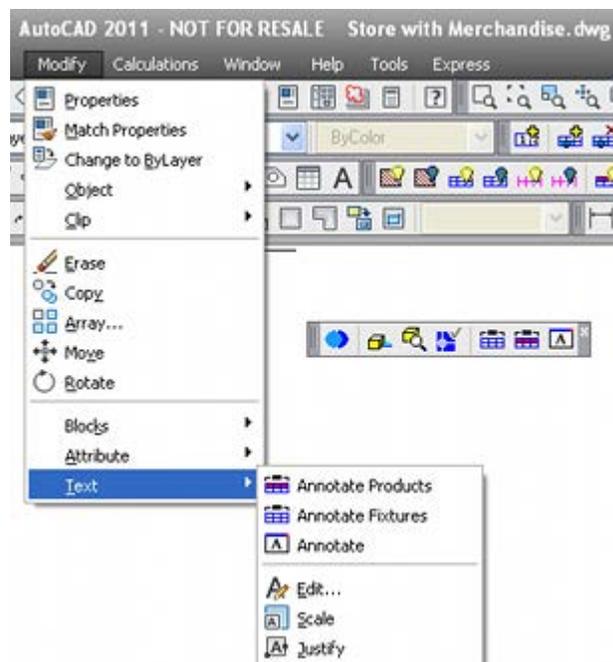
ID	Name	Description	Font	Bold	Italics	Colour	Layer Alias	Auto
1	General	General Notes	Arial	<input type="checkbox"/>	<input type="checkbox"/>		NOTES-TEXT	None
2	Dept	Dept Zones	Arial	<input type="checkbox"/>	<input type="checkbox"/>		DEPT-TEXT	Department Zone
3	Internal	Internal Zones	Arial	<input type="checkbox"/>	<input type="checkbox"/>		INTERNALZONE-TEXT	Internal Zone
4	Zone	General Zones	Arial	<input type="checkbox"/>	<input type="checkbox"/>		DEPT-TEXT	Zone
5	Product	Product Description	Arial	<input type="checkbox"/>	<input type="checkbox"/>		PRODUCT-TEXT	Product Placeholder
6	Planogram	Planogram Details	Arial	<input type="checkbox"/>	<input type="checkbox"/>		PLANOGRAM-TEXT	Planogram
7	Profile	Profile Details	Arial	<input type="checkbox"/>	<input type="checkbox"/>		PRODUCT-TEXT	Planogram
8	10 BayNumbering	Bay Numbering	Arial	<input type="checkbox"/>	<input type="checkbox"/>		BAYNUMBERING	None
9	11 Fixture	Fixture Details	Arial	<input type="checkbox"/>	<input type="checkbox"/>		FIXTURE-TEXT	Fixture

Note: See the *Administration Module User Guide* for information on how to configure Text Styles.

Using Annotation

Note: For fixtures to annotate, the **Include in Fixture Annotation** check box must be selected for that item of equipment in the Category tab of the Block Details dialog box in Fixture Studio.

Annotations can be selected from the **Modify>Text** menu. Alternatively, the same options can be selected from the retail toolbar.



Annotating Objects

Annotate Fixtures

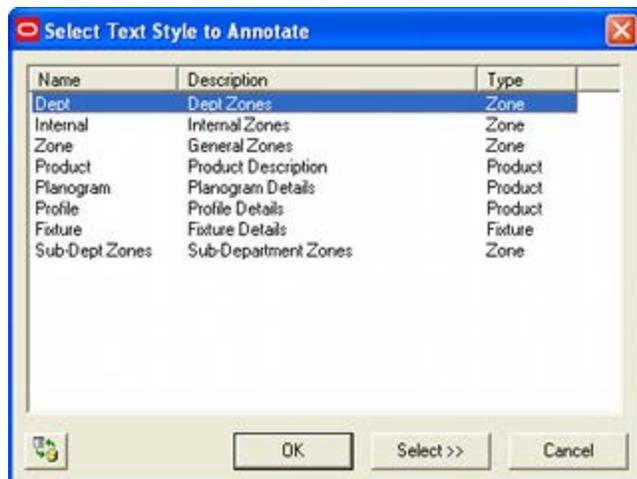
Fixtures do not automatically annotate when placed in a floor plan. If the **Include in Fixture Annotation** check box has been checked in Fixture Studio, clicking the **Annotate Fixtures** option will cause all valid fixtures to annotate or refresh.

Annotate Products

Clicking **Annotate Products** will cause annotation associated with products and planograms to refresh.

Annotate

Clicking **Annotate** will bring up the Annotate dialog box.



- The Refresh button ensures that all recent changes to the annotation rules made in the Administration module are updated in Planner.
- Highlighting an annotation style causes that specific style to be selected for updating.
- The Select >> button takes the user to the floor plan where standard AutoCAD methods can be used to select a specific subset of objects for updating.
- The OK button causes the selected objects to update.

Drawing Comparison

Overview of Drawing Comparison

Drawing Comparison can be used to compare the equipment, planograms and product categories in two floor plans. This can be done in one of two ways:

- Comparison between the currently active floor plan and any designated prototype store for that floor plan.
- Comparison between the currently active floor plan and any other currently active floor plan.

Accessing Drawing Comparison

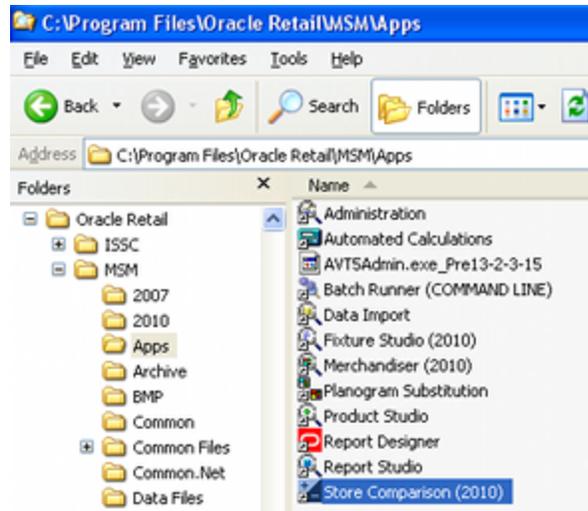
Drawing Comparison can be accessed in two main ways:

From the View Menu in Planner

Drawing Comparison can be accessed from the View Menu.



Alternatively, it can be accessed from the local **C:\Program Files\Oracle Retail\MSM\Apps** directory.



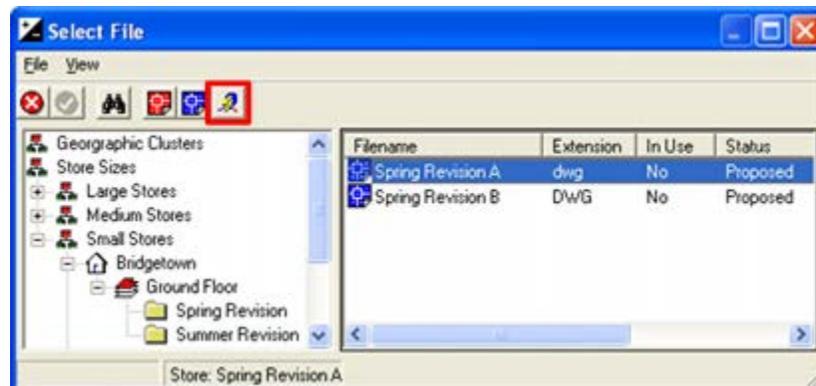
Opening Floor Plans with Store Comparison

Opening Directly from Directory

If opened directly from the local **C:\Program Files\Oracle Retail\MSM\Apps** directory, there are two ways Store Comparison can behave. These depend on whether the Planner Module is open or not.

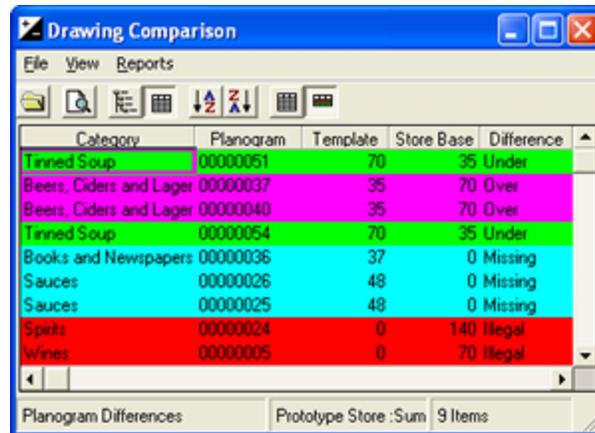
Opening without the Planner module being open

If the Planner module is not open, the Select File dialog box will appear. Highlight



Using Drawing Comparison

Once the floor plans have been selected, the **Drawing Comparison** dialog box will appear. This can be used to show differences between the selected floor plan and the template/prototype store it is being compared with.



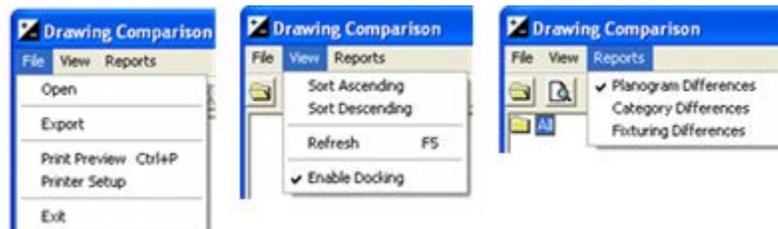
Category	Planogram	Template	Store Base	Difference
Tinned Soup	00000051	70	35	Under
Beers, Ciders and Lager	00000037	35	70	Over
Beers, Ciders and Lager	00000040	35	70	Over
Tinned Soup	00000054	70	35	Under
Books and Newspapers	00000036	37	0	Missing
Sauces	00000026	48	0	Missing
Sauces	00000025	48	0	Missing
Spirits	00000024	0	140	Illegal
Wines	00000005	0	70	Illegal

Planogram Differences Prototype Store : Sum 9 Items

Menus and Toolbar

Menu Bar

There are three Menus - **File**, **View** and **Reports**



File Menu

This contains the following options:

- Open opens the Select File dialog box, allowing users to select floor plans to compare.
- Export exports the current set of results to an Excel spreadsheet.
- Print Preview brings up the Print Preview dialog box. This gives a preview of the information to be printed. Users can opt to print the information or exit the option.
- Printer Setup being up a dialog box for changing the default printer and options for that printer.
- Exit causes store Comparison to close.

View Menu

This contains the following options:

- Sort Ascending sorts the data into ascending order. It will be based on the column containing the currently highlighted cell.
- Sort Descending sorts the data into descending order. It will be based on the column containing the currently highlighted cell.
- Refresh updates the results with any changes made in the floor plans since Drawing Comparison was opened. Once circumstance where Refresh could be used was if a store planner was manually changing planograms in a floor plan so that it conformed to those in the prototype store. Refreshing at intervals would keep the list of current differences between the floor plans updated.
- Enable Docking can be toggled on and off. If docking is On, the Drawing Comparison dialog box will dock to the left of Planner, displacing Planner to the

right to make room. If docking is Off, the Drawing Comparison dialog box can be positioned in any convenient location.

Reports Menu

The Reports menu allows users to toggle between one of three report modes:

- Report on difference in placed Planograms between the two selected floor plans.
- Report in differences in placed Categories between the two selected floor plans.
- Report in differences in placed Fixtures between the two selected floor plans.

Note: Reporting on differences between Categories is not currently operational.

Toolbar

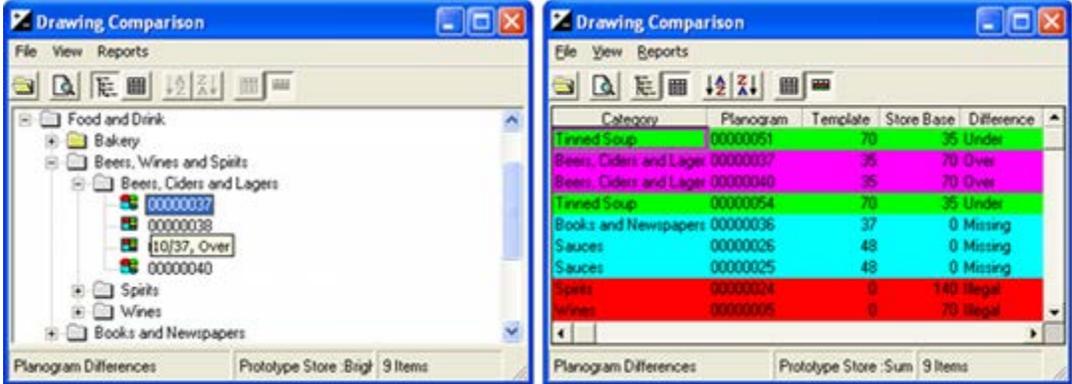
The toolbar contains the following options

Icon Description	
 Select Drawings to Compare	This option will open the Select Drawings to Compare dialog box. The user can then select the floors plans for comparison.
 Print Preview	This option will bring up the Print Preview dialog box. Users can opt to print the information or exit the option.
 Display Tree View	This option will cause information to be displayed in a tree (or hierarchical) view.
 Display List View	This option will cause information to be displayed in a list (tabular form).
 Sort Column in Ascending Order	This will sort the data into ascending order. It will be based on the column containing the currently highlighted cell.
 Sort Column in Descending Order	This will sort the data into descending order. It will be based on the column containing the currently highlighted cell.
 Show All Values	This will show all data from the two floor plans being compared. It will include data that is identical.
 Only Show Differences	This will only show data that differs between the two floor plans being compared.

Using Drawing Comparison

Tree and List View

The information may be view in one of two modes depending on user preference. These are Tree View (left in the screen shot below) and List View.

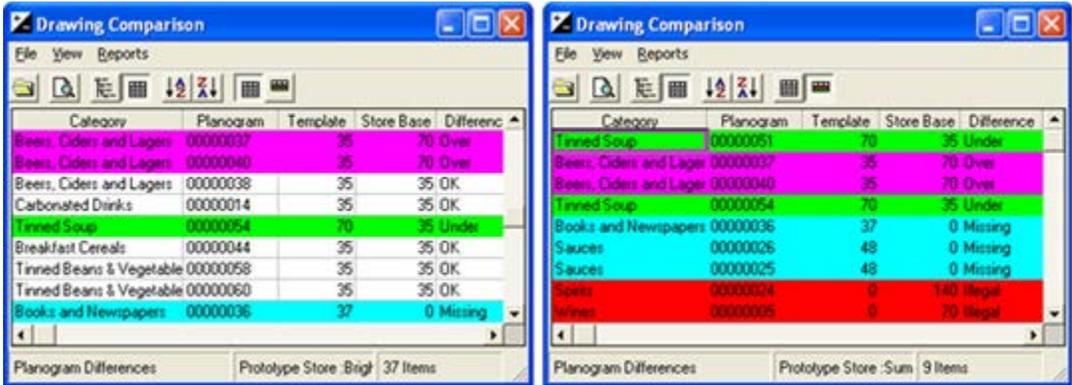


Users can toggle between the two views by using the appropriate icon in the toolbar.

Note: in Tree view, the icons change if there are differences between the store and the template/prototype. In the screen shot above, the tooltip contains the ID of the Planogram Group, the last two digits of the planogram code and the form of the difference.

Show All Values or Only Show Differences

Users can select the amount of information displayed. This can be all items (left in the screen shot below) or only the items that differ.



Possible Differences

There are four types of potential differences between the two selected floor plans. These are:

- Under: The quantity on the store is smaller than the quantity in the template/prototype.
- Over: The quantity on the store is greater than the quantity in the template/prototype.
- Missing: An object is present in the template/prototype that is not present in the store.
- Illegal: An object is present in the store that is not present in the template/prototype.

These differences can apply to:

- Equipment Placed.
- Planograms Placed.
- Categories Placed (not operational at present).

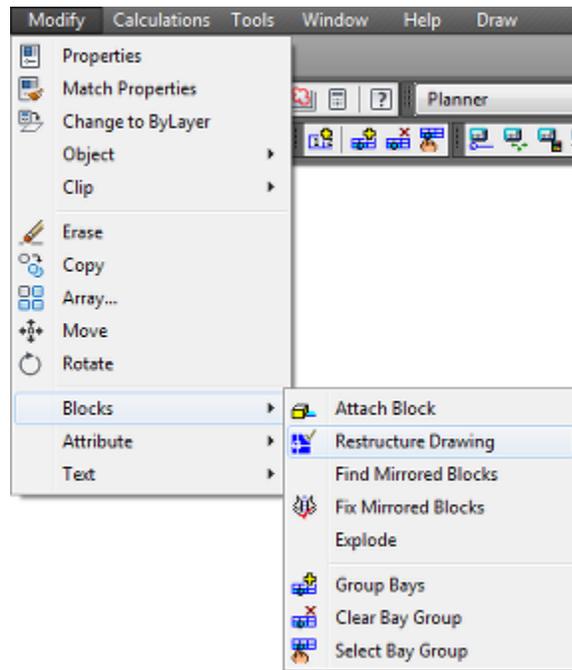
Other Planner Functionality

Restructure Drawing

Restructuring Drawing can be initiated from the Retail Toolbar.



Alternatively, the functionality can be invoked from the Modify menu.



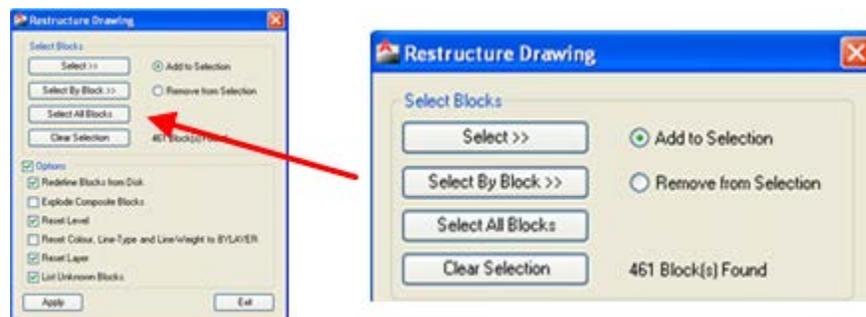
This will bring up the Restructure Drawing dialogue box.



The purpose of this dialog box is to restore blocks in the currently active floor plan to match the properties of the blocks as defined in Fixture Studio.

Selecting Blocks for Restructuring

Selecting Blocks for Restructuring is done by using the varying selection options and building up a list of blocks for the Restructuring operations to be carried out on.



Each selection is added to the current list (Add to Selection radio button) or removed from the current list (Remove from Selection radio button). A list containing several types of blocks can thus be built up - the total number of blocks currently selected being shown in the dialogue box.

Clicking on **Select** or **Select By Block** temporarily hides the Restructure Drawing dialogue box and takes the user to the currently active floor plan.

The apply button will remain grayed out until blocks have been selected and one or more check boxes selected.

Select

Select takes the user to the drawing where they can use standard AutoCAD selection methods to select one or more blocks. Valid methods include individual selection, windows or crossing selection boxes and fences. Selection must be completed with a right mouse click.

Select by Block

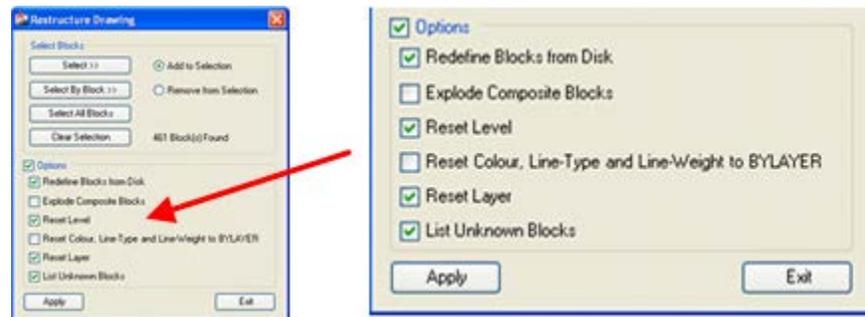
This option takes the user to the currently active floor plan. Selecting an individual block will select all blocks of that type. Multiple block types may be selected before selection is completed with a right mouse click.

Select all Blocks

Clicking this button will select all blocks in the currently active floor plan.

Clear Selection

Clicking this button will deselect all currently selected blocks. Once the blocks have been selected, varying **restructuring options** can be chosen.



Restructure Block Options

Redefine blocks from Disk

If the master block definition registered in Fixture Studio has been updated, it is possible to update the older version of the block held in the currently active floor plan with the more recent block held in Fixture Studio. On clicking the Apply button the block definition held in the 'database' section of the drawing will be updated, resulting in all visible instances of the block being changed.

Note: Block names will be ignored if they are not registered in Fixture Studio.

Explode Composite Blocks

This option will take any selected blocks and determine if they are composite (a block made up of made up of two or more previously defined blocks).

If any blocks are composite, they will be exploded into their component blocks and any connection points associated with the composite blocks removed. (If individual blocks within the composite have connection points assigned, these will not be affected).

Note: Blocks correctly registered and configured in Fixture Studio have an attribute called BSLINK-ATT assigned to them. If a composite has this attribute assigned, it will be removed when the composite is exploded using Restructure Drawing. If the composite is exploded using AutoCAD Explode, this attribute may be left in the floor plan. It is therefore suggested that Macro space Planning composites are exploded using Restructure Drawing.

Reset Level

This option results in any selected blocks being reassigned to the level (elevation above floor level) they are assigned to in the Insertion Tab of the Block Definition dialog box in Fixture Studio.

If the level is set to 'undefined', no changes will be made in the level for the block.

Note: Both shelves and products should be on undefined levels and should not be affected by this command.

Reset Color, Line Type and Line Weight to BYLAYER

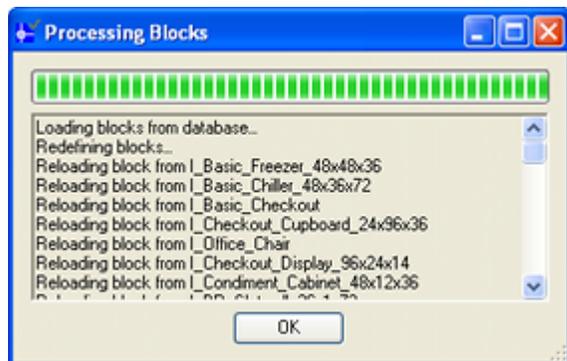
If the colors, line types and line weights of any selected block in the currently active floor plan are different from the default properties of the layer on which they have been placed, the properties of the selected blocks will be set back to those defaults. An example of this could be if a KPI was run in the floor plan. If there was some sort of failure before the floor plan was checked back in, the individual blocks in the drawing could be colored according to the KPI. Running Reset Color, Line Type and Line Weight to BYLAYER will reset those properties to the default values assigned in Fixture Studio.

Reset Layer

If the selected block is on a different layer to that defined for that block in Fixture Studio, the block will be reassigned to that layer in the currently active floor plan.

List Unknown Blocks

It is possible for blocks to exist in the drawing, but not be registered in Fixture Studio. These sorts of blocks are shown in the Processing Blocks dialogue box that appears when the drawing is being restructured.



The Retail Layers Toolbar

The **Retail Layers Toolbar** enables users to quickly control which layers pertinent to Retailing are visible.



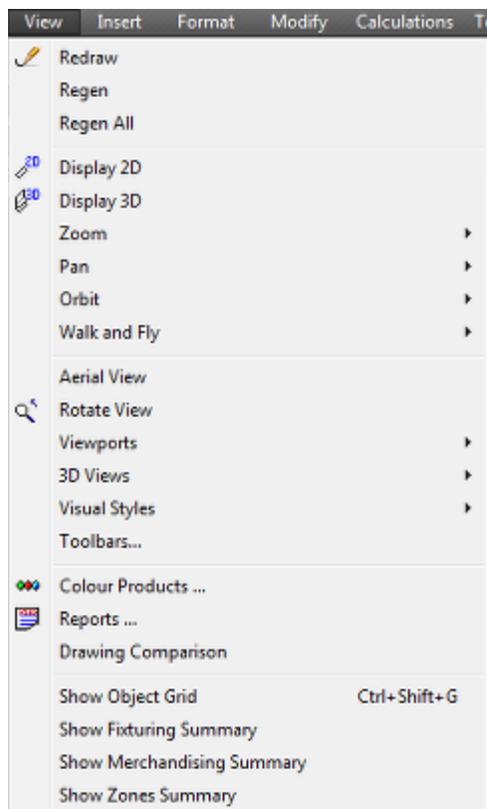
Buttons	Description
	Turns on all zones, zone text and aisles / boundary layers



Buttons	Description
	Turns off all zones, zone text and aisles / boundary layers
	Turns on all fixtures (but not fittings)
	Turns off all fixtures (but not fittings)
	Turns on all fittings (but not fixtures)
	Turns off all fittings (but not fixtures)
	Turns on all products, shelves and associated annotation
	Turns off all products, shelves and associated annotation
	Turns on all general notes, markups and general dimension lines
	Turns off all general notes, markups and general dimension lines
	Toggles fixtures to 2D layer (if set up for this)
	Toggles fixtures to 3D layer (if set up for this)

Display 2D and 3D

The **Display 2D** and **Display 3D** options are available from the View pull down menu.



They are also available from the Retail Layers toolbar.

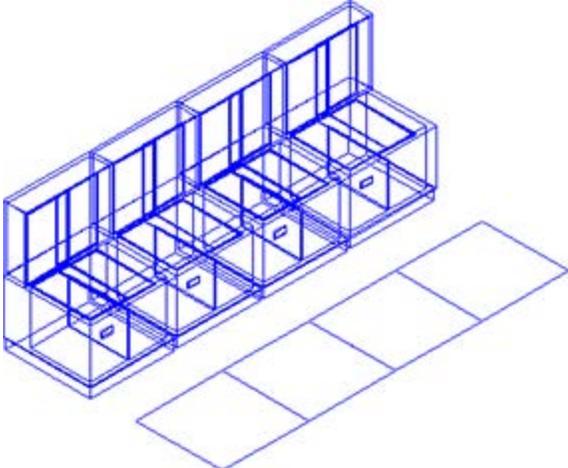


This functionality is specific to Macro Space Management. It requires fixtures that have been configured in a specific way prior to having been registered in Fixture Studio. (The method is described in more detail in the Fixture Studio help file). Fixtures that have not been configured in this manner will not toggle between 2D and 3D form.

If Display 2D is selected, only the base of the fixture will be displayed, giving an outline plan view. If display 3D is selected, all of the fixture will be displayed, giving a three dimensional view if the drawing is viewed from an oblique angle.

The purpose of the 2D functionality is to simplify the floor plan when the floor plan is being published prior to being put into service. Instead of all the construction lines for the fixtures being visible, only the outline is visible in the printed output. This makes the published plan easier to read when distributed to the stores for implementation.

The difference can be seen in the example below where the same fixtures can be seen in both 3D form (top) and 2D form (bottom).



Validating Floor Plans

Validating Floor Plans

Prior to authorizing a floor plan, it should be validated to see if it is optimum.

Reasons for Validating Floor Plans

Merchandise Placement Errors

Compliance is a key issue for retailers. Placing planograms on incompatible fixtures can lead to errors in product placement immediately the planogram is set. These placement errors can lead to the performance of the planogram being misinterpreted. For example, if there are few facings placed than designed for a product, its financial performance will be below that intended. An analyst looking at planogram performance might then be misled when the planogram is redesigned.

Merchandise Optimization

Planograms will generally be placed within a floor plan to meet an overall set of targets. An example would be the profitability of categories, aisles, departments and the overall floor plan. Forecast results could be calculated and compared to target. Any areas of the store falling short of target could then be replanned.

Other Forms of Validation

Retailers may have other reasons for validating floor plans meet the overall strategic plan. An example if this would be if the retailer was stocking a particular range of products as an image builder for the chain. Retailers might then want to validate that the placement of these image building products met requirements.

Methods of Validating Floor Plans

There are several methods of validating floor plans.

Quick Reports

Quick Reports (accessed from the View menu in both Planner and Merchandiser) enable the user to get specified results back from the floor plan. Macro Space Management comes with a set of pre-configured quick reports that can be used to check either for errors or for ways to further optimize the floor plan.

- Example Quick Reports that can be used to check for errors are those for multi-placed planograms or unpopulated fixtures.
- Example Quick Reports that can be used to optimize floor plans include results for financial performance - for example planogram space measures. It is then possible to check forecast planogram performance against location in the floor plan.

In addition to the pre-configured reports that are supplied, it would be possible to configure Quick Reports to meet retailer specific requirements. For example it would be possible to create a Quick Report identifying seasonal planograms and their expiry dates. It would then be possible to validate that there is a minimum period (say 4 weeks) between the floor plan going into service and the first seasonal planogram requiring replacement.

Key Performance Indicators

KPIs can be used to visually indicate performance in the current floor plan. As with KPIs, MSM comes with a set of pre-configured KPIs that can be used to check either for errors or for ways to further optimize the floor plan.

- Example KPIs that can be used to check for errors are those for planograms on fixtures of incorrect length, depth of height.
- Example KPIs that can be used to optimize floor plans include results for financial performance - for example it is possible to show forecast profit and see if the high profit planograms are in physical locations that would justify those forecasts.

In addition to the pre-configured KPIs that are supplied, it would be possible to configure KPIs to meet retailer specific requirements. For example it would be possible to create a KPI identifying all planograms with particular User Defined Attributes. An example of this would be UDAs identifying planograms that contain organic food products. It would then be possible to visually check the location of all organic products within the floor plan to see if they are logically placed in relation to each other.

BI Publisher Reports

BI Publisher reports are configured independently of MSM but could be used to give overview data on the floor plan. For example, historical data can be used to forecast the profitability of each planogram. It would be possible to use this forecast profitability to summarize profitability for the floor plan by category, aisle, department and overall. Each of these profit results could then be compared to pre-determined targets to see if the results are acceptable.

Business Process for Validating Floor Plans

The business process for validating floor plan will vary from retailer to retailer. One option is to put in a specific status (customizable in the Administration module) indicating the floor plan is awaiting validation. After the floor plan has been developed, it could be set to **ready to validate** status. If the floor plan meets requirements, the status could then be set to **authorized** and the floor plan set on the road to going into service.

Calculations

Overview of Calculations

Macro Space Management has many capabilities. One of these is to understand space. After creating a floor plan, it is then possible to run a number of calculations that give information on how well (or how badly) the floor plan has been laid out. This information can then be used to further optimize the floor plan, enabling a retailer to maximize the sales and profit from the available area. One example is area calculations: this apportions the floor area in a specific floor between the fixtures in that floor. This data then allows the amount of aisle space allocated to a fixture to be taken into account. In the screen shot below, the red areas show points where customers can stand in a floor plan and see a lot of fixtures - including end caps. This enables a retailer to identify prime areas to place high margin merchandise.

Custom Reports and KPIs

The results of the varying calculations write back to tables within the database. The template database supplied does not contain any specific reports or KPIs that can make use of that information. However, one of the aims of Macro Space Planning is to allow users to understand the use of space within their bricks and mortar retail outlets. It is possible to produce custom reports or KPIs that will enable them to optimize that space. Some of the reports/KPIs that can be created are detailed for each type of calculation within this section of the user guide.

Example of Use of Calculations

Consider a number of categories associated with snacks and convenience buys. Users not using Macro Space Management will have information in tabulated form.

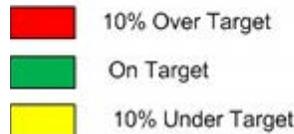
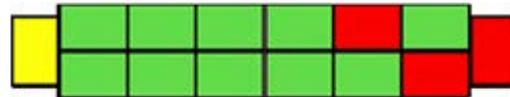
Category	Base Linear (feet)	Profit	Profit per foot	Base Linear
Crackers and Savory Biscuits	12	\$3,600	\$300	
Chocolate	16	\$6,400	\$400	
Crisps and Snacks	12	\$3,000	\$250	
Sweet Biscuits	8	\$2,400	\$300	
Sweets, Mints and Gums	4	\$1,400	\$350	

If users use the Allocated Area calculation, it is possible to extend this information to take into account the aisle space associated with the fixtures the products are on. For example, it is now possible to see that chocolate is showing a good profit when related to base linear, but a poor one when the amount of floor space assigned to it is taken into account.

Category	Base Linear (feet)	Profit	Profit per foot Base Linear	Allocated Area (Square Feet)	Profit per Square Foot
Crackers and Savory Biscuits	12	\$3,600	\$300	720	\$5

Category	Base Linear (feet)	Profit	Profit per foot Base Linear	Allocated Area (Square Feet)	Profit per Square Foot
Chocolate	16	\$6,400	\$400	1,600	\$4
Crisps and Snacks	12	\$3,000	\$250	600	\$5
Sweet Biscuits	8	\$2,400	\$300	400	\$6
Sweets, Mints and Gums	4	\$1,400	\$350	280	\$5

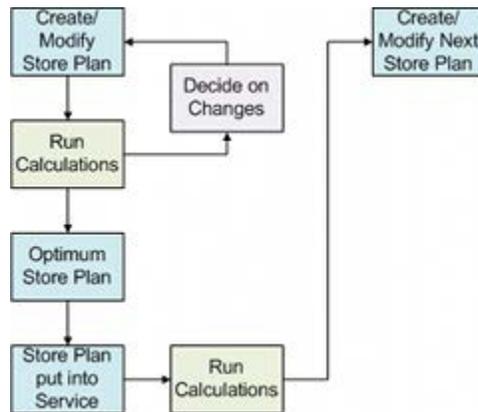
If used in conjunction with EPOS data, a KPI could be created that shows fixtures containing these products and whether they are on target for budgeted profit.



Here a store planner (or store manager) can see at a glance which fixtures contain products that are performing well or badly. In this case it is possible to see an end cap is performing below expectations and further investigation is required to identify the reasons.

Calculations and the Business Process

Calculations - providing the necessary reports and KPI's are available - can be used at any stage of the store planning process.



The initial stage would be for a floor plan to be created or modified. Calculations would then be run on that store plan, leading to information on how effectively the space within the store was being used. This information would allow a store planner to keep returning to his floor plan and optimizing it. Once optimized, the floor plan would be published and put into service. Once operational in a real life store, EPOS and other data from the 'live store' could be used to determine what improvements to make in the next iteration of the floor plan.

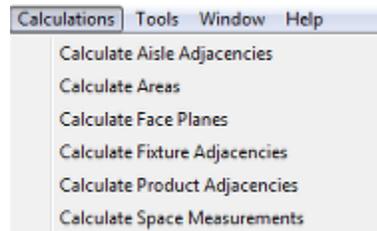
The necessary reports and KPIs resulting from the calculations are likely to be retailer specific - every retail chain has its own ideas and theories about how best to utilize the

space within its retail outlets. These reports and KPIs can be developed from a thorough knowledge of the technicalities of retail and careful study of how data is stored within the Macro Space Planning database.

General Technicalities for Calculations

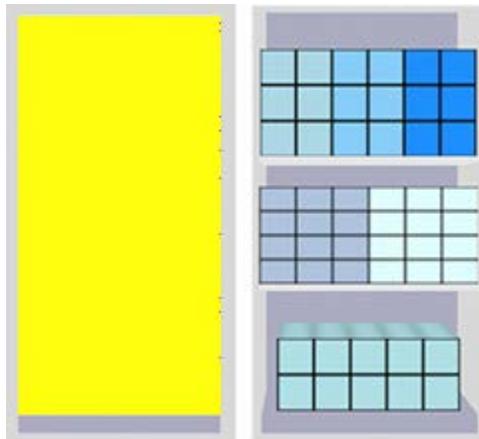
Initiating Calculations

Calculations are initiated from the Calculations menu.



Imploded and Exploded Planograms

Planograms can exist in two forms: 2D (imploded) and 3D (exploded).



The example planogram on the left is imploded (2D) and takes the form of a product block occupying the volume of the planogram. There is no information on the shelves and individual products present. The planogram on the right has been exploded to 3D form and contains information on both shelves and individual products. Planograms can be changed between the imploded and exploded form in the Merchandiser module. The Face Plane and Space Measurement calculations will only return meaningful results for planograms in 3D (exploded) form that contain Display Styles.

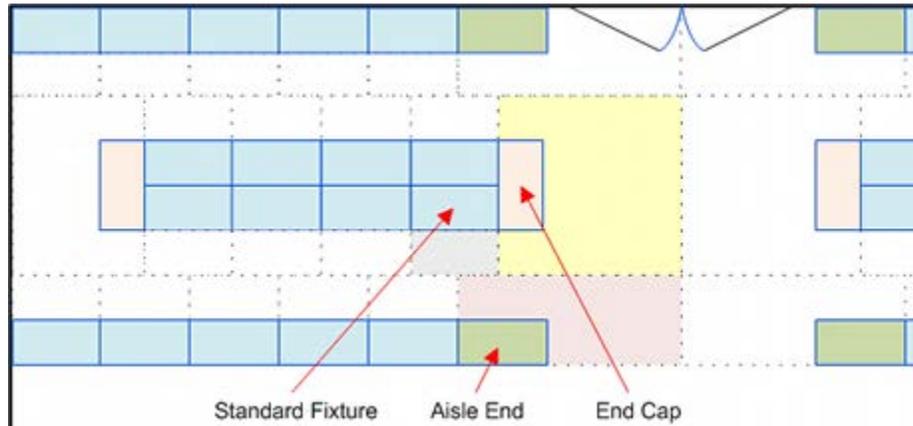
Information on Database Tables

Information is provided in the following sections on the database tables associated with the calculations. These are not generally accessible to normal users, but only to those with the correct privileges for accessing the database. This information has primarily been provided as an aid to anyone intending to produce custom reports.

Allocated Areas

Principles of Allocated Areas

The **Allocated Area** calculation is used to apportion areas of floor space to specific fixtures. This allows reports on performance to take into account the way the floor has been laid out.



In the above simplified example, fixtures are shown with a solid outline and the resulting allocated area with a dotted outline. It can be seen that an end cap will receive a greater allocated area than a standard fixture, while a fixture at an aisle end could have an allocated area intermediate between the two. The result can be seen in the following table.

Fixture	Footprint	Sales	Sales	Allocated Sales	Allocated Sales
	ft ²	ft2	ft2	Area	ft2
Standard Fixture	8 ft ²	\$1,200	\$150	16 ft ²	\$75
Aisle Fixture	8 ft ²	\$1,800	\$225	40 ft ²	\$45
End Cap	8 ft ²	\$54,000	\$375	60 ft ²	\$90

If performance figures were looked at purely on the basis of fixture area (footprint), it would appear that the aisle end fixture was performing well. However, when the floor area allocated to it is taken into account, it can be seen that the sales per square foot are disappointing.

This form of analysis allows a number of facets of floor layout to be explored:

- Wider aisles may mean fewer fixtures in a store, but will increased product visibility lead to higher sales?
- Are products performing badly because visibility for their parent fixture is poor and customers can't see them?
- How significantly does fixture position (end of aisle, centre of aisle) impact on sales?

Space Measurements

The Allocated Area result is also used in the Space Measurement calculation.

Allocated Area Calculation Technicalities

System Variables Affecting Allocated Areas

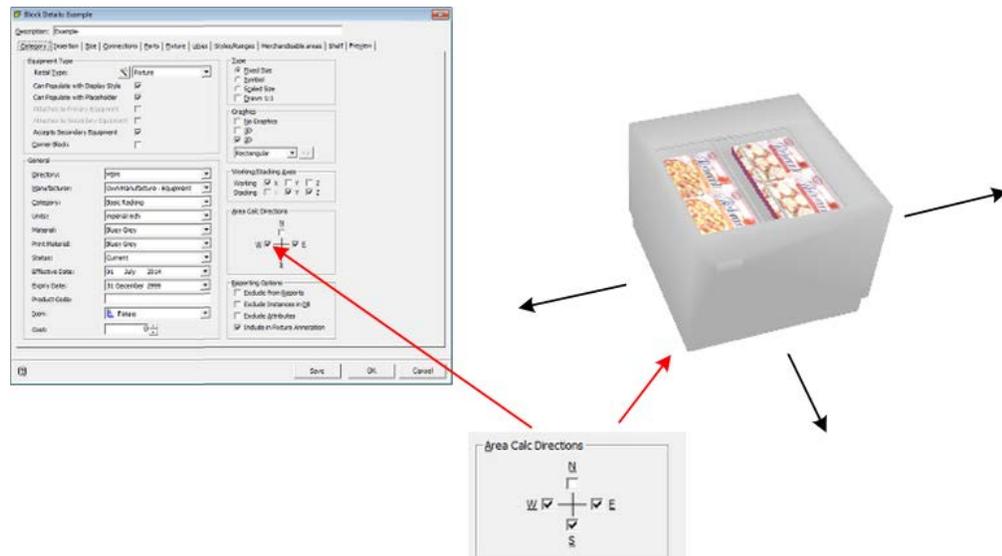
The following system variables affect the allocated areas calculation:

- AREA_LARGE_INCREMENT
- AREA_MEDIUM_INCREMENT
- AREA_SMALL_INCREMENT
- AREA_MAX_DISTANCE
- AREA_UNIT_OF_MEASURE

These system variables are set in the Administration Module - see the *Administration Module User Guide* for more information.

Area Calculation Directions

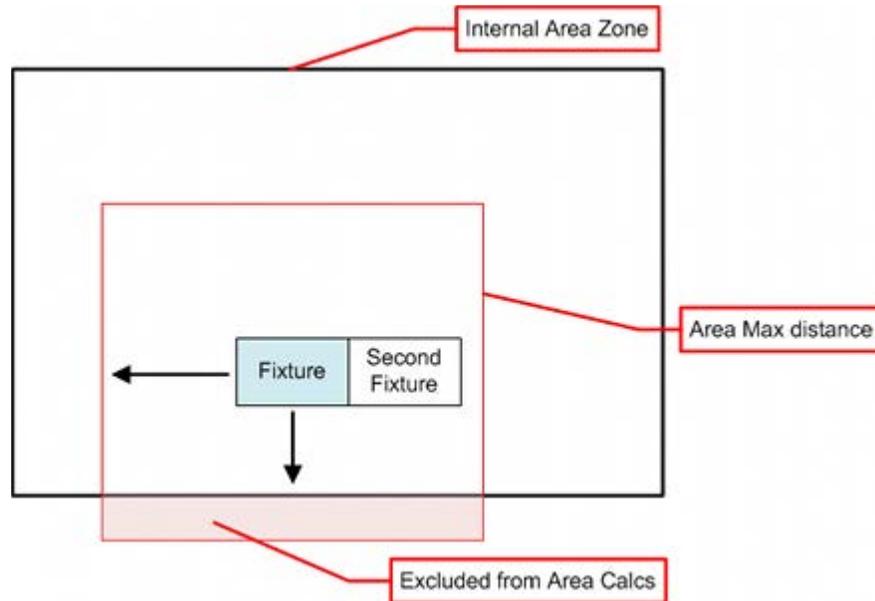
The directions for which the calculations apply for a specific type of fixture are set in the Block Details dialog box in Fixture Studio.



Fixtures such as spinners or bins that can be seen from all directions might have all four area calculation directions set. Conversely, fixtures such as slatwalls will not have the products visible from the back and will have their directions set to left, right and forward. See the *Oracle Retail Macro space Management Fixture Studio User Guide* for more information.

Internal Area Zone and AREA_MAX_DISTANCE_SYSTEM_VARIABLE

Two factors affect the maximum area that can be allocated to a fixture: the Internal Area zone and the AREA_MAX_DISTANCE system variable.



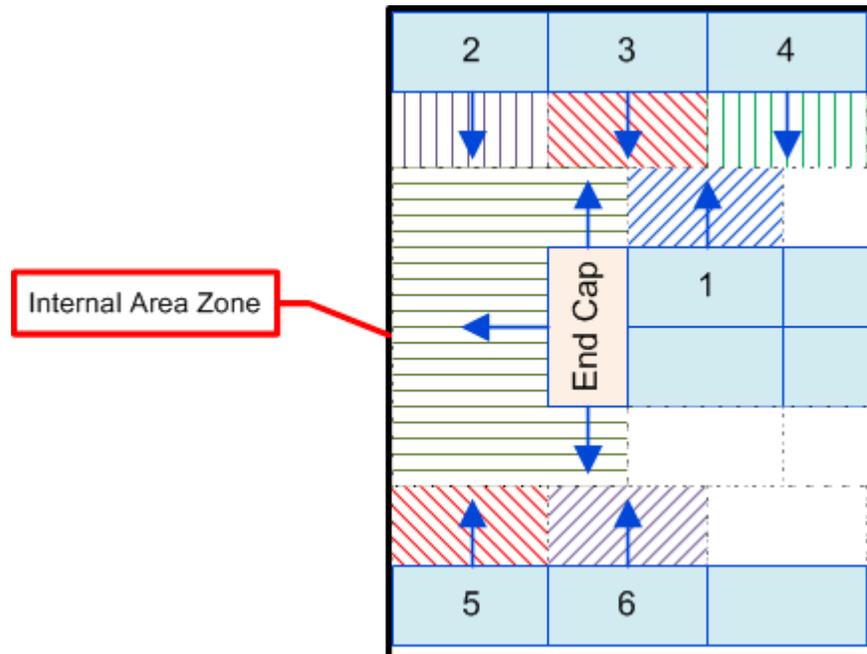
Individual fixtures 'feel out' in the specified directions until:

1. They reach another fixture.
2. They reach the boundary of the Internal Area zone.
3. They reach the distance specified in the AREA_MAX_DISTANCE system variable.

If the maximum distance is greater than the distance to the boundary of the Internal Area zone, the area allocated to that fixture will be determined by the distance to the Internal Area zone boundary.

Sharing Areas between Fixtures

If fixtures share areas, the space will be apportioned between them.



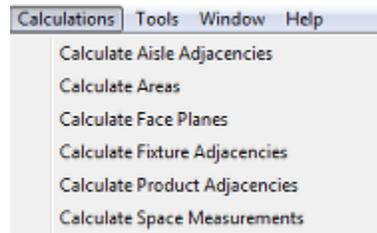
If we take the example of Fixture 1, it will 'feel out' towards Fixtures 3 and 4. Similarly, Fixtures 3 and 4 will 'feel out' towards Fixture 1. The total areas will be subdivided

between them, which will approximate to the hatched areas in the diagram above. The end cap is more complex. It will feel out forwards until it reaches the boundary of the internal area. It will also feel out left and right and will be constrained by Fixtures 2, 3, 5 and 6. The end cap will thus be allocated a larger area.

Using the Allocated Area Calculation

Running the Allocated Area Calculation

The Allocated Area calculations can be run from the Calculations menu



Allocated Area Results

Allocated Area results are stored in the **Fixture** table in the database. Allocated Areas are only assigned to fixtures - they are not assigned to fittings, shelves, etc. As the database table contains entries for all types of equipment, the results will have to be filtered to be specific for fixtures.

Note: For full details of database tables, see the *Oracle Retail Macro Space Planning Data Model*.

Reporting Using Allocated Areas

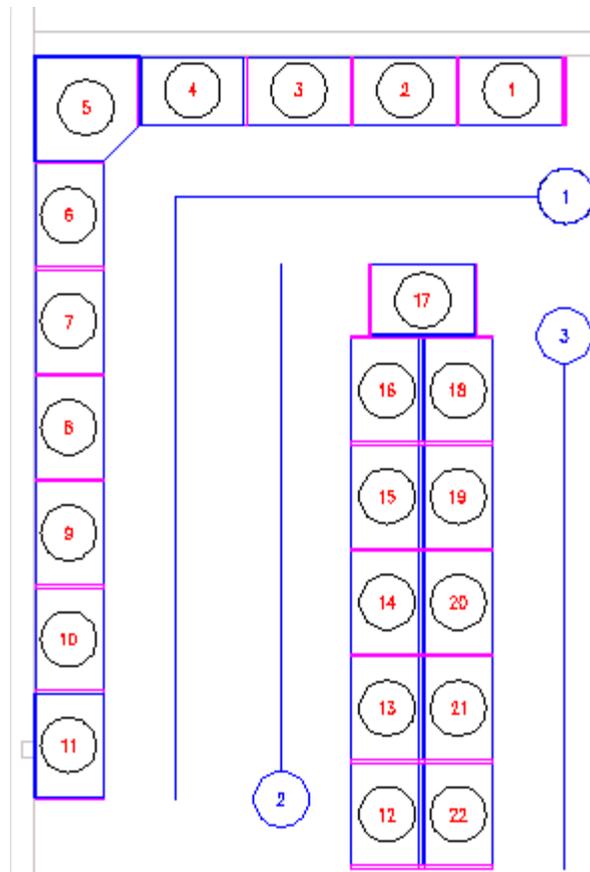
The default database supplied with Macro Space Planning does not contain any KPIs or Reports that use the results of Allocated Area calculations. These will have to be configured by the user; possibly using EPOS data. Possible reports include:

- Fixtures with allocated areas above or below a specified value.
- Total sales values per unit of allocated area.
- Total profit per unit of allocated area.
- Fixtures over and under-performing financially based on allocated area.

Aisle Adjacencies

Principles of Aisle Adjacencies

The Aisle Adjacency Calculation is used to assign fixtures to MSP Aisles. As these aisles have a direction, it is also possible to determine the sequence of the fixtures along that aisle. After products or planograms have been associated with those fixtures, it is then possible to generate reports stating whether those products are well or badly placed along the aisle.



In the above example, Aisle 3 contains fixtures 18 - 22, with Fixture 18 at the start of the aisle and Fixture 22 at the end. It is then possible to use this information in custom reports. For example, once the planograms on the fixtures are known, it would be possible to:

- Identify whether multi-bay planograms have been placed matching the direction of traffic flow they have been designed for.
- Identify whether there are desirable product affinities - for example are pasta sauces next to pasta.

Aisle Adjacency Technicalities

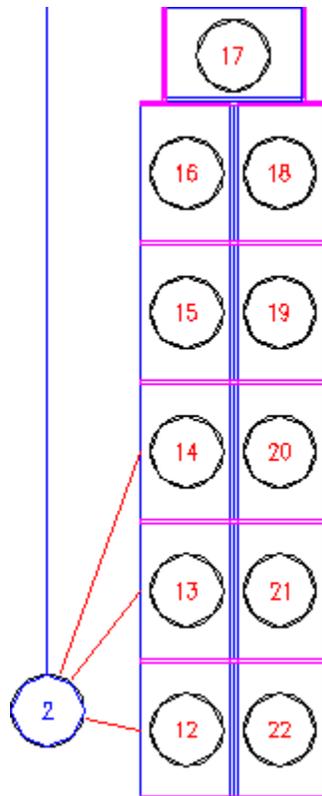
System Variables Affecting Aisle Adjacencies

The `ADJACENCY_AISLESIZE` system variable specifies the maximum distance that a fixture can be from an Aisle and still be associated with it. For example, if the `ADJACENCY_AISLESIZE` is set to 48 inches (4 feet), no fixture greater than that distance from the aisle will be associated with it. This system variable is set using the **System Variable dialog box** accessed from the General Menu in the Administration module.

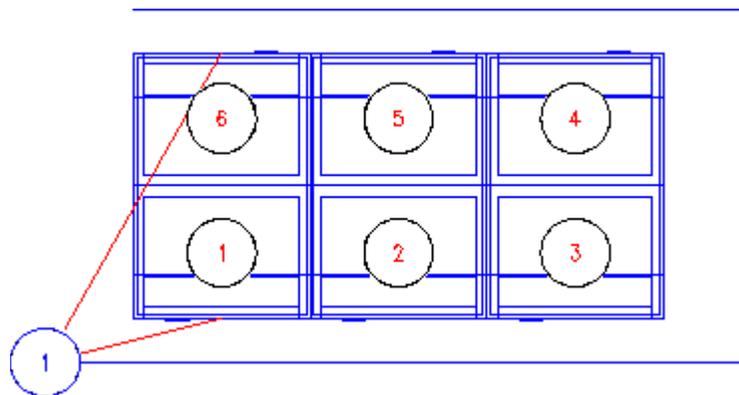
Method of Measuring Distances

The **Aisle Adjacency table** contains two distances associated with a specific aisle.

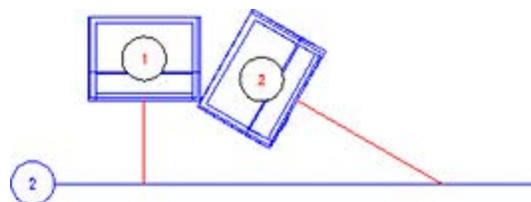
- **AIL_DISTANCE_FROM_START**
 - This distance is measured from the start position of the aisle to the centre of the front of the fixture.



- In the above example, the red lines indicate the distances from the start of Aisle 2 to Fixtures 12, 13 and 14. For this reason, it is best not to draw aisles using paths that turn through several right angles.



- In the above example Fixtures 1 and 6 will be shown as the closest to the start of the aisle; the true sequence along the aisle is 1 - 6.
- **AIL_DISTANCE_FROM_AISLE**
 - This distance is calculated perpendicular to the front of the fixture.



- In the above example the centers of the fronts of both fixtures are the same vertical distance from the aisle. However, because the distance to the aisle is measured perpendicular to the front of the fixture, Fixture 1 will be shown as being closer to the aisle than Fixture 2.

Note: For full details of database tables, see the *Oracle Retail Macro Space Planning Data Model*.

Items of Equipment that can be Assigned to Aisles

Only equipment of type **Fixture** can be assigned to aisles in the **Aisle Adjacency** table. (Fixture types are assigned in the Category Tab of the Block Details dialog box in the Fixture Studio module - see the *Oracle Retail Macro Space Management Fixture Studio User Guide* for more information). In addition Fixtures will only be assigned to a single aisle - this will be the nearest aisle within the limits set by the ADJACENCY_AISLESIZE system variable.

Using the Aisle Adjacency Calculations

The default database supplied with Macro Space Planning does not contain any KPIs or Reports that use the results of Aisle Adjacency calculations. These will have to be configured by the user, and would require using data from other tables. Possible reports include:

- Identifying whether multi-bay planograms have been placed matching the direction of traffic flow they have been designed for.
- Identifying whether planograms that require power (for example TV planograms) are in aisles that have been supplied with power
- Identifying whether there are desirable product affinities - for example whether pasta sauces are next to pasta.
- Identifying whether there are undesirable product affinities - for example whether shotgun shells are next to baby food.

If the ADJACENCY_AISLESIZE system variable is set to a sufficient size, it is possible to include the fixtures on both sides of the aisle, allowing the product affinities to be established for products sharing the entire aisle.

As an example, a short report could be generated for an aisle containing the 'Rice, Pasta and Noodles' category.

Segment	Side of Aisle	Distance from Start	Base Linear of Product	Profit/Foot
Instant Rice	Left	0 ft	12 ft	\$125
Ready to Heat Rice	Right	0 ft	8 ft	\$150
Instant Noodles	Left	12 ft	8 ft	\$75

Instant Pasta	Right	8 ft	4 ft	\$125
Dry Short Pasta	Right	16 ft	4 ft	\$100

This enables a store planner to see that the Instant Noodles segment with a profit of \$75 per base linear foot is placed in a prime position in the centre of the aisle yet is underperforming.

Fixture Adjacencies

Using Fixture Adjacencies

Fixture Adjacency Results

Aisle Adjacency results are stored in the **Fixture Adjacency** table. More information pertinent to gondolas is stored in the **Fixture Sequence** table.

Note: For full details of database tables, see the *Oracle Retail Macro Space Planning Data Model*.

Using the Fixture Adjacency Results

1. Product Adjacencies

Fixture Adjacency results are a necessary precursor for running the Product Adjacency calculations.

2. Reports Based on Fixture Adjacencies

Although it is not usual to generate reports or KPIs based on Fixture Adjacencies, it would be possible to produce specialized reports. An example would be to generate a report that used Fixture UDAs to identify if a fixture used to hold hot food has been placed directly behind a fixture used for frozen products.

Fixture Adjacency Technicalities

System Variables Affecting Fixture Adjacencies

The following system variables affect the fixture calculation:

- ADJACENCY_FIXTURE_SIZE
- ADJACENCY_LATERALGAP
- ADJACENCY_VERTICALGAP

These system variables are set in the Administration Module - see the *Oracle Retail Macro space Management Administration Module User Guide* for more information.

Bitwise System Variables

The results of the Fixture Adjacency calculations are stored in the **Fixture Sequence table**. The type of adjacency is stored as a bitwise system variable:

- 1 = Adjacent to Right
- 2 = Adjacent to Left
- 4 = Adjacent to Back
- 8 = Aisle Adjacency (Not in Use)
- 16 = Not in Use
- 32 = Adjacent Above

Bitwise variables can be built up of combinations of numbers, so 5 = Adjacent to Right and Behind.

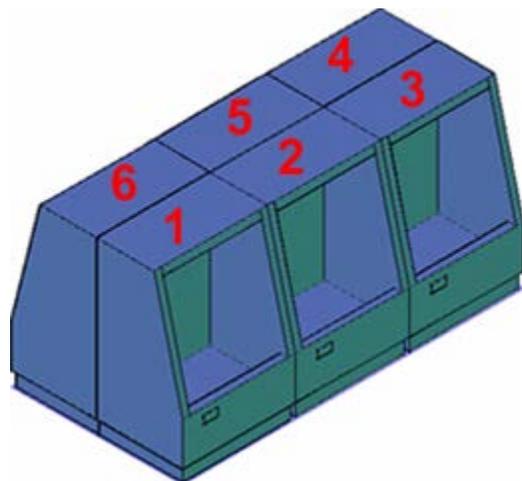
Note: For full details of database tables, see the *Oracle Retail Macro Space Planning Data Model*.

Principles of Fixture Adjacencies

The Fixture Adjacency calculation is used for several purposes:

- To determine which fixtures are assigned to a specific gondola and what the relationship of the fixtures are to each other within the gondola.
- As a precursor to updating result in the Fixture Sequence table which is used to hold additional information on the arrangement of fixtures within gondolas.
- As a necessary predecessor to the Product Adjacency calculation.
- As a necessary predecessor to placing multi-bay planograms in In-Store Space Collaboration

The Fixture Adjacency calculation determines which fixtures are to the left, right, above or behind other fixtures.



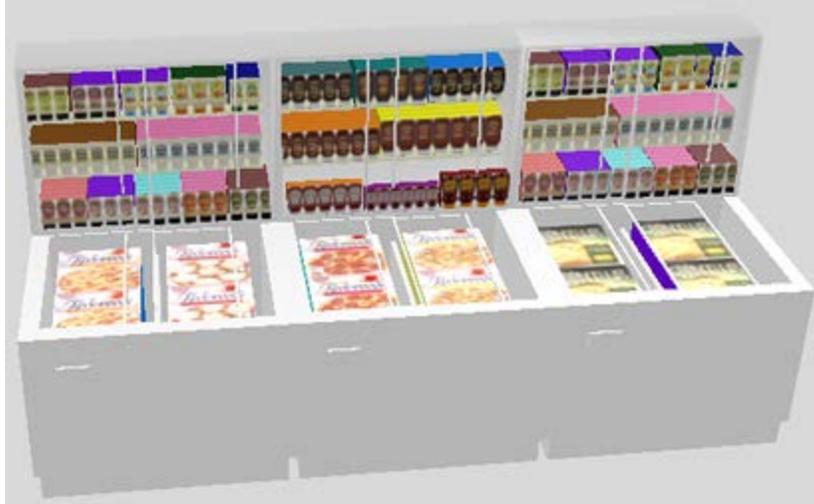
In the above example, Fixture 2 has Fixture 1 to the left, Fixture 4 behind and to the right, etc.

Note: For full details of database tables, see the *Oracle Retail Macro Space Planning Data Model*.

Product Adjacencies

Principles of Product Adjacencies

The Product Adjacency Calculation is used to determine the relationship of products on adjacent fixtures to one another. Products may be to the left, right, above or on the same fixture as other products. Results are aggregated up to sub-class (sub-category/sub-segment) level.



A necessary precursor for running the product adjacency calculations is that the Fixture Adjacency Calculation has been run first. When run, Product Adjacency aggregates the products up to subclass (sub-category/sub-segment) level and then reports which products are to the left/right/above other products. This information can then be used in conjunction with the Adjacency Severity rules to identify products that are well or badly placed.

The Adjacency Severity rules are configured in the Administration module.

Description	Product 1	Product 2	Rule
Beer + Spirits	Beers, Lagers and Ciders	Spirits	EXCELLENT: Sub-classes well placed
Beer + Wines	Beers, Lagers and Ciders	Wines	EXCELLENT: Sub-classes well placed
Beer and Cereals	Beers, Lagers and Ciders	Breakfast Cereals	Satisfactory: Sub-classes near enough
Bread + Cakes	Bread	Cakes	Satisfactory: Sub-classes near enough
Bread + Rolls	Bread	Rolls	EXCELLENT: Sub-classes well placed

The results are stored in the **Adjacency Rule** table.

Note: For full details of database tables, see the *Oracle Retail Macro Space Planning Data Model*.

Using Product Adjacencies

Product Adjacency Results

Product Adjacency results are stored in the **Product Adjacency** table. The main way of using the product adjacency results is in conjunction with the Adjacency Rules table (**Adjacency Rule** table). This allows a report to be generated specifying whether products that are to the left, right or above another product are products that are desirable or undesirable to have in that relationship.

Note: For full details of database tables, see the *Oracle Retail Macro Space Planning Data Model*.

Face Planes

Using the Face Plane Calculations

Face Plane results are stored in the **Face Plane** table.

COLUMN_NAME	DATA_TYPE
FIL_ID	NUMBER(10,0)
PRD_ID	NUMBER(10,0)
FIX_ID	NUMBER(10,0)
SHF_ID	NUMBER(10,0)
MER_ID	NUMBER(10,0)
FPC_FACE_AREA	FLOAT

Using the Face Plane Results

There are a number of potential ways of using the face plane results.

- By linking to individual planograms placed in a floor plan (Plano table) to generate area based performance metrics.
- By linking to the Aisle adjacency table to generate area based performance metrics for that aisle.
- By linking to the product hierarchy (Product Def table) and the products placed in a floor plan (Product table) to generate area based performance metrics for entire categories, segments or sub-segments in a floor plan.

Note: For full details of database tables, see the *Oracle Retail Macro Space Planning Data Model*.

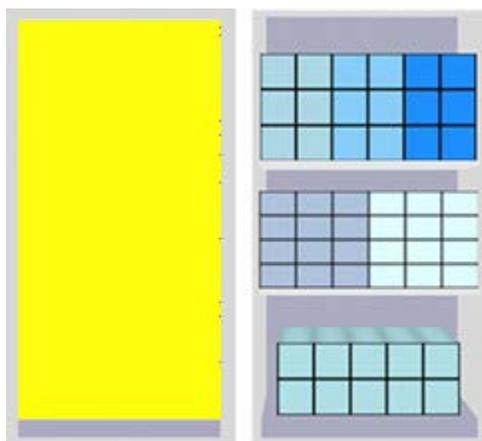
Face Plane Technicalities

System Variables Affecting Face Plane Calculations

There is no system variable connected with the Face Plane calculations.

Imploded and Exploded Planograms

Planograms can exist in two forms: 2D (imploded) and 3D (exploded).



The example planogram on the left is imploded (2D) and takes the form of a product block occupying the volume of the planogram. There is no information on the shelves and individual products present. The planogram on the right has been exploded to 3D form and contains information on both shelves and individual products.

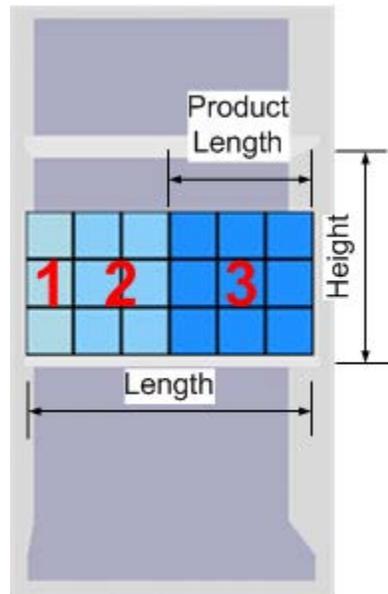
Planograms can be changed between the imploded and exploded form in the Merchandiser module. The Face Plane calculation will only return meaningful results for planograms in 3D (exploded) form that contain Display Styles.

Display Styles

Display Styles are the lowest level in the MSP Product hierarchy. Each display style is associated with a specific SKU and contains information on product dimensions. When the Face Plane calculation is run, results are aggregated up to the parent SKU.

Calculation Method

The calculation method is as follows:

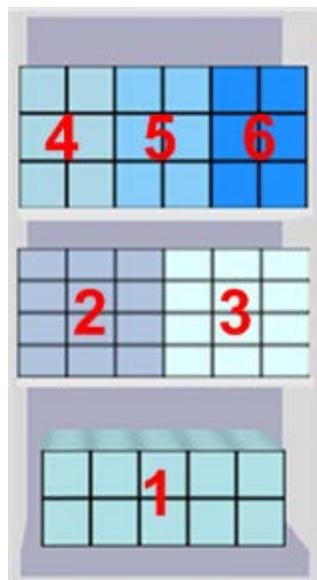


1. The total frontal area is found by multiplying the length of the shelf (or fixture) by the available height.
2. The frontage product occupies on the shelf is determined - for example Product 3 in the above example occupies 50% of the shelf.
3. The total frontal area is proportioned among the products according to the frontage they occupy.

Product	Total Area	Frontage	Face Plane
1	4 ft ²	50%	2 ft ²
2	4 ft ²	35%	1.4 ft ²
3	4 ft ²	15%	0.06 ft ²

Principles of Face Planes

Face Planes can be used to calculate the frontal area of products at display style level.



In the above example the base of the fixture contains a single product (1), the first shelf two products (2 & 3) and the top shelf three products (4, 5 & 6). The Face Plan calculation can be used to relate sales information to the frontal area of the products.

Product Number	Sales	Area	Sales ft ²
1	\$225	4.5 ft ²	\$50/ft ²
2	\$135	2.25 ft ²	\$60/ft ²
3	\$90	2.25 ft ²	\$40/ft ²
4	\$75	1.5 ft ²	\$50/ft ²
5	\$45	1.5 ft ²	\$30/ft ²
6	\$105	1.5 ft ²	\$70/ft ²

This allows (for example) space trading to be carried out. Product 5 is occupying the same frontal area as Product 6, but is generating less than half the sales per square foot. There would thus be a case to increase the number of facings of Product 6 and correspondingly reduce the number of facings of Product 5.

Note: For a similar calculation using volumes see the section on Space Measurement.

Space Measurements

Using Space Measurements

Space Measurement results are stored in the **Product Measurement** table.

COLUMN_NAME	DATA_TYPE
FIL_ID	NUMBER(10,0)
PRD_ID	NUMBER(19,0)
PRM_BASE_LINEAR	FLOAT
PRM_SHELF_LINEAR	FLOAT
PRM_ALLOCATED_AREA	FLOAT
PRM_FOOTPRINT	FLOAT
PRM_DISPLAY_VOLUME	FLOAT
PRM_NOMINAL_VOLUME	FLOAT
PRM_ALLOCATED_VOLUME	FLOAT

Reporting Using Space Measurements

The default database supplied with Macro Space Planning does not contain any KPIs or Reports that use the results of Space Measurement calculations. These will have to be configured by the user; possibly using EPOS data. Results will be aggregated up to sub-class (sub-category/sub-segment) level.

Possible reports include:

- Products at subclass level expressed as feet of shelf length (base linear plus shelf linear).
- Sales turnover for products at subclass level expressed as turnover per foot of shelf length (base linear plus shelf linear).
- Profit for products at subclass level expressed as profit per foot of shelf length (base linear plus shelf linear).
- Products at subclass level expressed as square feet of floor area (based on allocated area).
- Sales turnover for products at subclass level expressed as turnover per square feet of floor area (based on allocated area).
- Profit for products at subclass level expressed as profit per square feet of floor area (based on allocated area).
- Products at subclass level expressed as a cumulative volume (based on display, nominal or allocated volumes).
- Sales turnover for products at subclass level expressed as a turnover per unit volume (based on display, nominal or allocated volumes).
- Profit for products at subclass level expressed as profit per unit volume (based on display, nominal or allocated volumes).

Note: For full details of database tables, see the *Oracle Retail Macro Space Planning Data Model*.

Principles of Space Measurements

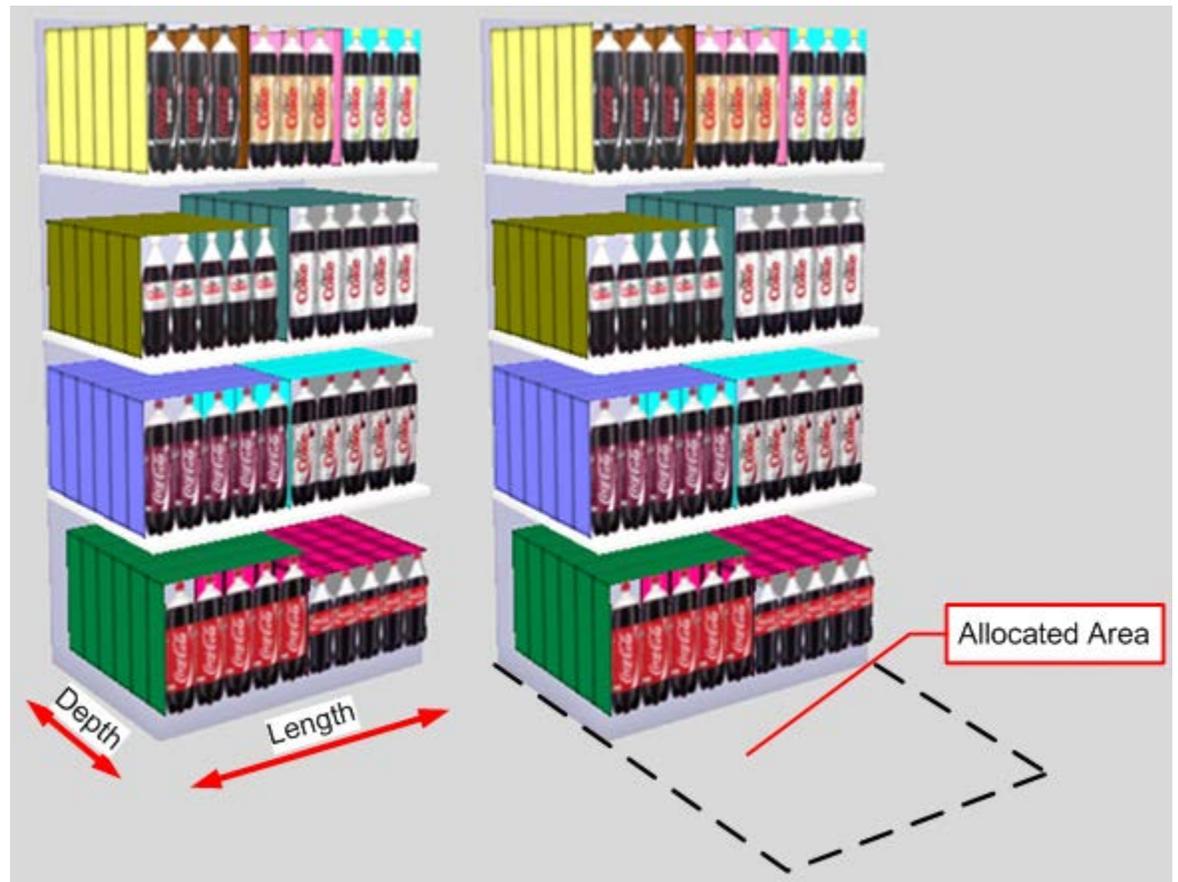
Space Measurements are used for calculating linear dimensions and volumes associated with planograms in a floor plan. These can then be combined with EPOS data for reporting purposes. For the full set of information in Space Measurements, the allocated area calculation must first have been run. In addition, the planogram must be in Exploded (3D) form - if not, the shelf linear figure will be inaccurate. Products will be aggregated up to sub-class (sub-category or sub-segment) level. The Space Measurement calculation provides the following information:

Base Linear and Shelf Linear



- Base Linear is the length of the fixture.
- Shelf Linear is the cumulative length of the shelves on the fixture.

Footprint and Allocated Area



- Footprint is the physical space the fixture occupies on the floor. It is calculated by multiplying the fixture length and depth.
- Allocated Area is the space the fixture occupies on the floor when any associated areas of its aisle have been apportioned to it.

Display Volume, Nominal Volume and Allocated Volume

These provide different volumes for calculation purposes:

- Display Volume is the actual volume occupied by the products. This will be less than the maximum volume of the parent fixtures because of finger gaps, unused spaces, etc.
- Nominal Volume is the Base Linear value for the parent fixtures, multiplied by the values of the CALC_STND_DEPTH and CALC_STND_HEIGHT system variables. This provides a nominal volume for the fixtures that is purely dependent on the Base Linear values.
- Allocated Volume is the Allocated Area for the parent fixtures multiplied by the value of the CALC_STND_HEIGHT system variable. It gives a volume within the floor plan for reporting purposes that takes into account any aisle space associated with the fixtures but which is not dependent on the height of the fixtures.

Space Measurement Technicalities

System Variables Affecting Space Measurement

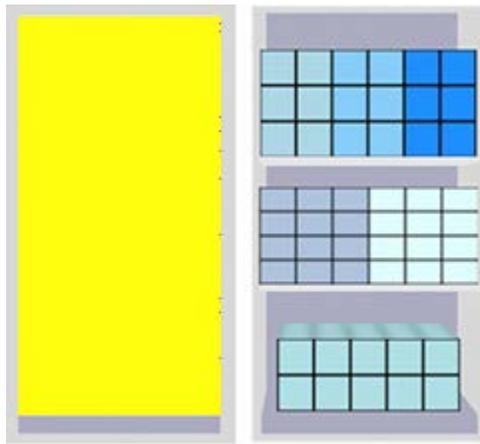
The following system variables affect the Space Measurement calculation:

- CALC_STND_DEPTH
- CAL_STD_HEIGHT

These system variables are set in the Administration Module - see the *Oracle Retail Macro Space Management Administration Module User Guide* for more information.

Imploded and Exploded Planograms

Planograms can exist in two forms: 2D (imploded) and 3D (exploded).



The example planogram on the left is imploded (2D) and takes the form of a product block occupying the volume of the planogram. There is no information on the shelves and individual products present. The planogram on the right has been exploded to 3D form and contains information on both shelves and individual products. Planograms can be changed between the imploded and exploded form in the Merchandiser module. The Space Measurement calculation will only return meaningful results for planograms in 3D (exploded) form that contain Display Styles.

Overview of KPIs

Overview of KPIs

Types of KPI

KPIs are used to color code objects in the Planner and Merchandiser modules and in In-store Space Collaboration to indicate performance. There are four types of object that can be color coded using KPI's.

- Zones
- Fixtures
- Shelves
- Products

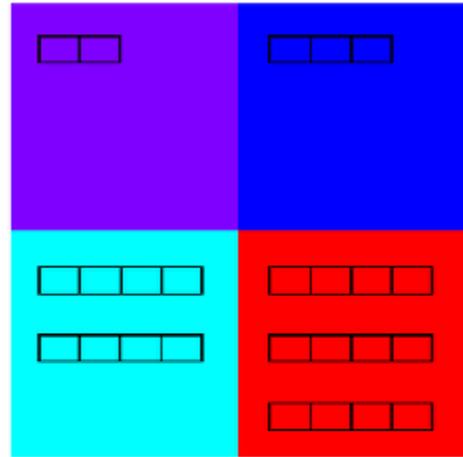
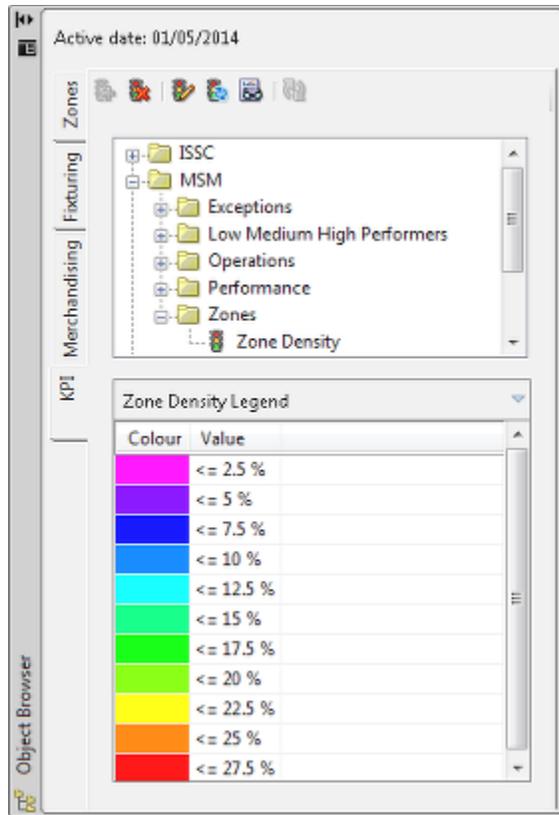
Because the Planner module does not generally show shelves or products at Display Style level, these forms of KPI are not generally used in that module.

Configuring KPIs

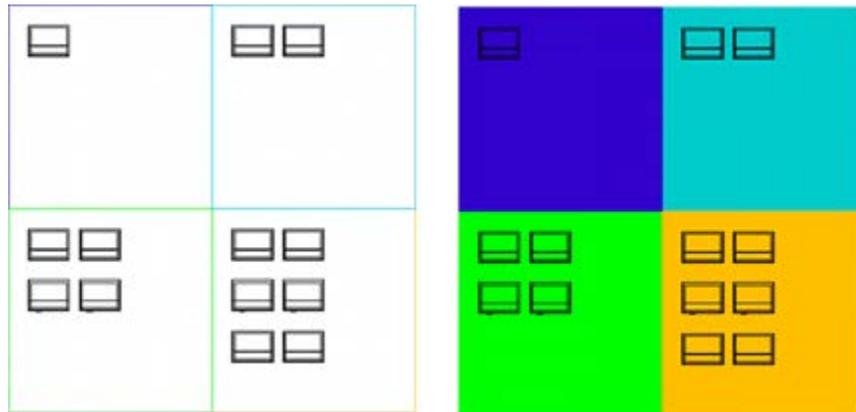
KPI's are configured in the Administration module. This can only be done by users with access to that module.

Zones

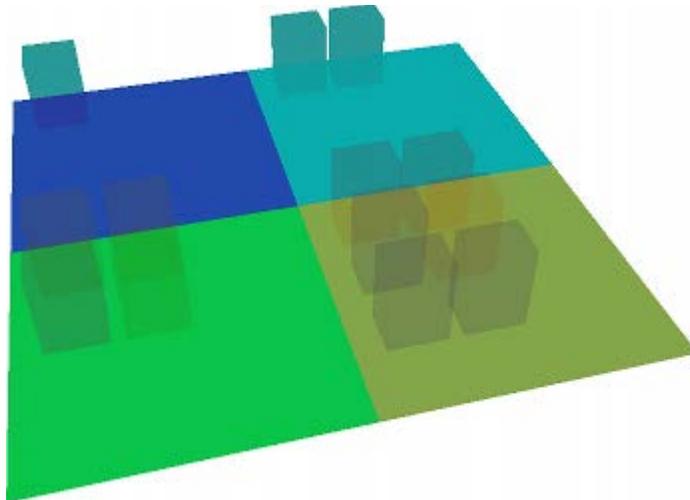
Zones can be color coded according to performance criteria. In the example below, the zones in Planner have been color coded according to the percentage of the available area taken up by equipment. As the number of fixtures in a zone increases, the color coding of a zone changes to reflect the increasing amount of floor area taken up by equipment.



How a zone will color for a KPI in Planner depends on whether it is **hatched** or not. In the screen shot below, the left hand image shows a KPI applied with hatching turned off. In this case, the line defining the boundary of the zone will color. In the right hand image hatching has been applied. In this case the entire zone will color.

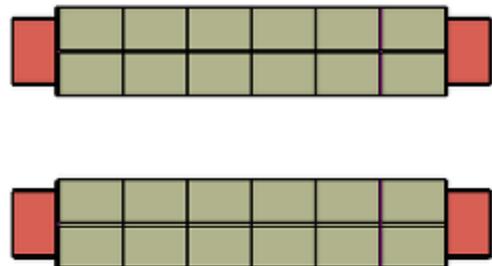
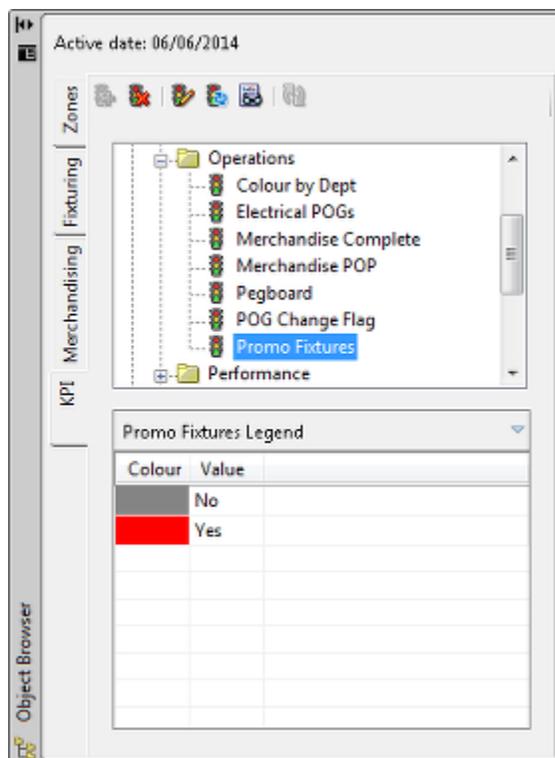


Zone KPIs will also display in the Merchandiser module. Objects not specific to the KPI in the Merchandiser module will display in a semi-transparent form. In the example below, the fixtures have been turned semi-opaque.

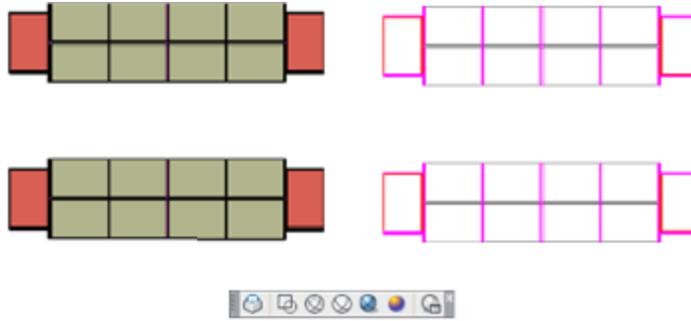


Fixtures

Fixtures can also be color coded by performance criteria. In the example below from the Planner module, fixtures designated as promotional fixtures have been color coded differently to standard fixtures.



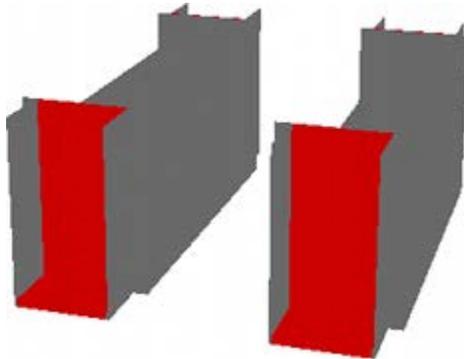
How Fixtures display in Planner depends on the visual style used. These can be changed using the visual style toolbar (shown below the fixtures).



The fixtures on the left are shown in conceptual visual style, the ones on the right in wire frame.

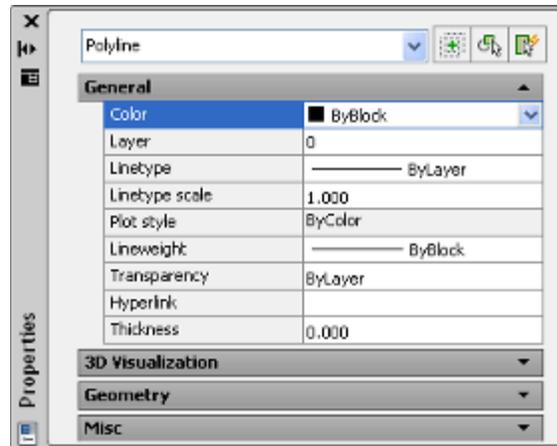
Note: If KPI's are displayed in wire frame mode, only the outlines of the fixture will color.

Fixture KPI's will also display in the Merchandiser module.



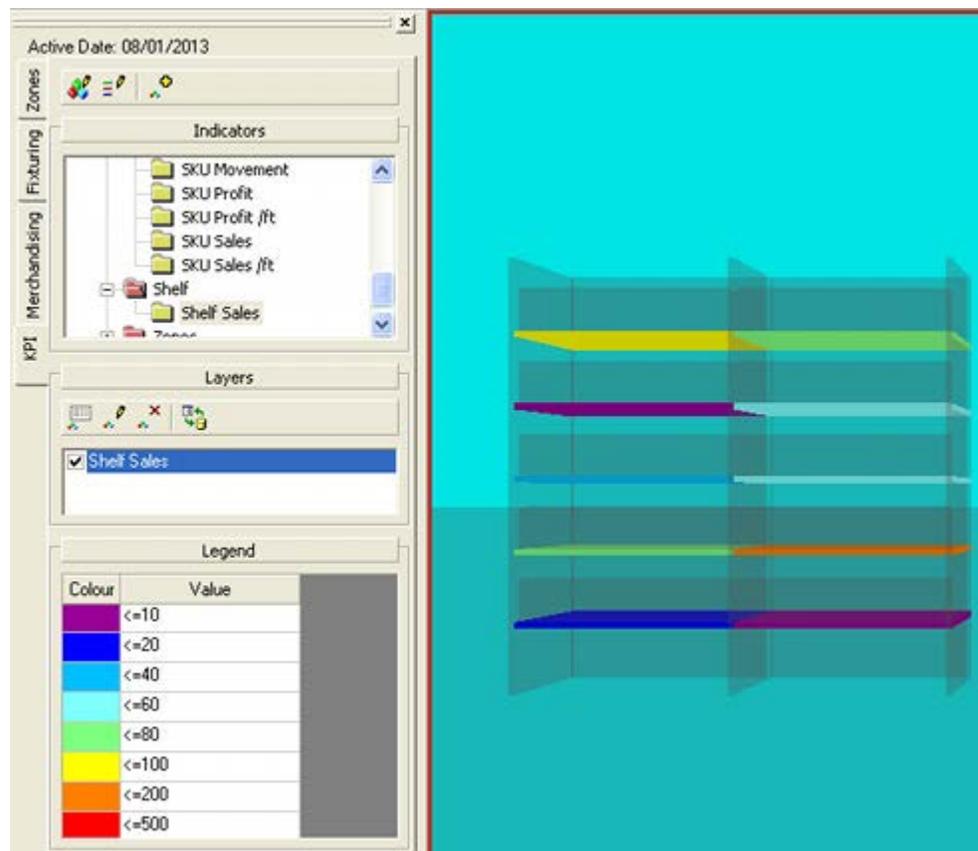
Fixtures and Coloring for KPIs in Planner

For fixture KPI's to work in Planner, the AutoCAD blocks used to represent the fixtures must have specific properties. Specifically, the block referenced by Fixture Studio must have the **Color** properties set to By Block. This enables individual fixtures to color as specified by the KPI functionality. If the Color property is left as the default (By Layer), the KPI will not work in Planner.



Shelves

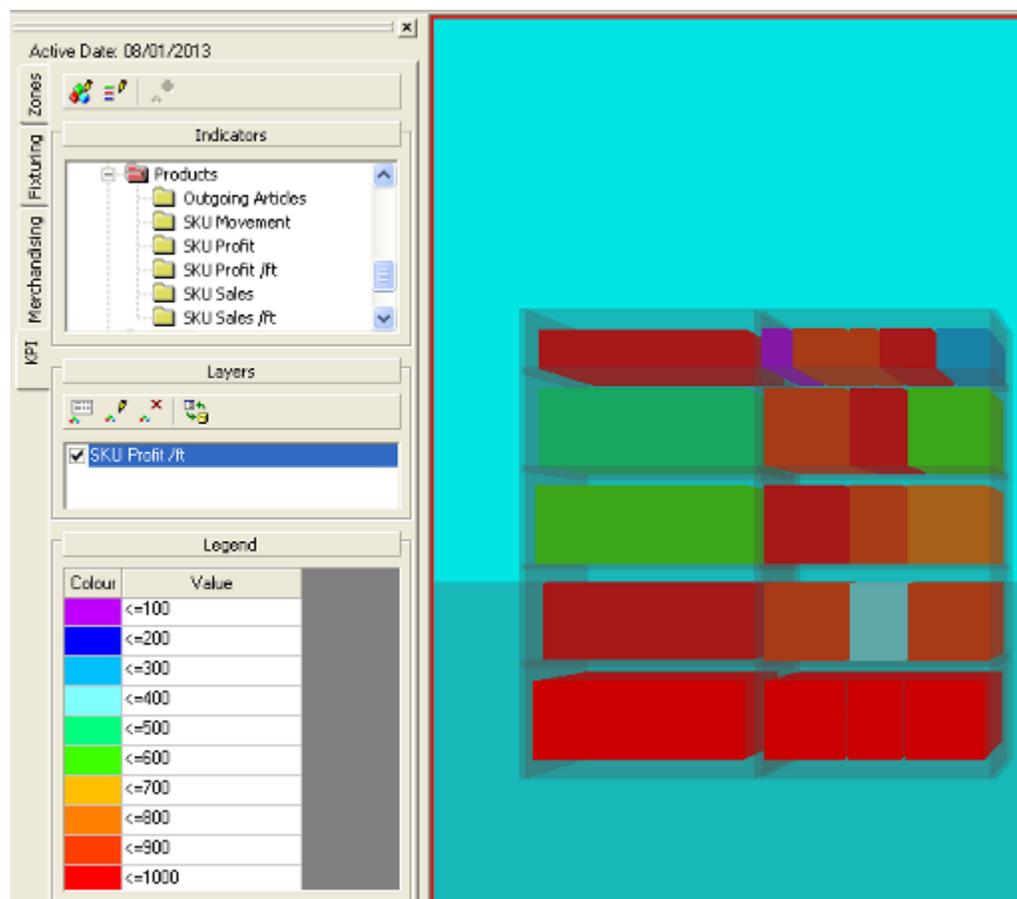
Shelf KPI's are generally only be used in the Merchandiser module. In this example the shelves on the fixtures have been color coded according to their performance. Objects not specific to the KPI will display in a semi-transparent form. In the example below, the fixtures have been turned semi-opaque.



An example of a Shelf KPI might be a book shop giving the performance of the genre of books each shelf contains.

Products

Product KPI's can only be used in the Merchandiser module. In this example the products on the shelves and fixtures have been color coded according to their performance. Objects not specific to the KPI will display in a semi-transparent form. In the example below, the fixtures and shelves have been turned semi-opaque.



Applying the KPI

This section shows how to run a KPI.

General Information on Using KPIs

KPIs are controlled from the Toolbar on the Object Browser.



Icon	Description	Purpose
	Add KPI	Apply the currently selected KPI in the hierarchy to the currently active floor plan.

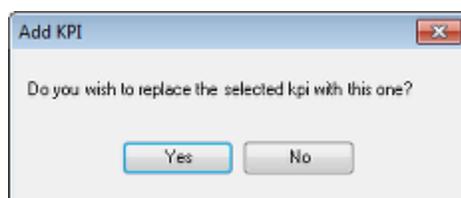
Icon	Description	Purpose
	Remove KPI	Clear the current KPI from the floor plan.
	Edit KPI	Edit the parameters for the currently active KPI.
	Refresh KPI	Refresh the data for the currently active KPI.
	View Data	View the data being used in the currently active KPI.
	Refresh All	Refresh the Object Browser with the latest information from the database.

When using KPIs, the following rules apply:

- Only one KPI can be run at a time on any one floor plan.
- Multiple floor plans can be open. Each open floor plan can have one KPI active. This KPI can be different for each floor plan.

Starting a KPI

To start a KPI, highlight the required KPI in the hierarchy on the Object Browser then click Add KPI on the toolbar. If a KPI is already in use a warning dialog box will appear.

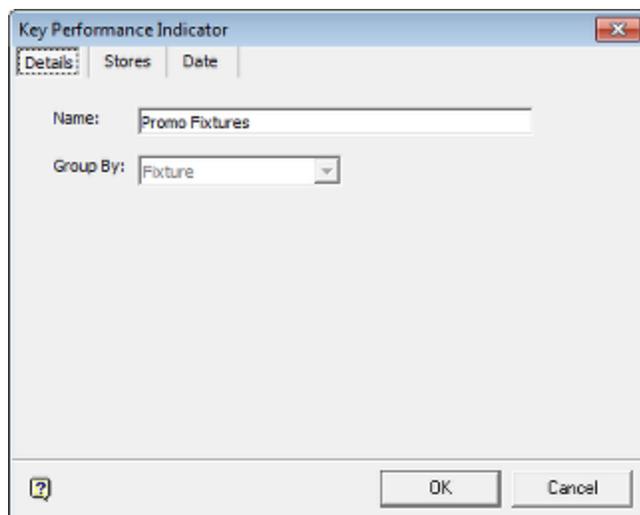


Clicking **Yes** will cause the current KPI to be replaced. Initiating the KPI will bring up the Key Performance Indicator dialog box. This has three Tabs.

Note: For the Planner module, generally only zone and fixture KPIs are appropriate. It is not generally possible to display meaningful KPIs or shelves or products at display style level.

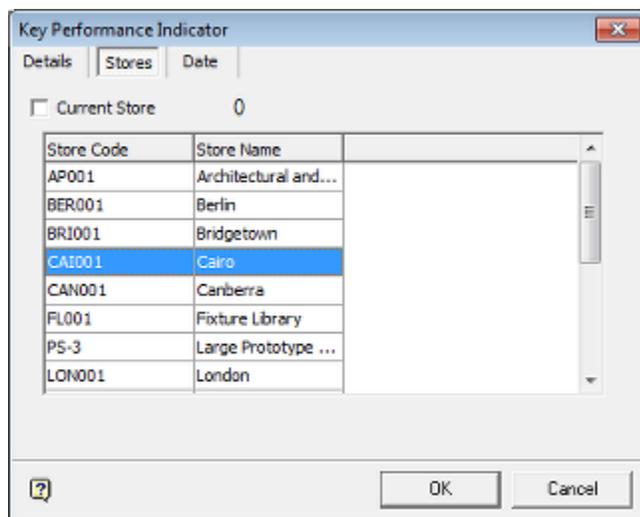
Details Tab

The **Details tab** allows the user to override the default name for the KPI by typing their own name into the **Name** text box.



Stores Tab

The **Stores Tab** allows the user to select data from another store and overlay that on the current store. It is activated by deselecting the Current Store check box and highlighting the required store.



In order to use this functionality, the query that powers the KPI must have been configured accordingly. Typically, data used will be general performance data associated with (for example) planograms. This data can be associated with the planograms physically placed in a new iteration of the floor plan to predict financial performance. This requires the SQL statement or stored procedure associated with the KPI to have been configured to use this planogram performance data. Selecting a store in the Stores tab is therefore only likely to be used for KPIs set up for very specific purposes by individual retail chains.

Note: As an example of the problems associated with using data from specified stores, KPIs based on Fixture IDs (FIX_ID) will not generally work. This is because fixtures in different drawings will not have comparable fixture IDs. However, planogram performance data can often be used because this can be related to the parent fixtures in the two different floor plans involved.

Date Tab

The **Date Tab** allows the user to select the date range for time sensitive data. The date ranges are linked to those specified in the Calendars option in the Administration module.

Date Options

- Effective Date sets the date to be used in the query to the Effective Date set for the floor plan (if previously defined). The Effective Date is set in the File Properties dialog box in Store Manager and will be available if the floor plan is at Authorised status or later.
- Current Date sets the date to be used in the query to the date the floor plan was made current. This is applicable if the floor plan is at Current status.
- Other Date enables the user to set a date using the calendar control activated from the drop down list.
- Active Date sets the date to be used in the query to the Active Date set for on the Object Browser (if previously defined).

Data Type

Data type specifies the date range the selected date is applicable to. The options are:

- All dates (no date range specified).
- Year
- Season
- Quarter
- Month
- Week

- Day

Using the Date Options and Data Type

The date options and data type are used in combination to find the data range required or the data. The date is the starting point. This can then be related to a specific calendar period containing that date. If for example, the date type is set to Month and the selected date is 14th March 2014, the query will return a specific Calendar ID (CAL_ID) from the database that can be used to select other data associated with that CAL_ID - for example performance data.

CAL_ID	CAL_PID	CAL_DESC	CAL_START_DATE	CAL_END_DATE	CAT_ID	ICO_ID	CAL_CODE
83	25 2013	Dec	08-DEC-13	05-JAN-14	4	48 2013	Dec
84	26 2014	Jan	12-JAN-14	02-FEB-14	4	48 2014	Jan
85	26 2014	Feb	09-FEB-14	02-MAR-14	4	48 2014	Feb
86	26 2014	Mar	09-MAR-14	30-MAR-14	4	48 2014	Mar

How the date options and data type are used depends on the sophistication of the query used

- Simpler queries (generally SQL statements) can be written for specific time periods - for example months. If the query is given a title such as Financial Performance (Month), the user will know to select Month in the data type drop down list in order for the KPI to work correctly.
- More complex procedures (generally stored procedures) can be written to select the calendar period based on the selection made in the data type drop down list. So (for example) if the user selected Quarter, the query would look for a CAL_ID in the Calendar table specifying the Quarter containing the required date. Conversely, if the user selected Month, the query would look for a CAL_ID in the database specifying the required Month.

Note: For more information on the Calendar table see the Oracle Retail Macro Space Planning Data Model.

Availability of Date Related Data

KPIs based on dates will only work if the correct data is present in, or has been imported into the database. For example queries on financial performance will only execute correctly if point of sale data aggregated to the correct time periods has first been imported into the appropriate tables referenced by the query.

Starting the KPI

After the appropriate selections have been made in the Key Performance Indicator dialog box, click OK. The KPI will start.

Viewing the Data

The Data for the currently active KPI can be viewed by clicking View Data on the Object Browser toolbar.



This will bring up the **Key Performance Indicator Data** dialog box. This contains the data used to color code the objects in the floor plan.

Fixture	Cost	Price	Movement	Indicator	Colour
F_5 - Basic Racking Fixture...	0	0	0	1.5	Red
F_24 - Basic Racking Fixtur...	0	0	0	1.5	Red
F_49 - Basic Racking Fixtur...	0	0	0	1.5	Red
F_30 - Basic Racking Fixtur...	0	0	0	1.5	Red
F_41 - Basic Racking Fixtur...	0	0	0	0	Grey
F_44 - Basic Racking Fixtur...	0	0	0	0	Grey
F_2 - Basic Racking Fixture...	0	0	0	0	Grey
F_47 - Basic Racking End T...	0	0	0	0	Grey
F_27 - Basic Racking Fixtur...	0	0	0	0	Grey
F_25 - Basic Racking End L...	0	0	0	0	Grey
F_7 - Basic Racking Fixture...	0	0	0	0	Grey
F_39 - Basic Racking Fixtur...	0	0	0	0	Grey

- The initial column will have an identifier for the object being colored. This will generally be a zone, fixture, shelf or product ID.
- Cost, Price and Movement are not currently enabled.
- Indicator is the value being used to decide the applicable band that a specific object falls into. This may either be a value determined directly from the database or a value calculated from a number of database values.
- Color is the color the object will be color coded relative to the value of the indicator.

Editing, Refreshing and Deleting the KPI

KPIs can be edited, refreshed and deleted.

Editing the KPI

To edit the KPI, click **Edit KPI** on the toolbar of the KPI tab of the Object Browser. This will bring up the **Key Performance Indicator** dialog Box. This enables the user to modify the options selected when the KPI was initiated. (See the section on adding a KPI for more information).

This enables the user to modify the store or date being used to select the data.

Refreshing the KPI

To refresh the values displayed in the KPI, click **Refresh KPI** on the toolbar of the KPI tab of the Object Browser. This will refresh the KPI with the latest values in the database. KPIs would normally be refreshed if dates or other data has been changed when the KPI was edited.

Deleting the KPI

To delete the KPI, click **Delete KPI** on the toolbar of the KPI tab of the Object Browser. The KPI will be removed without further confirmation.

Tips for KPIs in Planner

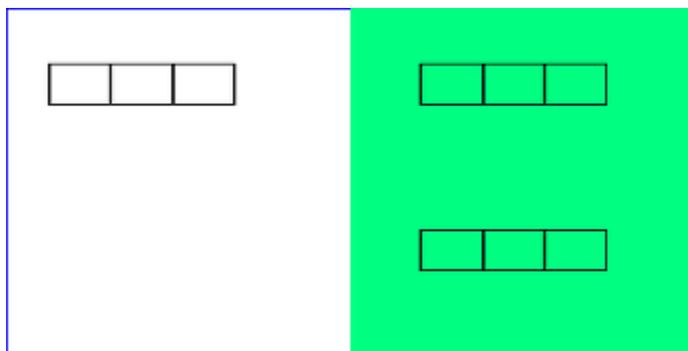
Two types of KPI are generally applicable in Planner: Zones and Fixtures. (It is unlikely that Shelf and Product KPI's will be used). There are a number of methods that can be used to maximize the visual impact of the KPI.

Layers

AutoCAD allows selected layers to be turned on or off. Turning off layers (such as the Placeholder layer in order to hide products) may make KPIs appear in a less cluttered form.

Zone KPI's

Zones can have hatch styles assigned. These can be turned on or off using the options in the toolbar of the zones tab on the Object Browser. Assigning a hatch to the zone and turning it on for the KPI makes the result far more visible.



In the above example, the zone KPI has hatching turned off for the zone on the left and turned on for the zone on the right.

Fixture KPI's

Fixtures are often displayed in wire frame mode. In this form, only the outline of the fixture is colored. This can make it difficult to see the color of the KPI. By changing to Conceptual visual style, the KPI displays in a clearer format (**View Menu > Visual Styles**).



In the above example, the upper set of fixtures is in **wire frame** mode, the lower in **conceptual** style.

Quick Reports

About Quick Reports

Quick Reports can be called from the View menu in the Planner and Merchandiser modules. Because each retailer will have a different slant on the information they wish to see during store planning, Quick Reports can be customized to user requirements. They are used to provide information on specific aspects of the currently active floor plan.

NAME	DESCRIPTION	BAYGROUP	BAYNUMBER	ACADHANDLE
I_BR_Fixture_36x24x72	Basic Racking Fixture 36 x 24 x 72	Food	F-16	149
I_BR_Fixture_36x24x72	Basic Racking Fixture 36 x 24 x 72	Food	F-18	FB
I_BR_Fixture_36x24x72	Basic Racking Fixture 36 x 24 x 72	Food	F-10	171
I_BR_Fixture_36x24x72	Basic Racking Fixture 36 x 24 x 72	Food	F-1	123
I_BR_Fixture_36x24x72	Basic Racking Fixture 36 x 24 x 72	Food	F-12	155
I_BR_Fixture_36x24x72	Basic Racking Fixture 36 x 24 x 72	Food	F-17	135
I_BR_Fixture_36x24x72	Basic Racking Fixture 36 x 24 x 72	Food	F-13	152

In the example above, a Quick Report has been configured to show all unpopulated fixtures in a floor plan. The store planner can then use the bay number or the highlight button on the toolbar to identify the fixtures.

Forms of Quick Reports

Quick Reports are of three broad types:

General Reports

These are reports that give general information from the database without being dependent on a floor plan or planogram being open. The example below shows a Quick Report developed to show which floor plans are currently checked out.

DATE CHECKED OUT	STORE CODE	STORE NAME	FLOOR	FILE NAME	STATUS	USER
22/08/2012 14:30:51	BR1001	Bridgetown	Ground Floor	Spring 2013	Proposed	Joe Bloggs
22/08/2012 14:32:32	BR1002	Brighton	Ground Floor	Summer 2013	Proposed	Jane Joe
22/08/2012 14:31:44	BR1001	Bridgetown	Ground Floor	Winter 2013	Proposed	John Smith
22/08/2012 14:33:34	OSL001	Oslo	Ground Floor	Fall 2013	Proposed	John Smith

Floor Plans

These are reports that give information on the currently active floor plan. The example below shows a comparison between planograms placed in the currently active floor plan and the designated prototype store.

NAME	PLANOGRAM GROUP	BASELINEAR	PROTOTYPE BASELINEAR
1_Bay_Carlsberg_Lager	Beers, Ciders and Lagers	5.8	2.9
1_Bay_Specialty_Beer	Beers, Ciders and Lagers	5.8	2.9
1_Bay_Heinz_Basic_Soups	Tinned Soup	2.9	5.8
1_Bay_Baxters_Favourite_Soups	Tinned Soup	2.9	5.8
4_Bay_Basic_Spirit_Planogram	Spirits	12	5.8
2_Bay_Red_and_White_Wine	Wines	5.8	5.8

Planograms

Quick Reports for Planograms can only be accessed when a planogram design is open for review in the Merchandiser Module. This form of Quick Report cannot be accessed from the Planner Module. In the example below, a simple Quick Report has been developed to list what products are present on what shelves in each planogram bay.

BAY	LOCATION	PRODUCT	FACINGS	DEPTH	STACK	TOTAL
BAY 1	FIXTURE	Wholegrain Rice 250g	3	23	2	138
BAY 1	FIXTURE	Vegetable Pilau Rice 250g	2	23	2	92
BAY 1	FIXTURE	Tomato & Basil Rice 250g	3	23	2	138
BAY 1	SHELF 1	Thai Sweet Chili Rice 250g	3	23	2	138
BAY 1	SHELF 1	Thai Curry Rice 250g	2	23	2	92
BAY 1	SHELF 1	Tandoori Rice 250g	3	23	2	138
BAY 1	SHELF 2	Spicy Mexican Rice 250g	3	23	2	138
BAY 1	SHELF 2	Special Fried Rice 250g	2	23	2	92
BAY 1	SHELF 2	Rice Chicken 250g	3	23	2	138
BAY 1	SHELF 4	Pilau Rice 250g	3	23	2	138
BAY 1	SHELF 4	Mushroom Rice 250g	2	23	2	92
BAY 1	SHELF 4	Long Grain Wild Rice 250g	3	23	2	138
BAY 1	SHELF 4	Long Grain Rice 250g	1	23	1	23
BAY 1	SHELF 4	Lemon-Rosemary Rice 250g	2	23	1	46
BAY 1	SHELF 4	Golden/Vegetable Rice 250g	1	23	1	23
BAY 1	SHELF 4	Egg Fried Rice 250g	2	23	1	46
BAY 1	SHELF 4	Chinese Style Rice 250g	2	23	1	46

Quick Reports and KPI's

Quick Reports and KPIs complement each other. KPIs can be used to visually display the same information that a Quick Report can display in tabular form. For example, fixtures generating high levels of sales can be seen at a glance - as can poorly performing ones. As the KPI shows performance date in bands, it could be complemented by a Quick Report showing detailed information for each fixture.

Configuring Quick Reports

Quick Reports are completely configurable by implementers or administrators with access to the Macro Space Planning (MSP) Database. Information on how to carry out this configuration is included with the *Macro Space Planning Data Model*. Anyone wishing to configure will need a good working knowledge of SQL and a detailed knowledge of the database schema.

What Quick Reports Can Be Used For

Quick Reports can be used to display any information in the database pertinent to store planning tasks. Some examples of potential uses:

Compliance

Compliance is verifying that the floor plan does not contain errors that may prevent the floor plan being correctly implemented when the floor plan is published and put into service. Example Quick Reports that are possible include:

Aisles

- Planograms that have a flow direction not appropriate for the aisles they have been placed in.

Equipment

- Items of equipment that are not due to come into service or will be taken out of service when the floor plan is implemented.
- Fixtures that have not been populated with merchandise or which have multi-placed planograms.

Merchandise

- Planograms on inappropriate fixtures; for example fixtures of the wrong size or wrong temperature range.
- Multi-placed planograms that require correction.

Zones

- Merchandise that is not appropriate for that zone - for example clothing in a Food and Drink zone.

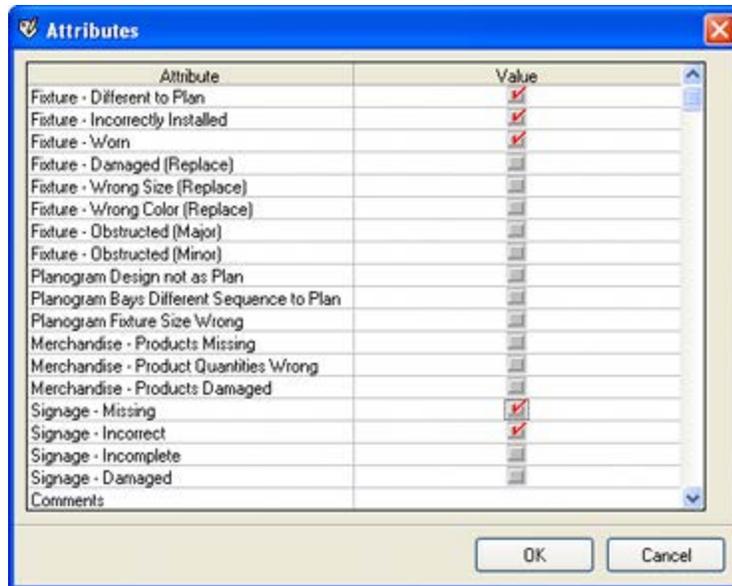
External Information

External information can be used as a basis for planning the currently active floor plan. Examples of such information include:

- Product Targets: information from an external application such as Category Management as to the types and quantities of merchandise that are recommended for placement in the floor plan.
- Comparison with Prototype Store: If a prototype store has been assigned, reports could compare the zones, fixtures, merchandise and financial performance of the currently active floor plan to its prototype.

Fixture Attributes

Customizable Fixture Attributes can be assigned to fixtures in a floor plan. This is done using the Fixture Attributes option in the Fixturing toolbar on the Object Browser.



These attributes can then be inspected on a 'fixture by fixture' basis in the floor plan by another store planner. It may be more convenient to create a quick report summarizing the information in the floor plan.

Performance Metrics

After Point of Sale data has been imported into the MSP database, this information can be used to give a variety of tabulated reports on performance of the currently active floor plan. Examples of such performance metrics include:

- Sales and profit by zone (department).
- Cumulative sales volume for a fixture.
- Cumulative sales volume for a fixture expressed relative to the area occupied by the fixture and the area of aisle allocated to it.
- Cumulative profit for a fixture.
- Cumulative profit for a fixture expressed relative to the area occupied by the fixture and the area of the aisle allocated to it.
- Best and worst performing products in the floor plan.

Planogram Substitutions

MSP can automatically substitute planograms in an existing floor plan and then publish that floor plan for implementation. Quick Reports could include:

- Planograms that were substituted and their bay numbers.
- Signage that will require changing as a result of the substitutions.

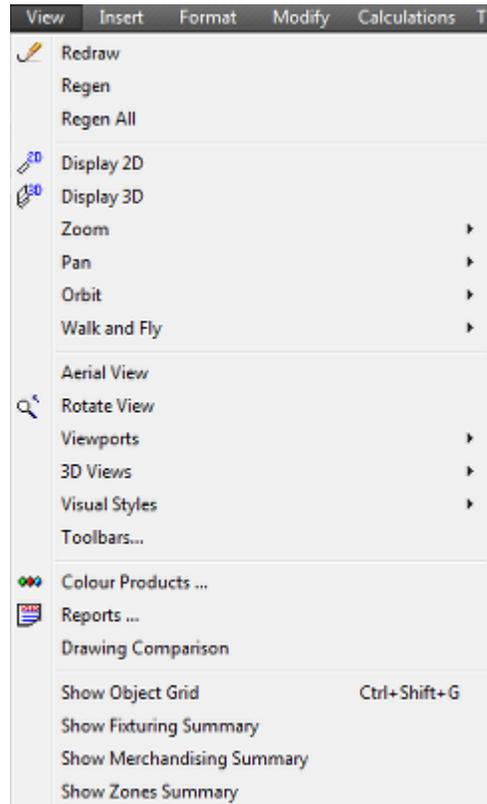
Promotional Fixtures

Promotional fixtures are fixtures that have been flagged in the MSP database as being in a position will generate high sales volumes. Examples include end caps, free standing bins for special offers and checkouts holding merchandise designed to induce impulse buys. It is possible to generate Quick Reports specific to these promotional fixtures

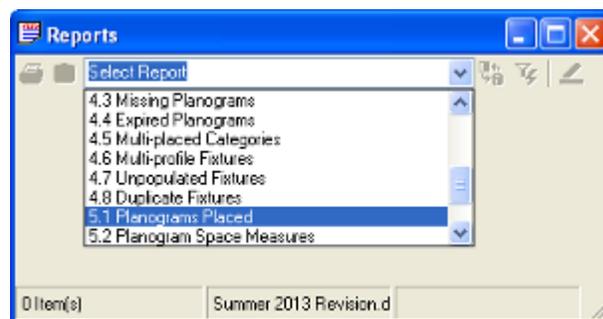
Note: The above list is not exhaustive. Any information in the database can potentially be used to give information on the currently active floor plan and hence improve some aspect of that floor plan.

Using Quick Reports

To open a Quick Report, select the **Report** option from the **View** menu.



This will bring up the **Quick Reports dialog box**. The required report can be selected from the drop down list. On clicking the selected report, it will open.



On clicking the selected report, it will open.

POG CODE	DESCRIPTION	GROUP NAME	LENGTH (FT)	DEPTH (IN)	HEIGHT (IN)	BAYS	INSTANCES
00000019	1 Bay Mixed Cola	Carbonated Drinks	3	24	72	1	1
00000015	1 Bay Bottled Pepsi	Carbonated Drinks	3	24	72	1	1
00000014	1 Bay Bottled Coke	Carbonated Drinks	3	24	72	1	1
00000056	4 Bay Mixed Soups	Tinned Soup	12	24	72	4	1
00000004	1 Bay White Wine	Wines	3	24	72	1	1
00000003	1 Bay Red Wine	Wines	3	24	72	1	1
00000037	1 Bay Specialty Beer	Beers, Ciders and Lagers	3	24	72	1	1
00000011	2 Bay Mixed Spirits	Spirits	6	24	72	2	1

Multiple reports can be open at one time by revisiting the view menu and selecting additional reports.

Dynamically Updating

Quick Reports do not dynamically update so, once opened, they will progressively lose accuracy as changes are made in the floor plan. To overcome this, Quick Reports can be instantly updated by clicking **Refresh** in the toolbar.

Synchronization

Quick Reports are based on information currently held in the database. They will not be accurate if differences exist between the currently open floor plan and the database. Examples of this include changes made to zones with AutoCAD tools and changes made to the database with Batch tools. If in any doubt, the Synchronize option should be used to ensure the information in the current Planner floor plan and the database is identical.

Quick Reports Toolbar

The Quick Reports toolbar has the following options:

Icon	Description	Comment
	Print	This option will print the current contents of the quick report to the default printer for the computer MSM is being run on.
	Copy to Clipboard	This option will copy the current contents of the report to the Windows clipboard. From there it can be pasted into other applications like Excel.
	Select report	This option allows a user to select an alternative Quick Report without closing the dialog box.
	Refresh	This option refreshes the quick report with the latest data held in the database. It also clears any filters that have been set.

Icon	Description	Comment
	Filter	This filters the data in the report to match the data in the currently highlighted cell. Multiple filters can be used, each refining the data.
	Highlight in Floor Plan	This option causes the selected object to highlight in the floor plan. For this to work in Planner the Quick report must contain the AutoCAD handle.