Oracle® Retail In-Store Space Collaboration

User Guide

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Oracle Retail In-Store Space Collaboration User Guide, Release 13.2

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Preface

This guide enables you to install the Oracle Retail In-Store Space Collaboration, along with the server-side components required for the application.

Audience

This User Guide is written for the following audiences:

- Database administrators (DBA)
- System analysts and designers
- Integrators and implementation staff

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Related Documents

For more information, see the following documents in the Oracle Retail In-Store Collaboration Release 13.2 documentation set:

- *Oracle Retail In-Store Space Collaboration Release Notes*
- *Oracle Retail In-Store Space Collaboration Online Help*

For more information on Macro Space Management see the following documents in the Oracle Retail In-Store Space Collaboration Release 13.2 documentation set:

- *Oracle Retail Macro Space Management Administration Guide*
- *Oracle Retail Macro Space Management Administration Online Help*
- *Oracle Retail Macro Space Management Configurations Guide*
- *Oracle Retail Macro Space Management Configurations Online Help*
- *Oracle Retail Macro Space Management Release Notes*
- *Oracle Retail Macro Space Management User Guide*
- *Oracle Retail Macro Space Management Online Help*
- *Oracle Retail Macro Space Management Advanced Users Guide*
- *Oracle Retail Macro Space Management Data Importer Online Help*
- *Oracle Retail Macro Space Planning Installation Guide*
- *Oracle Retail Macro Space Planning Licensing Information*

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- 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 or a later patch release. If you are installing the base release, additional patch, and bundled hot fix releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch and bundled hot fix releases can contain critical information related to the base release, as well as information about code changes since the base release.

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/technology/documentation/oracle_retail.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

The following text conventions are used in this document:

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

1

Introduction

In-Store Space Collaboration is a web enabled version of Macro Space Management. Along with an internet connection, it can be used to develop or edit store plans on site at the actual stores. This combination of internet based access with the use of small portable computers makes the software highly portable.

It provides access to store planning, merchandising, and performance information held within the central Macro Space Management database.

About In-Store Space Collaboration

In-Store Space Collaboration allows many of the functions of Macro Space Management to be carried out on site.

After logging in and selecting a store, you can:

- add, move, and delete fixtures and gondolas
- add, move, and delete products and planograms
- view KPI
- add mark-ups, dimensions, and notes to the store plan
- change the status of the store plan to reflect the work carried out within it
- identify planograms within a store by scanning bar codes on the products

Using a computer with a wireless internet connection, you can walk around the actual store and update the store plan in situ.

About Macro Space Management

In-Store Space Collaboration is a web module of Macro Space Management. It is made up of a series of interrelated modules.

The Planner and Merchandiser environments allow store planning to be carried out.

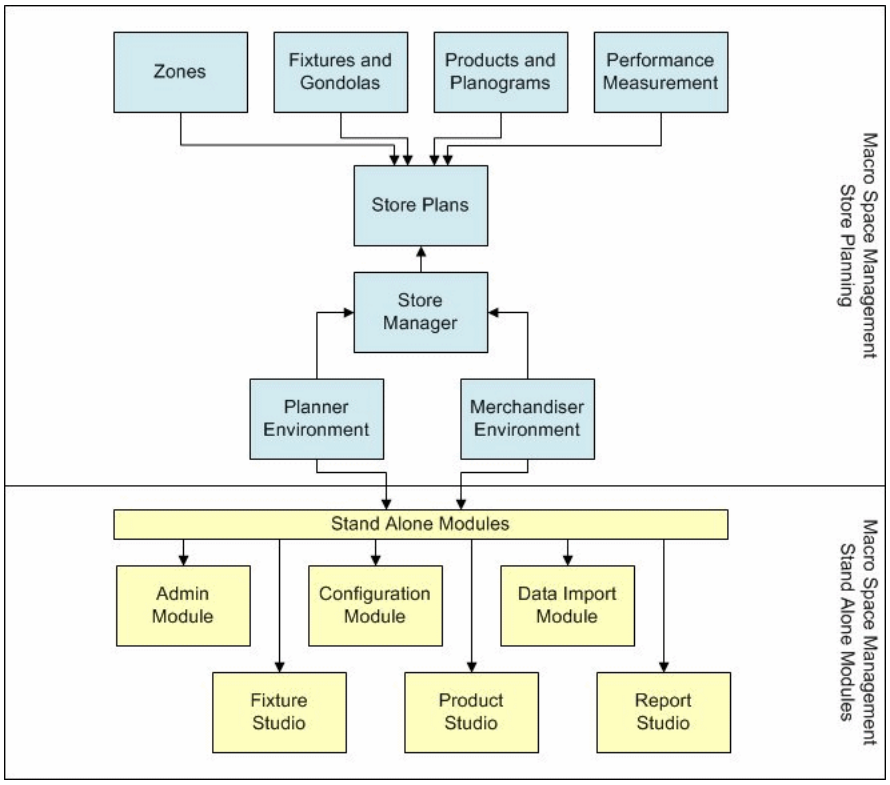
- Store Manager allows store plans to be administered and controlled.
- The store plans can be sub-divided into zones - areas for particular retail activities.
- The store can be laid out with fixtures and gondolas.
- The equipment can be merchandised with products or planograms.
- The performance of the completed store can be measured.

Stand alone modules support the Planner and Merchandiser environments.

- The Administration Module allows the overall operation of Macro Space Management to be configured.
- The Configuration allows you to configure how Macro Space Management operates for them.
- The Data Import module allows data to be brought in from other databases.
- Fixture Studio allows fixtures and gondolas to be configured.
- Product Studio allows products to be configured.
- Report Studio allows reports to be produced.

The results of all activities within Macro Space Management are stored within a central database.

Figure 1–1 Macro Space Management–Flowchart



Specific parts of this database can also be accessed using In-Store Space Collaboration to add fixtures, gondolas, products, and merchandise. You can also view KPI, which gives an immediate visual overview of the performance of the store layout that you working on.

Figure 1–2 Macro Space Management and In-Store Space Collaboration

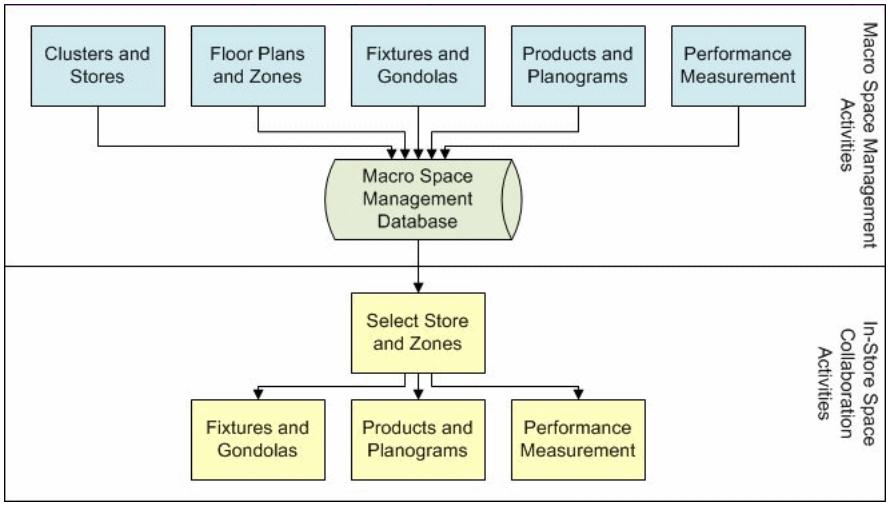


Table 1–1 In-Store Space Coilaboration and Macro Space Management

	In-Store Space Collaboration	Macro Space Management
Clusters and Stores	Arrange stores in a hierarchical tree using Store Manager.	Select store from hierarchical tree defined in Store Manager.
Floor Plans and Zones	Define zones (departments) in Admin Module. Place zones (departments) in a floor plan in the Zones Module.	Select required zones (departments) from those placed in the drawing in Macro Space Management.
Fixtures, fittings, and gondolas.	Create fixtures, fittings, and gondolas in Fixture Studio. Add, edit, and delete in drawing in both the Planner environment and Merchandiser.	Add fixtures, fittings, and gondolas in Fixtures Tab in In-Store Space Collaboration Object Browser.
Products and Planograms	Create products in Product Studio. Create planograms in Merchandiser. Place in drawing in Planner environment or in Merchandiser.	Add products and planograms in Planogram Tab in In-Store Space Collaboration Object Browser.
Key Performance Indicators (KPI).	Use KPI to view the performance of various retail outlets.	Select the KPI tab in In-Store Space Collaboration Object Browser to view the performance of various retail outlets.

Basic Computing Concepts

BASIC COMPUTING CONCEPTS gives you an introduction to some of the fundamental computing concepts.

- Server
- Client
- Network
- Database

- User Names, Passwords, and Privileges
- Checking in and Checking Out
- Read Only Files

Server

A Server is a computer system that provides services to other computer systems (called clients) over a network.

A server typically provides two basic types of service:

- It acts as a communications hub, allowing other computers to communicate with it and each other.
- It acts as a link to the common files that are used by a range of users over the network.

In In-Store Space Collaboration, the server links you to the central Macro space management database that holds all the information on the stores, floor plan, fixtures, merchandise, and KPI.

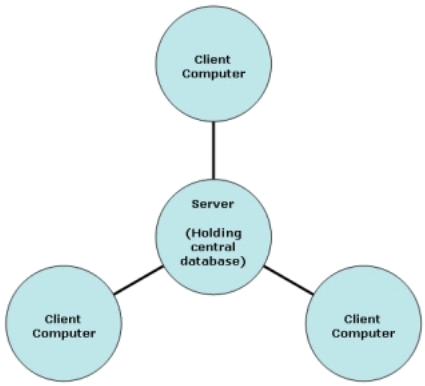
Client

A Client is a computer that accesses another remote computer, typically a server, over a network. The client computer can then work on the data it has obtained from the server. It can save the modified data back to the server.

Network

A computer network is a series of computers linked together by communication link.

Figure 1–3 Network



There are various types of networks. In-Store Space Collaboration uses a client-server type where servers contain the central database. Clients communicate with the server to get information, process it then save it back to the central database. The most common method of communication between client and server is by using Internet connection.

Software

Software is the generic term for a computer program. Both Macro Space Management and In-Store Space Collaboration are software. (They are also sometimes called applications)

They contain a series of instructions which are executed by the computer to carry out specific tasks. These tasks often involve manipulation of the information stored in the central Macro Space Management database.

Software is used in conjunction with the database; the database holds the information, the software is the method by which it is manipulated.

Database

A Database is a collection of information that has been organized in a highly structured manner. Data may be stored, retrieved, modified, and deleted in such a way that the integrity of the data is always maintained.

A database typically consists of a series of tables, each table containing a specific class of data. Within each table are records, each record consisting of one or more fields. Fields are the basic unit of data storage and generally are of a specific type such as text, numerical, boolean, etc.

When any data is added, edited, or deleted, the software first opens the appropriate table then makes changes to the appropriate records and fields. The database is then saved, ensuring that the latest version of the information is retained.

Safeguards are in place to ensure that only one person can change a particular part of the database at any one time. Information contained in the database can be used in two broad ways:

- Software - when a user is carrying out operations such as adding, editing, and deleting fixtures.
- Drawings, reports, and KPI - when you are seeking to collate and analyze information held in the database.

> **Note:** The database is used in conjunction with the software; the database holds the information, the software is the method by which it is manipulated.

User Names, Passwords, and Privileges

User Names are used to identify a specific user. They can be a combination of letters and numbers: JohnSmith and Sarah23 are valid User Names.

Passwords are information used to verify the credentials of a user when logging in. They are normally a combination of letters and numbers. To preserve confidentiality, passwords appear as asterisks when typed in. Typing in a password such as JimsHere will appear as ******** on the screen.

When a valid User Name and Password have been typed in, you will be logged in. When logged in, Privileges determine which part of the program you can access. Different users have different privileges.

Checking in and Checking out

The Macro Space Management database holds many files. It is important that only one person can make changes to a specific file at a given time. If more than one person makes changes to a file, the data will rapidly become confused and corrupted. This is overcome by Checking Out and Checking In files.

When an In-Store Space Collaboration file is opened, it is automatically registered as Checked Out. After a file is checked out, only you can alter the files. Other users can view the file in Read Only mode, but they cannot make any changes to it. Checked In files are files that have been closed (and normally saved) by their current user. Checked In files can be opened and altered by any In-Store Space Collaboration user.

Checking Out and Checking In are normally automatic, but some files may have to be manually checked in if there has been a system failure. Manual check in can only be done using Store Manager in Macro Space Management. You cannot manually check in files.

Read Only Files

Read Only Files are files you have permission to view but not to change.

Within In-Store Space Collaboration, a file is opened as Read Only when it has been set to Read Only status by Macro Space Management. An example would be files of Historical status.

2

Getting Started

This section gives you a quick tour of:

Software Requirements

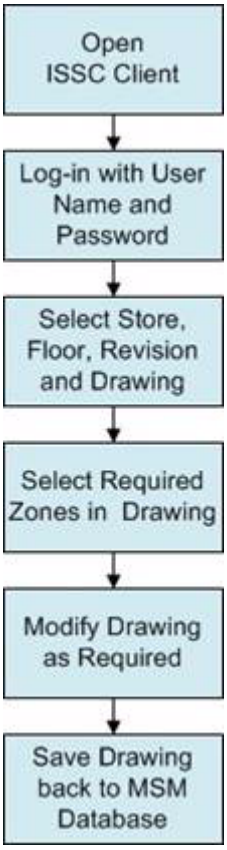
Before In-Store Space Collaboration can be used on your computer, the following must have been carried out:

- In-Store Space Collaboration Server must be installed and configured on the server machine and have a connection to the central Macro Space Management database. This will allow In-Store Space Collaboration to communicate with the database.
- In-Store Space Collaboration Client must be installed and configured on your computer. This will allow you to take date from the central Macro Space Management database, manipulate it, and send the updated data back to the central database.
- Appropriate user rights must be assigned to you by a Macro Space Management administrator. This will allow you to sign in to In-Store Space Collaboration with your personal User Name and Password.

In-Store Space Collaboration Process Flow

When using In-Store Space Collaboration, the following basic flow occurs.

Figure 2–1 In-Store Space Collaboration Process Flow



Opening In-Store Space Collaboration client

Opening the In-Store Space Collaboration client activates the software and establishes a connection with the server containing the central Macro Space Management database.

For this to be effective you must have an internet connection open and the In-Store Space Collaboration server software must be active on the server.

Logging in with User Name and Password

Logging in with your User Name and Password tells the software and the server you are an authorized user.

Selecting the Store, Floor, Revision, and Drawing

After logging in, a hierarchical tree containing all the valid drawings that you have access to is displayed. You can navigate through the branches of the hierarchical tree until you have selected the drawing you wish to work on.

Opening the drawing automatically locks it to other users, so only the person who has opened the drawing can make changes to it. (Although it can still be viewed by other users).

Selecting the Required Zones in Drawing

When the required drawing has been selected, another window opens allowing you to specify which zones (departments) you want to be displayed on the screen. Zones (departments) that are not selected will appear as blank areas.

Altering the drawing as required

You can view the drawing and then add, edit, and delete fixture, fittings, and gondolas. They can also add, edit, and delete products and planograms.

Finally, you can look at KPI, which give a quick visual indication as to how effective the store layout is.

Saving the drawing to Macro Space Management Database

Saving the drawing to the central database achieves two things.

- the changes made to the drawing are stored to the central database
- when the drawing is closed after saving it becomes available to other users to edit again.

Access Rights and Privileges

Access Rights to In-Store Space Collaboration are set in the Administration Module of Macro Space Management.

Users are assigned to User Groups. These user groups are then assigned access to specific stores.

As second factor controlling access in In-Store Space Collaboration is the status of the drawing within a store - you can only access drawings when they reach specified statuses within Macro Space Management.

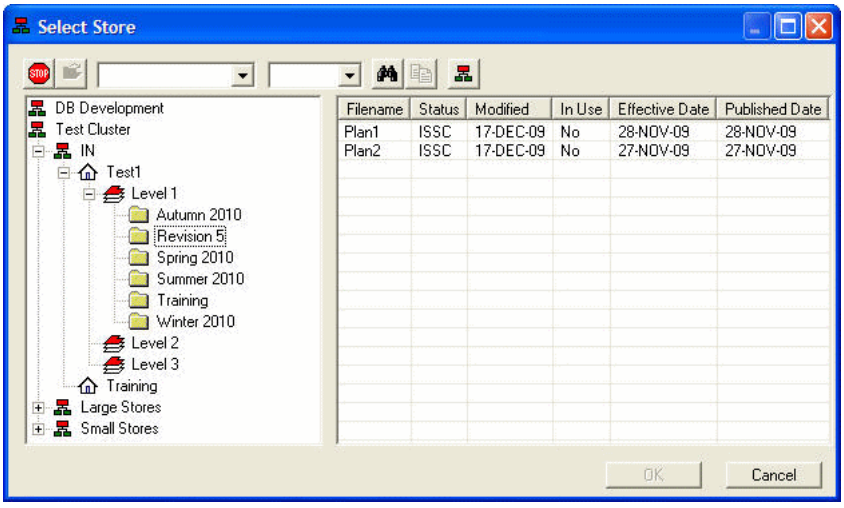
When logging into In-Store Space collaboration, you can only see the stores that you have been assigned access to, and which are at the required drawing status.

In-Store Space Collaboration Privileges

Access rights to In-Store Space Collaboration are set in the Administration Module of Macro Space Management. Users are assigned to User Groups. These user groups are then granted access to specific stores. Access to drawings in In-Store Space Collaboration is determined by the status of the drawing within the store: users can only access drawings when they reach specified statuses within Macro Space Management.

When logging into In-Store Space collaboration, you can only see the stores they have been assigned access to.

Figure 2–2 Select Store window



More about Privileges

The privileges (access rights) a user has are determined by you Group he/she is put into by an administrator. User Groups are defined within the Administration Module of Macro Space Management. As second factor controlling access in In-Store Space Collaboration is the status of the drawing within a store - users can only access drawings when they reach specified statuses within Macro Space Management. When logging into In-Store Space collaboration, users can only see the stores they have been assigned access to.

Assigning and Changing Passwords

Passwords are initially assigned in the Administration Module of Macro Space Management when a new user is given access rights by an Administrator.

This password can be changed by you at any time during login by clicking on the Change Password button. This will bring up an additional dialog that will allow you to select a new password.

Note: Passwords cannot be changed unless a currently valid User Name and Password are also entered.

Figure 2–3 In-Store Space Collaboration - Change Password

Depending on settings within the Administration Module within Macro Space Management, users may also be forced to change passwords at preset intervals.

Logging In

When In-Store Space Collaboration Client is started, a login window opens. You will be asked for a User Name and a Password.

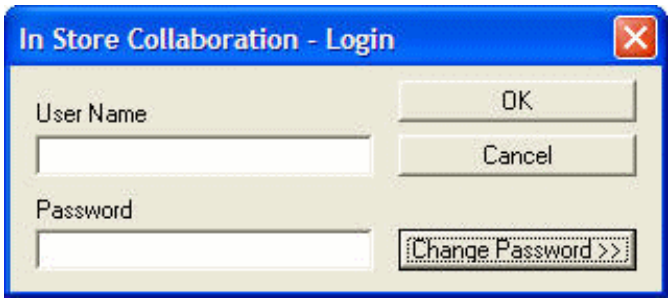
You Name identifies the individual and specifies the privileges (access rights) they have. The Password, which should be kept secret, confirms the identity of the individual logging in.

Note: User Names and Passwords are assigned in the Administration module of Macro Space Management.

To login to In-Store Space Collaboration:

1. Click In-Store Space Collaboration Client on the desktop. The In-Store Space Collaboration - Login window opens.

Figure 2–4 In-Store Space Collaboration - Login

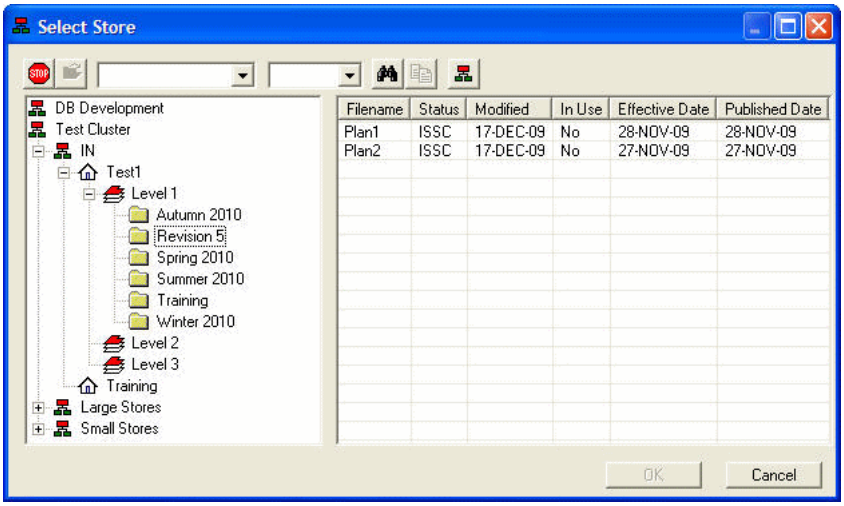


2. Enter your user name and password.

Selecting the Store Data

The Select Store window opens after you Name and Password have been entered. To view a particular store data, you must first select a store and then select the data within the store.

Figure 2–5 Select Store



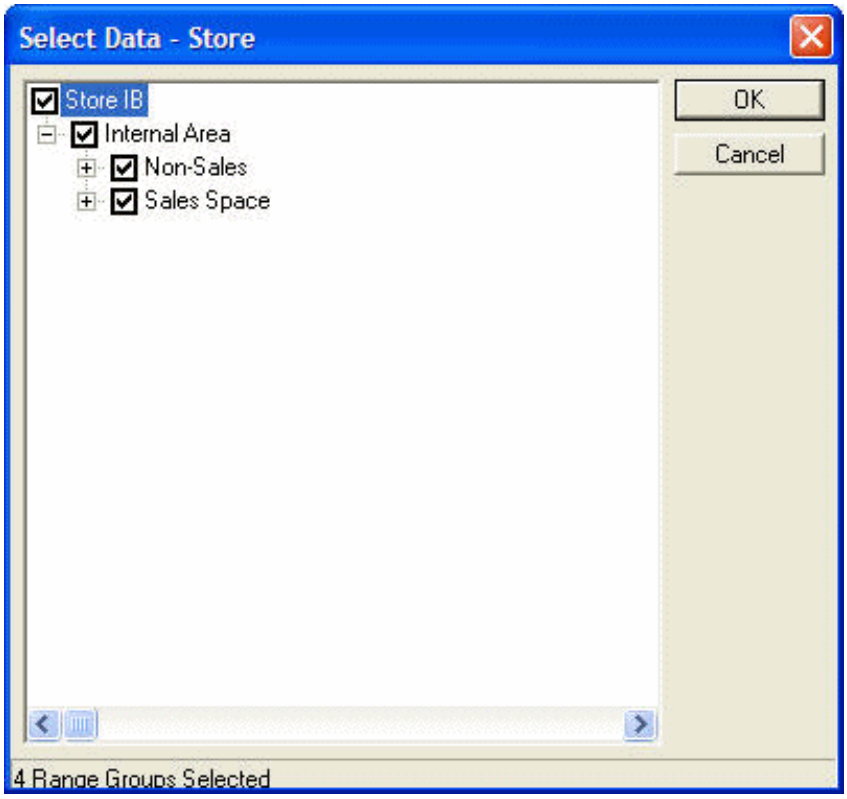
The following icons represent the type of object within the hierarchy.

Note: Click + to expand, and - to collapse the hierarchy.

To select the store data:

1. After logging into the In-Store Space Collaboration Client, select the store plan from the Select Store window.
2. Click **OK**. The Select Data - Store window opens.

Figure 2–6 Select Data - Store



3. Select the data to be displayed in the drawing.
4. Click OK. The selected drawing opens in In-Store Space Collaboration.

The information visible in the hierarchy will depend on two factors:

- The access rights granted to the individual user. Only stores for which you has viewing permission will be displayed.
- The setting of the IN-STORE_STORE_LEVEL_SELECTION system variable. This determines how many levels are shown in the hierarchy.

Any drawing can then be selected for editing. If necessary the search fields can be used.

To search by Store Name:

1. On the **Select Store** window, type the Store name.
2. Click **Search**.

It is possible to use wild cards. For example *ham will return store names such as Birmingham or Nottingham. *ham* would return names such as Northampton or Southampton. If there are multiple results to the search, clicking on the search icon will cycle between the possibilities.

To search by Store Number:

1. On the **Select Store** window, enter the required store number.
2. Click **Search**.

Wildcards are not permitted while searching by store number. Continue down the hierarchical tree until the required drawing has been selected. After the drawing has been selected, click **OK**. The data selection dialog box opens.

Once the data store is selected, the drawing opens in the In-Store Space Collaboration Window

> **Note:** The status of the drawing is indicated in brackets after the drawing. Only drawings that are checked in (i.e. not in use by another person) can be opened.

After the drawing is selected and opened, the drawing will be unavailable to other users as the drawing is automatically checked out.

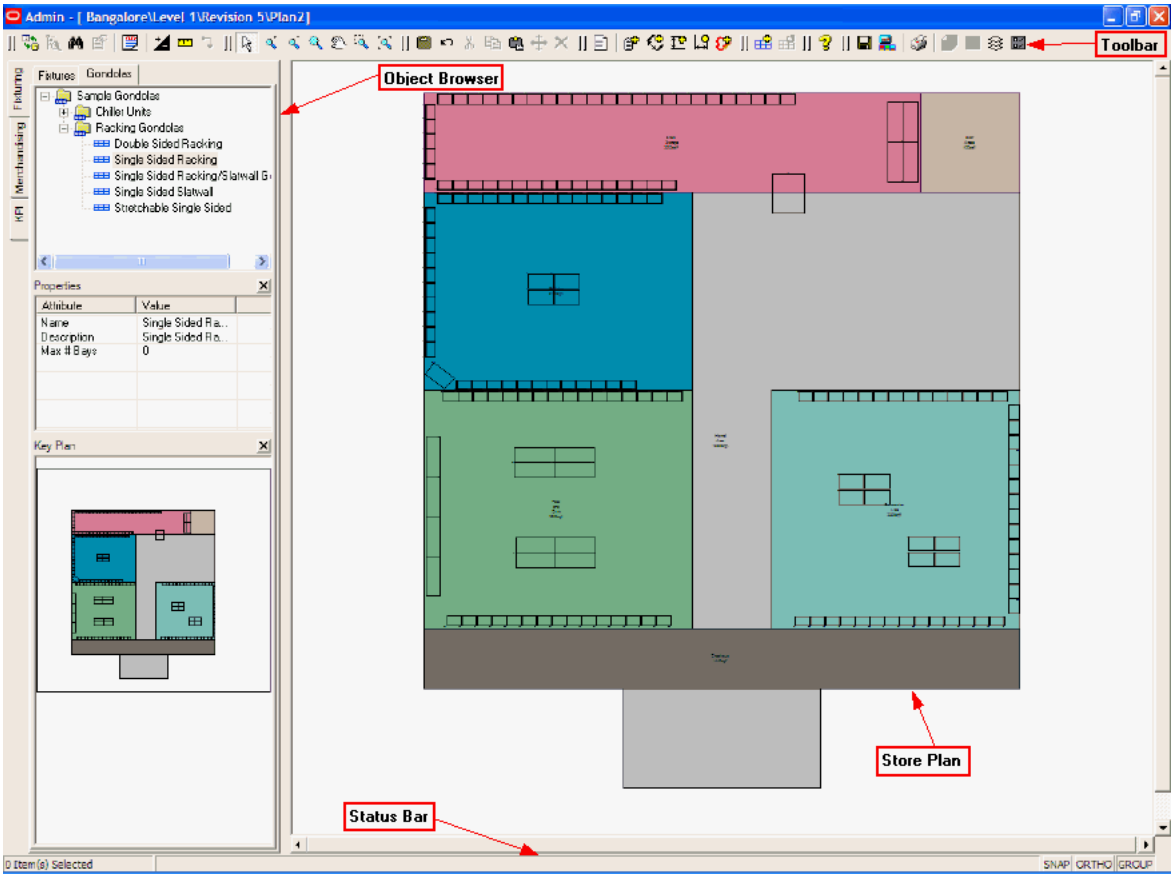
To close the application, click **Close** or **Cancel**.

The In-Store Space Collaboration Window

The In-Store Space Collaboration window gives access to every component you has permission to use.

- The Toolbar
- The Object Browser
- The Store Plan
- The Status Bar

Figure 2–7 In-Store Space Collaboration window



The Toolbar

Located at the top of the window, the toolbar gives access to a wide range of In-Store Space Collaboration functions. (Different users may have access to slightly different options on the toolbar - this depends on the settings for the parent User Group in Macro Space Manager).

The Object Browser

You can switch between Fixturing, Merchandising, and Performance Measuring options using the Object Browser. Windows within the Object Browser give further information on the objects currently selected.

The Store Plan

The Store Plan is a plan view of a selected floor within a store. Depending on the selections made you can:

- View, add, edit, and delete fixtures, fittings, and gondolas.
- View, add, edit, and delete products and planograms.
- Use scanning or manual entries to update information on which planograms are physically present in a store.
- View KPI's.

The Status Bar

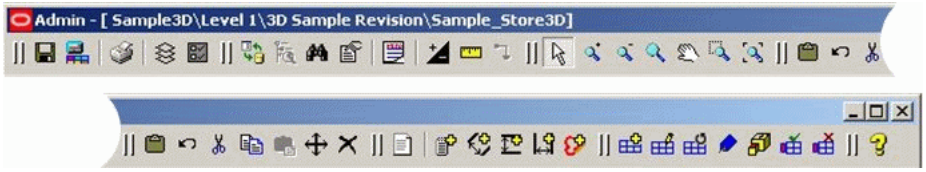
The Status Bar is located at the bottom of the window. It serves two purposes:

- It allows the options such as Snap, Ortho, and Group to be toggled On and Off.
- It gives information on the objects selected and the next action required to manipulate them.

The Toolbar

Located at the top of the window, the toolbar gives access to a wide range of In-Store Space Collaboration functions. (Different users may have access to slightly different options on the toolbar - this depends on the settings for the parent User Group in Macro Space Manager).

Figure 2–8 The Toolbar



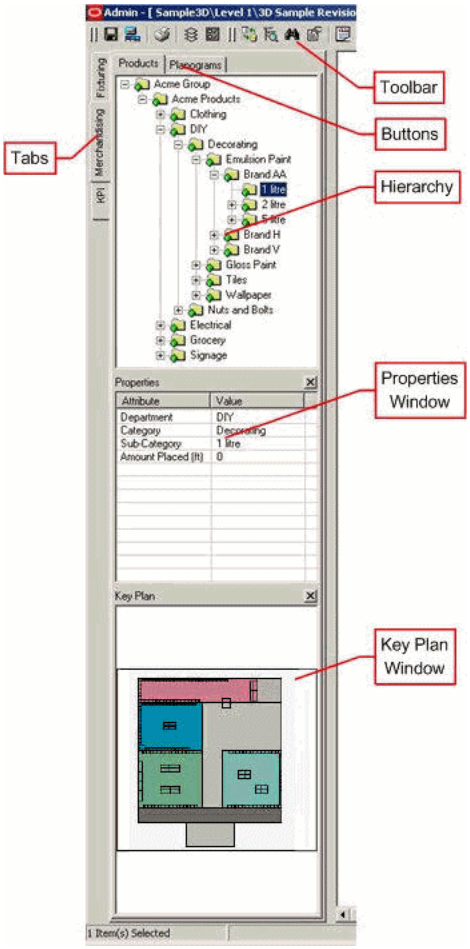
A slightly different toolbar is displayed depending on whether Fixturing, Merchandising, or KPI have been selected on the Object Browser. The Fixture tab under Fixturing is the default tab selected.

Each icon along the top represents a potential action that can be carried out. Not all actions will be possible at any one time. Those that are not possible will have the icons grayed out. Icons that are active (can be used) are colored.

The Object Browser

You can switch between Fixturing, Merchandising, and Performance Measuring options using the Object Browser. Windows within the Object Browser give further information on the objects currently selected.

Figure 2–9 The Object Browser



You can switch between tabs by using the Fixturing, Merchandising, and KPI tabs to the upper left. Switching between options also changes the toolbars that are visible - for example, the fixturing toolbar is different from the KPI toolbar.

For both the Fixturing and Merchandising Tabs, two more tabs are available on the top of the object browser. These allow you to switch between fixtures and gondolas in Fixturing, and products and planograms in Merchandising. Windows within the object browser typically gives you access to more information.

A hierarchical view gives users access to the available fixtures, gondolas, products, planograms and KPI. The properties of the selected object can be seen in the Properties Window. The Key Plan Window will show users where they are in the Store Plan.

The Store Plan

The Store Plan is a plan view of a selected floor within a store. Depending on the selections made you can:

- view, add, edit, and delete fixtures, fittings, and gondolas.
- view, add, edit, and delete products and planograms.
- use scanning or manual entries to update information on which planograms are physically present in a store.
- view KPI.

The Store Plan

The Store Plan gives a simplified 2D plan view of the specified floor of the Store.

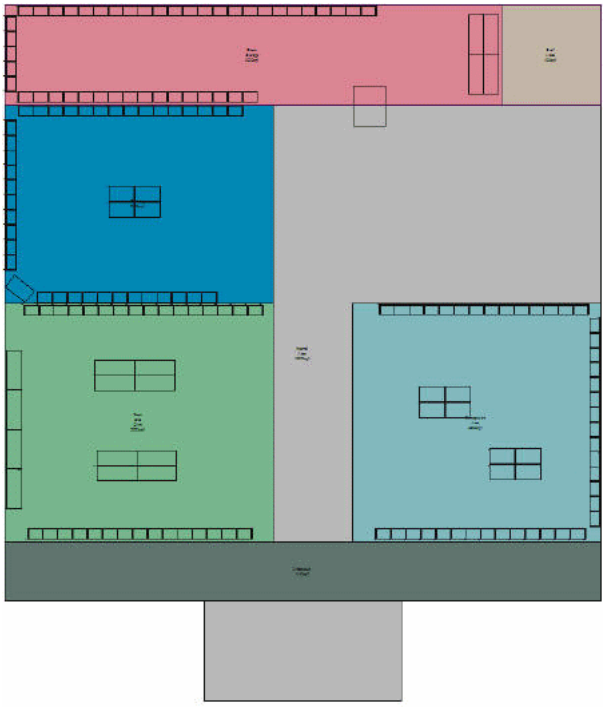
Depending on what Tab has been selected in the Object Browser the view will show:

- a view of the floor plan with the fixtures, fittings, and gondolas showing.
- a view of the floor plan with the merchandise placed on the fixtures and gondolas showing.
- a view of the floor plan with the fixtures and gondolas color coded with the selected KPI's.

The scale of the drawing can be changed by using the various zoom in and zoom out options, while the drawing can be moved left, right, up, and down by using the panning option.

The Store Plan will show the floor plan broken up into a series of Zones (Departments). Each department has its own color code as defined in the Macro Space Management Administration Module.

Depending on the choices made during selecting data, departments may or may not show details of fixtures and merchandise.



The Status Bar

The Status Bar is located at the bottom of the window. It serves two purposes:

- It allows the options such as Snap, Ortho, and Group to be toggled On and/or Off.
- It gives information on the objects selected and the next action required to manipulate them.

Figure 2–10 The Status Bar

Fixturing Options

Fixturing Operations can be activated by clicking on the Fixturing Tab in the Object Browser. This changes the toolbar to options associated with fixturing.

Fixture Options

Fixturing operations in In-Store Space Collaboration allow some (but not all) of the operations possible in Macro Space Management to be carried out.

Note: Fixturing activities that can only be carried out in Macro Space Management include:

- creation of fixtures, fitting, and gondolas.
- editing the properties of those fixtures, fittings, and gondolas.
- creating and maintaining the hierarchical tree of fixtures, fittings, and gondolas.

Merchandising Options

Merchandising Operations can be activated by clicking on the Merchandising Tab in the Object Browser. This changes the toolbar to options associated with fixturing.

Merchandising operations in In-Store Space Collaboration allow some (but not all) of the operations possible in Macro Space Management to be carried out.

Note: Merchandising activities that can only be carried out in Macro Space Management include:

- creation of products and planograms
- editing the properties of those products and planograms
- creating and maintaining the hierarchical tree of products and planograms

---

KPI

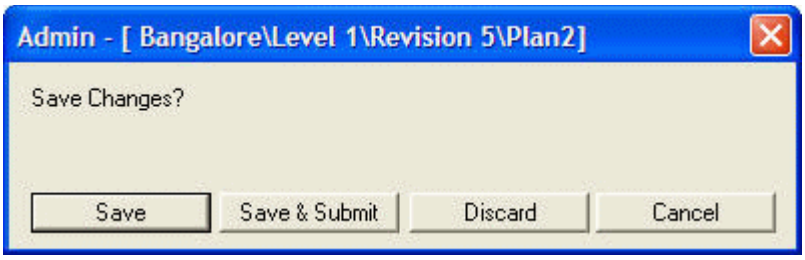
Key Performance Indicators (KPI) are visual indications of the performance of the store. Any number of KPI can be set up in Macro Space Management. When this KPI is selected, the fixtures on the drawing are automatically color-coded.

With the help of KPIs, the performance of the merchandise can be easily monitored.

Saving and Closing

When saving and closing a dialog box will appear.

Figure 2–11 Saving and Closing



Basic In-Store Space Collaboration Concepts

Basic In-Store Space Collaboration Concepts covers a number of fundamental ideas essential to the understanding of In-Store Space Collaboration.

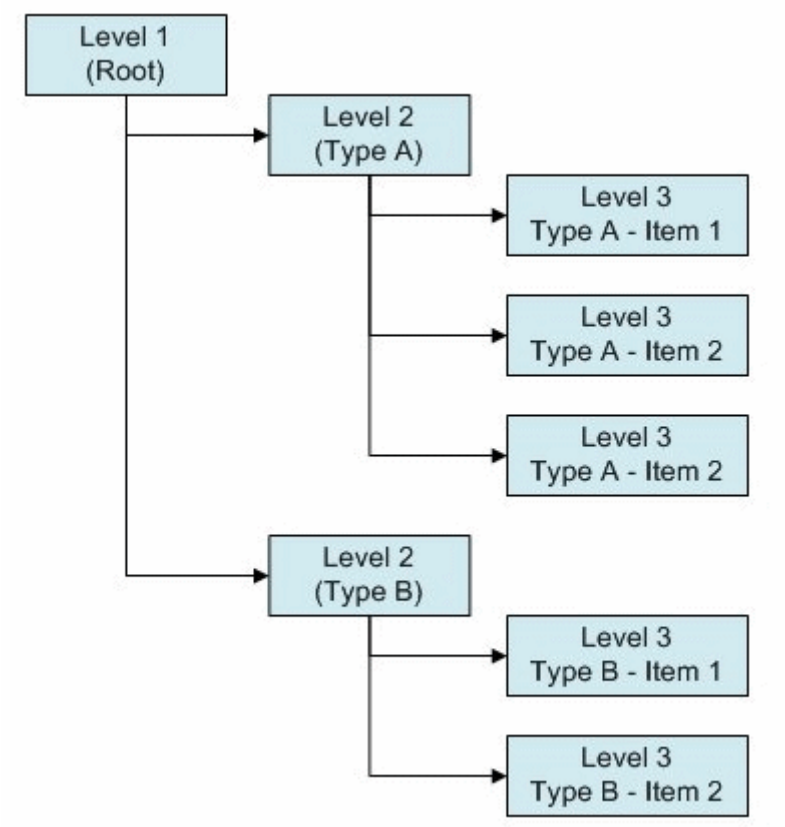
The following concepts are explained in this section:

- Hierarchical Tree
- Clusters, Stores, and Floors
- Zones and Departments
- Revisions, Drawings, and Status
- Fixtures and Fittings
- Gondolas
- Parts
- Shelves
- Products
- Planograms

Hierarchical Tree

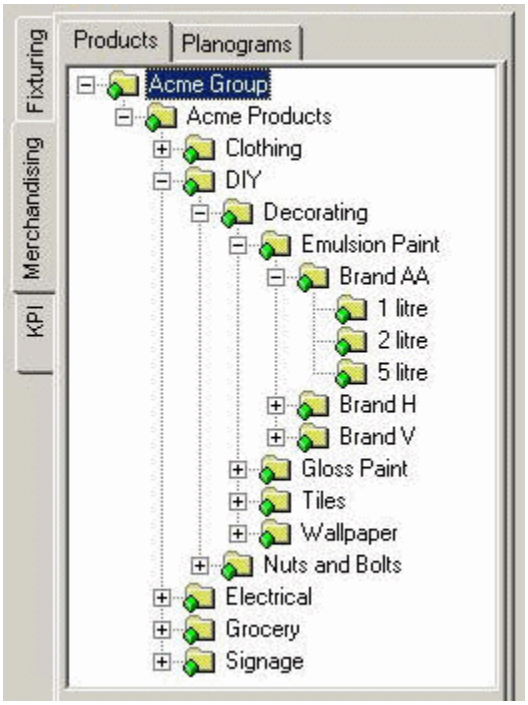
A hierarchical tree (so called because it resembles a tree) is a way of organizing objects in a logical pattern.

Figure 2–12 Heirarchicy Flow Chart - Example



The top level of the hierarchy (often called the root) is essentially the start point. The tree then splits out into more levels.

Figure 2–13 Hierarchical Tree



Working down through the levels of the tree enables you to find a specified item from a large list of potential objects.

Macro Space Management and In-Store Space Collaboration make considerable use of hierarchical trees.

Clusters, Stores, and Floors

Clusters, sub-clusters, stores, floors, revisions, and drawings are all forms of information used in In-Store Space Collaboration. They are organized in a hierarchical tree. (This tree can only be modified in Macro Space Management).

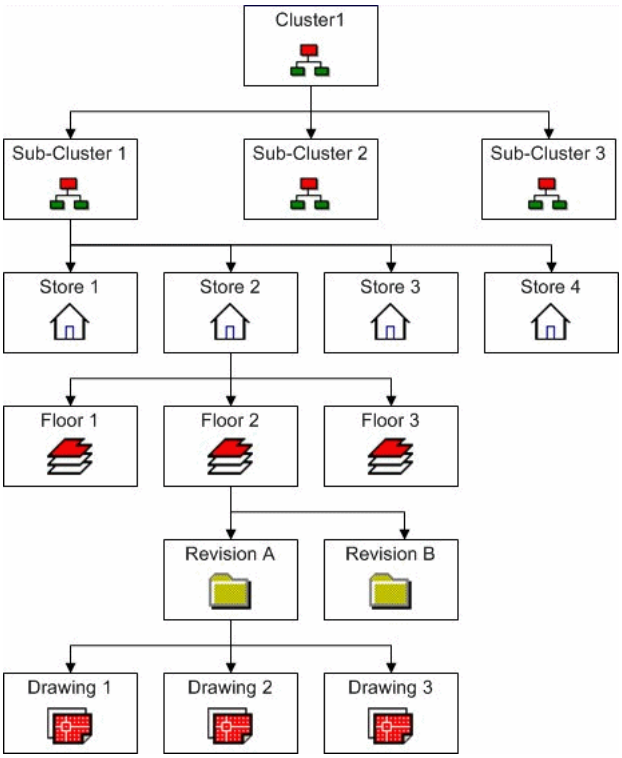


Table 2–1 Clusters, Stores, Floors

Field	Description	Example
Cluster	A Cluster is a group of stores sharing a particular characteristic.	For example, one cluster might contain all the stores in England, another cluster all the stores in Sweden.
Sub-cluster	A Sub-cluster is a subdivision of a cluster containing stores that share a common but more precisely specified characteristic.	For example, the England cluster might contain sub-clusters called Southern Region, Central Region, and Northern Region.
Store	A Store is a retail outlet. Although stores occasionally appear directly in the hierarchy, they are normally assigned to clusters or sub clusters.	For example, the London store could be assigned to the Southern Region sub-cluster, while the Birmingham store could be assigned to the Central Region sub-cluster.
Floor	A Floor is a physical level in a store.	A store can contain any number of floors. For example, a store might have a Ground, First, and Second floor.

Table 2–1 (Cont.) Clusters, Stores, Floors

Field	Description	Example
Revisions	Each floor can contain a number of Revisions.	Each revision is a potential arrangement of fixtures and merchandise. For example, a floor might have Spring, Summer, Autumn, and Winter revisions. Only one revision will actually be in use at any one time.
Drawings	Each revision can contain a number of Drawings.	Each of these drawings can contain a potential arrangement of fixtures and merchandise.

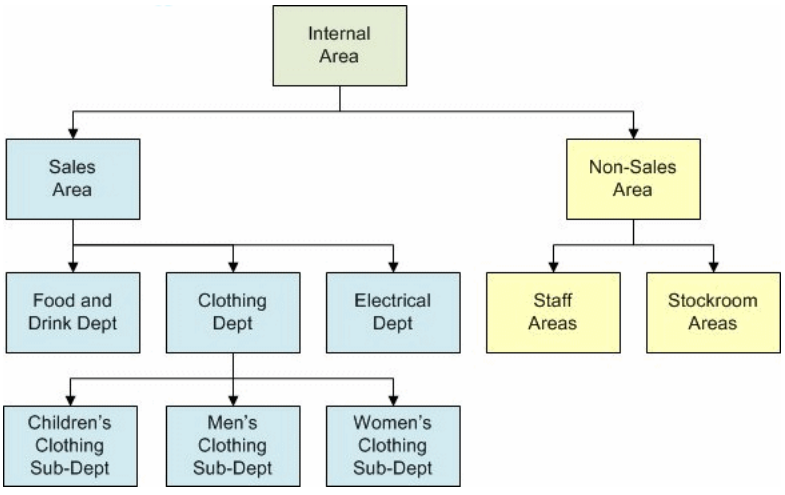
Note: Stores can be assigned to multiple clusters. For example, the London store could be assigned to both the England cluster and the Central Region sub-cluster. This ability to assign stores to more than one cluster is only used within Macro Space Management, but it will be reflected in the hierarchical structure visible in In-Store Space Collaboration. This form of hierarchical tree can be seen when the In-Store Space Collaboration user selects a drawing.

Zones and Departments

Zones (Departments) are a way of sub-dividing a floor plan.

Note: The words Zone and Department are often used interchangeably and mean the same thing. Zones can only be modified in Macro Space Management

Like many other features of In-Store Space Collaboration the information is presented in the form of a hierarchical tree.



Internal Areas

Many floor plans are drawn using the architectural plan as a template. The maximum area that can be used for retailing purposes can be set in Macro Space Management. This basic area is often called the Internal Area.

Sales and Non-Sales areas

Internal Areas are often subdivided into two broad classes of zone. Sales Areas are areas containing merchandise for sale.

For example, Clothing, and Electrical departments.

Non-Sales areas are areas essential to the functioning of the store, but which are not directly used for sales.

For Example, Staff Areas (canteens, offices, etc), and stockrooms.

Departments and Zones

Sales and Non-Sales areas can be further subdivided using Departments and Sub Departments.

For example, the Sales area might contain Food and Drink, Clothing and Electrical departments.

The Clothing department could be further divided into Children's, Men's Wear and Women's wear sub-departments.

Each level of division divides the floor areas into smaller and smaller areas of ever more specific use.

Note: This form of hierarchical tree can be seen in In-Store Space Collaboration when you select the parts of the drawing required.

Revisions, Drawings, and Status

Status is a concept used in Macro Space Management to define where an object is in the business cycle. Some ways of saving In-Store Space Collaboration drawings change the status of that drawing within Macro Space Management.

Stores, floors, revisions, and drawings can all have statuses. These describe the condition of use of that object and often reflect their progress through the business cycle.

Status is customizable, but typical status's include:

Table 2–2 Revisions, Drawings, and Status

Object	Potential statuses
Store	Proposed à Open à Closed
Floor	Proposed à Open à Closed
Revision	Proposed à Authorized à Current à Historical
Drawing	Proposed à Authorized à Current à Historical

For example a recently created drawing might start with Proposed status.

After review by a manager it might be given Authorized status.

At a specific date the drawing would be implemented on the store floor and would be Current.

When the drawing is eventually superseded by another arrangement of fixtures and merchandise it will be retired from use and given Historical status.

Fixtures and Fittings

Fixtures and fittings are individual items of store equipment. A Fixture is an item of store equipment that can hold merchandise.

A Fitting is an item of store equipment that cannot hold merchandise.

Table 2–3 Fixtures and Fittings

Examples of Fixtures	Examples of Fittings
Chilled Goods Cabinet	Checkout
Frozen Goods Cabinet	Mirrors for fitting rooms
Clothing Rail	Tables and chairs for café.
Shelving for canned goods	Racking for advertising material.

Gondolas

A Gondola is a collection of fixtures and fittings assembled into a permanently connected arrangement.

Parts

Parts are used within Macro Space Management to build up fixtures and fittings.

Examples of parts include bolts, wheels and rails.

When a fixture or fitting is subsequently ordered, all the associated parts can automatically added to the purchase.

Products

Products are individual classes of merchandise.

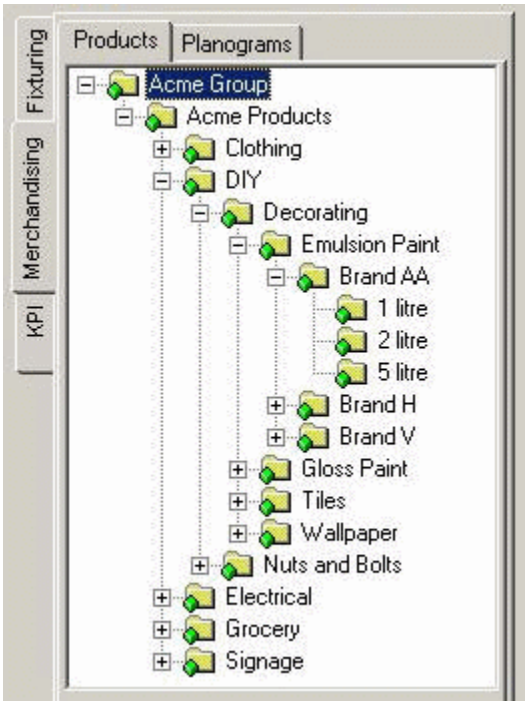
Examples of products include sparkling water, bananas, and baby wipes.

Products are arranged in a hierarchy - the closer to the root, the broader the class.

For example, one group of products might be called DIY. This group could then be further sub-divided at the next level down into Decorating, Nuts and Bolts, etc.

The Decorating accessories product group can then be sub-divided once more into emulsion, gloss paint, etc.

Figure 2–14 Products Hierarchy



Shelves

Shelves are store equipments on which products can be placed. Shelves must always have a parent fixture.

Planograms

Planograms are specific arrangements of combinations of products that are designed to go on single or multiple fixtures.

Planograms can also contain a specific arrangement of shelves for optimum display of products.

For example a Soup planogram might contain specific quantities of chicken and vegetable, beef and vegetable, spring vegetable, potato and leek, bacon and lentil, clam chowder and tuna and sweet corn soups.

These could be arranged on a specific shelving layout.

System Variables

System Variables are settings within Macro Space Management that affect how In-Store Space Collaboration looks and operate. They are set in the Administration Module.

In-Store Space Collaboration users cannot access these settings, but they are described so that they understand the effect of the settings.

IN-STORE_STORE_LEVEL_SELECTION

This system variable controls the number of levels visible in the Stores hierarchical tree.

It is set within the Administration module of Macro Space Management and will only be accessible to Macro Space Management users with Administrator's privileges. Valid values range between 2 to 5:

Table 2–4 Valid Values

Valid Values	Description
2	Display hierarchy to Store Level
3	Display hierarchy to Floor Level
4	Display hierarchy to Revision Level
5	Display hierarchy to File Level

Depending on the level set, you may be able to see part or all of the hierarchy.

If the settings mean only part of the hierarchy is visible, then the OK button in the Select Store dialog box will remain grayed out until you selects a valid branch of the tree. The OK button will then become active, allowing you to select the valid file within that branch.

IN_STORE_SUBMITSTATUS

This **system variable** determines which status a store plan is changed to when the Save Submit option is used in In-Store Space Collaboration.

For more information on system variable, see Oracle Retail Macro Space Management Administration Module User Guide.

3

Administrative Functions

This section gives you a quick tour of:Access Rights to In-Store Space Collaboration are set in the Administration Module of Macro Space Management.

Users are assigned to User Groups. These user groups are then assigned access to specific stores.

A second factor controlling access in In-Store Space Collaboration is the status of the drawing within a store - you can only access drawings when they reach specified statuses within Macro Space Management.

When logging into In-Store Space collaboration, you can only see the stores that you have been assigned access to, and which are at the required drawing status.

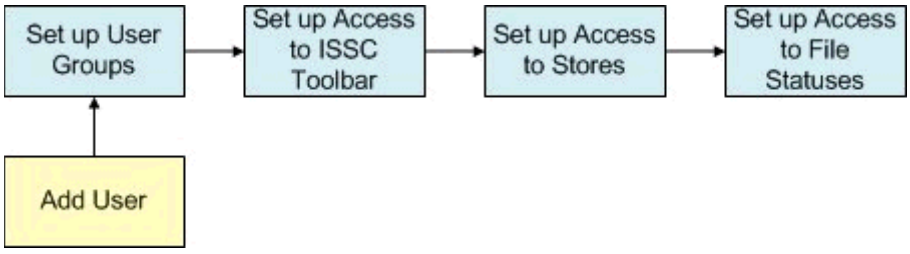
This sections gives you an overview of:

- Setting up Access to In-Store Space Collaboration
- Setting up User Groups in Functional Security
- Setting up Access to Stores and File Statuses in Data Security

Setting up Access to In-Store Space Collaboration

Setting up access to Stores and Files in In-Store Space Collaboration is carried out in the Admin module in Macro Space Management. It takes place in four stages:

Figure 3–1 ISSC Flowchart



1. Where required, User Groups are set up in Functional Security
2. New User Groups are given access to the ISSC Toolbar
3. Access to stores is defined using those User Groups in Data Security
4. Access to files of a specific status is defined using those User Groups in Data Security

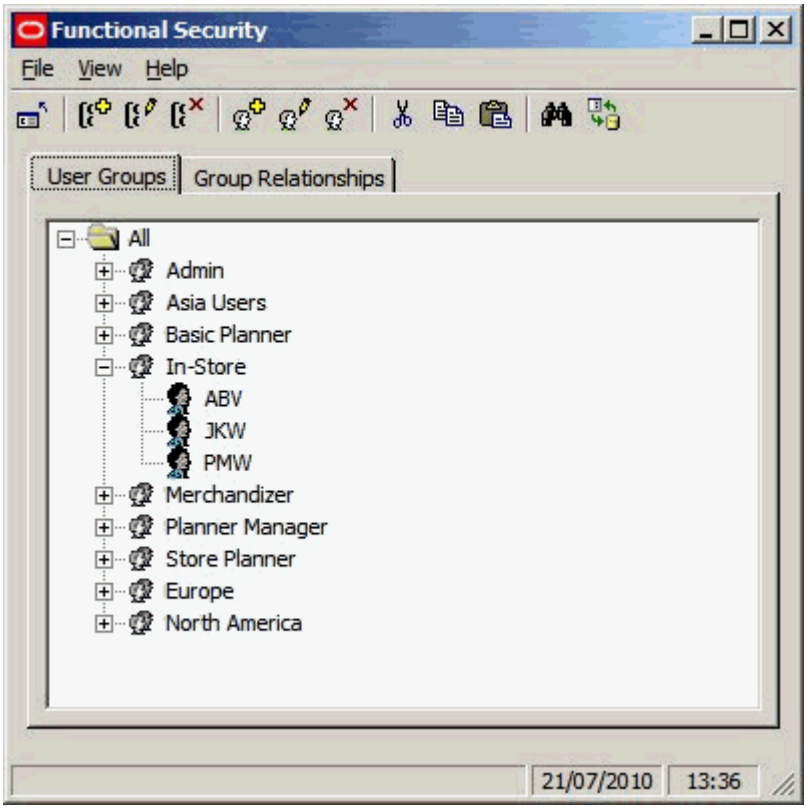
Any User added to those User Groups will then have access to the toolbar, stores and files statuses defined for those User Groups.

Setting up User Groups in Functional Security

Setting up User Groups

User Groups are set up in the Functional Security dialog box in Macro space Management's Admin Module.

Figure 3–2 Functional Security



Giving access to the ISSC Toolbar

Changes are also required to the AVTTB_MESSAGE_USER_GROUP_LINK table in the database to give new User Groups access to the ISSC toolbar. If these changes are not made, the toolbar icons will be grayed out and unavailable. (See Implementation Guide for more information).

Figure 3–3 ISSC - Locked Toolbar

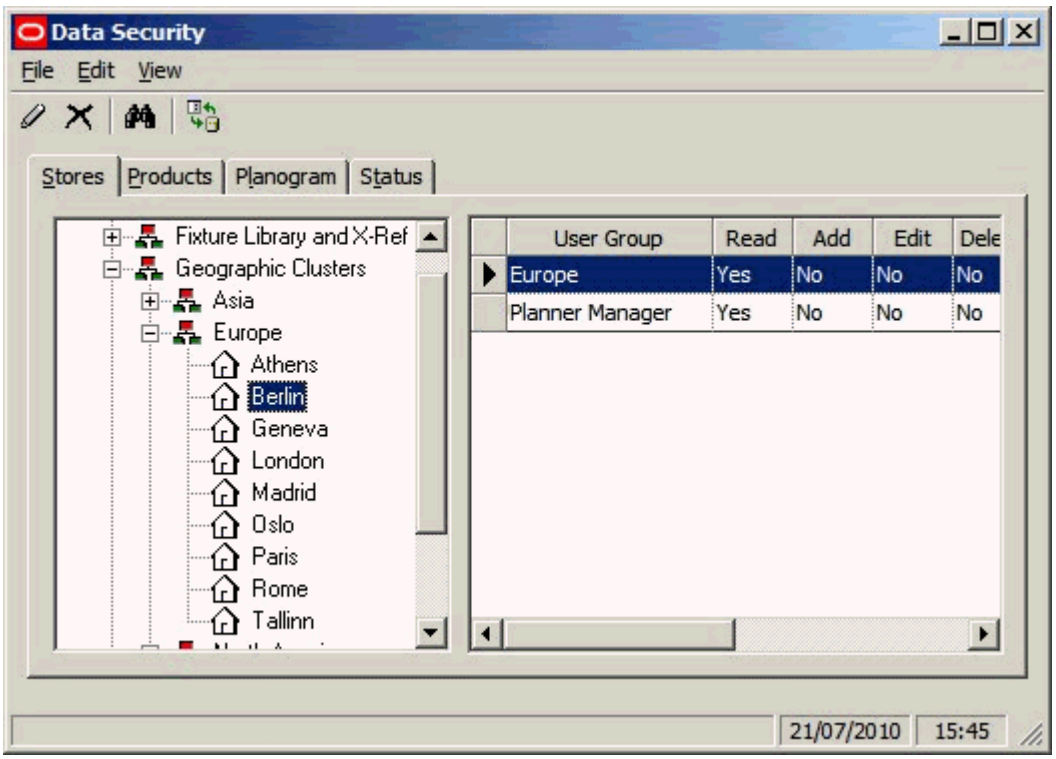
It present these changes can only be made directly in the database by means of an upgrade script.

Setting up Access to Stores and File Statuses in Data Security

Setting up Access to Stores

Access to stores is set up in the Stores tab of Data Security.

Figure 3–4 Data Security - Stores Tab

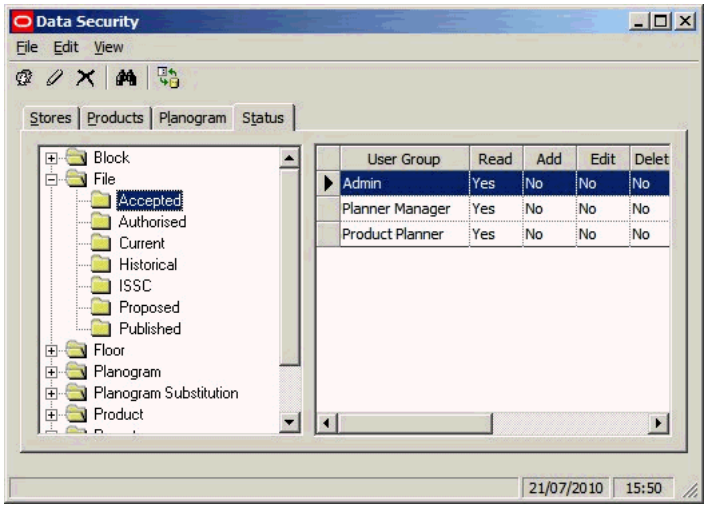


User Groups can be given permission to access a specific store by highlighting that store and bringing up the right click menu. Selecting Add User Group brings up another dialog box, allowing Administrators to select what User Groups can access that specific store.

Setting up Access to File Statuses

Access to files at a specific status is set up in the Status tab of Data Security.

Figure 3–5 Data Security - Status Tab



User Groups can be given permission to access a specific status by highlighting that status and selecting Add User Group from the Edit menu. This allows Administrators to select what User Groups can access that specific store.

Cumulative Effect of Permissions

The permissions for Stores and File Statuses are cumulative. Users belonging to a User Group with rights for a specific store might have permission to access that store, but they will not be able to open any files (floor plans) unless files of that status exist within the store.

4

Using In-Store Space Collaboration

The Using In-Store Space Collaboration section describes the different options that you come across while you use In-Store Space Collaboration. These include:

- General Options
- Front and Shelf Graphical Views
- Schematic Preview
- Operating in the Drawing

General Options

This section provides information to help you to access the general options for the In-Store Space Collaboration Help File. These are those options that are common to the Fixturing, Merchandising, and KPI toolbars. Options that are specific to those toolbars are discussed in their appropriate sections.

These are:

- Keyboard and Mouse Shortcuts
- Annotations
- Tooltips
- The Status Bar
- Saving
- Printing
- Adjacency
- The Layers Window
- The Options Window
- The Find Window
- The Properties Window
- The Refresh Option
- The Measure Option
- The Note Option
- The Dimension Option
- The Markup Option

- Undo, Cut, Copy, and Paste Options

Keyboard Shortcuts

The following keyboard shortcuts can be used.

Table 4–1 Keyboard Shortcuts

Shortcut	Description
<Ctrl + S>	Save.
<Ctrl + P>	Print.
<Ctrl + F>	Display the Find dialog box.
<Ctrl + L>	Display the Layers dialog box.
<Ctrl + O>	Display the Options dialog box.
<Ctrl + > >	Zoom In.
<Ctrl + < >	Zoom Out.
<Ctrl + E>	1. Zoom to Extents of the drawing. 2. Zoom to Extents of any selected fixtures.
<Ctrl + W>	Zoom Window.
<Del>	If in fixturing tab, delete currently selected fixtures or gondolas.
<the Esc key>	Clear the current selection.
Cursor Keys	1. Pan Left, Right, Up, and Down. 2. Nudge if fixtures/fittings are selected.

Mouse Shortcuts

The following mouse shortcuts can be carried out using the keys and wheel.

Table 4–2 Mouse Shortcuts

Shortcut	Description
Mouse Click	Select/De-select Fixtures
Mouse Wheel Up	Zoom In (relative to mouse pointer position)
Mouse Wheel Down	Zoom Out (relative to mouse pointer position)

Table 4–2 (Cont.) Mouse Shortcuts

Shortcut	Description
Mouse Wheel Drag	Pan

Different mouse icons will be displayed, depending on the current command that is active:

Annotations

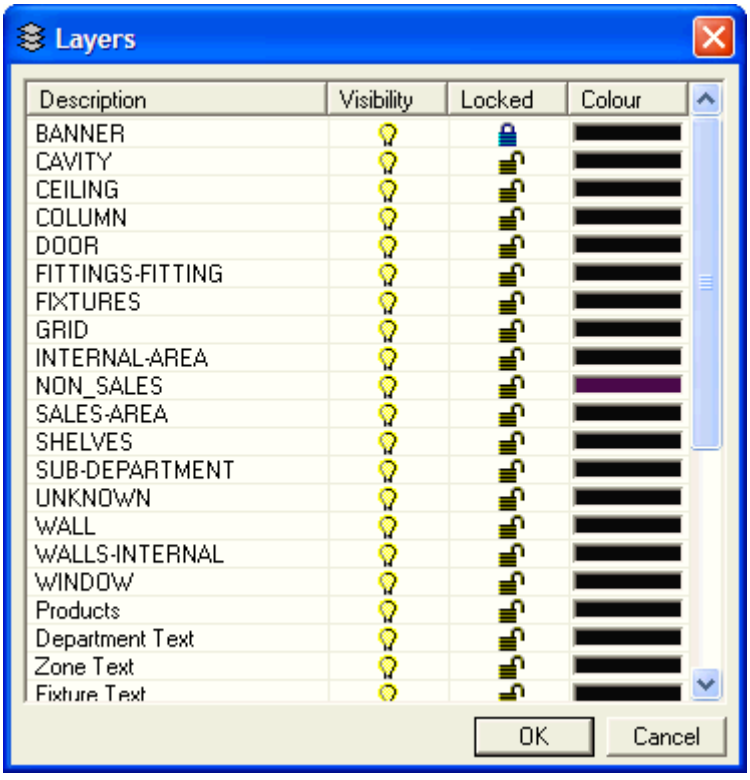
Annotation on the drawing is of a fixed size, so the text will get visibly larger as you zoom into the drawing.

Product/Placeholder annotation will be refreshed when you click on the Refresh Icon in the toolbar.

Many features of annotation can be configured in Macro Space Management, but In-Store Space Collaboration users can only affect annotation via the Layers dialog box (accessible from the toolbar).

For more information on Layers dialog box, see Layers Window section described later in this chapter

Figure 4–1 Layers Window



Annotations are of three types. They are:

- Department (Zone) Annotation
- Fixture Annotation
- Planogram / Product Place-holder Annotation

Department (Zone) Annotation

Zone (Department) annotation is not enabled in this release.

Fixture Annotation

Fixture Annotation is not enabled in this release.

Planogram / Product Place-holder Annotation

There are two types of texts placed for both Planograms and Product Place-holders.

- Product Text
- Profile text

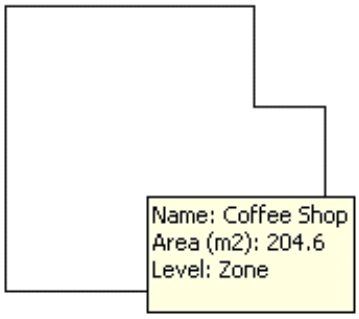
Product Text

Product Text is used to display either the product category description or the planogram description when a product or a planogram is placed in the drawing. Depending on the configuration settings, the description display varies. These are set within Macro Space Management and are not accessible to the In-Store Space Collaboration user.

Profile Text

The Profile Text is used to display company recognized codes; for example the Category Code or Planogram Number.

Figure 4–2 Profile Text



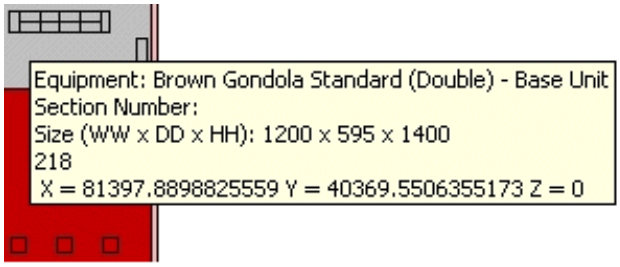
In the example, Product Text informs you that the fixture has Kids Shirts on it and Profile Text indicates that they belong to category code 150.

Tooltips

Tooltips are small information windows that come up when you hold the mouse pointer over an item or object.

For example, holding the mouse pointer over an icon in the Toolbar brings up a short description of the purpose of the icon.

Figure 4–3 Tooltips



Tooltips can be customized to user requirements.

To see if a tooltip is present hold the mouse pointer over an item or object for a few seconds. It a tooltip is present, it will appear.

Note: Contact Oracle Customer Support to customize the tooltips.

Tooltips are of two types. They are:

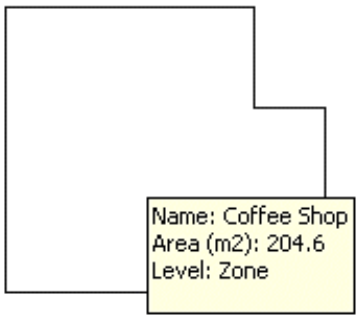
- Zone (Department) Tooltips
- Fixture Tooltips

Zone (Department) Tooltips

Within a drawing, Departments (Zones) are color coded according to the settings assigned within Macro Space Management.

A tooltip appears when you hold the mouse cursor over the zone providing more information about the Zone (Department)

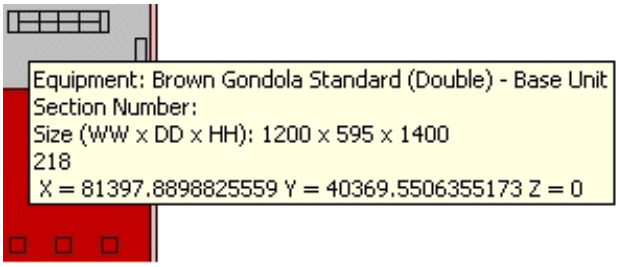
Figure 4–4 Zone (Departments) Tooltip



Fixture Tooltips

A tooltip appears when you hold the mouse cursor over the fixture in the fixturing tab, providing more information about the fixtures.

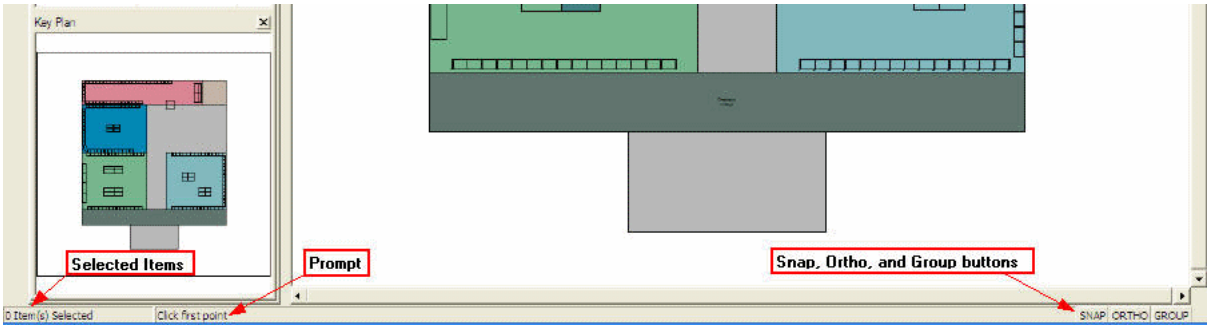
Figure 4–5 Fixture Tooltips



The Status Bar

The Status Bar can be found at the bottom of the In-Store Space Collaboration window.

Figure 4–6 The Status Bar



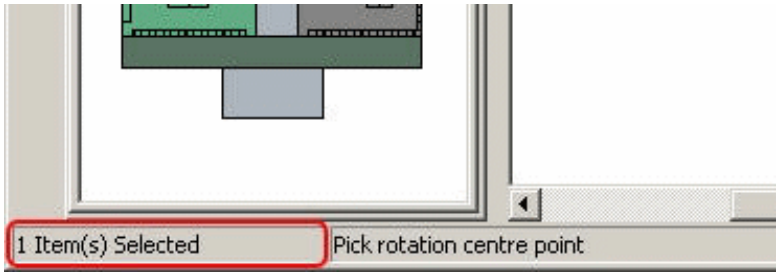
It consists of the following:

- Selected Items - It displays the current number of objects that have been selected for further operations.
- Prompt section - It displays instructions that will assist you in executing the current command.
- Snap button - It switches on or off the snapping the cursor to a grid point.
- Ortho button - It switches on or off whether selected points are orthogonal (at 90 degrees) to each other.
- Group button - It determines whether fixtures that belong to a previously determined group are treated singly or collectively.

Selected Items

The number of items selected is displayed on the left had side of the Status Bar.

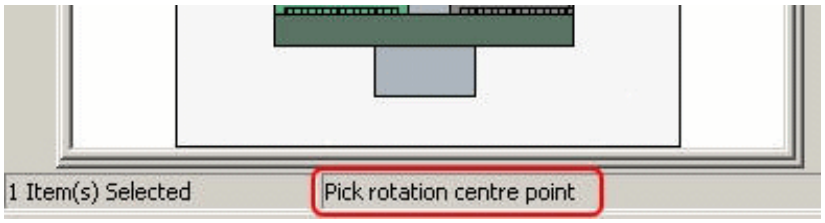
Figure 4–7 Selected Items



Prompt

Instructions for executing the current command are displayed in Prompt section.

Figure 4–8 Prompt



Snap

The Snap button is found to the right hand side of the Status Bar.

Figure 4–9 Snap button

When the Snap option is enabled it allows objects to be snapped to a grid of specified spacing.

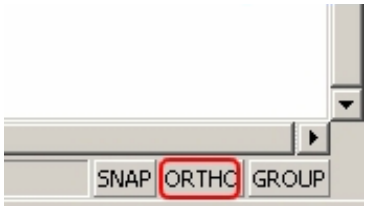
> **Note:** The spacing of the grid is specified in the Options field present in the toolbar at the top of the window.

The Snap option can be toggled on and off by clicking on the button. When the Snap option is On, the button will appear depressed.

The Ortho Option

The Ortho button is found to the right hand side of the Status Bar.

Figure 4–10 The Ortho Option



When enabled it will automatically adjust second or subsequent picked points so they are orthogonal (at 90 degrees) to the previous point. The Ortho option can be toggled on and off by clicking on the button. When the Ortho option is On, the button will appear depressed.

The Group Option

The Group button is found to the right hand side of the Status Bar.

Figure 4–11 The Group Option

When grouping is on all fixtures that have been placed as a group (typically a gondola) can be selected by clicking on any member of the group. When grouping is off fixtures (even if they were placed as a group) have to be selected individually. The Group option can be toggled on and off by clicking on the button.

When the Group option is On, the button will appear depressed.

Note: Grouping options are defined in Macro Space Management. They cannot be changed by In-Store Space Collaboration users.

Saving

The Save option is to the extreme left of the toolbar.

When Save is clicked from the toolbar, it updates the Macro Space Management database with any changes made to the drawing open in In-Store Space Collaboration since the last save. It also causes Macro Space Management to carry out a series of calculations to establish which fixtures are adjacent to each other.

This information is important when products and planograms are placed and it is recommended the In-Store Space Collaboration user saves the drawing after adding, editing, or deleting fixtures and before placing products or planograms.

Note: It is suggested In-Store Space Collaboration users save their drawings at regular intervals to minimize the chance of data being lost.

Saving and Closing

To Save and Close the drawing, click **Close** to the top right of the drawing. The Save Changes window will open.

For more information on Saving and Closing, see Saving and Closing.

> **Note:** If the drawing has been saved immediately before clicking on the close button, the drawing will close without the Save Changes dialog box being displayed. The status a Survey drawing is changed to when using Save & Submit can be changed by modifying the IN_STORE_SUBMITSTATUS system variable in Macro Space Management.

The options available will depend on you and drawing type.

Table 4–3 Types of Drawings

Drawing type	Options
Survey	Save/Save Submit/Discard/Cancel
Proposal	Save/Discard/Cancel
Other types	Save/Discard/Cancel

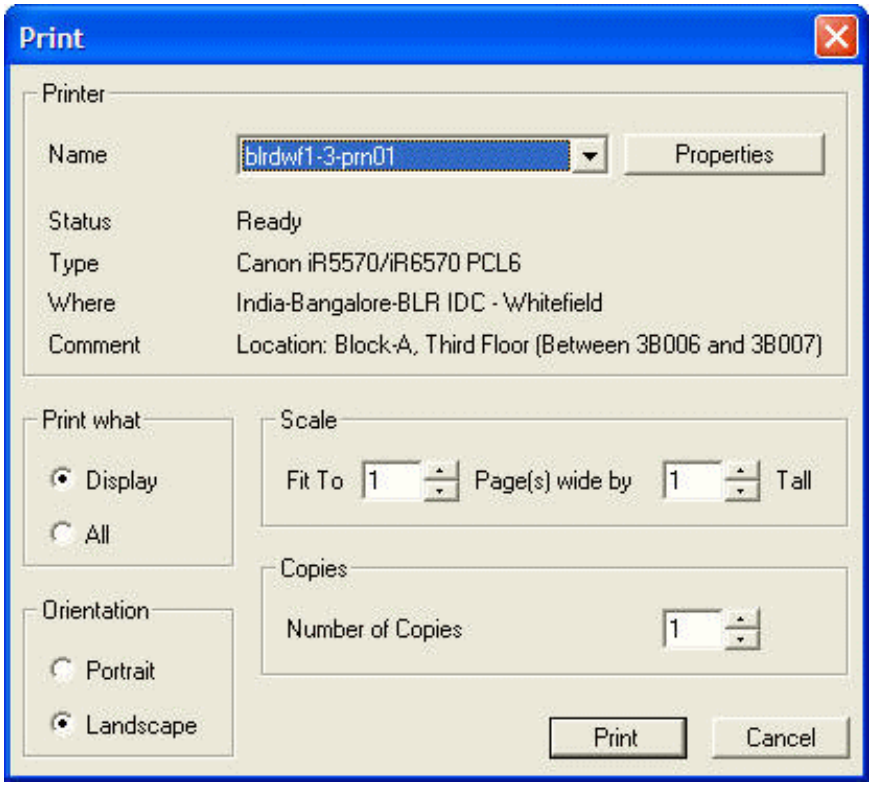
Printing

You can print a drawing using the print option on the toolbar.

To print a drawing:

1. Click **Print**. The Print window will open.

Figure 4–12 Print



- **Printer** specifies the printer to be used. It will default to the computer's default printer each time the application is loaded. It will remember any changes during the session, but the changes will not be retained when the session is closed.
- **Print what** enables you to specify whether all the drawing or merely that part selected to display on the screen will print.
- **Scale** enables you to specify how many pages the drawing (or specified part of the drawing) prints over. This will allow you to print the drawing on multiple pages, which can then be stick together to create a single large drawing.

  Note: This option is intended for users who do not have access to a large format printer or plotter.

- **Orientation** enables you to determine whether the page on which the drawing is printed is in Portrait or Landscape orientation. The orientation will affect the scale of the printed drawing as the drawing will print to the maximum size allowed by the page orientation and number of pages selected.
- **Copies** enable you to specify the number of copies of the drawing that will print. The value can be set to any number between 1 and 100. It will default to 1 each time the application is loaded. During the session, the last value selected will be retained, but this value will not be remembered when the session is closed.

2. Click **Print**. The specified plan is printed on the specified printer.

Adjacency

Adjacency is the relationship of certain classes of object within Macro Space Management/In-Store Space Collaboration to one another. There are three different types of adjacencies:

- Fixture Adjacency
- Product Adjacency
- Aisle Adjacency

Adjacencies are used for differing purposes.

Fixture Adjacency

Fixture adjacency is used to establish which fixtures are treated as having a relationship with each other. This could be for bay numbering, gondola numbering, and other purposes.

Product Adjacency

The relationship of the parent fixtures to each other is known as product adjacency.

Aisle Adjacency

The planograms can have a relationship with each other depending on the relationship of the parent fixtures to any aisles that may have been placed. This is known as Aisle Adjacency.

It is important to note that slightly different rules apply for aisle, fixture, and product adjacency. For example, a specific bay might be adjacent to another bay by the rules of fixture adjacency, but the product in those bays might not be adjacent by the rules of product adjacency.

Adjacency Calculations in In-Store Space Collaboration

Only Fixture Adjacency calculations can be carried out in In-Store Space Collaboration. They are carried out automatically when the drawing is saved. To calculate Fixture Adjacency manually, click the Fixture Adjacency icon on the toolbar.

Once the calculations are completed, a Calculate Adjacency Complete message is displayed. This will result in In-Store Space Collaboration calculating the relative positions of all fixtures in the drawing.

Note: Product and Aisle Adjacency calculations can be done only within Macro Space management.

The Layers Window

The Layers Window allows users to control what is displayed in the various graphical views. To access the Layers Window, left click on the Layers icon in the toolbar.

- Ctrl + A will select all layers.
- Ctrl + mouse click selects random layers from the list.
- Shift + mouse click selects a certain range of layers.

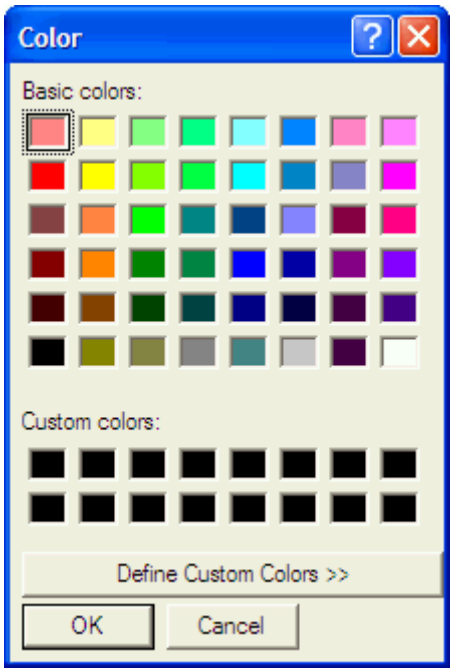
The window can be resized by dragging on the appropriate edge. Each column can be sorted by clicking on the top. Clicking once will sort on ascending order. Clicking a second time will reverse the sort order.

Clicking on the Visibility icon for a specific layer will show or hide it on the drawing.

Clicking on the Locked icon will prevent changes being made to objects on that Layer.

A locked layer cannot have objects added to it, edited, deleted, moved, or rotated. Users require the appropriate In-Store Space Collaboration privileges to lock and unlock layers. The Color for each layer can be customized by clicking on it, then selecting from the Color Pallet that will appear.

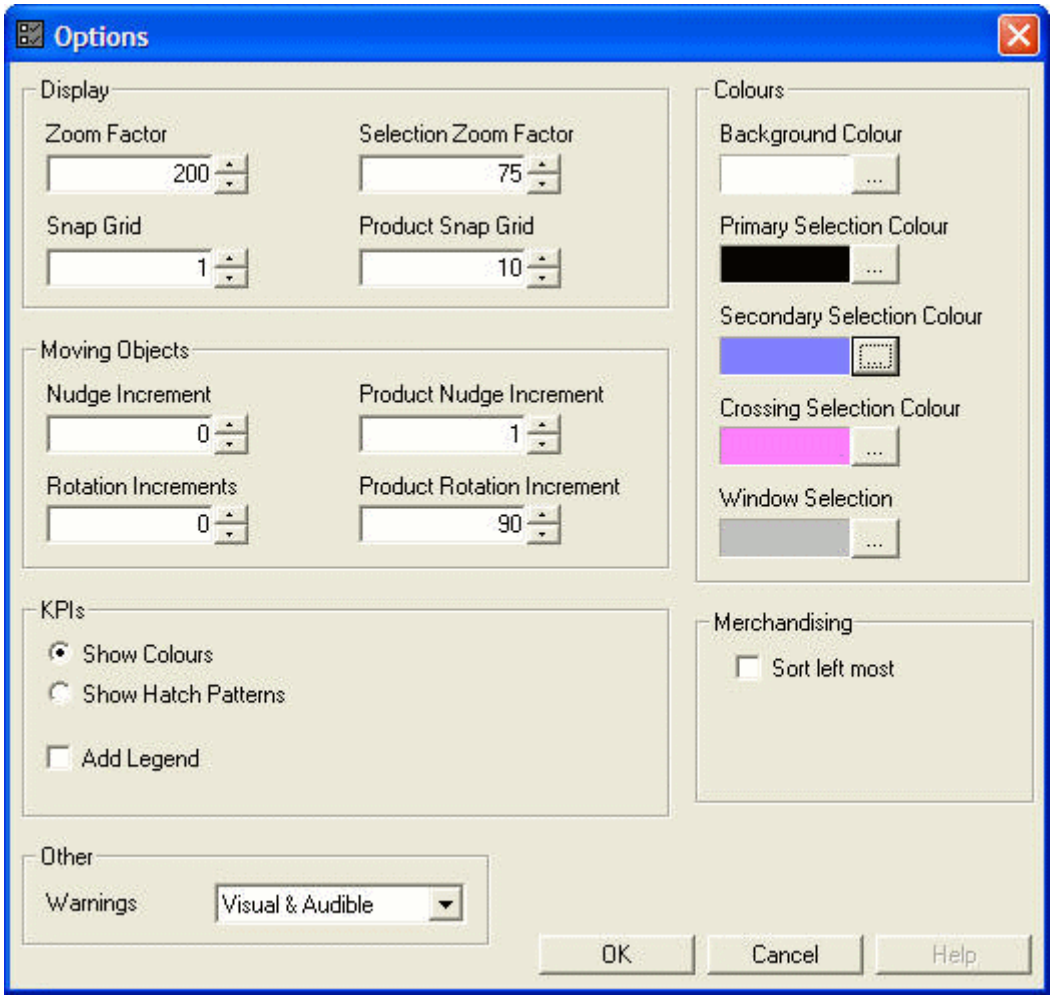
Figure 4–13 Color



The Options Window

The Options Window allows the In-Store Space Collaboration user to set a series of options that will affect how the software interacts with you. It is invoked by clicking on the Options icon in the toolbar.

Figure 4–14 The Options Window



The settings are specific to individual users and can be customized to suit their preferences.

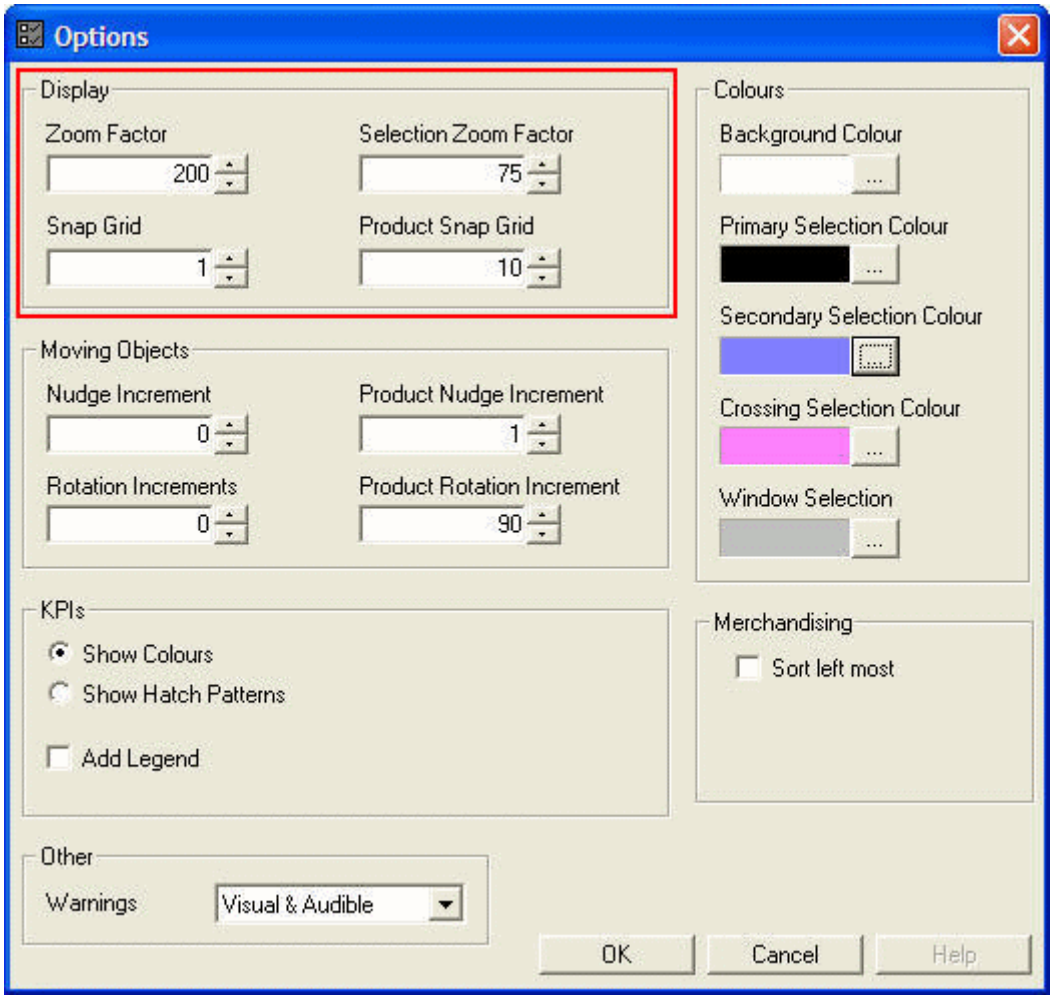
- The Display Frame
- The Moving Objects Frame
- The Merchandising Frame
- The Colors Frame
- The KPI Frame
- The Other Frame

The Display Frame

The Display Frame allows the Zoom Factors and the Grid Sizes for objects and products to be snapped onto to be specified.

- Zoom Factor
- Selection Zoom Factor
- Snap Grid
- Product Snap Grid

Figure 4–15 Options Window–Display Frame



Zoom Factor

The Zoom Factor affects the amount the image zooms in or out, either by clicking the Zoom In or Zoom Out icons on the toolbar, or by rotating the central wheel on the mouse. The setting is in percentage, with the default setting at 200%. Permissible ranges for the Zoom Factor are between 10% - 1000%.

Selection Zoom Factor

The Selection Zoom Factor is used when selecting objects. It determines how much the drawing zooms out so all the selected objects are visible. The setting is in percentage, with the default setting at 90%. Permissible ranges for the Selection Zoom Factor are between 25% - 100%.

Snap Grid

The Snap Grid setting affects the movements of fixtures and fittings. It will only be active if the Snap option is enabled.

The setting is in linear units with the default setting at 1. The permissible range for the Snap Grid is 1 - 100. The units, and hence size of grid will depend on whether the store is using metric or imperial units. This is configurable within Macro Space Management but not In-Store Space Collaboration.

Product Snap Grid

The Product Snap Grid setting the movements of objects on shelves. It will only be active if the Snap option is enabled. The setting is in linear units with the default setting at 1. The permissible range for the Snap Grid is 1 - 100. The units and size of the grid will depend on whether the store is using metric or imperial units. This is configurable within Macro Space Management but not In-Store Space Collaboration.

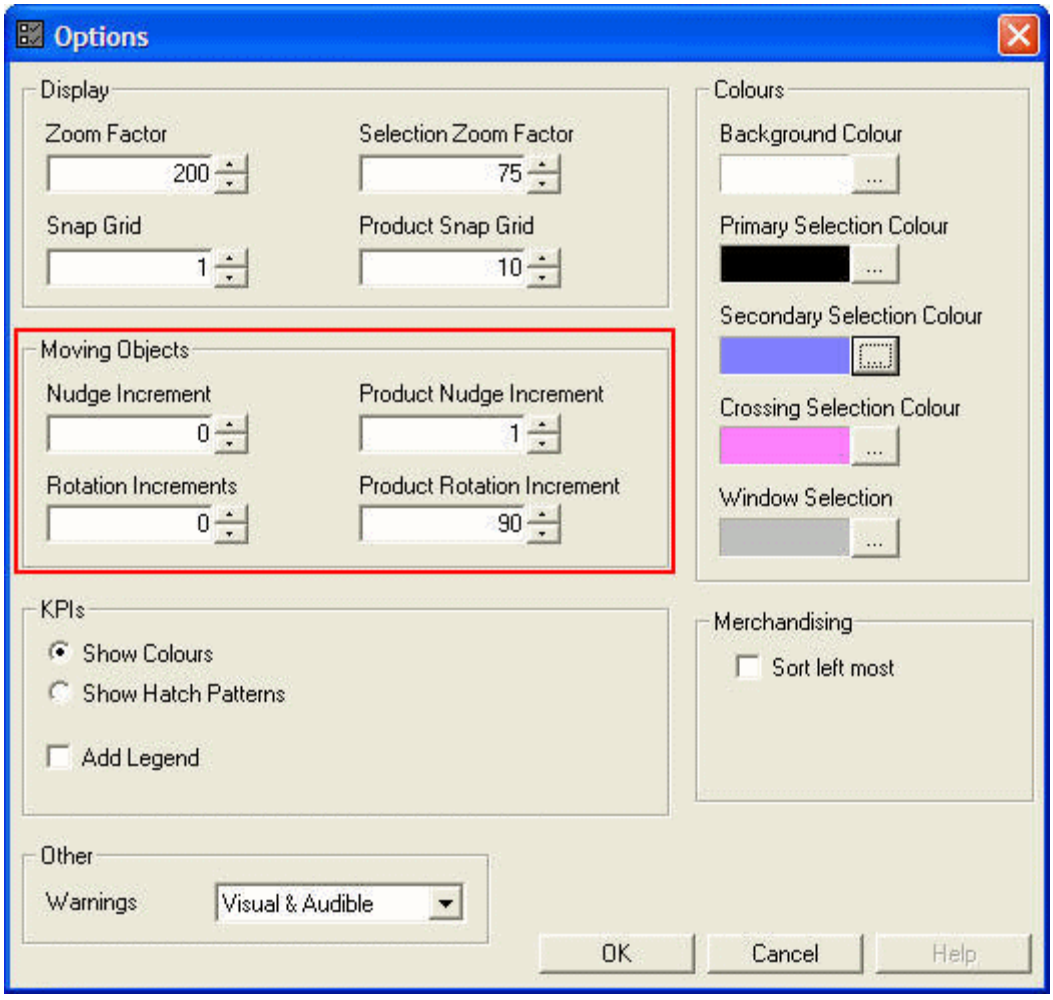
Note: The Snap button is found to the lower right of the main screen.

The Moving Objects Frame

The Moving Objects Frame allows you to specify the increments by which objects can be moved or rotated.

- Nudge Increment
- Product Nudge Increment
- Rotation Increments
- Product Rotation Increment

Figure 4–16 The Moving Objects Frame



Nudge Increment

Nudge Increment allows you to set the amount a selected fixture is moved by means of the keyboard cursor keys. Fixtures may be moved up, down, left and fight by this method. The setting is in inches. The permissible range is between 1 - 100 inches.

Product Nudge Increment

Product Nudge Increment allows you to move products on a shelf by means of the keyboard cursor keys. Products may be moved up, down, left and fight by this method. The setting is in inches. The permissible range is between 1 - 100 inches.

Rotation Increments

Rotation Increments allows you to set the amount fixtures and fittings are rotated in the Top Graphical View. The setting is in degrees. The permissible range is between 1 - 90 degrees. The spin buttons will change the setting in 5-degree increments.

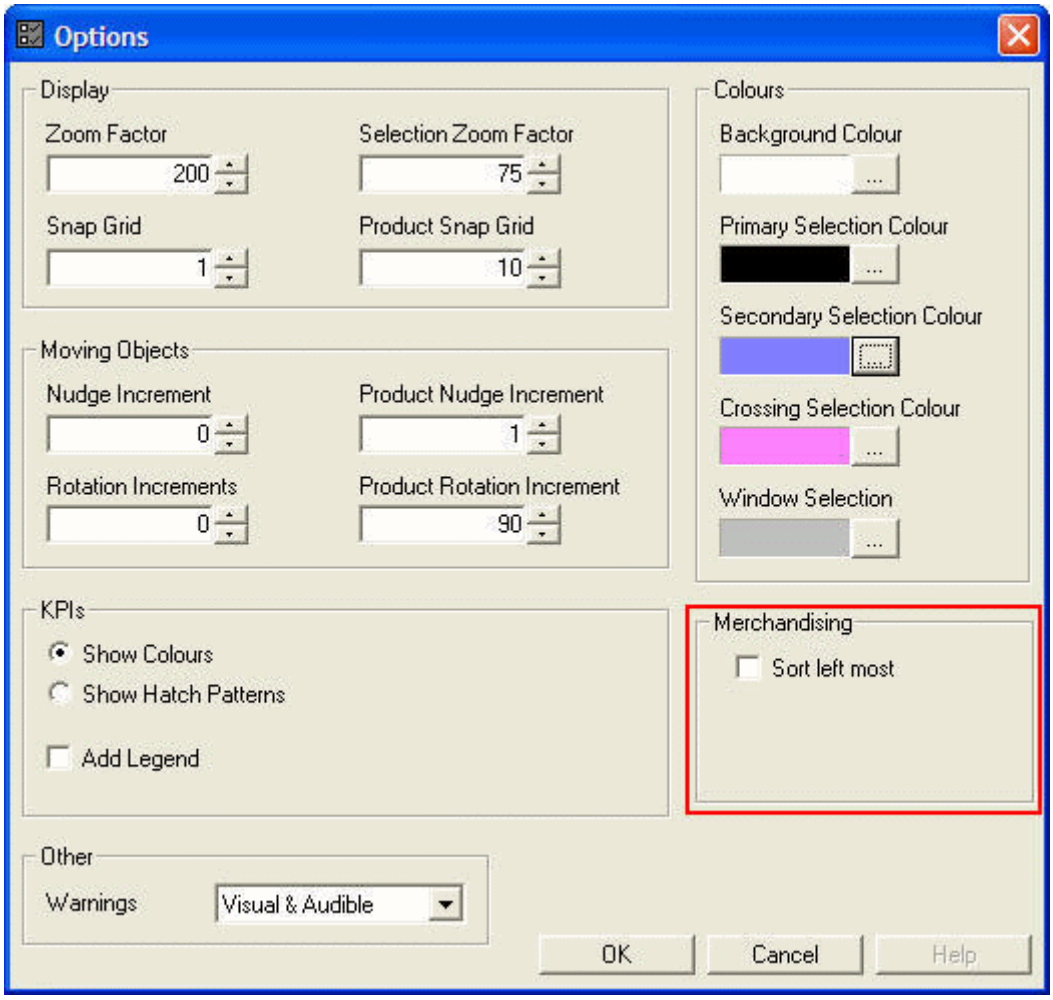
Product Rotation Increment

Product Rotation Increment allows you to set the amount products are rotated in the Top Graphical View. The setting is in degrees. The permissible range is between 1 - 90 degrees. The spin buttons will change the setting in 5-degree increments.

The Merchandising Frame

The Merchandising Frame allows options to be set that will determine some of the behavior of planogram placement.

Figure 4–17 The Merchandising Frame



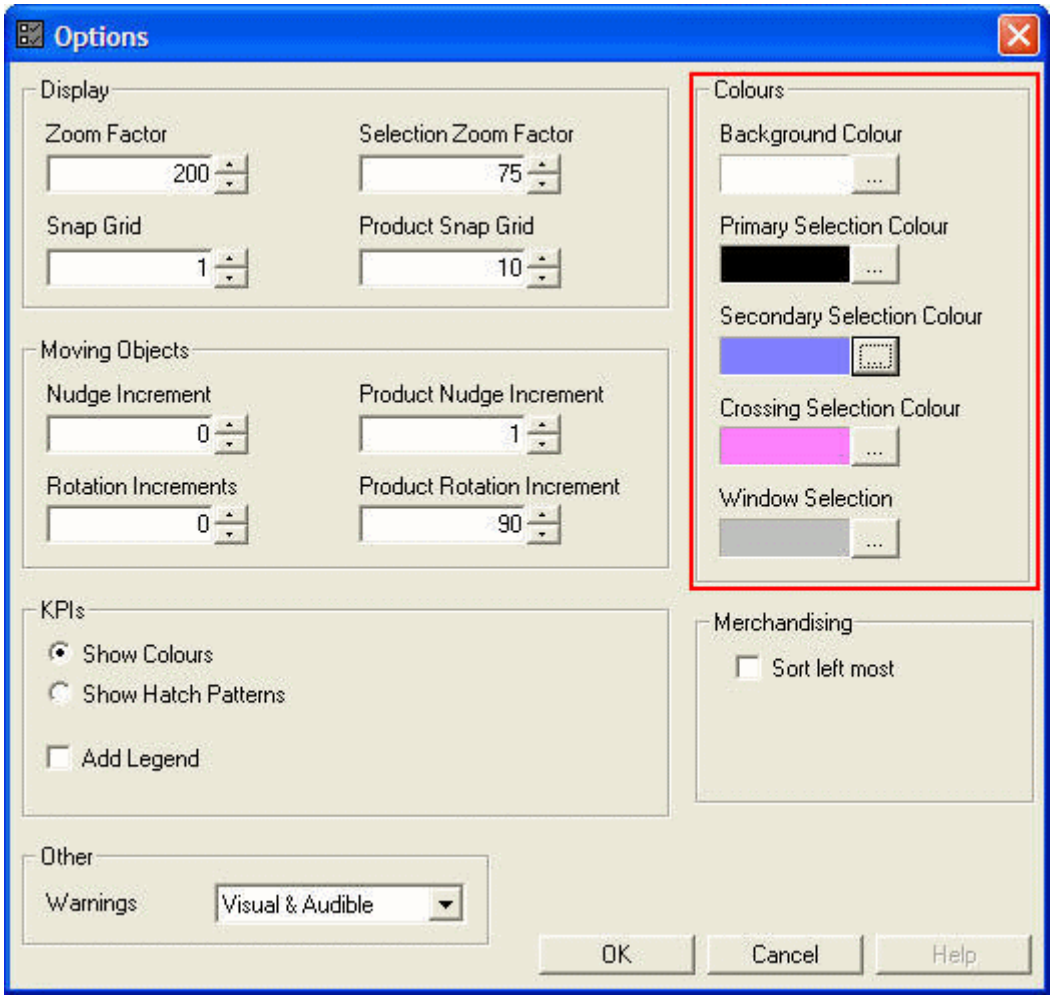
Sort left most ensures the fixtures are sorted before being populated so that they are populated in sequence, left most first. If this feature is not enabled then the fixtures will be populated in the sequence they were selected.

Note: If the selected fixtures contain split groups (for example fixtures on different sides of an aisle) and they are to be populated with the same planogram then In-Store Space Collaboration will first sort the fixtures into adjacent groups, then sort each group of adjacent fixtures left most first.

The Colors Frame

The Color Frame allows you to specify colors used for selection.

Figure 4–18 The Colors Frame



In each case clicking on the button to the right of the option will bring up the color selection pallet.

Figure 4–19 Color

- Background Color sets the background for all graphical views. The default color is white.
- Primary Selection Color specifies the color to which the first selected object will change to confirm selection.
- Secondary Selection Color specifies the color to which further selected objects in a selection set will change to confirm selection.
- Crossing Selection Color specifies the color of the Crossing Selection box. This box has a dotted outline. (The default color is green).

> **Note:** Crossing Selection will select every object that the window encloses or crosses. Crossing Selection occurs when you selects a start point then moves the cursor left.

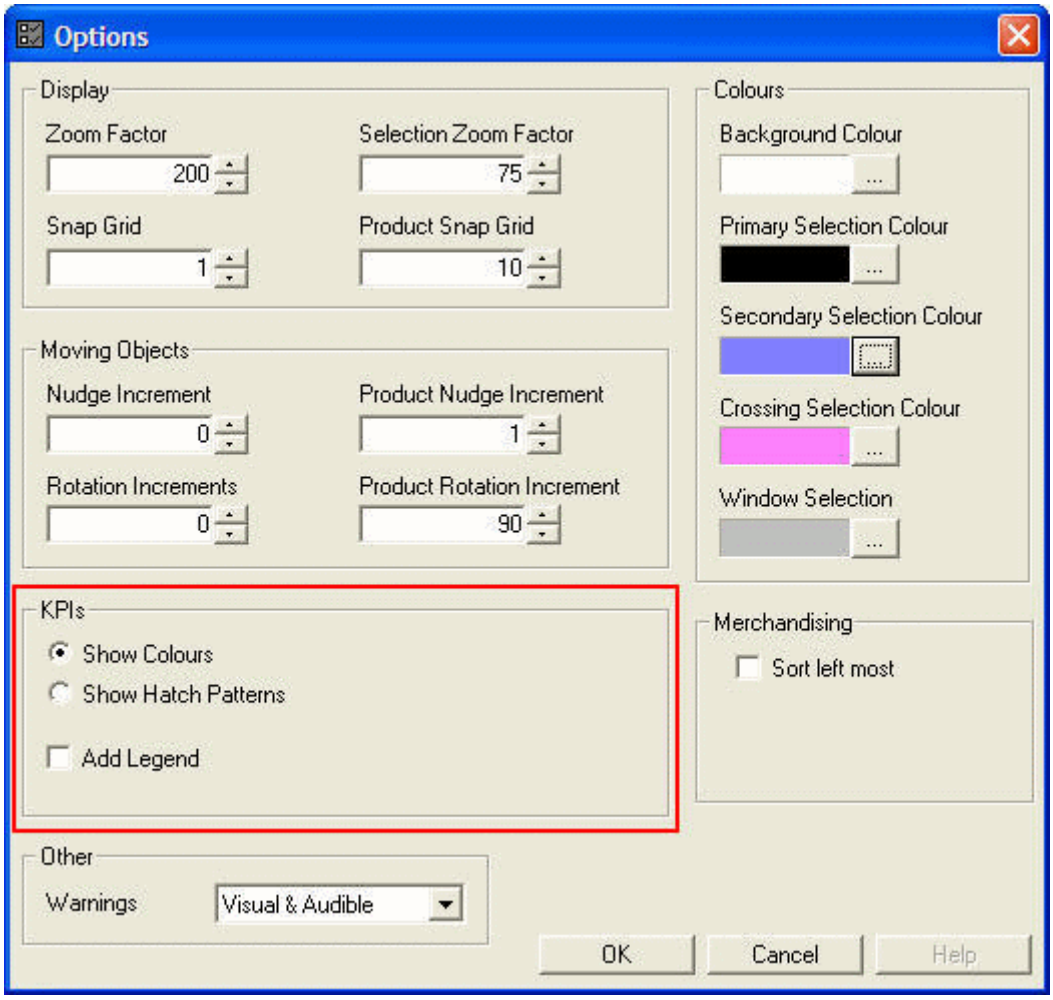
- Window Selection Color specifies the color of the Window Selection box. This box has a solid outline. (The default color is blue).

> **Note:** Window Selection will only select objects that the window completely encloses. Window Selection occurs when you select a start point then moves the cursor right.

The KPI Frame

The KPI Frame allows options to be set for Key Performance Indicators.

Figure 4–20 The KPIs Frame



Show Colors and Show Hatch Patterns are mutually exclusive options selected by means of a radio button.

- If Show Colors is selected then performance will be indicated by means of a color-coding scheme.
- If Show Hatch Patterns is enabled then performance will be indicated by means of different hatching patterns.

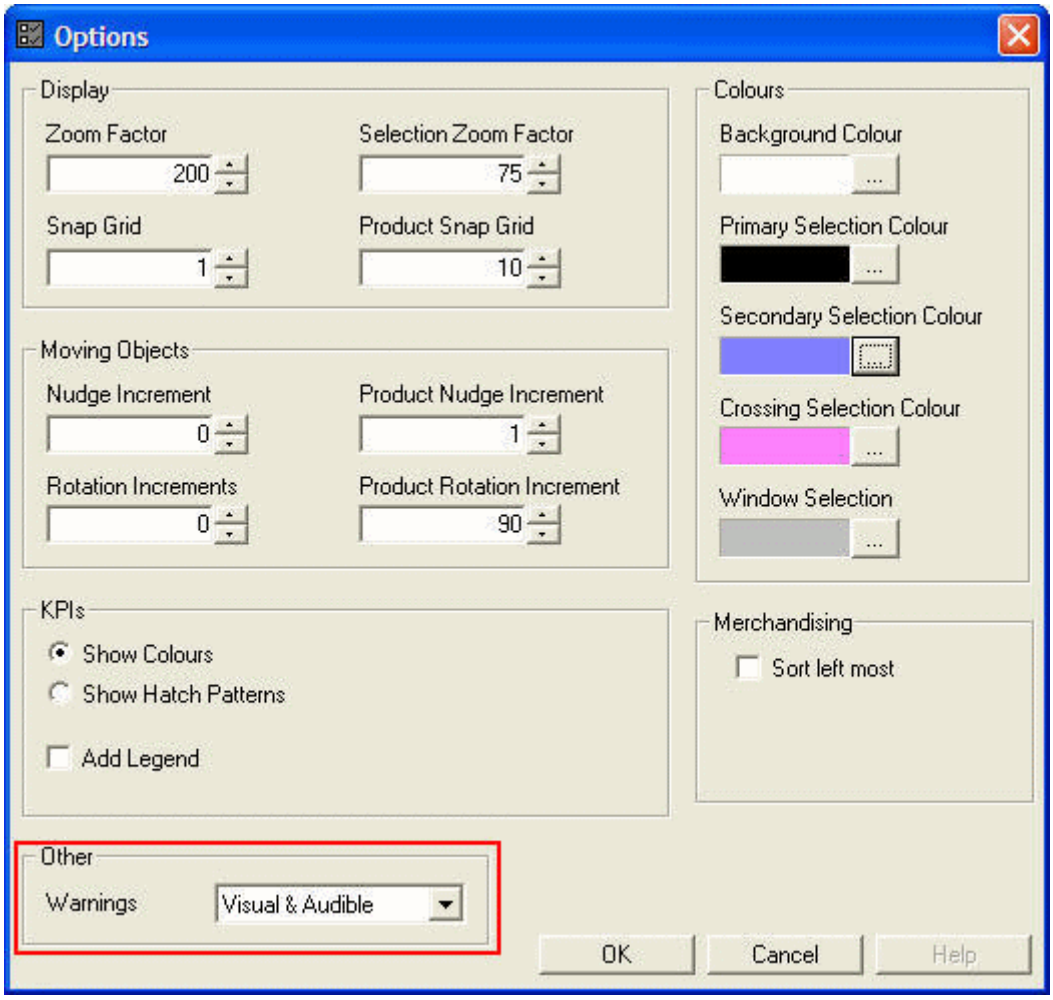
> **Note:** Hatch patterns are primarily intended for use on black and white printers where color-coding performance may not be effective.

- Add Legend will add a legend to the printed drawing showing the Key Performance Indicators. These could either be in the form of colors or hatch patterns.

The Other Frame

The Other Frame allows users to set the options for warning.

Figure 4–21 The Other Frame



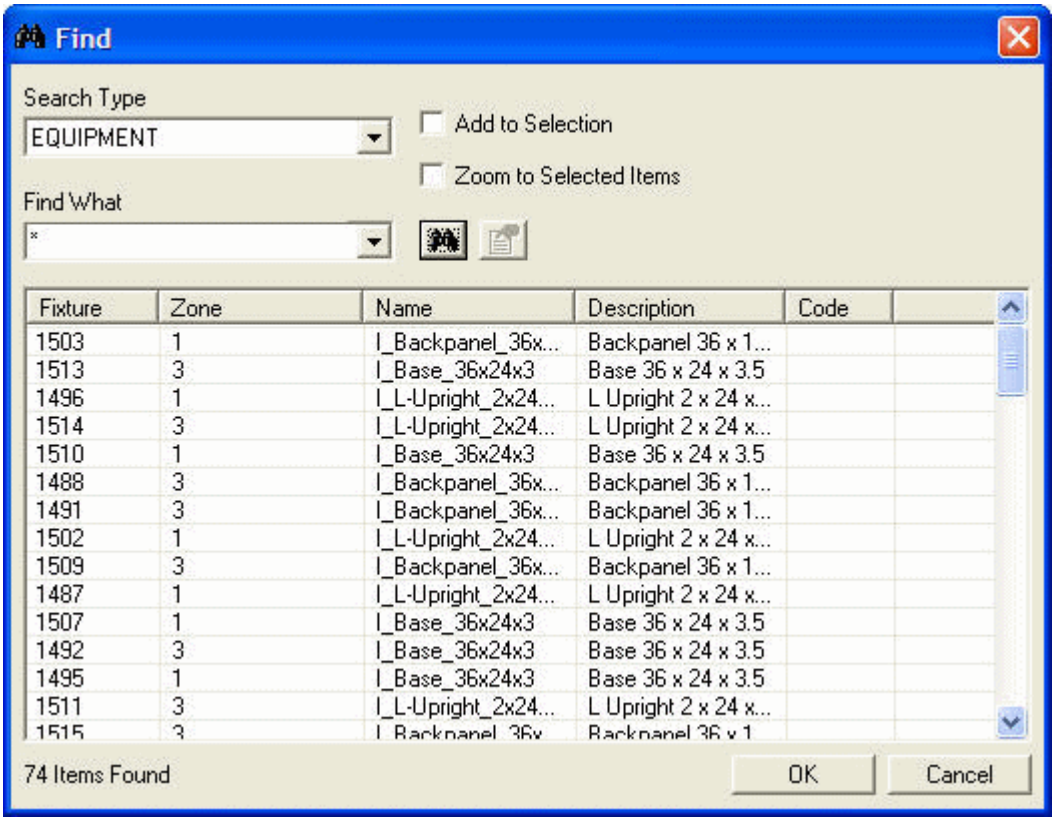
The drop down list allows users to swap between Visible & Audible warnings and purely Visual warnings.

Note: The exact sounds used for each warning can be configured. Contact Oracle Customer Support for more information.

The Find Window

Click the Find icon in the toolbar. The Find Window opens.

Figure 4–22 The Find Window



Note: Find will only operate on the sections of the drawing that were selected in the Select the Data dialog box when it was opened. Data that is not in the selected sections will not appear in the search results.

The Search Type can be selected from a pre-set drop down list.

Find What will search for matching text strings.

The search criteria will accept wildcards and is not case sensitive.

Table 4–4 Wildcards

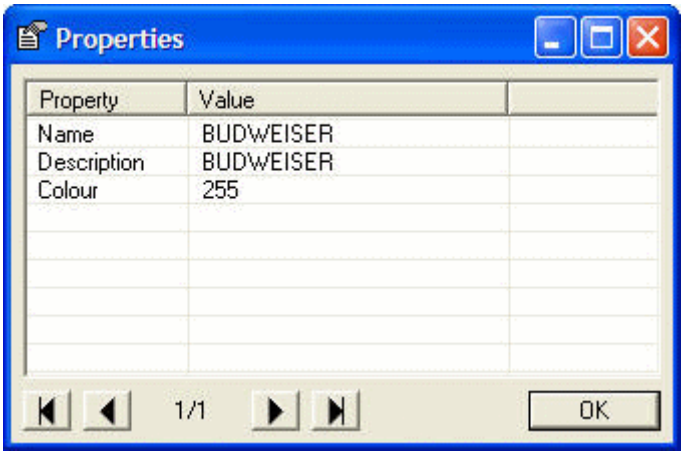
Wild Card	Description
?	Any single character.
*	Any sequence of characters.

The last 10 search strings entered are retained and are available from a drop down list.

The Properties Option

Click the Properties icon after selecting a fixture to activate the Properties Window.

Figure 4–23 The Properties Option



This will show the properties for the selected product(s) or planogram(s).

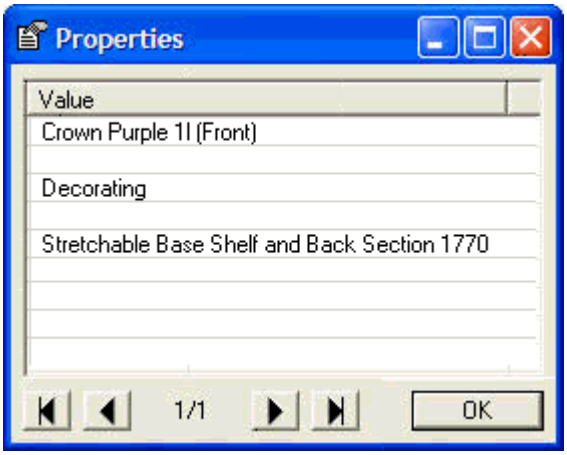
The number of objects can be seen at the bottom of the window. The arrowheads allow you to move through the records.

The Properties Window

The Properties Window can be activated once a fixture has been selected.

The Icon will become active. On clicking the icon, the Properties window will appear.

Figure 4–24 The Properties Window



This window contains details of the product, the department and the fixture.

The number of objects can be seen at the bottom of the window. The arrowheads allow you to move through the records.

Note: The information displayed in the Properties window is configurable in Macro Space Management.

The Refresh Option

Clicking on the Refresh Option updates the currently active hierarchical trees with information from the central Macro Space Management database.

Note: If the Fixturing Tab has been selected in the Object Browser then the Fixture and Gondola hierarchies will be updated. If the Merchandising Tab has been selected then the Product and Planogram hierarchies will be updated.

The Measure Option

The Measure Option is used to determine the length of paths in the drawing.

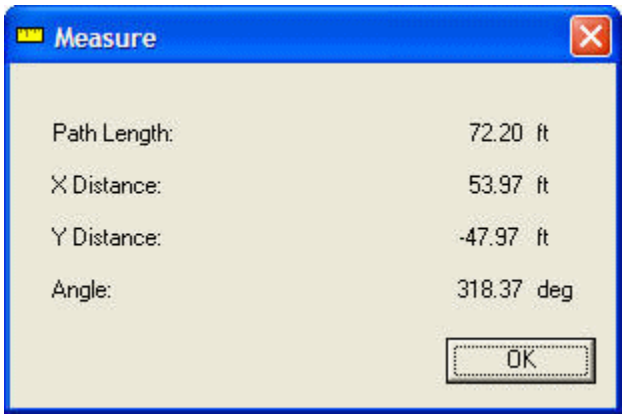
Note: If the measured distance is made up of a single line then a more detailed information is displayed.

It is activated by clicking on the Measure icon in the toolbar.

To measure the path length:

1. When the measure icon is clicked, a prompt will appear in the lower left of the screen asking you to set the first point. Click to set the first point.
2. The prompt will ask for the next point.
3. Click to set the next point.
4. Continue setting points in this manner until the path is defined. All but the last section will be dotted.
5. When the path has been drawn, press the Esc key.
6. The path length will then be displayed.

Figure 4–25 The Measure Option



The Note Option

The Note options can be accessed using the Note icons on the Toolbar. This enables users to attach short text based notes to Fixtures, KPI's, etc. There are three options available:

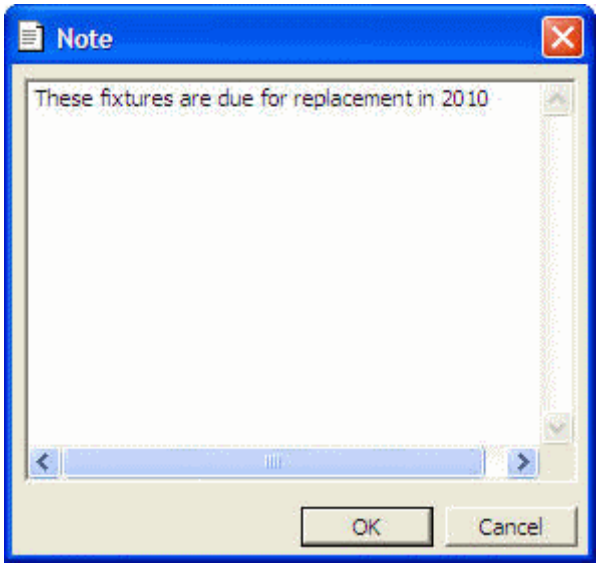
Notes can be placed anywhere in the drawing, except in KPI.

Adding a Note

To add a note:

1. Click Add Note.
2. Move the cursor into the drawing and position it where the note should appear.
3. Left click and the Note dialog box will appear.

Figure 4–26 The Note Option



4. After the required information has been entered, click OK. The note will then be added to the drawing.

Moving a Note

Notes can be moved in one of two ways:

- Dragging and dropping
- Using the move icon

Dragging and dropping

To drag and drop:

1. Click to select the required note.
2. Place the mouse pointer inside the note, hold down the left mouse key, and drag the note to where it is required.
3. Release the left mouse key to drop the note in its new location.

Using the Move Icon

To move using the Move icon:

1. Click on the required note so it is highlighted.
2. Click on the move icon in the toolbar.

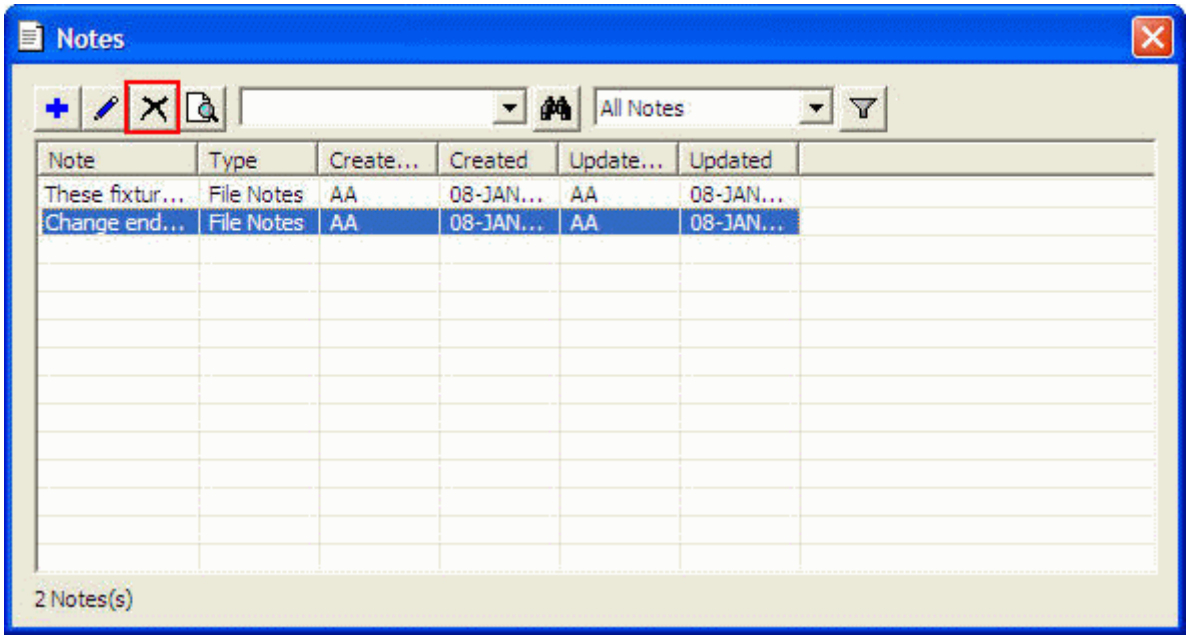
3. You will then be prompted to set two points to show the relative movement.
4. On setting the second point, the note will be moved the required distance and angle.

Deleting a Note

To delete a note:

1. Select the Notes option from the toolbar
2. This will bring up the Notes dialog box.
3. Highlight the required note and click on the Delete icon.

Figure 4–27 Deleting a Note



4. A confirmation dialog will appear.
5. Click on Yes to delete the note.

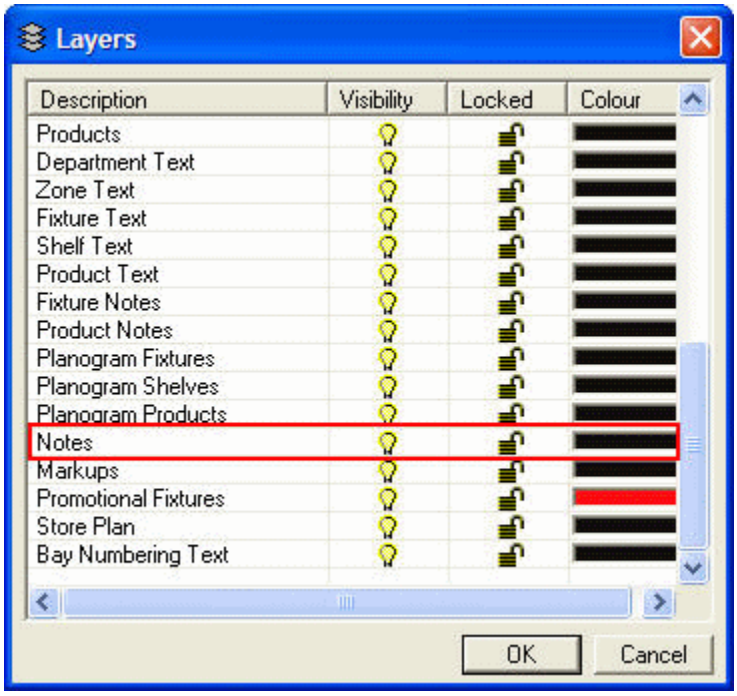
Turning Note Display On and Off

Note display can be turned on or off by switch the appropriate layer on or off.

To turn the note display on and off:

1. Click Layer icon on the toolbar.

Figure 4–28 Turn Notes display On and Off



2. Click on the visibility by Notes to toggle note display on and off.

Changing the Appearance of a Note

The font type and font size can be changed by altering the system variable settings in the database.

Contact Oracle Customer Support for more information.

The Dimension Option

The Dimension options can be accessed using the Dimension icons on the Toolbar. You can use this option to indicate the distance between fixtures.

- Adding a Dimension
- Moving a Dimension
- Deleting a Dimension
- Turning Dimensions Display On and Off
- Changing the Appearance of a Dimension

One use might be to indicate the distance between fixtures.

There are five options available:

Adding a Dimension

To add a dimension:

1. Click Add Dimension.
2. The prompt in the status point will indicate you should pick the first base point.

3. Left click to set the base point. The prompt will then change to prompt you to set the second base point.
4. Drag the cursor to where the second base point will be. A solid line will appear on the drawing.
5. Left click and the line will turn to a dotted one. The dotted line can now be dragged to the required dimension height as prompted on the status bar.
6. This will result in the line changing shape so it becomes a drawing dimension line.
7. Left click and the line will become solid with the dimension included.

Moving a Dimension

Dimensions can be moved in one of two ways:

- Dragging and dropping
- Using the move icon.

Dragging and dropping

To drag and drop:

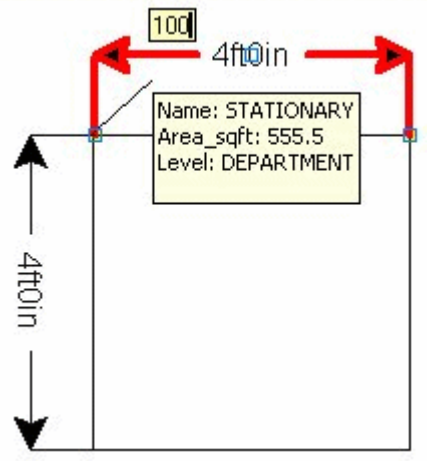
1. Click to select the required Dimension line.
2. Place the mouse pointer inside the Dimension Line, hold down the left mouse key and drag the Mark Up to where it is required.
3. Release the left mouse key to drop the Dimension Line in its new location.

Using the Move Option

To use the move option:

1. Click to select the required Dimension Line.
2. Click Move on the toolbar.
3. You will then be prompted to set two points to show the relative movement.
4. On setting the second point, the Mark Up will be moved the required distance and angle.
5. Alternatively, you can set the first point; drag the line to set the required angle of movement, then type in the required distance to move.

Figure 4–29 Dimensions



6. The dimension line will then move the specified distance at the required angle.

Deleting a Dimension

To delete a dimension:

> **Note:** If you are having trouble selecting a line for deletion, it is easiest to use a selection box rather than clicking on it.

1. Select the dimension.
2. Click Delete Mark-Up. A confirmation window will open.
3. Click Yes.

Turning Dimension Display On and Off

Dimension display can be turned on or off by switching the Markups layer on or off. Turning Dimension Display On or Off will also turn Mark Up Display On or Off.

To turn dimension display on and off:

1. Click Layers. The Layers window opens.
2. Clicking on the light bulb by Mark Ups will toggle Mark Up display on and off.

Changing the Appearance of a Dimension

The line color and weight, together with the text font and size can be changed by altering the system variable settings in the database.

Contact Oracle Customer Support for more information.

The Mark Up Option

The Mark Up options can be accessed using the Mark Up icons on the Toolbar.

You can use this tool to draw freehand lines in the drawing. For example, you can circle a group of fixtures to mark them for future attention.

One use might be to circle a group of fixtures to mark them for future attention.

- Adding a Mark Up

- Moving a Mark Up
- Deleting a Mark Up
- Turning Mark Up Display On and Off
- Changing the Appearance of Mark Ups

Adding a Mark Up

To add a mark up:

1. Click Add Mark Up on the toolbar.
2. A freehand line can then be drawn on the drawing by using the mouse.
3. Two different weights of line are available; one by holding down the left mouse button while drawing and one by holding down the right mouse button while drawing.

Moving a Mark Up

Mark ups can be moved in one of two ways:

- Dragging and dropping
- Using the move icon

Dragging and dropping

To drag and drop:

1. Select the required Mark Up.
2. Place the mouse pointer inside the Mark Up, hold down the left mouse key, and drag the Mark Up to where it is required.
3. Release the left mouse key to drop the Mark Up in its new location.

Using the Move Option

To use the move option

1. Click on the required Mark Up so it is highlighted.
2. Click Move on the toolbar.
3. You will then be prompted to set two points to show the relative movement.
4. On setting the second point, the Mark Up will be moved the required distance and angle.

Deleting a Mark Up

To delete a mark up:

1. Click on the line to active it.

> **Note:** If you are having trouble selecting a line for deletion, increase the scale of the drawing by using the mouse wheel.

2. Click Delete Mark-Up. A confirmation dialog box will appear.
3. Click Yes to delete the mark up.

Turning Mark Up Display On and Off

Mark Up Display can be turned on or off by switching the appropriate layer on or off.

To turn mark up display on and off:

1. Click Layer. The Layers window will open.
2. Click the light bulb by Mark Ups to toggle Mark Up display on and off.

Changing the Appearance of Mark Ups

The line color and weight can be changed by altering the system variable settings in the database.

Contact Oracle Customer Support for more information.

Undo, Cut, Copy, and Paste Options

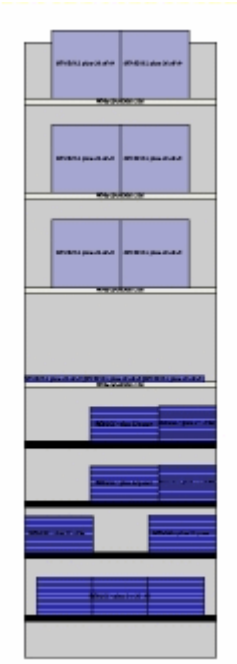
The Undo, Cut, Copy, and Paste options can be accessed using the icons on the Toolbar.

- The Undo option enables users to undo the last actions in the drawing.
- Only specific types of things within In-Store Space Collaboration can be cut, copied, and pasted. For example, notes and mark-ups can be copied to the clipboard and then pasted back to the drawing in Top Graphical (Plan) view.
- Similarly, products can be cut, copied and pasted in Front Graphical and Shelf Graphical views.
- If the cut, copy and paste icons are grayed out, that means they are unavailable for that task.

Front and Shelf Graphical Views

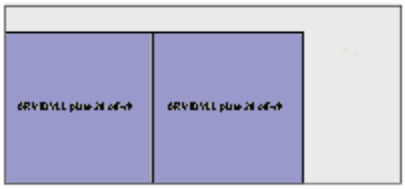
The Front Graphical View window gives a view of the front of the selected fixture(s) and can be used to modify products and shelves on a fixture.

Figure 4–30 Front Graphical View



The Shelf Graphical View window gives a planned view of the selected shelf and can be used to move products on a shelf.

Figure 4–31 Shelf Graphical View



Front Graphical View

The Front Graphical View Window gives a view of the front of the selected fixture(s).

To access Front Graphical View:

1. Select an appropriate fixture.
2. Click Front Graphical View in the Top Graphical View toolbar. The Front graphical View window opens.

Figure 4–32 Front Graphical View

This opens the Front Graphical View window displaying the selected fixture in front view.

- Front Graphical View Window
- Front Graphical View Toolbar
- Cut, Copy, and Paste in Front Graphical View
- Adding, Editing, and Deleting Products in Front Graphical View
- Adding, Editing, and Deleting Equipments in Front Graphical View
- Selecting Products and Equipment in Front Graphical View
- Moving Shelves in Front Graphical View
- Moving Products in Front Graphical View
- Rotating Products in Front Graphical View
- Aligning Products in Front Graphical View
- On Top in Front Graphical View
- Clash in Front Graphical View

The Front Graphical View Window

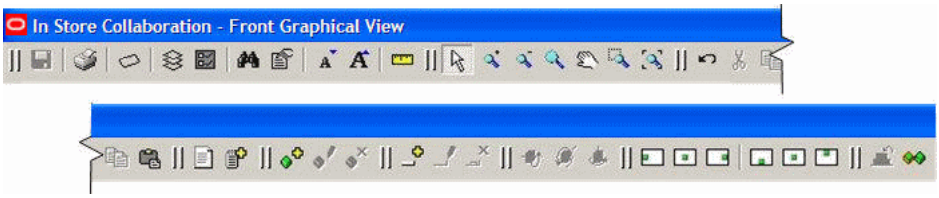
Front Graphical View enables you to modify products and shelves on a fixture. It can be used in conjunction with the Shelf Graphical View to configure many aspects of the shelves and products on that fixture.

- The Front Graphical Window contains a Toolbar (1), allowing actions to be selected by clicking on icons.
- The KPI Window (2) in the Object Browser allows you to select a KPI to color code the currently selected fixture or merchandise.
- The Key Window (3) shows the significance of the colors used to code the currently selected fixture.
- The fixture, its shelves, and its associated products are shown in the Front View (5).
- The Status Bar (6) contains prompts about the current action and allows the Snap, Ortho and Group options to be toggled On and Off.
- If a KPI has not been selected, each product will be colored according to its definition in Product Studio of Macro Space Management and product images are not shown.

Front Graphical View Toolbar

The Front Graphical View Toolbar controls operations in the Front Graphical View.

Figure 4–33 Front Graphical View–Toolbar



See The Toolbar for more information on the other options.

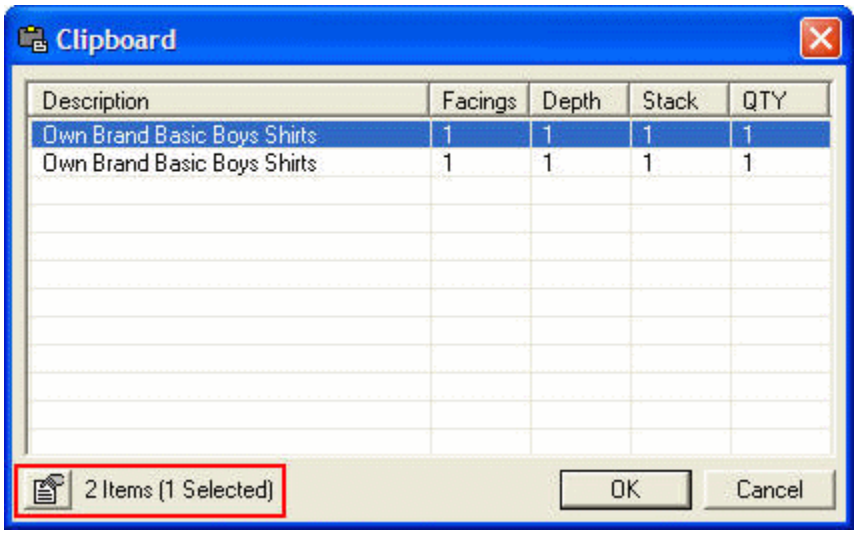
Cut, Copy, and Paste in Front Graphical View

The cut, copy, and paste options can be used in conjunction with the clipboard to modify the products present on a shelf.

The Clipboard

The clipboard contains details of all products that have been cut or copied during the current In-Store Space Collaboration session. The clipboard is enabled if a or a product shelf is selected. Otherwise, the icon is grayed out.

Figure 4–34 The Clipboard



Clicking on the Properties icon (highlighted in red) will bring up additional details on any highlighted items. The clipboard will be cleared of data when you logs out at the end of their In-Store Space Collaboration session.

Cut Option

The cut option will only be enabled if products are selected. Otherwise, the icon will be grayed out. The cut option will remove any currently highlighted products from the shelf and copy them to the clipboard.

Copy Option

The copy option will only be enabled if products are selected. Otherwise, the icon will be grayed out. The copy option will place details of any currently highlighted products on the clipboard.

Paste Option

The paste option will only be enabled if first the parent shelf is selected (and highlighted).

To use the paste option:

1. Select the parent shelf.
2. Click Paste. The Clipboard window will open.

3. Within the parent shelf, click to select a product.
4. Select the required items in the clipboard and click OK - the selected items will be pasted to the shelf.

Adding, Editing, and Deleting Products in Front Graphical View

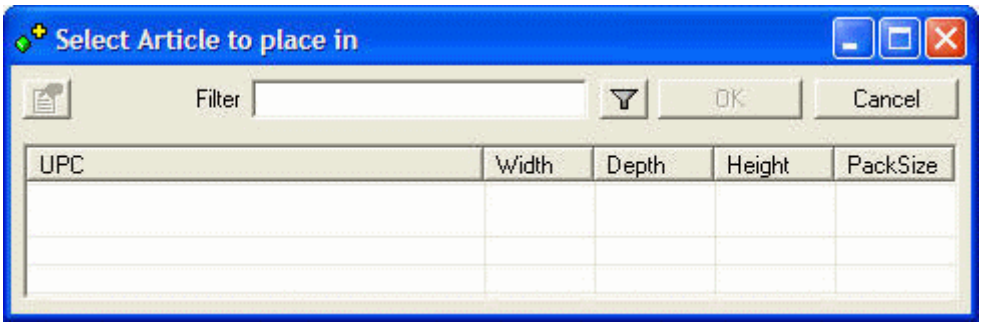
Products can be added to, edited on, or deleted from the active shelf using the Add, Edit, or Delete icons.

Adding a Product

To add a product:

1. Select the parent shelf
2. Click Add Product. The Select Article to place in window opens.

Figure 4–35 Select Article to place in



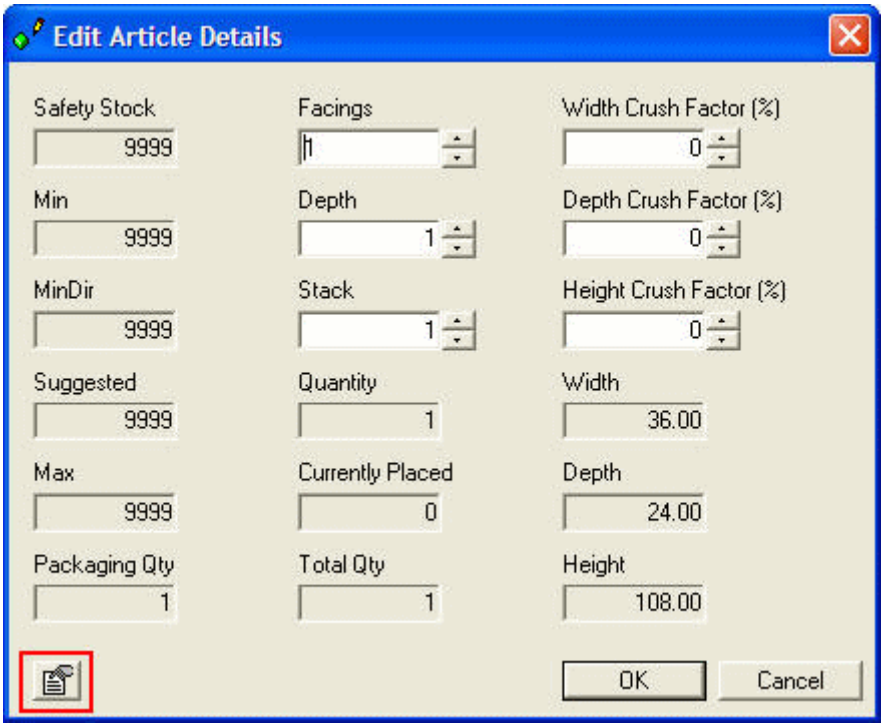
3. Use the filters to select a range of possible products for the shelf.
4. Highlight the required product, and then click OK. The Edit Article window opens.
5. Select the product and click Edit Product. The Edit Article Details window opens.

Editing a Product

To edit a product:

1. Select the product.
2. Click Edit Product. The Edit Article Details window opens.

Figure 4–36 Edit Article Details



The first column displays information that relates to the product item (product), except for the MultiPack quantity, which is a property of the selected Display Style (Product, Multipack, Half Pallet, or Full Pallet). This information is read from the database and cannot be changed.

The next column allows you to change the array size (facings, depth, stack), which will update the quantities accordingly. The minimum and maximum values for the spin buttons will be determined by the min/max values for the product display style; the increment will be set to 1 for each.

Note: The number in the Currently Placed text box indicates the number placed elsewhere in the store. This enables you to see the total quantity placed in the store, as well as the number placed in this instance.

At present you cannot place products in a non-regular array. If you wish to do so, you will have to place the same product more than once.

The third column details the crush factor and the total dimension occupied by the product. The total is calculated from the product dimensions and the number of instances of the product placed.

Clicking on the Properties button (highlighted in red) will call the Properties dialog for the selected product.

Deleting a product

To delete a product:

1. Select the product to be deleted.

2. Click Delete Product. The product will be deleted.

Adding, Editing, and Deleting equipment in Front Graphical view

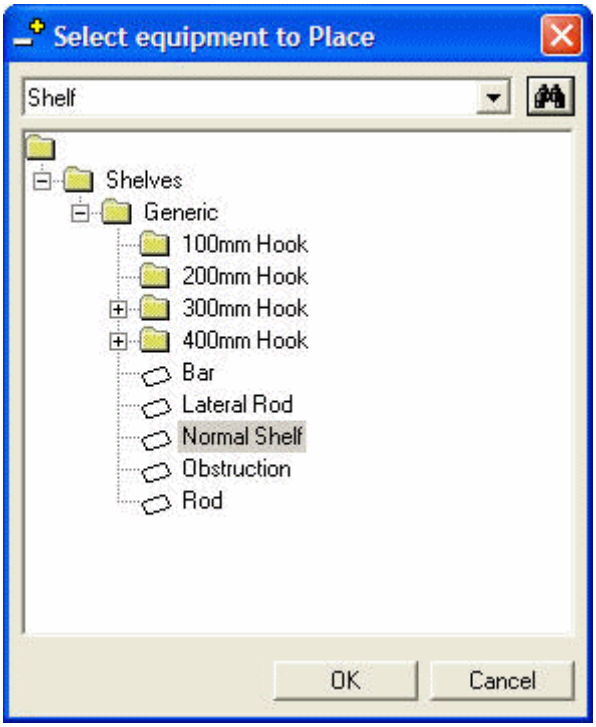
Equipment can be added to, edited on, or deleted from the active fixture using the Add, Edit, or Delete icons.

Adding Equipment

To add equipment:

1. Select the parent fixture.
2. Click Add Equipment. The Select Equipment dialog box will appear.

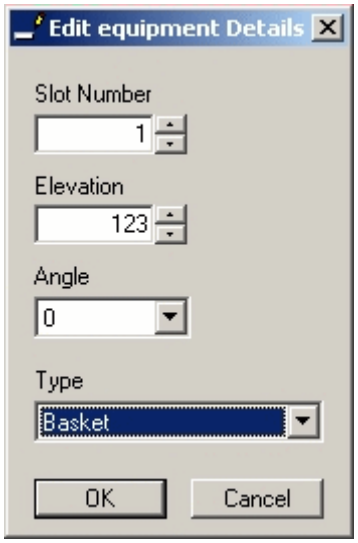
Figure 4–37 Select Equipment to Place



Note: Either use the search facility or navigate the hierarchy to select the item of equipment required.

3. Highlight the required equipment, and then click OK. The Edit Equipment Details dialog box will appear.

Figure 4–38 Edit Equipment Details



4. Set the required parameters and click OK. The equipment will be placed in the desired position.

Editing Equipment

To edit an item of equipment:

1. Select the equipment.
2. Click Edit Equipment. The Edit Equipment Details window opens.
3. Set the required parameters and click OK.

Deleting Equipment

To delete equipment:

1. Select the equipment.
2. Click Delete Equipment. The equipment will be deleted.

> **Note:** Parent fixture cannot be deleted.

Selecting Products and Equipment in Front Graphical View

To select products in shelf graphical view:

1. Click to select a product. The first item that is selected will be highlighted using the primary selection color (as defined in the Options dialog box); subsequent selected items will be highlighted using the secondary selection color.

> **Note:** Products can be de-selected from the selection set by clicking on them one more. Clicking on the first product selected in a selection set will de-select all products in that selection set. Pressing the Esc key will have a similar effect.

2. If you click on another product, it will select the new one and de-select the previously selected one. Clicking on a currently selected product will remove it from the selection set.
3. The status bar will indicate how many are selected.

Selecting Shelves

To select shelves in shelf graphical view:

1. Shelves can be selected clicking on them. (They cannot be selected if any products are currently selected).
2. Products can be selected once a shelf is selected. This will make them available for (for example) alignment operations.
3. Press the Esc key to de-select all objects in that selection set.

Moving Shelves in Front Graphical view

A shelf is moved in Front Graphical View by:

- Nudging
- Using the edit equipment window

Nudging

To move a shelf by nudging:

1. Select the shelf.
2. Use the cursor keys to move the equipment.

> **Note:** Only one item of equipment can be nudged at a time.

Edit Equipment window

To move a shelf using Edit Equipment window:

1. Select the fixture or shelf to be moved.
2. Click Edit Equipment. The Edit Equipment Details window will open.
3. Edit the details as required, and then click **OK**.

Moving Products in Front Graphical view

A product is moved in Front Graphical View by:

- Dragging and dropping
- Nudging

Dragging and Dropping

To move a product by dragging and dropping:

1. Click the product to select it.
2. Move the mouse cursor inside it and hold down the left mouse button.
3. Drag the product to where it is wanted and release the left mouse button. The product will be dropped in its new position.

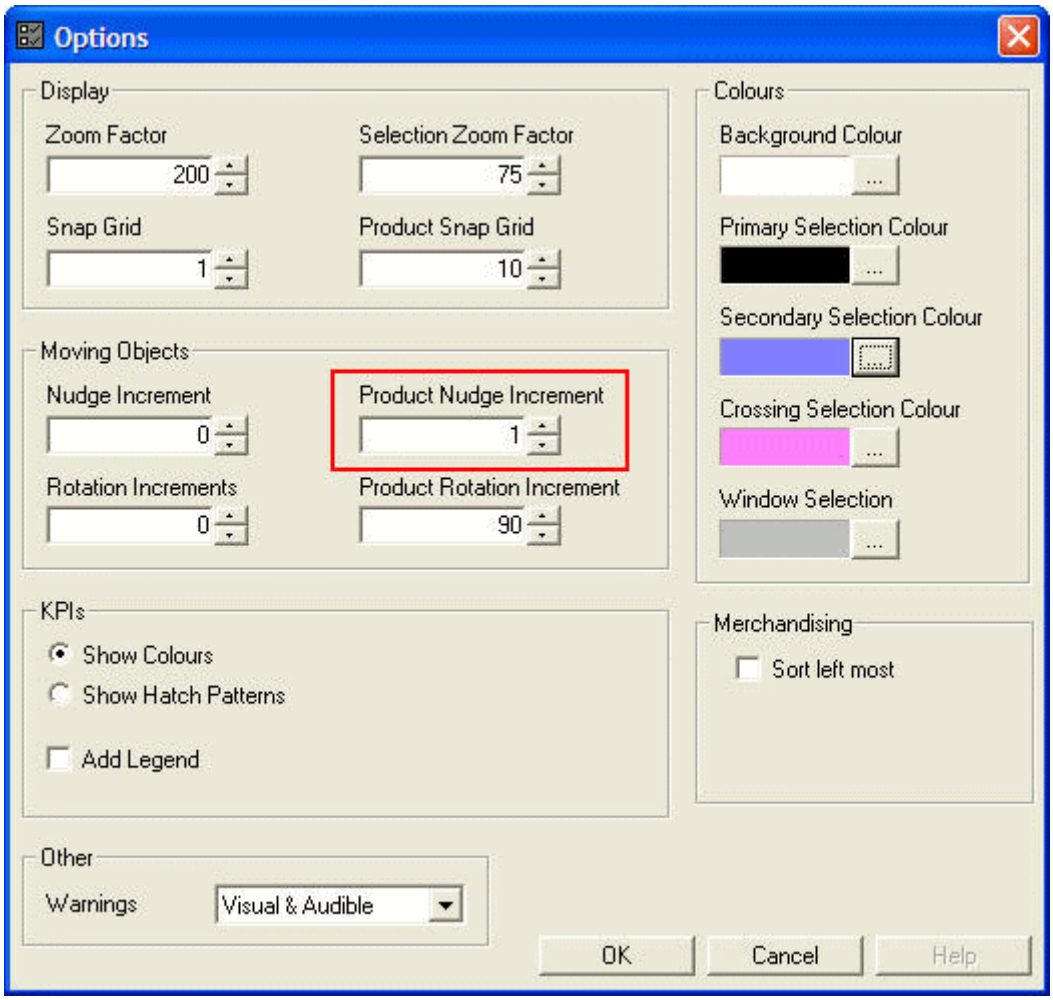
Note: Only one item can be dragged and dropped at the time. If multiple products are selected, drag and drop will not work.

Nudging

Select one or more products to be moved by clicking on them. They can then be moved up, down, left or right by the cursor keys.

Note: Only one item of equipment can be nudged at a time.

Figure 4–39 Product Nudge Increment



Rotating Products in Front Graphical View

Products can be rotated in the X, Y or Z planes by selecting them, then clicking on the appropriate rotation in the toolbar.

The rotation increment is set in the Options dialog. The default value is 90o.

Product Rotation

The rotate buttons will only be enabled if one product is selected.

- Rotating the object around the X axis is equivalent to tilting an object, so that its top or bottom can be viewed from the front.
- Rotating the object around the Y axis is equivalent to laying an object on its side.
- Rotating the object around the Z axis is equivalent to turning an object, so that side can be viewed.

The position of the product will be adjusted after rotation so that the product remains on the shelf/peg/rod.

Aligning Products in Front Graphical View

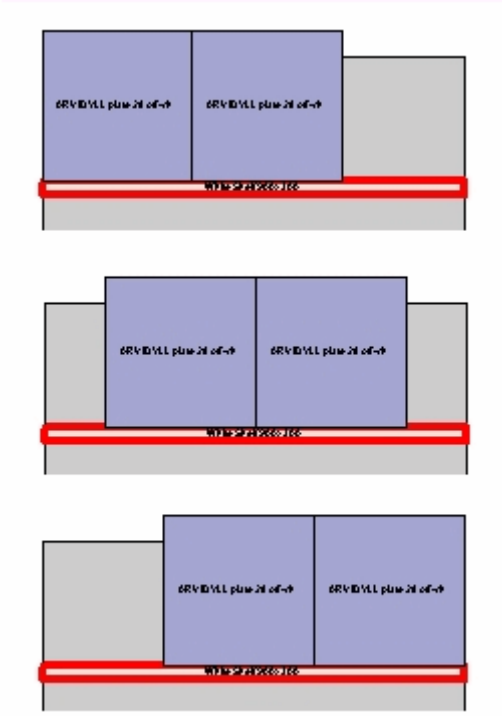
Products can be aligned on the shelf in both the X (left to right) and Y (front and back) directions by clicking on the appropriate icons in the toolbar.

There are two ways of using the functionality: selecting the parent shelf and selecting individual products.

Selecting the parent shelf

Select the parent shelf by clicking on it. It will become highlighted. All the products on the shelf will then align according to the alignment option selected. Alignments are sequential. For example to get all products aligned to the left, rear of the shelf click on align to left then click on align to rear.

Figure 4–40 Selecting the parent shelf



In the example above:

The top image shows products left aligned.

The middle image shows products centre aligned.

The bottom image shows products right aligned.

Selecting individual products

Individual products are aligned by nudging or by dragging and dropping.

> **Note:** This functionality has not been fully enabled in this release and aligning one or more products by selecting them and clicking on the alignment buttons may have unpredictable effects.

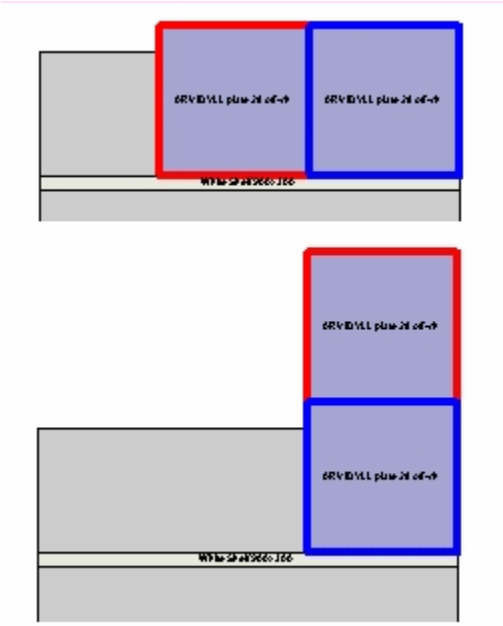
On Top in Front Graphical View

The On Top option allows users to place one product on top of another.

To place a product on top of another:

1. Select a product already existing on the fixture. This will be highlighted in the first selection color.
2. Then select a second product. This will be highlighted in the second selection color.
3. Click On Top to place the first selected product on top of the second selected product.

Figure 4–41 On Top in Front Graphical View



By default, it will position the product so that it is centered on the bottom product. Products can then be moved by nudging or by dragging and dropping.

> **Note:** Alignment is not fully implemented in this release, so there may be issues aligning products placed on top of each other.

Gravity is not implemented, i.e. if the bottom product is moved or deleted, the top product will remain in the same position.

Clash in Front Graphical View

The Clash option is found to the right of the toolbar. The Clash button is a toggle button.

Clash will be enabled when pressed in and disabled when un-pressed.

When clash is enabled, it will prevent articles overlapping, it will also assist you in lining up articles so that they adjoin each other, although the snap functionality will override this, if enabled.

Note: This functionality is not enabled in this release. If items are aligned, they may overlap.

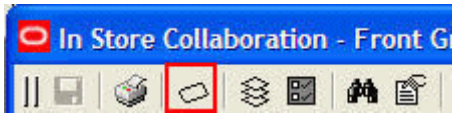
Shelf Graphical View

The Shelf Graphical View Window gives a view of the shelf of the selected fixture(s).

To access Shelf Graphical View:

1. Select an appropriate fixture.
2. Click Front Graphical View in the Top Graphical View toolbar. The Front graphical View window opens.
3. On the Front Graphical View window, click Shelf Graphical View (highlighted in red). The Shelf Graphical View window opens.

Figure 4–42 Shelf Graphical View

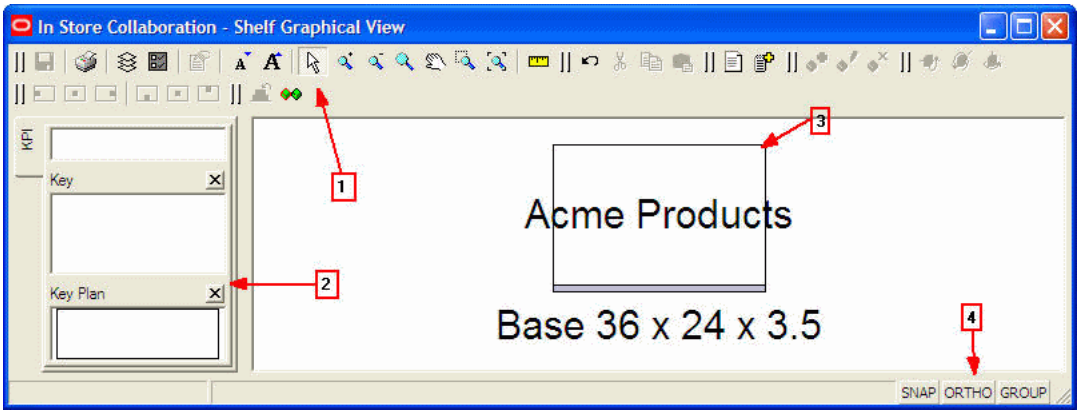


- Shelf Graphical View Window
- Shelf Graphical View Toolbar
- Cut, Copy, and Paste in Shelf Graphical View
- Adding, Editing, and Deleting Products in Shelf Graphical View
- Selecting Products and Equipment in Shelf Graphical View
- Moving Products in Shelf Graphical View
- Rotating Products in Shelf Graphical View
- Aligning Products in Shelf Graphical View
- On Top in Shelf Graphical View
- Clash in Shelf Graphical View

The Shelf Graphical View Window

Shelf Graphical View enables you to move products on a shelf, using top view; particularly useful if objects need to be moved behind other objects on a shelf.

Figure 4–43 The Shelf Graphical View Window



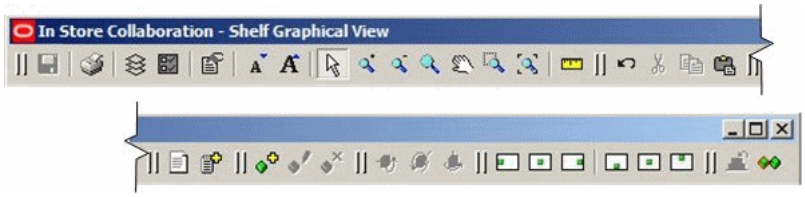
- The Shelf Graphical Window (1) contains a Toolbar, allowing actions to be selected by clicking on icons.
- The Object Browser (2) gives information on current activities.
- The shelf and its associated products (3) are shown in the Top View.
- The Status Bar (4) contains prompts about the current action and allows the Snap, Ortho, and Group options to be toggled On and Off.

The products are drawn using rectangles, as defined in the central Macro Space Management database. Each article is colored according to its definition in Macro Space Management's Product Studio; product images will not be shown.

The Shelf Graphical View Toolbar

The Shelf Graphical View Toolbar controls operations in the Shelf Graphical View.

Figure 4–44 Shelf Graphical View Toolbar



See The Front Graphical View Toolbar for more information on all options.

Cut, Copy, and Paste in Shelf Graphical View

The cut, copy, and paste options can be used in conjunction with the clipboard to modify the products present on a shelf.

The Clipboard

The clipboard contains details of all products that have been cut or copied during the current In-Store Space Collaboration session. The clipboard will only be enabled if a shelf is selected, or of a shelf then a product is selected. Otherwise the icon will be grayed out.

Clicking on the Properties icon (highlighted in red) will bring up additional details on any highlighted items. The clipboard will be cleared of data when you logs out at the end of their In-Store Space Collaboration session.

Cut Option

The cut option will only be enabled if products are selected. Otherwise, the icon will be grayed out. The cut option will remove any currently highlighted products from the shelf and copy them to the clipboard.

Copy Option

The copy option will only be enabled if products are selected. Otherwise, the icon will be grayed out. The copy option will place details of any currently highlighted products on the clipboard.

Paste Option

The paste option will only be enabled if first the parent shelf is selected (and highlighted).

To use the paste option:

1. Select the parent shelf.
2. Within the parent shelf, click to select a product.
3. Click Paste. The Clipboard window will open.
4. Select the required items in the clipboard and click OK - the selected items will be pasted to the shelf.

Adding, Editing, and Deleting Products in Shelf Graphical view

Products can be added to, edited on, or deleted from the active shelf using the Add, Edit, or Delete icons.

To add a product:

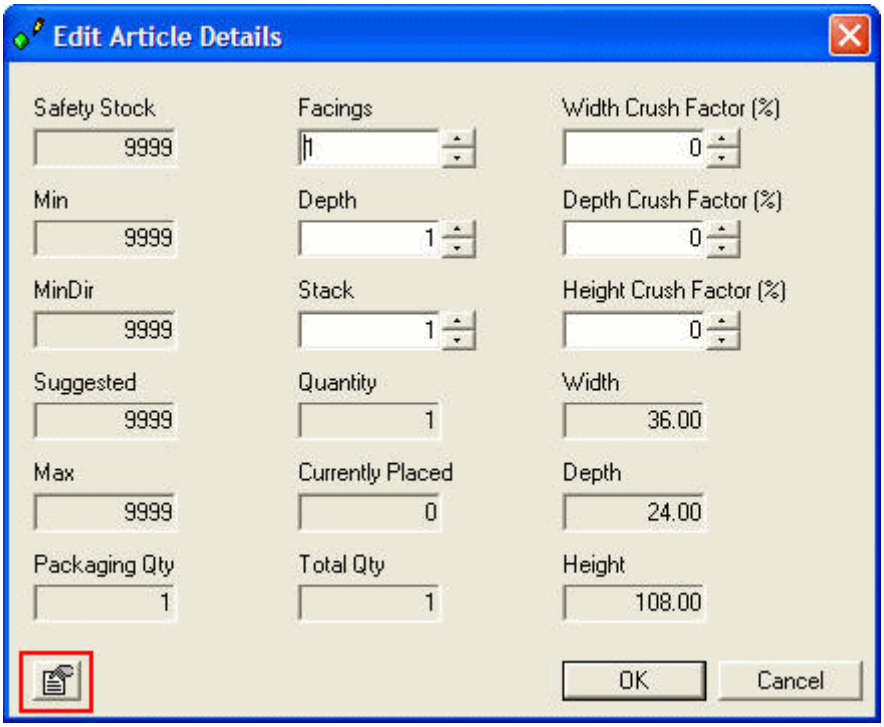
1. Select the parent shelf
2. Click Add Product. The Select Article to place in window opens.
3. Use the filters to select a range of possible products for the shelf.
4. Highlight the required product, and then click OK. The Edit Article window opens.
5. Select the product and click Edit Product. The Edit Article Details window opens.

Editing a Product

To edit a product:

1. Select the product.
2. Click Edit Product. The Edit Article Details window opens.

Figure 4–45 Edit Article Details



The first column displays information that relates to the product item (product), except for the MultiPack quantity, which is a property of the selected Display Style (Product, Multipack, Half Pallet, or Full Pallet). This information is read from the database and cannot be changed.

The next column allows you to change the array size (facings, depth, stack), which will update the quantities accordingly. The minimum and maximum values for the spin buttons will be determined by the min/max values for the product display style; the increment will be set to 1 for each.

Note: The number in the Currently Placed text box indicates the number placed elsewhere in the store. This enables you to see the total quantity placed in the store, as well as the number placed in this instance.

At present you cannot place products in a non-regular array. If you wish to do so, you will have to place the same product more than once.

The third column details the crush factor and the total dimension occupied by the product. The total is calculated from the product dimensions and the number of instances of the product placed.

Note: Crush factors are not enabled in this release.

Clicking on the Properties button (highlighted in red) will call the Properties dialog for the selected product.

Deleting a product

To delete a product:

1. Select the product to be deleted.
2. Click Delete Product. The product will be deleted.

Selecting Products and Shelves in Shelf Graphical View

To select products in shelf graphical view:

- Click to select a product. The first item that is selected will be highlighted using the primary selection color (as defined in the Options dialog box); subsequent selected items will be highlighted using the secondary selection color.

> **Note:** Products can be de-selected from the selection set by clicking on them one more time. Clicking on the first product selected in a selection set will de-select all products in that selection set. Pressing the Esc key will have a similar effect.

- If you click on another product, it will select the new one and de-select the previously selected one. Clicking on a currently selected product will remove it from the selection set.
- The status bar will indicate how many are selected.

Shelves

To select shelves in shelf graphical view:

- Shelves can be selected clicking on them. (They cannot be selected if any products are currently selected).
- Products can be selected once a shelf is selected. This will make them available for (for example) alignment operations.
- Press the Esc key to de-select all objects in that selection set.

Moving Products in Shelf Graphical View

There are two ways of moving products in Shelf Graphical View:

- Dragging and dropping
- Nudging

Dragging and Dropping

To move a product by dragging and dropping:

1. Select the product.
2. Move the mouse cursor inside it and hold down the left mouse button.
3. Drag the product to where you want to place it and release the left mouse button. The product will be dropped in its new position.

> **Note:** Only one item can be dragged and dropped at a time. If multiple products are selected, drag and drop does not work.

Nudging

Select one or more products to be moved by clicking on them. They can then be moved up, down, left or right by the cursor keys.

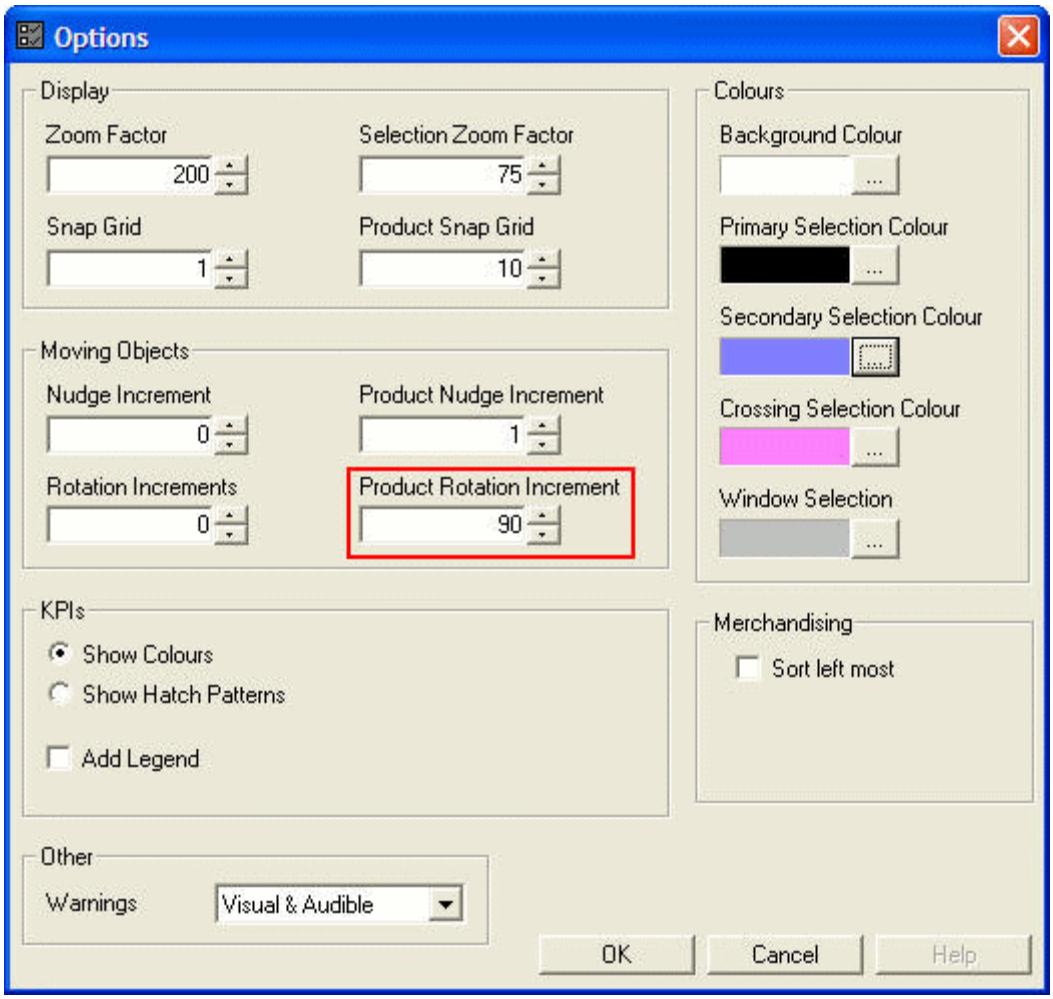
> **Note:** The amount the selected product(s) move on each nudge is set in the options dialog box by changing the Product Nudge Increment.

Rotating Products in Shelf Graphical View

Products can be rotated in the X, Y, or Z planes by selecting them, then clicking on the appropriate rotation in the toolbar.

The rotation increment (normally 90o) is set in the Options dialog.

Figure 4–46 Product Rotation Increments



The rotate buttons will only be enabled if one product is selected.

- Rotating the object around the X axis is equivalent to tilting an object, so that its top or bottom can be viewed from the front.
- Rotating the object around the Y axis is equivalent to laying an object on its side.

- Rotating the object around the Z axis is equivalent to turning an object, so that side can be viewed.

The position of the product will be adjusted after rotation so that the product remains on the shelf/peg/rod.

Aligning Products in Store Graphical View

Products can be aligned on the shelf in both the X (left to right) and Y (front and back) directions by clicking on the appropriate icons in the toolbar.

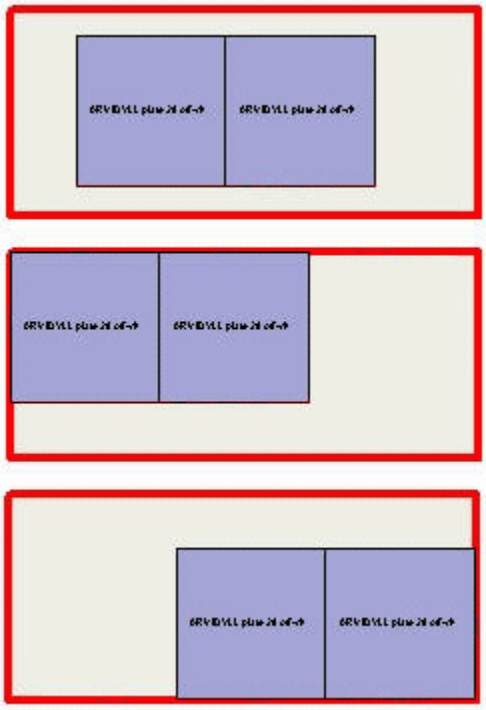
There are two ways of using the functionality:

- Selecting the parent shelf
- Selecting individual products

Selecting the parent shelf

Select the parent shelf by clicking on it. It will become highlighted. All the products on the shelf will then align according to the alignment option selected. Alignments are sequential. For example, to get all products aligned to the left, rear of the shelf click on align to left then click on align to rear.

Figure 4–47 Selecting Parent Shelf



In the example above:

The top image shows products aligned centre, middle.

The middle image shows products aligned left, rear.

The bottom image shows products aligned front, right.

Selecting individual products

Individual products are aligned by nudging or by dragging and dropping.

> **Note:** This functionality has not been fully enabled in this release and aligning one or more products by selecting them and clicking on the alignment buttons may have unpredictable effects.

On Top in Shelf Graphical View

The On Top option allows users to place on product on top of another. You starts by selecting a product. This will be highlighted in the first selection color. You then selects a second product This will be highlighted in the second selection color. Clicking on the On Top button will then place the first selected product on top of the second selected product.

By default, it will position the product so that it is centered on the bottom product. The alignment buttons can then be used to align the top relative to the bottom one. Alternatively, products can be moved by nudging or by dragging and dropping.

> **Note:** Alignment is not fully implemented in this release, so there may be issues aligning products placed on top of each other.

Gravity is not implemented, i.e. if the bottom product is moved or deleted, the top product will remain in the same position.

Clash in Shelf Graphical View

The Clash option is found to the right of the toolbar. When clash is enabled, it will prevent articles overlapping, it will also assist you in lining up articles so that they adjoin each other, although the snap functionality will override this, if enabled.

> **Note:** This functionality is not enabled in this release. If items are aligned, they may overlap.

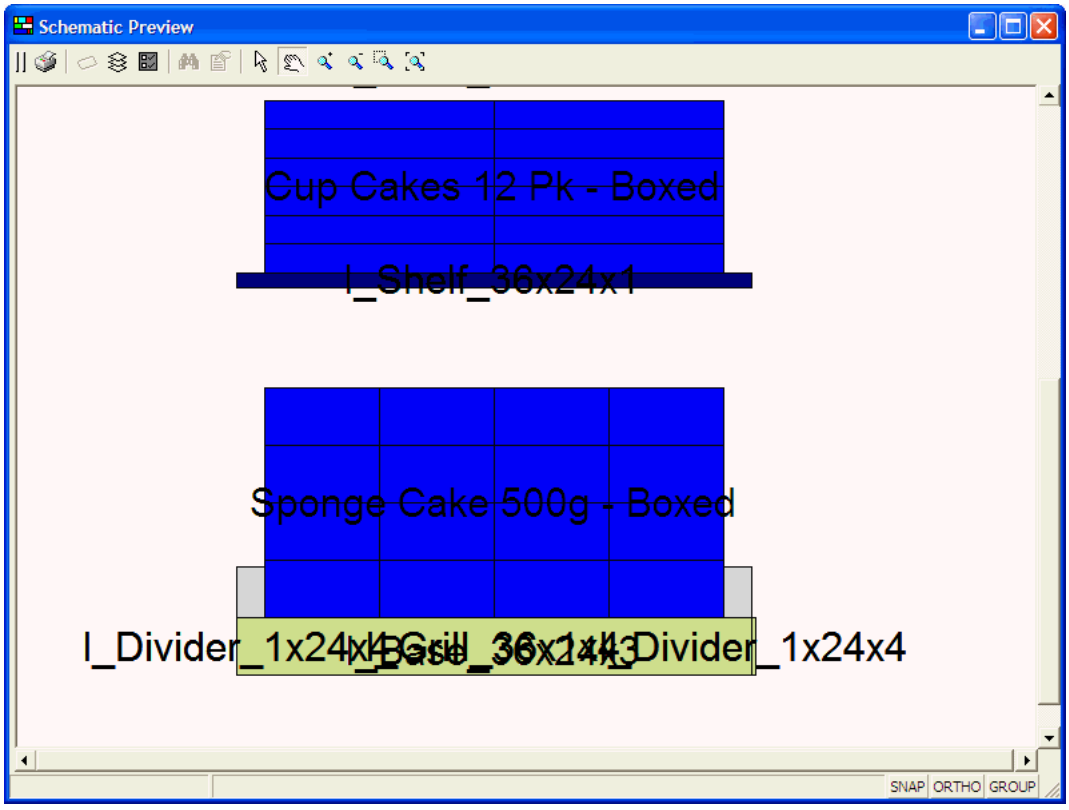
Schematic Preview

The Schematic Preview Window or the Planogram Preview Window gives the front view of the planogram. It shows the Display Styles of shelves, fixtures, and merchandise just placed on the shelves. It is not possible to modify anything using the window but you can query the items present

The view is accessed by first clicking on the fixture with the placed planogram to select it. The Schematic Preview icon in the toolbar will then become active.

Click Schematic Preview. The Schematic Preview window will open.

Figure 4–48 Schematic Preview



The size of the image can be changed by zooming on or out (using either the mouse or the toolbar options).

The position of the image can be changed by panning (using either the mouse or the toolbar option).

It is also possible to zoom to the extents of the schematic preview or selected objects in the preview.

The Schematic Preview Toolbar

The Toolbar at the top of the Schematic Preview Window allows a number of operations to be carried out within the window.

See The Toolbar for more information on the other options.

Operations in the Schematic Preview Window

The Properties Window

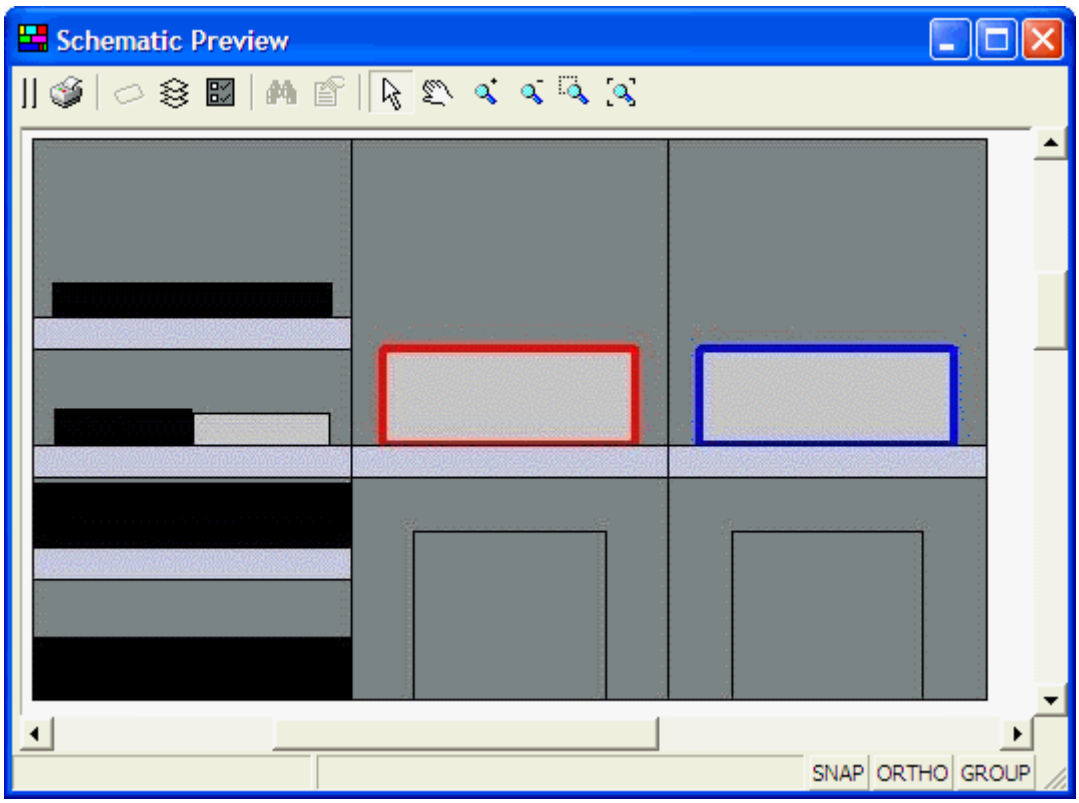
It is possible to get more information on a fixture, fitting, or placed product in the planogram by clicking on the required object to highlight it.

You can select an object in the following ways:

- Window Selection: Window Selection only selects objects that the window completely encloses. To use Window Selection, select a start point then move the cursor right.

- Crossing Selection: Crossing Selection selects every object that the window encloses or crosses. To use Crossing Selection select a start point then moves the cursor left.

Figure 4–49 Schematic Preview window



Only similar type of objects can be selected at any one time. For example, if a fixture is the first object selected, then only fixtures can be selected if further selections are made. Selected objects will be highlighted. Selection sets can be cancelled by means of the Esc key or by clicking on the first selected object.

Note: IGrouping is on, then clicking on a shelf will select all objects on the shelf. Clicking on a fixture will select all objects on the fixture.

Click the Properties Icon. The Properties window will open, which will contain more information on the selected objects.

The number of objects can be seen at the bottom of the window. The arrowheads allow you to move through the records.

Hovering over a fixture, fitting or placed product will bring up a tooltip giving brief information as to what the object is.

Note: Contact Oracle Customer Support to customize the tooltips.

Operating in the Drawing

You can affect how the drawing behaves by use of the provided controls.

See The Toolbar for more information on the options.

Select Tool

The Select Tool is the default selection.

When it is toggled on (depressed) objects may be selected in the drawing by left clicking on individual fixtures or fittings or by means of Crossing or Windows Selection Boxes.

Zooming In

Zoom In will increase the magnification and hence the level of detail visible in the drawing.

The centre of the drawing will remain centered in the screen while zooming in.

This option is operated by clicking it.

Each click will increase the scale of the drawing by the Zoom Factor set in the Options Window.

Zooming Out

Zoom Out will decrease the magnification and hence the level of detail visible in the drawing.

The centre of the drawing will remain centered in the screen while zooming out.

Each click will decrease the scale of the drawing by the Zoom Factor set in the Options Window.

Zoom Tool

Each left or right button click will increase or decrease the scale of the drawing by the Zoom Factor set in the Options Window.

The point where the mouse cursor is will remain centered in the screen while zooming in.

Note: You can also Zoom In/Out by rotating the central wheel on the mouse.

Panning

Panning enables you to move the visible part of the drawing left and right, or up and down.

This option is toggled on by clicking it. It is turned off by clicking on another option.

When the option is selected, the mouse cursor will change to the Panning icon.

The drawing can then be moved by holding down the left mouse button and dragging the drawing in the required direction.

Zoom Window

Zoom Window gives you the option of magnify a selected portion of the current store plan.

This option is toggled on by clicking it. It is turned off automatically after the drawing has been zoomed to the selected area.

When this option is selected, you will be asked to pick the first selection point in the prompt window in the status bar at the bottom of the screen. Select the point and left click to confirm it.

You will then be prompted to select a second selection point. This will define a rectangle - black in the above example. Left click to confirm the second point and the screen will zoom to show the selected area.

Zoom to Extents

When Zoom to Extents is clicked in the toolbar the drawing will change scale so the full drawing can be seen at the largest possible scale in the Top Graphical View.

If any fixtures are selected, then the drawing will zoom to the extents that all selected fixtures can be seen.

5
Fixturing

This chapter describes the Fixturing module in In-Store Space Collaboration. It includes the following sections:

Within In-Store Space Collaboration, users can access drawings created within Macro Space Management. These drawings can then be edited in In-Store Space Collaboration. On saving and closing the drawing, it will become available to other users in both Macro Space Management and In-Store Space Collaboration.

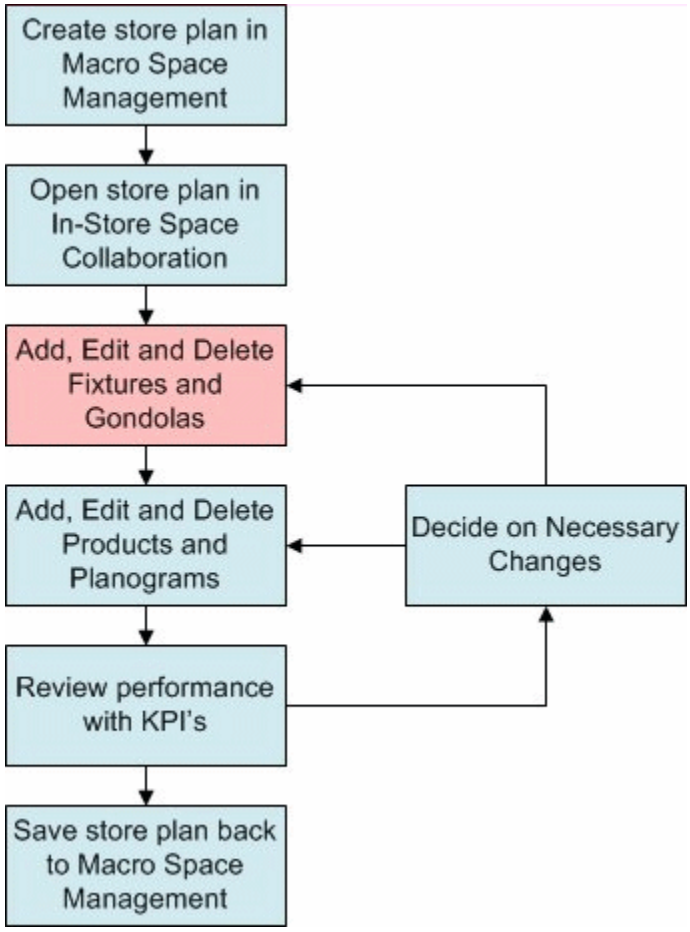
- In the Fixturing Tab, fixtures, fittings, and gondolas can be added to, manipulated within, and deleted from the drawing.
- In the Merchandising Tab, both products and planograms can be added to, manipulated within, and deleted from the drawing. In addition, existing products already in place in the store can be scanned with a bar code reader to enable previously placed planograms to be identified.
- In the KPI Tab the performance of the current layout can be reviewed (and if necessary the layout can be revised in consequence.

Fixturing Process Flow

The following figure illustrates the process flow for Macro Space Management and In-Store Space Collaboration. It provides a high level overview of where the Fixturing Module fits in the process flow.

The Fixturing Process Flow is as follows:

Figure 5–1 Fixturing Process Flow



Once the drawing is open, fixtures, fittings, and gondolas can be added, edited, and deleted.

Once the arrangement of fixtures, fittings, and gondolas are set to your satisfaction, they can be populated with merchandise, and the result assessed using Key Performance Indicators (KPI's).

Basic Concepts for Fixturing

This section describes the basic concepts of Fixturing. These are:

- Fixtures, Fittings, and shelves
- Gondolas
- Insertion Points
- Layers

Fixtures, Fittings, and Shelves

Fixtures and fittings are often color coded as to purpose. For example, fixtures holding groceries might be drawn in green, fixtures holding chilled goods in blue.

Table 5–1 Fixtures, Fittings, and Shelves

Field	Description	Example
Fixtures	A fixture is a structure designed to hold products for sale. A fixture can hold product directly, or via shelves.	A fixture can hold product directly, or via shelves. A shelf always has a parent fixture. For example, runs of shelving, display cabinets, and kiosks.
Fittings	Fittings are items within a store that aid the retail effort, but do not themselves hold merchandise. Some fittings are used to support or augment fixtures. Fittings always remains as a separate items on the drawing, (and can be hidden from view using the Hide Fittings command).	For example a shelving unit could be made up of support legs, (a fitting), and shelves, (a fixture). Examples are display material and checkout counters.
Shelves	It can be described as an equipment within a fixture which can hold a product. Each shelf or fixture always has a product base associated with it. This serves as a placeholder for any merchandise placed on it.	For example a backboard might hold several support bars. The support bars could in turn have rods attached. Product could then be hung from those rods. The arrangement of rods emanating from a single support bar is generically called a shelf for planning purposes.

Gondolas

A Gondola is an arrangement made up from two or more fixtures (and associated fittings) linked together by means of connection points or in sufficiently close proximity to meet the definition of adjacency. An example might be a run of 10 fixtures placed back to back, with end caps on each end to maximize the area devoted to sales.

Gondolas are internally sub-divided into sections, each new section beginning where fixtures go through more than a 30o change of angle when connected.

Gondolas are often color coded as to purpose. For example, gondolas holding groceries might be drawn in green, fixtures holding chilled goods in blue.

Insertion Points

The point where a fixture, fitting, or gondola is located on the drawing is called the Insertion Point. It can be designated anywhere within the fixture during the creation stage within Macro Space Management.

Insertion points are visible in In-Store Space Collaboration.

Layers

Drawings can be divided into layers. Each layer contains a specific type of information. For example, one layer might contain information on fixtures, and another might contain data on electrical wiring.

Layers can be further sub-divided into aliases. Each alias will contain very specific information. For example, one alias might contain details of all the fixtures capable of holding chilled goods, and another might contain all fixtures holding fruit, and vegetables.

Layers are one method used by Macro Space Management to filter fixtures, planograms, etc.

Fixturing Toolbar and Object Browser Window

Located at the top of the window, the toolbar gives access to a wide range of In-Store Space Collaboration functions. Different users may have access to slightly different options on the toolbar - this depends on the settings for the parent User Group in Macro Space Manager.

The following concepts are explained in this section:

- The Fixturing Toolbar
- The Gondolas Toolbar
- The Fixtures Hierarchy Window
- The Gondolas Hierarchy Window
- The Properties Window
- The Key Plan Window

The Fixturing Toolbar

The Fixturing tool bar is found on the main toolbar. It is selected by clicking on Fixtures in the Fixturing Tab. It contains a series of icons allowing various operations to be carried out on Fixtures. Some may be grayed out if they are not available for that operation.

The Gondolas Toolbar

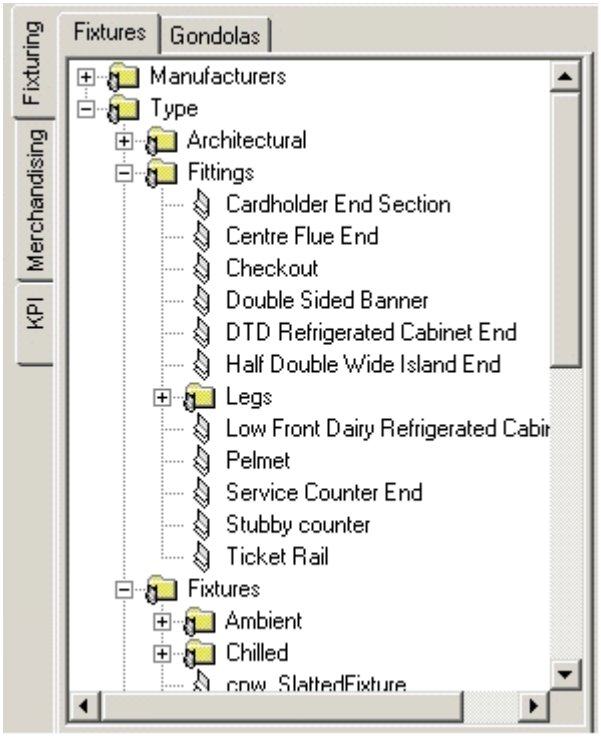
The Gondolas tool bar is found on the main toolbar. It is selected by clicking on Gondolas in the Fixturing Tab of the Object Browser.

It contains a series of icons allowing various operations to be carried out on Gondolas. Some may be grayed out if they are not available for that operation.

The Fixtures Hierarchy Window

The Fixtures tab is the default tab under Fixturing. The Fixtures tab displays the Fixtures Hierarchy Window.

Figure 5–2 The Fixture Hierarchy Window



The fixtures hierarchy tree shows the list of fixtures that can be placed in the store plan. It is configured in Macro Space Management and cannot be changed in In-Store Space Collaboration.

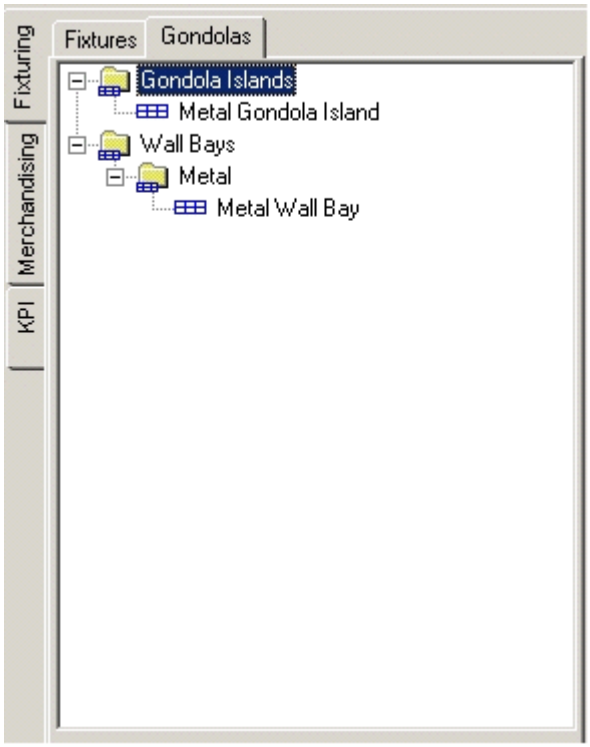
Horizontal and vertical scroll bars will be displayed if the hierarchical tree is larger than the extents of the window.

Click + to expand, and - to collapse the hierarchy.

The Gondolas Hierarchy Window

The Gondolas tab displays the Gondolas Hierarchy.

Figure 5–3 The Gondola Hierarchy Window



The gondolas hierarchy tree shows the list of gondolas that can be placed in the store plan. It is configured in Macro Space Management and cannot be changed in In-Store Space Collaboration.

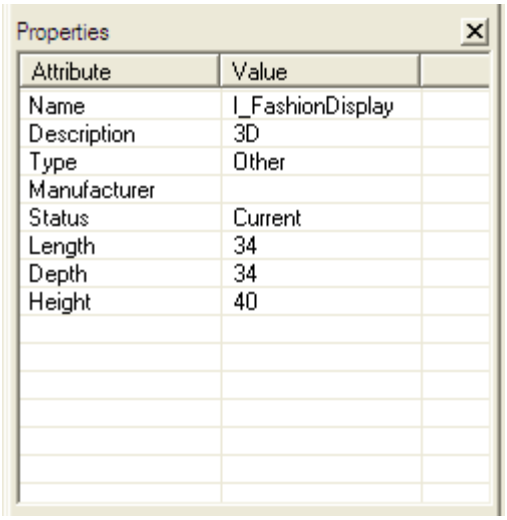
Horizontal and vertical scroll bars will be displayed if the hierarchical tree is larger than the extents of the window.

Click + to expand, and - to collapse the hierarchy.

The Properties Window

The Properties Window contains details of the currently selected fixture or gondola. The list of properties displayed is configurable within Macro Space Management. The currently displayed properties can be refreshed by clicking on another fixture of gondola.

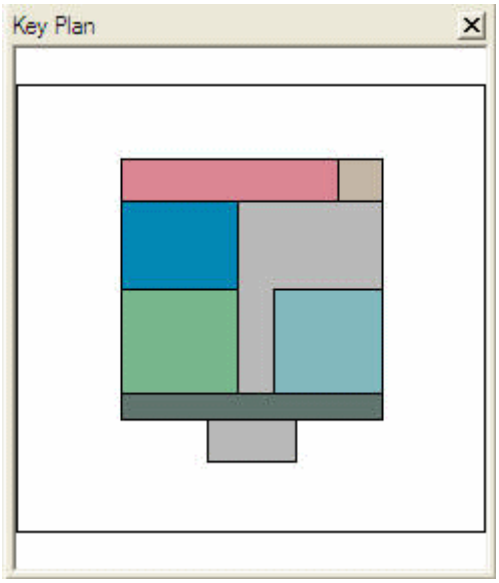
Figure 5–4 The Properties Window



The Key Plan Window

The Key Plan Window shows which part of the drawing is currently being viewed.

Figure 5–5 The Key Plan Window



Fixture Operations

A fixture is a structure designed to hold products for sale. A fixture can hold product directly, or via shelves. A fixture can hold product directly, or via shelves. A shelf always has a parent fixture. For example, runs of shelving, display cabinets, and kiosks.

Following are the Fixture Operations:

- Selecting Fixtures
- Cancelling Selection of Fixtures

- Effect of Ortho Option on Fixture Operations
- Effect of Snap Option on Fixture Operations
- Adding Fixtures
- Adding Fixtures using the Offset option
- Swapping Fixtures
- Deleting Fixtures
- Moving Fixtures
- Rotating Fixtures
- Fixture Attributes
- Resizing Fixtures
- Promotional Fixtures

Selecting Fixtures

There are three ways to select fixtures for further operations (such as moving or rotating) from within the drawing.

- Individual Selection
- Crossing Selection
- Window Selection

Individual Selection

Individual Selections are made by left clicking on fixtures to select them.

Crossing Selection

A Crossing Selection is made using a selection box where the cursor is moved to the left of the original selection point. Crossing Selections have a dotted outline and include all fixtures totally or partially within the selection box.

Window Selection

A Window Selection is made using a selection box where the cursor is moved to the right of the original selection point. Window Selections have a solid outline and only include fixtures totally within the selection box.

Note: The colors of the outlines of the Crossing or Window Selection Boxes, together with the colors for the first and subsequently selected fixtures can be customized in the Colors Frame of the Options Window.

Cancelling Selection of Fixtures

Selection can be cancelled in two ways:

- Individually clicking on fixtures.
- Using the Esc key.

Individually clicking on fixtures

Any fixture can be removed from the current selection by clicking on it for a second time. The outline will change back from thick and colored to its original form.

If the first fixture selected is clicked for a second time, then all selected fixtures will be de-selected. The first fixture is differentiated from all subsequent selections by being a different color. (These colors can be defined in the Options Window.

Using the Esc Key

Press the Esc Key to cancel all selections.

Effect of Ortho option on Fixture operations

Although fixtures can be moved or rotated freely throughout the drawing, the Ortho option allows you to move or rotate the fixtures only in 90-degree angles (0 degrees, 90 degrees, 180 degrees, and 270 degrees).

The insertion angle, when fixtures are added, will also be confined to these angles.

If the Ortho option is disabled, then the fixtures can be moved in any direction, and rotated through any angle.

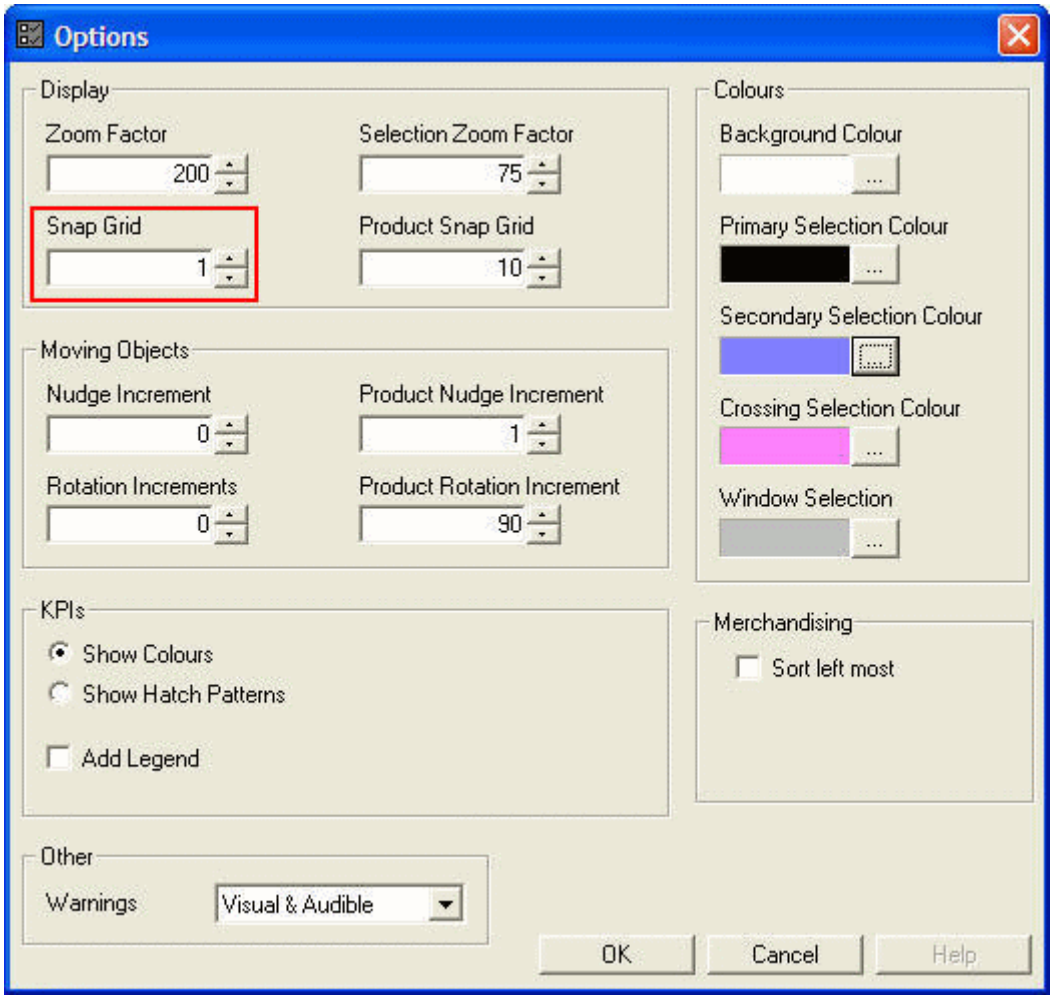
Effect of Snap Option on Fixture Operations

Although the fixtures can be moved freely at any distance, the Snap option allows the fixtures to be moved only in discrete increments as specified in the Options window.

If the Snap option is disabled, then fixtures can be moved by any distance.

Note: The setting in the Snap Grid options, in the Options Window, will determine the size of the grid that the fixtures are snapped to.

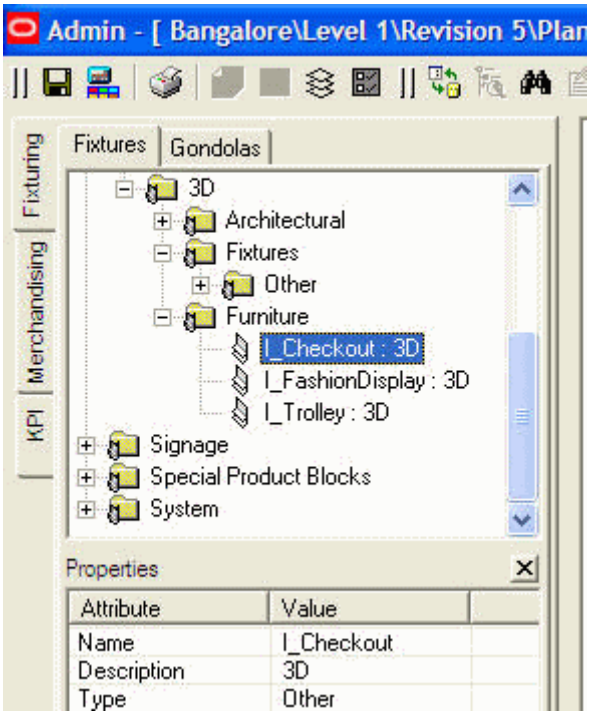
Figure 5–6 Snap Grid



Adding Fixtures

Adding Fixtures to the drawing is achieved by selecting the required fixture from the Fixture Hierarchical Tree in the Object Browser.

Figure 5–7 Adding Fixtures



To add a fixture:

1. On the Fixtures tab, select a fixture from the Fixture Hierarchical Tree.
2. Click Add Fixture.
3. Click an area to choose the insertion point.
4. Move the cursor to choose the rotation angle.
5. Click to confirm the rotation angle. The fixture will be inserted at that point, and at the angle set.
6. If the fixture is defined as stretchable in Macro Space Management, the Edit Size window will open, allowing you to customize the size of the fixture.

Figure 5–8 Edit Size

7. Click OK to complete the insertion of the fixture.

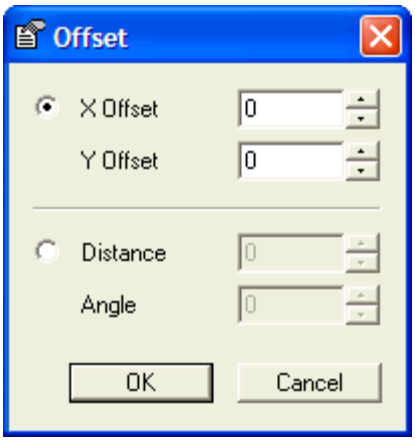
Adding Fixtures using the Offset Option

Using Offsets you can add new fixtures at specified distances from fixtures already in place.

To add fixtures using offset:

1. Select the Fixture and click Add Fixture.
2. Click Offset. The Offset window opens.

Figure 5–9 The Offset Option



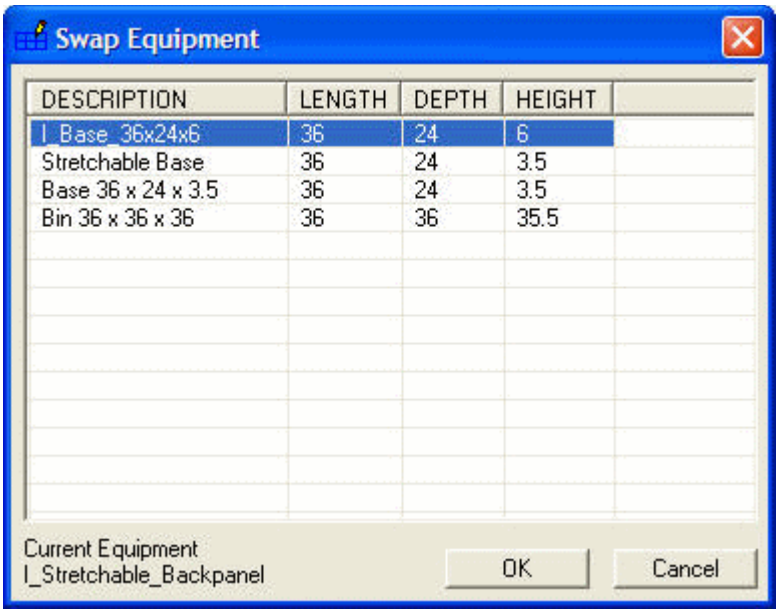
3. Enter an offset, either in terms of X and Y co-ordinates, or Distance and Angle.
4. Click OK.
5. In the diagram, move and click the first pointer to specify the required position of the offset.
6. Move and click the second pointer to insert the fixture at the specified offset from the first pointer.

Swapping Fixtures

Fixtures or fitting can be swapped with comparable items. To swap fixtures:

1. Select the fixture(s) or fitting(s) to be swapped.
2. Click Swap. The Swap Equipment window opens.

Figure 5–10 Swap Equiment



Note: All compatible equipments are displayed in the central part of the window.

3. Click the column header to sort by that column.
4. Click the equipment to select it for swapping with the current fixture.
5. Click OK to swap the selected fixtures or fitting to the new object. If a fixture populated with merchandise is swapped, then this will be refreshed in case the dimensions have changed.

Deleting Fixtures

Deleting Fixtures can be done by using the Delete option on the fixturing toolbar.

To delete fixtures:

1. Click to select the fixtures to be deleted.
2. Click Delete. A confirmation message will appear.
3. Click Yes to delete the selected fixtures from the drawing.

Moving Fixtures

Fixtures can be moved in the following three ways:

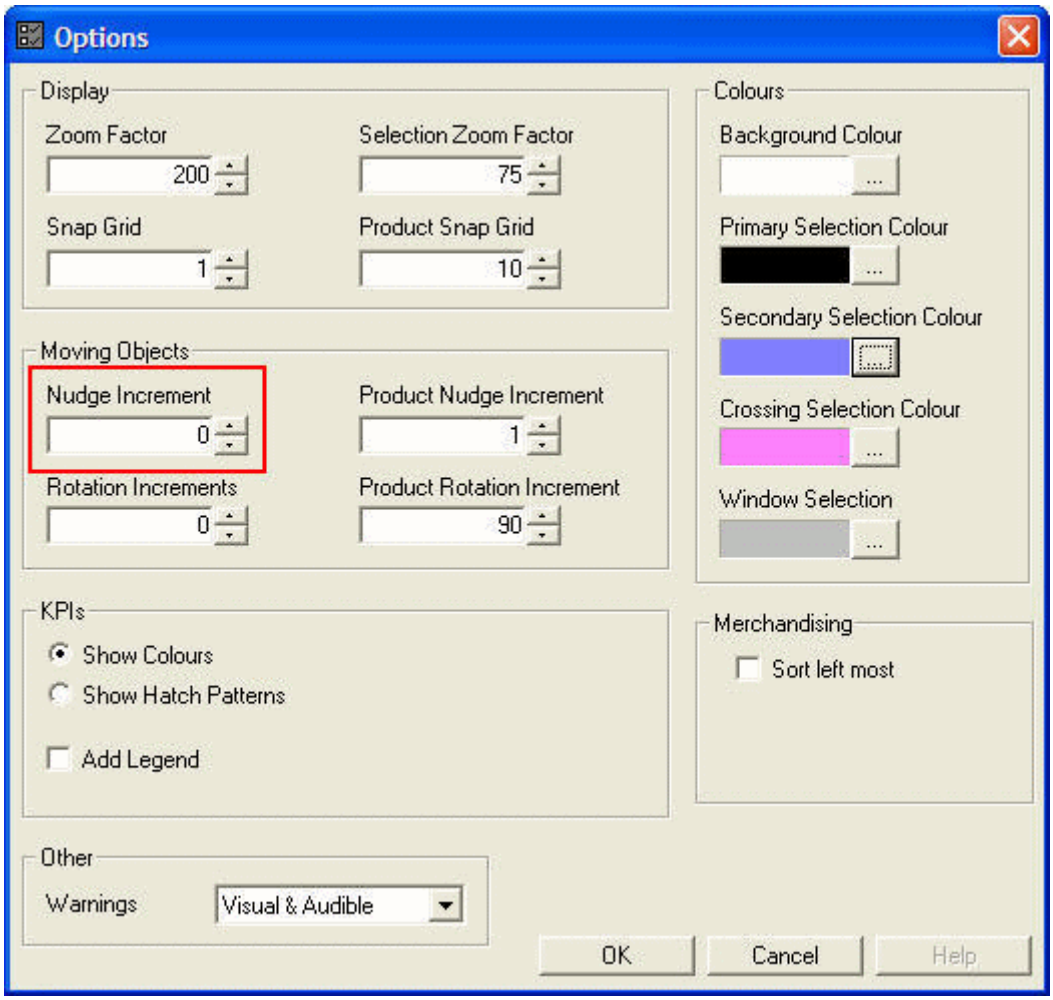
- Using the keyboard cursor keys
- Using the move option on the toolbar
- Moving by dragging and dropping

Using the keyboard cursor keys

Once fixtures have been selected, the keyboard cursor keys may be used to move the selected fixtures up, down, left, or right.

The distance moved for each key press will depend on the setting in the Nudge Increment box in the Moving Objects frame of the Options Window.

Figure 5–11 Moving Objects



Using the move option on the toolbar

Alternatively, once selected the fixtures may be moved by using the move option in the Fixturing toolbar.

To move a fixture using the move option:

1. Select the fixture to move.
2. Click Move. A prompt will appear in the prompt window of the status bar at the bottom of the screen.
3. Click to set the first base point. A second prompt will appear.
4. Move the mouse cursor to the second point. A line will appear indicating the distance and angle the selected fixtures will be moved.
5. Click at the second point. The selected fixtures will be moved the specified distance and angle.

Note: After setting the angle, enter a value and press Enter. The fixture is moved to the required distance along the selected angle.

Moving by dragging and dropping

A third way of moving fixtures is by dragging and dropping.

To move fixtures by dragging and dropping:

1. Click to select the fixture(s).
2. Position the cursor inside the selected fixtures and hold down the left mouse button. The mouse pointer will change to a hand. The fixtures can then be dragged to the new position.
3. A dotted outline will show the new position for the fixtures.
4. When in the required position, release the mouse button. The fixtures will be moved to their new position.

Rotating Fixtures

To Rotate Fixtures:

1. Select the fixture(s) to be rotated.
2. Click Rotate option on the toolbar. The prompt window of the status bar will display the number of items selected and will ask you to select a rotation centre point.
3. Click at a selected point to specify the base point for the rotation. A dotted outline will show the new position of the fixture(s). The angle of rotation will also show in the status bar.
4. Click at a selected point to specify the new angle. The fixture(s) will rotate to the new angle.

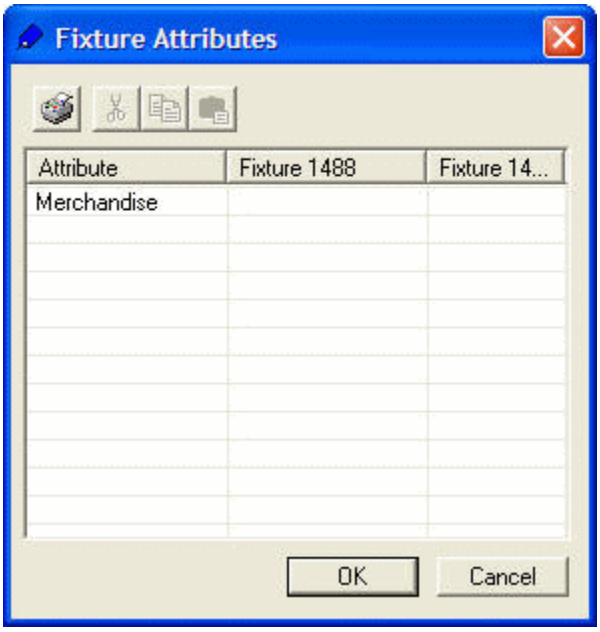
All dependent objects including shelves, merchandise, and annotation will also rotate along with the fixture(s). After the rotate icon has been pressed, it is also possible to type in the required rotation angle and press <Return>.

Fixture Attributes

To define fixture attributes:

1. Select one or more fixtures.
2. Click Fixture Attribute option on the Fixturing toolbar. The Fixture Attributes window opens.

Figure 5–12 Fixture Attributes



Note: Each fixture type may have a range of attributes. These attributes are defined in Macro Space Management. Some attributes may be numeric, some textual, some yes/no and other selectable from drop down lists.

3. If multiple fixtures are selected and the current value of the attributes differs, then the affected fields will remain blank. If an attribute is entered, this will be applied to all the fixtures, overwriting the current information.
4. Click OK to change all selected fixtures. Attributes without a value (often for fixtures with differing attributes) will not be overwritten.

Resizing Fixtures

Only stretchable fixtures can be resized. A stretchable fixture can be created in Macro Space Management, by changing the properties of that fixture.

To resize a fixture:

1. Select a fixture or fixtures.
2. Click Resize on the Fixturing toolbar. The Edit Size window opens.

Note: The default values displayed are the current values for the fixture. The dimensions which cannot be resized will be grayed out. If multiple fixtures are selected, then only those dimensions that are common to all selected fixtures will be displayed. Fields that varies will be blank.

3. Enter the required values and click OK.

Note: The scaling will be done relative to the insertion point of the fixture(s) so its effective position in the drawing will not change. If a fixture's dimensions are changed and it is populated with merchandise, then this will be refreshed in case the dimensions have changed.

Promotional Fixtures

Promotional Fixtures are fixtures that can be flagged for use in promotions.

To assign a fixture as a promotional fixture:

1. Click to select the fixture.
2. Click Set as Promo Fixture.

To remove a fixture as a promotional fixture:

1. Click to select the fixture.
2. Click Set as Standard Fixture.

Note: Promotional fixtures can be identified by running the appropriate KPI.

Gondola Operations

A Gondola is an arrangement made up from two or more fixtures (and associated fittings) linked together by means of connection points or in sufficiently close proximity to meet the definition of adjacency. An example might be a run of 10 fixtures placed back to back, with end caps on each end to maximize the area devoted to sales.

Following are the Gondola Operations:

- Selecting Gondola
- Cancelling Selection of Gondola
- Effect of Ortho Option on Gondola Operations
- Effect of Snap Option on Gondola Operations
- Effect of Group Option on Gondola Operations
- Adding Gondolas
- Adding Gondolas using the Offset option
- Deleting Gondolas
- Moving Gondolas
- Rotating Gondolas

Selecting Gondolas

There are three ways to select gondolas for further operations (such as moving or rotating) from within the drawing.

- Individual Selection
- Crossing Selection

- Window Selection

Note: The effect of the operations depend on whether grouping is On or Off.

Individual Selection

Individual Selections are made by left clicking on gondolas to select them.

Crossing Selection

A Crossing Selection is made using a selection box where the cursor is moved to the left of the original selection point. Crossing Selections have a dotted outline and include all gondolas totally or partially within the selection box.

Window Selection

A Window Selection is made using a selection box where the cursor is moved to the right of the original selection point. Window Selections have a solid outline and only include gondolas totally within the selection box.

The colors of the outlines of the Crossing or Window Selection Boxes, together with the colors for the first and subsequently selected gondolas can be customized in the Colors Frame of the Options Window.

Cancelling Selection of Gondolas

Selection can be cancelled in two ways:

- Individually clicking on gondolas
- Using the Esc Key

Individually clicking on gondolas

Any gondola can be removed from the current selection by clicking on it for a second time. The outline will change back from thick and colored to its original form.

Using the Esc Key

Press the Esc Key to cancel all selections.

Effect of Ortho option of Gondola Operations

Although gondolas can be moved or rotated freely throughout the drawing, the Ortho option allows you to move or rotate the gondola only in 90-degree angles (0 degrees, 90 degrees, 180 degrees, and 270 degrees).

The insertion angle, when gondolas are added, will also be confined to these angles.

If the Ortho option is disabled, then the gondolas can be moved in any direction, and rotated through any angle.

Effect of Snap Option on Gondola Operations

Although the gondolas can be moved freely at any distance, the Snap option allows the gondolas to be moved only in discrete increments as specified in the Options window.

If the Snap option is not enabled, then gondolas can be moved by any distance.

Note: The setting in the Snap Grid options within the Options Window will determine the size of the grid gondolas are snapped to.

Effect of Group operation on Gondola Operations

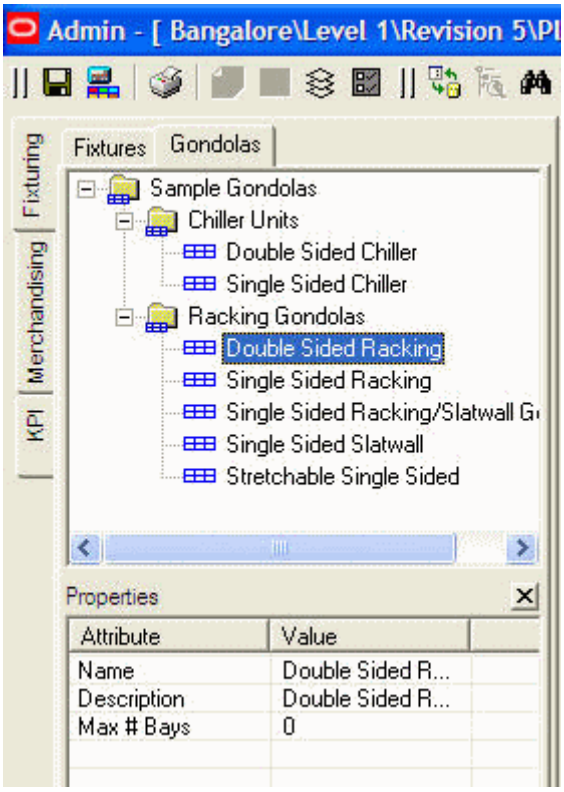
The Group option allows you to select the entire gondola, instead of selecting the fixtures individually. Grouping can be switched On and Off in the status bar.

When grouping is on, click on a single fixture within a gondola to select the entire gondola for further operations.

Adding Gondolas

Adding Gondolas to the drawing can be achieved by selecting the required gondola from the Gondola Hierarchical Tree in the Object Browser. The properties of the selected gondola will appear in the properties window immediately below.

Figure 5–13 Adding Gondolas

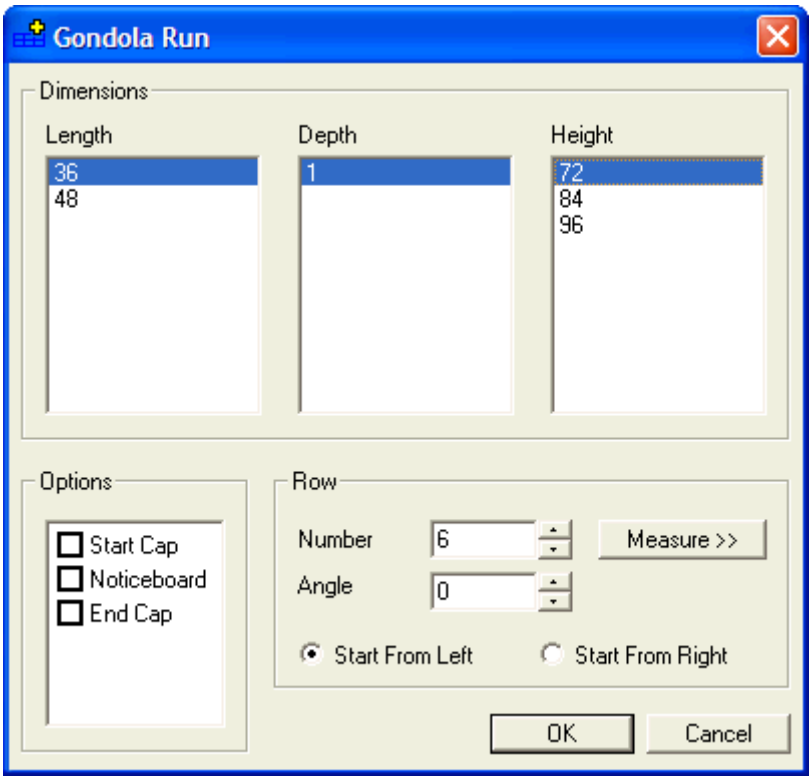


To add a gondola:

1. Select the gondola. The properties of the selected gondola appears in the properties window immediately below
2. Click Add Gondola.
3. Click an area to choose the start point of the gondola run.
4. Click an area to choose the end point of the gondola run.
5. Move the cursor to choose the rotation angle.

6. Click to confirm the rotation angle. The Gondola Run window will open.

Figure 5–14 Gondola Run



7. Select the required details and click OK. The Gondola Run will be inserted.

Adding Gondolas using the Offset option

The Offset option becomes available when the Add Gondola icon has been clicked.

To add gondolas using offset:

1. Click Offset. The Offset window opens.
2. Enter an offset, either in terms of X and Y co-ordinates, or Distance and Angle.
3. Click OK.
4. In the diagram, move and click the first pointer to specify the required position of the offset.
5. Move and click the second pointer to insert the fixture at the specified offset from the first pointer.

Note: Using Offsets allows you can add new gondolas at specified distances from gondolas already in place.

Gondola Run dialog box

The Gondola Run dialog box allows a series of options to be specified for the gondola being inserted.

Dimensions

The permissible dimensions are defined when the gondola is created in Macro Space Management. Click a particular dimension to select it.

The default dimensions displayed are the first values in the list. If a similar type of gondola was placed earlier, the dimensions will display the values for that gondola.

Options

The Options Frame allows you to specify optional parts. These parts are defined when the gondola is created in Macro Space Management.

They can be selected by checking the appropriate box.

Row

The Row Frame allows the placement angle and number of fixtures in the gondola to be changed, if necessary. It also allows the start direction of the gondola to be specified.

- The initial row Number is determined by the picked length of the gondola run. This can be changed by using the Up or Down buttons or by entering a new value. It can also be changed by clicking Measure. The dialog box will be temporarily hidden and you will be prompted to pick the start and end points of the gondola run. The dialog box will then reappear.
- The Angle can be changed by using the Up and Down buttons or by entering a new value between 0 to 360 degrees.
- The Start From Left and Start From Right options are important for placing gondolas that run along walls and initiate from corners. If Start from Left is selected, the gondola starts from a left hand corner. If Start from Right is selected, the gondola starts from a right hand corner.

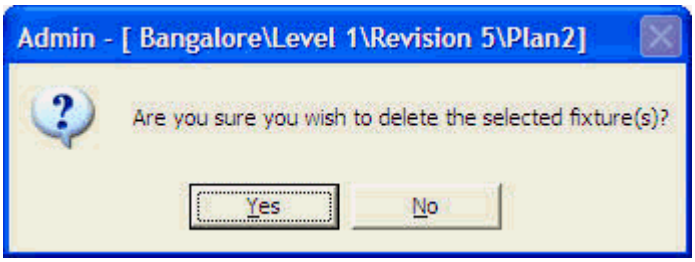
Deleting Gondolas

Gondolas can be deleted using the Delete Selection icon on the gondola toolbar.

To delete gondolas:

1. Click to select the gondolas to be deleted.
2. Click Delete Selection. A confirmation message will open.

Figure 5–15 Delete Gondolas



3. Click Yes to delete the selected gondolas.

Moving Gondolas

Gondolas can be moved in three ways:

- Using the keyboard cursor keys
- Using the move icon on the toolbar
- Moving by dragging and dropping

Using the keyboard cursor keys

Once a gondola has been selected the keyboard cursor keys may be used to move the selected gondola up, down, left, or right.

The distance moved for each key press will depend on the setting in the Nudge Increment box in the Moving Objects frame of the Options Window

Using the move icon on the toolbar

Alternatively, once selected the gondolas may be moved by clicking on the move icon in the Gondolas toolbar.

To move a gondola using the move option:

1. Select the gondola to move.
2. Click Move. A prompt will appear in the prompt window of the status bar at the bottom of the screen.
3. Click to set the first base point. A second prompt will appear.
4. Move the mouse cursor to the second point. A line will appear indicating the distance and angle the selected gondola will be moved.
5. Click at the second point. The selected gondola will be moved the specified distance and angle.

Moving by dragging and dropping

A third way of moving gondolas is by dragging and dropping using the mouse.

To move gondola by dragging and dropping:

1. Click to select the gondola.
2. Position the cursor inside the selected gondola and hold down the left mouse button. The mouse pointer will change to a hand. The gondola can then be dragged to the new position.
3. A dotted outline will show the new position for the gondola.
4. When in the required position, release the mouse button. The gondola will be moved to their new position.

Note: After setting the angle, enter a value and press Enter. The gondola is moved to the required distance along the selected angle.

Rotating Gondolas

To Rotate Gondolas:

1. Select the gondola to be rotated.
2. Click Rotate option on the toolbar. The prompt window of the status bar will display the number of items selected and will ask you to select a rotation centre point.

3. Click at a selected point to specify the base point for the rotation. A dotted outline will show the new position of the gondola. The angle of rotation will also show in the status bar.
4. Click at a selected point to specify the new angle. The fixture(s) will rotate to the new angle.
5. All dependent objects including shelves, merchandise, and annotation will also rotate along with the fixture(s).

Note: After Rotate Gondola is selected, you can also enter the required rotation angle and press enter.

6

Merchandising

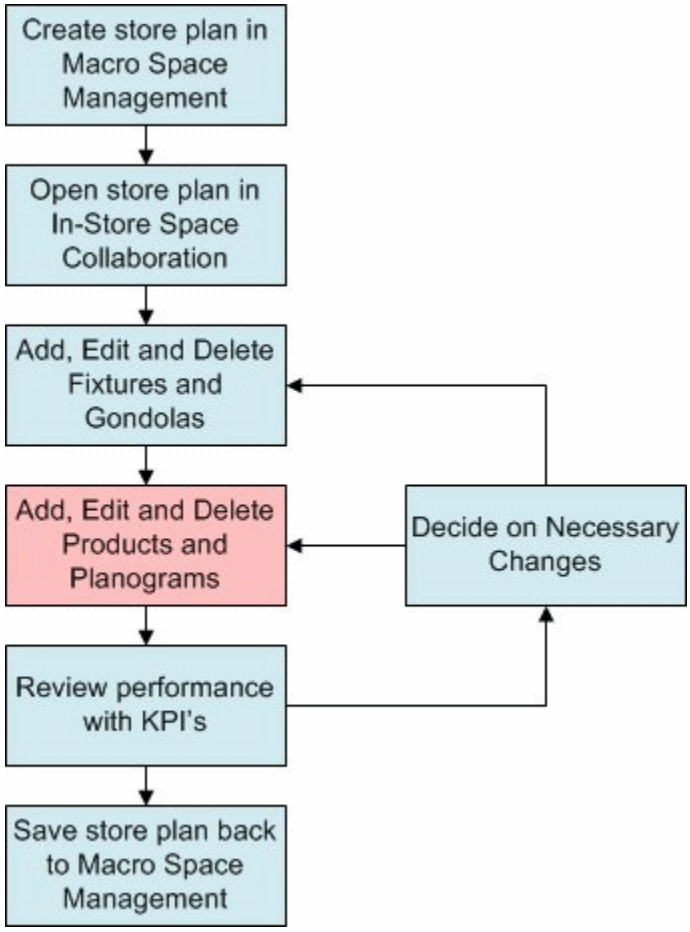
This chapter describes the Merchandising module in In-Store Space Collaboration. It includes the following sections:

Merchandising Process Flow

The following figure illustrates the process flow for Macro Space Management and In-Store Space Collaboration. It provides a high level overview of where the Merchandising Module fits in the process flow.

The Fixturing Process Flow is as follows:

Figure 6–1 Merchandising Process Flow



Basic Concepts for Merchandising

This section describes the basic concepts of Merchandising. These are:

- Products
- Display Styles
- Planograms

Products

A Product is a single type of merchandisable item.

- Jasmine rice is one type of product.
- Basmati rice is another type of product.
- Japonica rice is a third type of product.
- Short grained rice is yet another type of product.

Products can be combined in a Planogram to give a planned combination of products filling part of all of a fixture.

For example, a Rice planogram might contain specified amounts of Jasmine, Basmati, and Japonica, short grained and other types of rice.

Display Style

A Display Style is the lowest level in the product hierarchy.

It represents a specific example of the product type and indicates how it would appear if displayed on a fixture or gondola.

For example, a shirt product group might contain 'hanging', 'folding', or 'boxed' display styles.

Within In-Store Space Collaboration, products can be placed onto fixtures or gondolas down to SKU level, but not to style level.

Planograms

Planograms are designs generated within or imported into Macro Space Management. They hold details of merchandise to be placed into the fixtures within a store. Planograms define the type, quantity, and arrangement of the sales goods to be placed in the bay(s). They are designed to maximize sales revenue by placing the optimum combination of products into the available sales space.

Planograms are infinitely flexible and can be configured to hold any combination of products.

Planograms are placed in fixtures and gondolas, but must be of suitable configuration for that specific fixture or gondola.

Merchandising Toolbar and Object Browser Window

Located at the top of the window, the toolbar gives access to a wide range of In-Store Space Collaboration functions. Different users may have access to slightly different options on the toolbar - this depends on the settings for the parent User Group in Macro Space Manager.

The following concepts are explained in this section:

- The Products Toolbar
- The Planogram Toolbar
- The Product Hierarchy Window
- The Planogram Hierarchy Window
- The Properties Window
- The Key Plan Window

The Products Toolbar

The Products Toolbar is found on the Object Browser. It is selected by clicking on Products in the Merchandising Tab.

It contains a series of icons allowing various operations to be carried out on Fixtures. Some may be grayed out if they are not available for that operation.

See The Toolbar for more information on the other options.

The Planogram Toolbar

The Planogram Toolbar is found on the Object Browser. It is selected by clicking on Planograms in the Merchandising Tab.

It contains a series of icons allowing various operations to be carried out on Planograms. Some may be grayed out if they are not available for that operation.

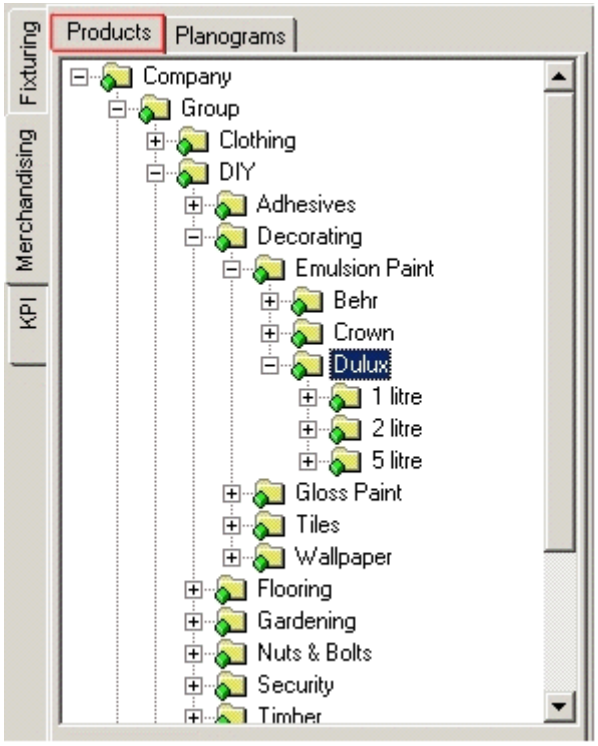
See The Toolbar for more information on the other options.

The Products Hierarchy Window

The Products Hierarchy Window is selected by clicking on the Products tab within the Merchandising Tab on the Object Browser.

The Products Hierarhy is configured in Macro Space Management's Product Studio module and cannot be altered in In-Store Space Collaboration.

Figure 6–2 The Products Hierarchy Window



The type of hierarchical tree can be seen from the icons as well as from the Products tab.

The products hierarchy tree shows the list of available products down to subcategory level (the level above SKU's).

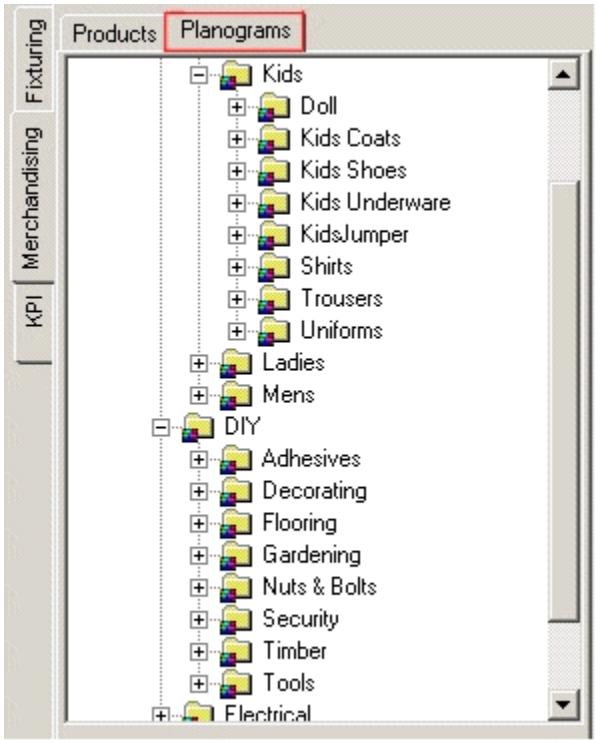
Horizontal and vertical scroll bars will be displayed if the hierarchical tree is larger than the extents of the window.

Click + to expand, and - to collapse the hierarchy.

The Planogram Hierarchy Window

The Planograms Hierarchy Window is selected by clicking on the Planograms tab within the Merchandising Tab on the Object Browser.

Figure 6–3 The Planogram Hierarchy Window



The planograms hierarchy tree shows the list of planograms that can be placed in the store plan.

The hierarchical tree is configured in Macro Space Management and cannot be configured in In-Store Space Collaboration.

Horizontal and vertical scrollbars will be displayed if the hierarchical tree is larger than the extents of the window.

Click + to expand, and - to collapse the hierarchy.

The Properties Window

The Properties Window contains details of the currently selected product or planogram.

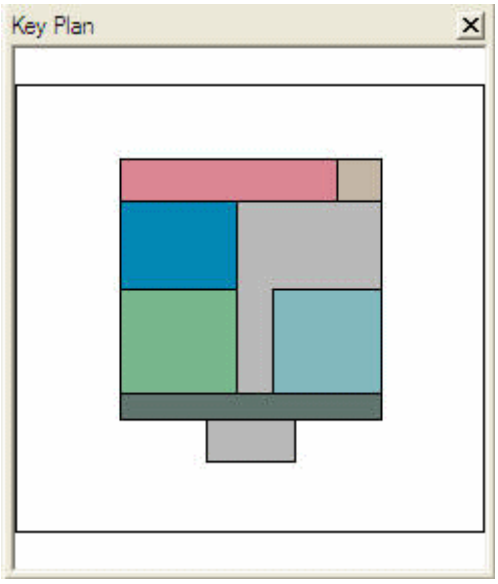
The list of properties displayed is configurable within Macro Space Management.

The currently displayed properties can be refreshed by clicking on another product or planogram.

The Key Plan Window

The Key Plan Window indicates which part of the drawing (Top Graphical View) is currently visible.

Figure 6–4 Key Plan Window



If all the drawing is visible, the window will be a uniform color. If only part of the drawing is visible, a rectangle within the Key Plan Window shows you where they are currently viewing within the drawing.

Product Operations

A Product is a single type of merchandisable item. Products can be combined in a Planogram to give a planned combination of products filling part of all of a fixture.

Following are the Product Operations:

- Selecting Fixtures to be Merchandised
- Adding Products
- Selecting Level of Product to Add
- Removing Products

Selecting Fixtures to be Merchandised

There are three ways to select fixtures for further operations.

- Individual Selection
- Crossing Selection
- Window Selection

Individual Selection

Individual Selections are made by left clicking on fixtures to select them.

Crossing Selection

A Crossing Selection is made using a selection box where the cursor is moved to the left of the original selection point. Crossing Selections have a dotted outline and include all fixtures totally or partially within the selection box.

Window Selection

A Window Selection is made using a selection box where the cursor is moved to the right of the original selection point. Window Selections have a solid outline and only include fixtures totally within the selection box.

When selected by Individual, Crossing or Window Selection, the outline of the fixture increases in thickness and changes in color.

The colors of the outlines of the Crossing or Window Selection Boxes, together with the colors for the first and subsequently selected fixtures can be customized in the Colors Frame of the Options Window.

Cancelling Selection of Fixtures to be Merchandised

Selection can be cancelled in two ways:

- Individually clicking on fixtures
- Using the Esc Key

Individually clicking on fixtures

Any fixture can be removed from the current selection by clicking on it for a second time. The outline will change back from thick and colored to its original form. If the first fixture selected is clicked for a second time, then all selected fixtures will be de-selected. The first fixture is differentiated from all subsequent selections by being a different color. (These colors can be defined in the Options Window).

Using the Esc Key

Clicking on the Esc key cancels all selections.

Adding Products

Adding Products to the drawing is done by selecting the required product from the Product Hierarchical Tree in the Object Browser. The properties of the selected product will appear in the properties window immediately below.

There are then two ways to add products:

- Using the Add Icon
- Dragging and Dropping

Using the Add Icon

When the product has been selected, the Add Product icon (which may have been grayed out) will become active.

1. Select the fixtures to be populated.
2. Click Add Product. The selected product will be added to the specified fixtures.

Dragging and Dropping

This method of placement only allows products to be placed on single fixtures.

1. Hold down the left mouse button and drag the highlighted product over to the required fixture.
2. Release the left mouse button to place the product.

Selecting Level of Product to Add

The level of product to be added can be selected within the Product Hierarchy Window.

Products can be placed from any level in the hierarchy.

Products placed from higher levels in the hierarchy serve as a general indication as to the purpose of the fixture on which it has been placed; products placed from lower levels serve as specific indications.

It is thus possible to place the Emulsion Paint product group on a fixture - this serves to indicate that the fixture may be used for any type of emulsion paint.

Conversely, it is possible to place the Dulux 1 liter Emulsion Paint product group on a fixture - the purpose of the fixture has now been more specifically defined.

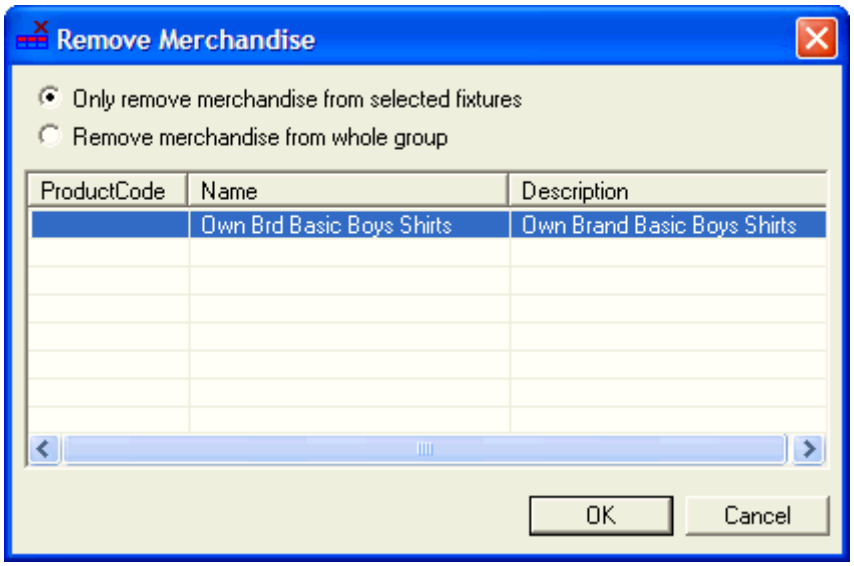
Removing Products

Products can be removed by using the Remove icon on the Products toolbar.

To remove a product:

1. Select the fixtures from which products are to be removed.
2. Click Remove. The Remove Merchandise dialog box will open.

Figure 6–5 Removing Products



Note: The Window can be resized by dragging on the sides.

3. Click the Radio button at the top of the dialog box to switch between the two options.
4. Click Only remove merchandise from selected fixtures to remove products from the selected fixtures.
5. Click Remove merchandise from whole group to remove the specified products from other (unselected) fixtures as well as the selected one.

Note: Specified products will only be removed from unselected fixtures if they were placed at the same time as the selected product. If the Casual Shirts product was placed on two fixtures at the same time, then both instances of Casual Shirts will be removed. If there are two instances of Casual Shirts in the drawing and they were placed at different times, then only the selected instance will be removed. The second instance of Casual shirts must be removed in a separate operation.

6. The window shows all products on the selected fixtures. Select a single product to be removed from the list.
7. To remove multiple products, hold down either the <Shift> or <Ctrl> keys and Select the products.

Note: Holding down the <Shift> key then left clicking on two items in the list will select those and all items between them. Holding down the <Ctrl> key then left clicking on items in the list will add them to those selected.

8. Click OK to remove the select products from the drawing.

Planogram Operations

A Product is a single type of merchandisable item. Products can be combined in a Planogram to give a planned combination of products filling part of all of a fixture.

Following are the Product Operations:

- Selecting Fixtures for Planogram Operation
- Adding Planograms
- Removing Planograms
- Selecting Planogram Filters
- Comparison Operators

Selecting Fixtures for Planogram Operations

There are three ways to select fixtures for further operations.

- Individual Selection
- Crossing Selection
- Window Selection

Individual Selection

Individual Selections are made by left clicking on fixtures to select them.

Crossing Selection

A Crossing Selection is made using a selection box where the cursor is moved to the left of the original selection point. Crossing Selections have a dotted outline and include all fixtures totally or partially within the selection box.

Window Selection

A Window Selection is made using a selection box where the cursor is moved to the right of the original selection point. Window Selections have a solid outline and only include fixtures totally within the selection box.

When selected by Individual, Crossing, or Window Selection, the outline of the fixture increases in thickness and changes in color.

The colors of the outlines of the Crossing or Window Selection Boxes, together with the colors for the first and subsequently selected fixtures can be customized in the Colors Frame of the Options Window.

Cancelling Selection for Planogram Operations

Selection can be cancelled in two ways:

- Individually clicking on fixtures
- Using the Esc Key.

Individually clicking on fixtures

Any fixture can be removed from the current selection by clicking on it for a second time. The outline will change back from thick and colored to its original form. If the first fixture selected is clicked for a second time, then all selected fixtures will be de-selected. The first fixture is differentiated from all subsequent selections by being a different color. (These colors can be defined in the Options Window).

Using the Esc Key

Clicking on the Esc key cancels all selections.

Adding Planograms

Adding Planograms to the drawing is done by selecting the required planogram from the Planogram Hierarchical Tree in the Object Browser.

To add a planogram:

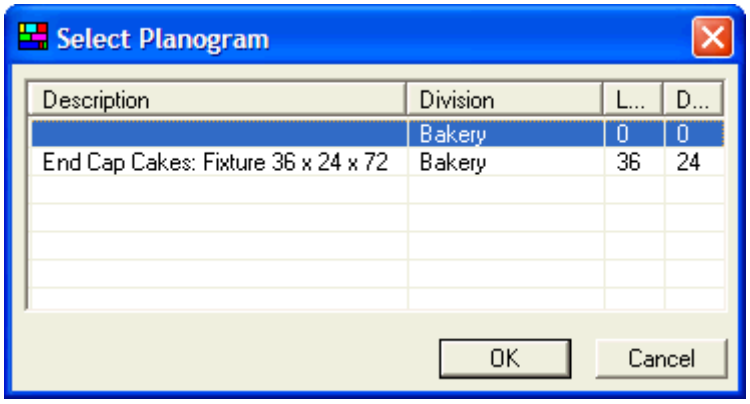
1. Select a Fixture or the entire Gondola.
2. On the Planograms tab under Merchandising, select a planogram. The properties of the selected planogram appear in the properties window immediately below. The Add Planogram icon is enabled once fixture is selected.
3. Click Add Planogram.

Adding repeated planograms of the same class.

To add repeated planograms of the same class:

1. If there are multiple planograms of a specific type in the hierarchy, selecting the lowest common branch in the hierarchy rather than the individual planogram.
2. Click Add Planogram. The Select Planogram window opens.

Figure 6–6 Select Planogram



3. Highlight the required planogram, and then click Ok.

Removing Planograms

Planograms can be removed by using the Remove icon on the Planogram toolbar.

To remove planograms:

1. Click to select the fixtures from which planograms are to be removed.
2. Click Remove. The Remove Merchandise window will open.

> **Note:** The Window can be resized by dragging on the sides.

3. Click the Radio button at the top of the dialog box to switch between the two options.
4. Click Only remove merchandise from selected fixtures to remove planograms from the selected fixtures.
5. Click Remove merchandise from whole group to remove the specified planograms from other (unselected) fixtures as well as the selected one. The Radio button at the top of the dialog box allows you to switch between two options.

> **Note:** Using this option is recommended, as it will ensure that no partial planograms remain in the drawing.

6. 6. The window shows all products on the selected fixtures. Click to select a single product to be removed from the list.
7. 7. To remove multiple products, hold down either the <Shift> or <Ctrl> keys and click to select the products.

> **Note:** Holding down the <Shift> key then left clicking on two items in the list will select those and all items between them. Holding down the <Ctrl> key then left clicking on items in the list will add them to those selected.

8. Click OK to remove the select planograms from the drawing.

Reversing Planograms

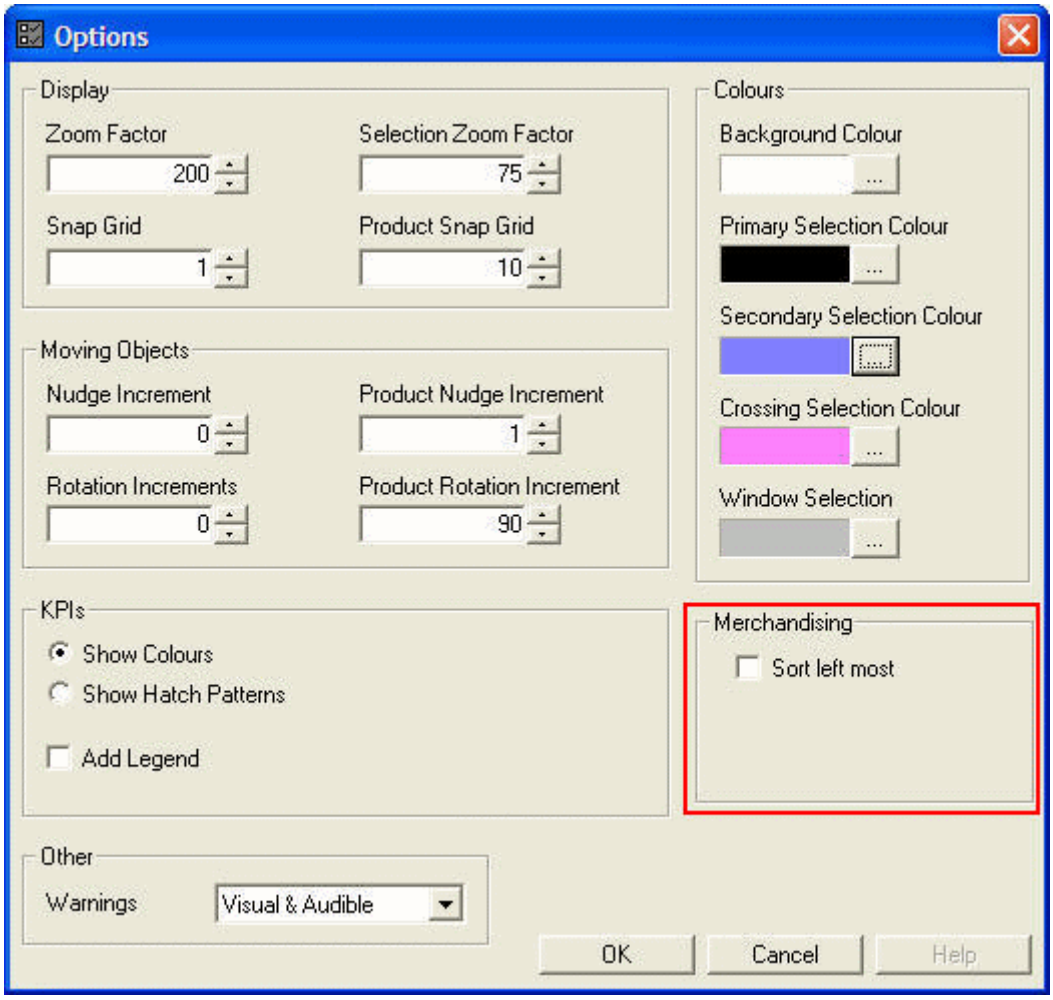
The placement direction of planograms can be reversed by clicking on the Reverse Planogram icon on the Planogram toolbar. This button can be toggled on and off.

- For normal planogram placement, the first section of the planogram is placed on the first fixture (normally the leftmost) then the second on the next fixture, etc.
- If the Reverse Planogram button is toggled on before placing the planogram, then the first segment of the planogram will be placed on the last fixture (normally the rightmost) then the second on the next fixture, etc.

The justification of each segment of planogram will also be reversed, the initial products being placed on the right, not the left. In effect, a mirror image of the planogram will be placed.

Note: Planogram placement is also affected by whether the sort left most option is checked in the Options Window.

Figure 6–7 Options–Sort Left Most

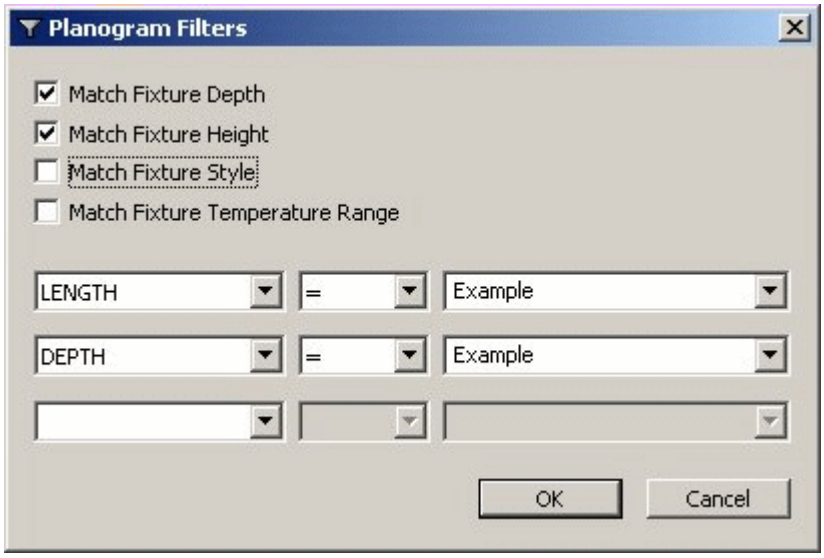


Setting Planogram Filters

To set filters for the types of planograms that can be placed:

1. Click Filters on the toolbar.
2. The Planogram Filters window will open.

Figure 6–8 Planogram Filters



3. This contains a series of options that allow planograms to be filtered.
   - Match Fixture Depth, Match Fixture Height, and Match Fixture Style warns if the planogram being placed does not match these criteria for the selected fixtures.
   - Match Fixture Temperature Range is not implemented in this release.
   - The fields in the drop down lists filter according to requirements specified by customers and provided by Oracle accordingly. Typical fields include Planogram ID, Planogram Name, Planogram Description, Fixture Length, and Fixture Depth.
4. Click OK.

Comparison Operators

Table 6–1 Comparison Operators

Operator	Result
=	Select planograms equal to data in Value field
<>	Select planograms not equal to the data in the Value field
<	Select planograms less than the data in the Value field

Table 6–1 (Cont.) Comparison Operators

Operator	Result
=<	Select planograms less than or equal to the data in the Value field
>	Select planograms greater than the data in the Value field
=>	Select planograms greater than or equal to the data in the Value field
IN	Select planograms matching date in a list separated by commas
NOT IN	Select planograms not matching date in a list separated by commas
LIKE	Select planograms where the data in the Value field matches part of the planogram information
NOT LIKE	Select planograms where the data in the value field does not match part of the planogram information

Note: Not all filter options will have all operators enabled. Some filter options may offer a more restricted list.

Examples of the use of filters include:

- Description = Baked Beans* will find all examples of backed beans.
- Description IN Baked Beans, Barbecue Beans, Broad Beans will find all planograms called Baked Beans, Barbecue Beans and Broad Beans.
- Description NOT LIKE *Beans* will find all planograms that don't include Beans or variants of Beans in their description.

Using wild-cards

The following wild-cards can be used:

Table 6–2 Using Wildcards

Wild-card	Result
?	Match single letter or number
*	Match one or more letters or numbers

Examples of the use of wild-cards include:

- Baked* will find Baked Beans, Baked Rolls, Baked Alaska, etc.
- Beer-???? will find Beer-1664, Beer-Lite, etc.
- Wild-cards can only be used in selected options. For example wild-cards cannot be used when the IN and NOT IN operators are selected.

Scanning Planograms

In-Store Space Collaboration allows users to attach a barcode scanner to the computer being used (normally a laptop or tablet). You can then walk around the store and scan the barcodes of merchandise on any fixture.

In-Store Space Collaboration will then check that data against any known planograms and display a list for you. Scanning further barcodes will allow the list to be narrowed to a specific planogram. This will allow you to identify an unknown planogram or to verify the planogram in place is that specified in the store plan.

To scan planograms, click the Scan icon in the planogram toolbar.

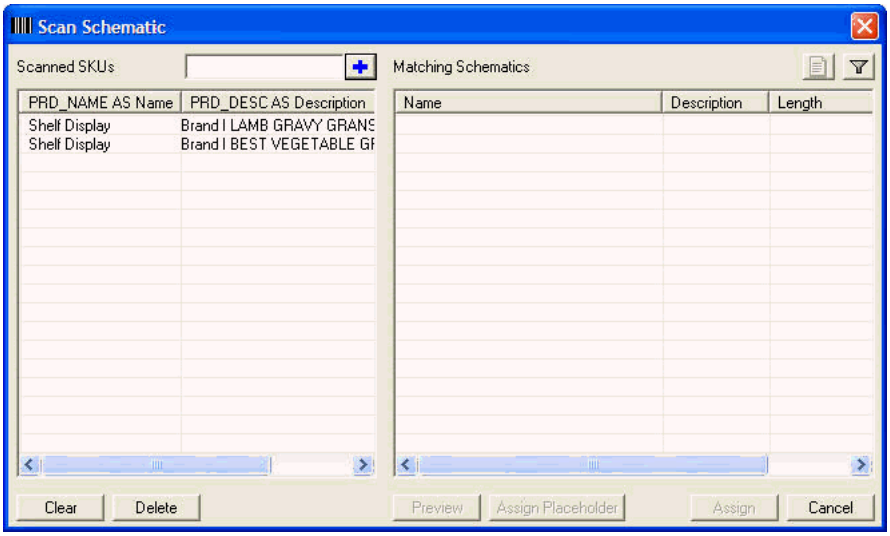
If a barcode scanner is attached to your computer and the scan icon is clicked on the planogram toolbar, the Scan schematics dialog will be invoked.

Clicking the scan button (or clicking the trigger on the scanner itself) scans the barcode on the product. The barcode is then compared against the list of products in the database.

If the barcode is found in the list of products, it will display in the list of scanned items. If the barcode cannot be found an error message will be displayed.

Note: Depending on the make of scanner, it may be necessary to click the Scan button in the program then press the trigger on the scanner.

Figure 6–9 Scanning Planograms



The Scanned SKU's window

The Scanned SKU's window contains details of all the merchandise that has been scanned. Each time a new item is added, the list of matching planograms will be automatically updated.

The Matching Schematics Window

The Matching Schematics window contains a list of all planograms that match the list of scanned barcodes.

Filter

The Filter option allows users to access a dialog box allowing them to set filters determining which planograms are displayed for comparison purposes against the scanned barcodes.

Clear button

The clear button removes all items from the list of scanned merchandise.

Delete button

The delete button allows you to remove single or multiple items from the list of scanned merchandise.

This is useful if you inadvertently scans an incorrect item and clears the list of possible planograms as a result.

Preview Button

The Preview button will be grey out unless a planogram has been selected in the Matching Schematics window. If active, clicking on this button will display the Schematic Preview.

Assign Placeholder button

If no matching planogram can be found, then you has the option of placing a Product Placeholder.

In-Store Space Collaboration will determine the category that is appropriate to all scanned barcodes. If there is no subcategory that is common then a warning message will display and no placeholder will be placed.

In the case of no common subcategory, you can place an alternative placeholder and add a note to explain their choice.

Assign button

When the assign button is clicked, the selected planogram will be assigned to the fixture and the Scan Schematics dialog box will close.

The following rules apply:

- If the planogram is longer than the selected fixture(s) length, then the end of the planogram will not be placed.
- If the planogram is shorter that the selected fixture(s) length, the planogram will not be applied to the excess length.

Cancel button

If the cancel button is clicked, the dialog box will close and the selection box will be cancelled.

7

KPI

The Key Performance Indicators (KPI) can be customized in Macro Space Management according to your requirements. Within the In-Store Space Collaboration environment, it is only possible to use the pre-configured KPI available from the hierarchical tree on the Object Browser.

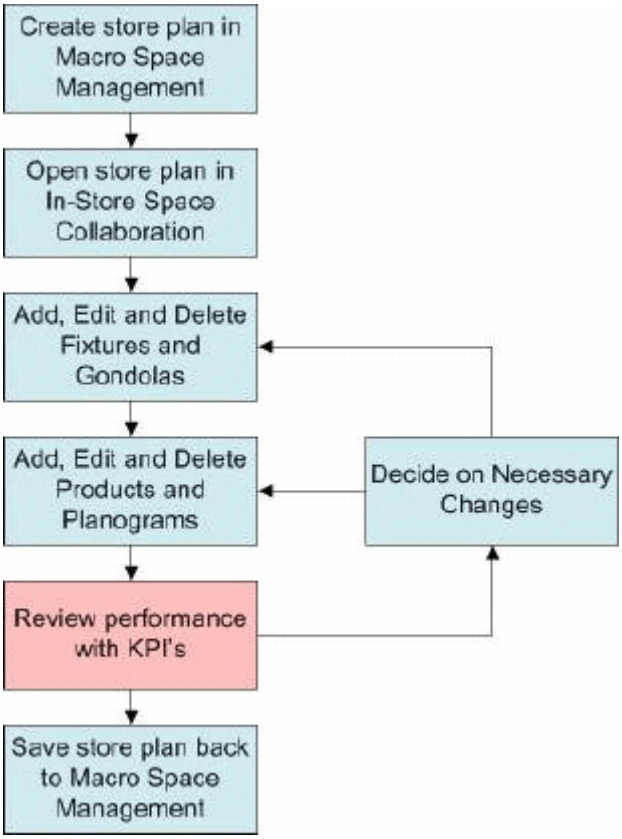
This chapter describes the KPI module in In-Store Space Collaboration. It includes the following sections:

KPI Process Flow

Reviewing KPI can be done at any stage after the drawing has been opened.

Based on the information from a review of the KPI, the decision can be taken whether to continue to edit the drawing, or to save a completed drawing back to Macro Space Management.

Figure 7–1 General KPIs Process Flow

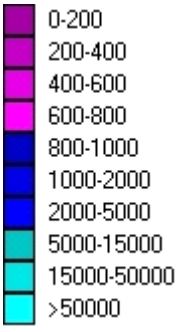


About KPI

KPI are a way of giving an immediate visual indication of performance.

The performance criteria is identified and sub-divided into specific ranges. Each range is then assigned a color code.

Figure 7–2 KPIs



Fixtures can then be color coded to show how they are performing against those criteria.

KPI reports are configured in Macro Space Management. In-Store Space Collaboration users can only select from the available reports.

KPI might be used to indicate:

- Profit by zone
- Profit by week
- Profit by month
- Profit by quarter
- Sales volume by zone
- Sales volume by week
- Sales volume by month
- Sales volume by quarter
- Profit or sales volume by length of shelving.
- Profit or sales volume by stock turns.
- Number of stock turns per week, month, quarter or length of shelving
- Stock categories
- Stock losses per week, month, quarter or length of shelving

They can also be used to indicate problems to be addressed.

- Promotional material coming up for replacement
- Time sensitive stock to be removed - for example Easter eggs
- Illegally placed planograms
- Fixtures with excessive numbers of products placed

In short, KPI can be configured within Macro Space Management to indicate performance against any criteria that will assist a retailer in monitoring and improving the performance of their stores.

Overview of KPI Window

The KPI window has a series of parts. The Toolbar contains a series of options. None are directly concerned with KPIs, but some (for example those controlling the scale of the drawing) may be useful in viewing the results.

The KPI reporting options are displayed in a hierarchical tree. Selecting from here will determine the type of information that is displayed. The KPI legend details the colors or hatch patterns that are used to code the fixtures on the drawing.

The Key Plan indicates which part of the drawing is currently being viewed. It will be grey if the entire drawing is visible; else, the grey area indicates the currently displayed section of the drawing.

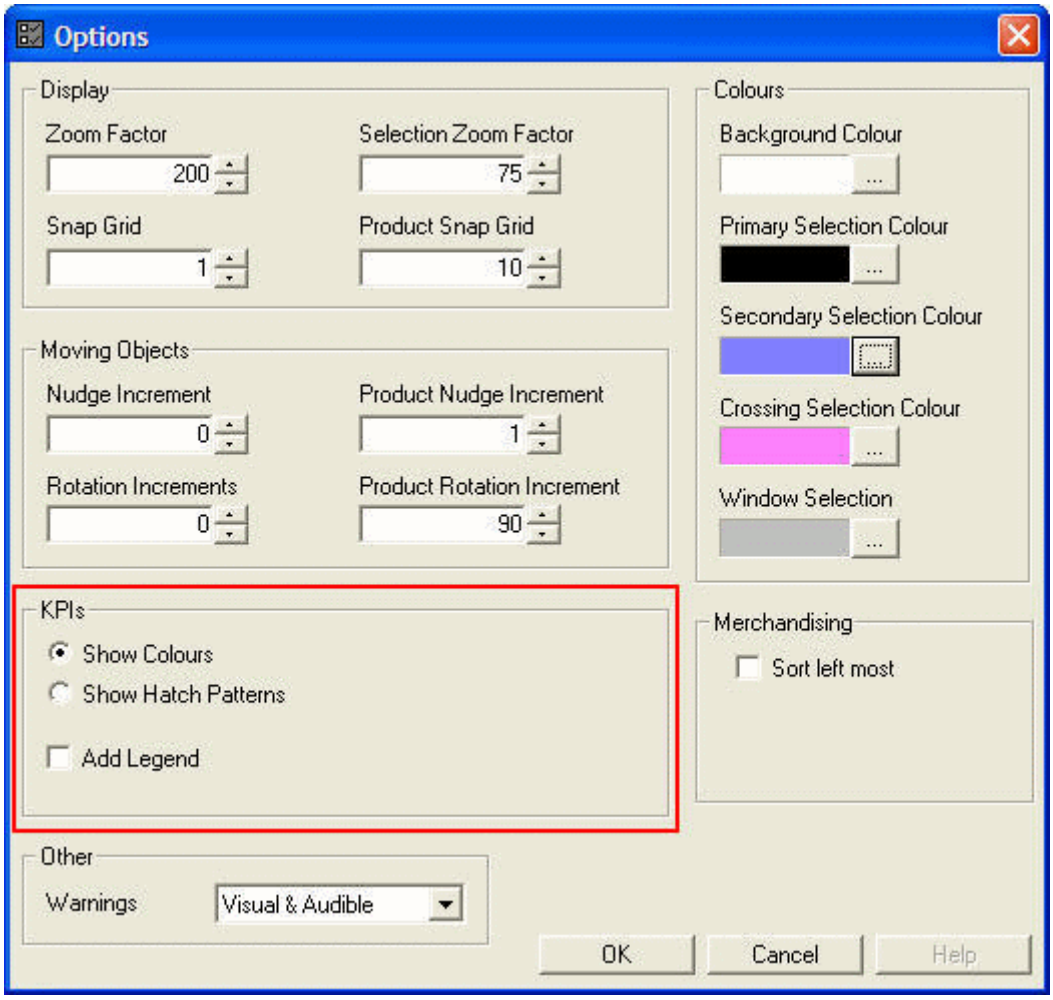
The Store Plan (Top Graphical View) will be color coded with the current KPI results.

Note: Department (Zones) are not color coded when in the KPI tab.

Configuring the way KPI display

The In-Store Space Collaboration user can configure how KPI displays by changing the settings within the KPI frame in the Options window.

Figure 7–3 Options Window–KPIs



This allows users to decide whether KPIs should be displayed as colors or hatch patterns.

It also allows you to specify whether a legend should be included on any drawings that are printed.

Configuring KPIs

Key Performance Indicators can be configured by users with access to the Planner and Merchandiser modules. They may also need access to the database. The facility to configure KPIs gives users the ability to produce reporting tools that can be customized to meet business needs.

Stages in Creating Key Performance Indicators

There are three basic stages in creating Key Performance indicators:

Figure 7–4 KPI Flowchart

Creating the Data Source

There are three possible sources of data for KPIs:

Tables or Views

KPIs can be based on information from Tables or Views (temporary tables). Views are more flexible because they can combine information from multiple tables. However, if Views other than those supplied with the database are required, they will have to be set up by someone with a good knowledge of databases.

SQL Statement

An SQL statement is a query written in a special language designed to extract data from databases. It can be used to extract data from single or multiple tables.

Stored Procedures

A stored procedure is similar to a SQL statement, except that it has been pre-compiled into a form that makes it execute quicker and more efficiently within a database.

Summary

All of these data sources provide an array of data:

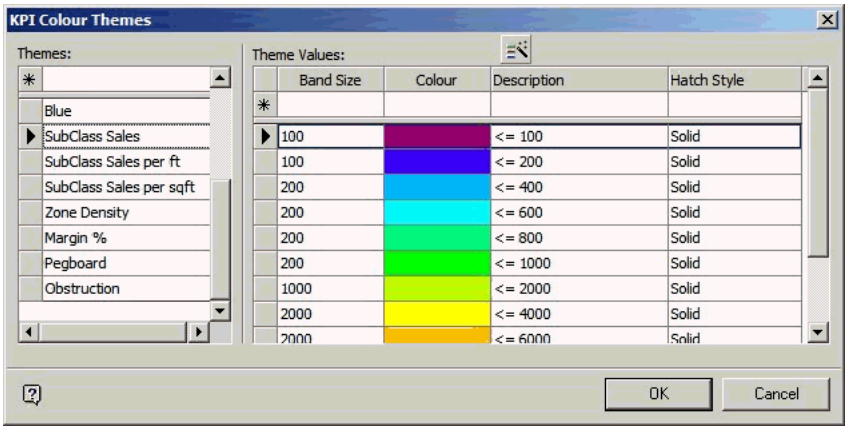
Figure 7–5 Example of Data

FIL_ID	FIX_ID	PRD_ID
12	109	5758
29	541	5871
33	597	6230
40	109	5758
41	109	5758
42	109	5758

Creating Themes

Themes are the bands KPI results are divided into. They can be customized by the user.

Figure 7–6 KPI Color Themes



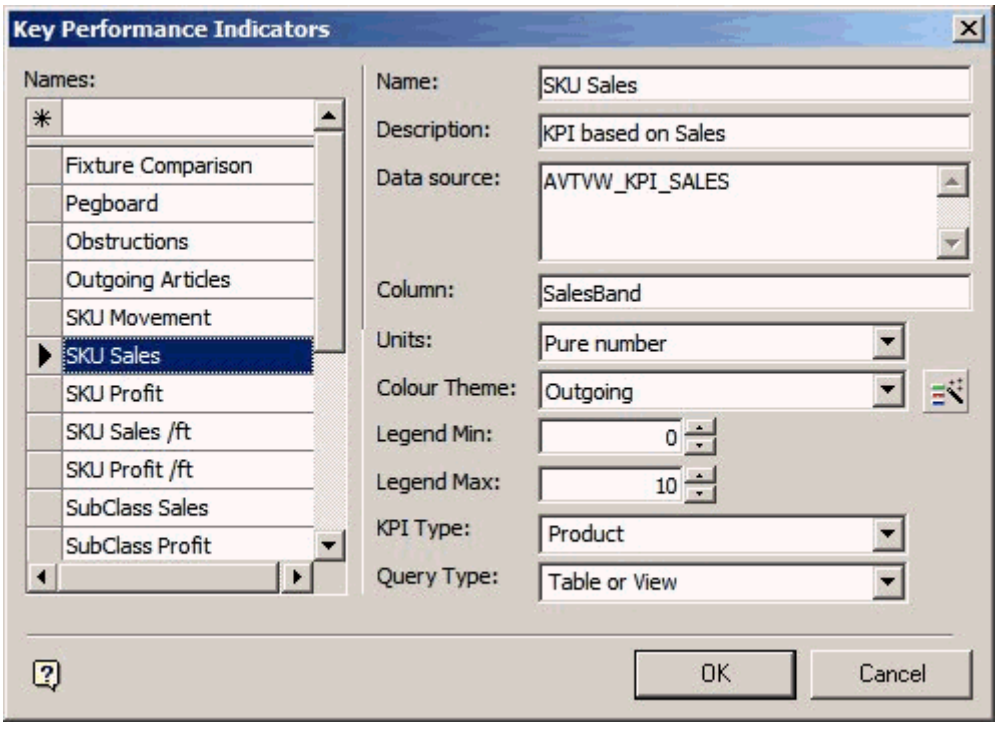
In the above example, the range of possible results from Sub-class Sales has been divided into bands. Each band will color according to the value it represents. This facility allows users to decide exactly how to color code the results.

The KPI Color Themes dialog box can be accessed from the KPI tab of the Object Browser in either the Planner or Merchandiser Modules in Macro Space Management.

Creating the KPI

Once a data source is available and the themes have been configured, the KPI itself can be configured using the Key Performance Indicators dialog box accessed from the KPI tab of the Object Browser in either the Planner or Merchandiser Modules in Macro Space Management.

Figure 7–7 Creating KPIs



This dialog box allows the user to create a KPI, specify the data source and the column within the data source to use. It also allows the user to specify the color theme to be used to color code the set of results being used by the KPI.

Once configured, the KPI is available for use and can be selected from the Object Browser in the Planner and Merchandiser modules and in In-store Space Collaboration.

Note: Care should be taken in re-configuring existing KPIs. The changes are global and will affect all users of that KPI.

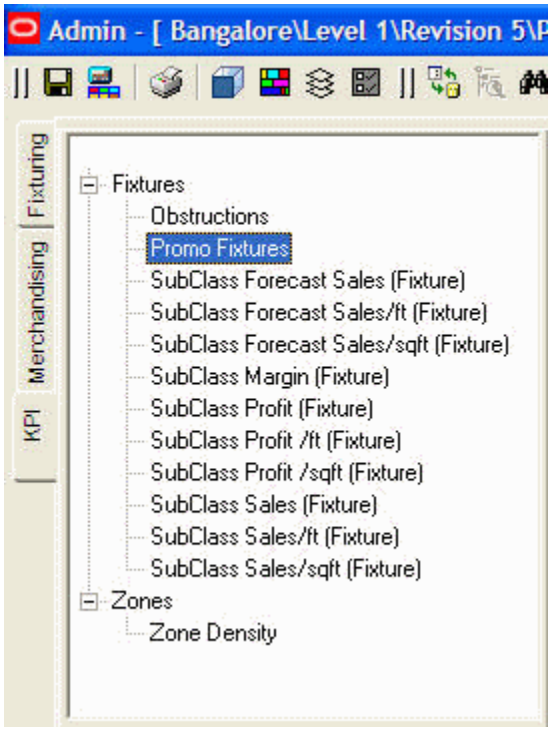
The KPI Toolbar

The KPI Toolbar will be found at the top of the window. It does not contain any KPI specific icons. Some icons may be grayed out if they are not available.

The KPI Hierarchy Window

The KPI Hierarchy Window shows a list of the available KPIs.

Figure 7–8 KPIs Hierarchy

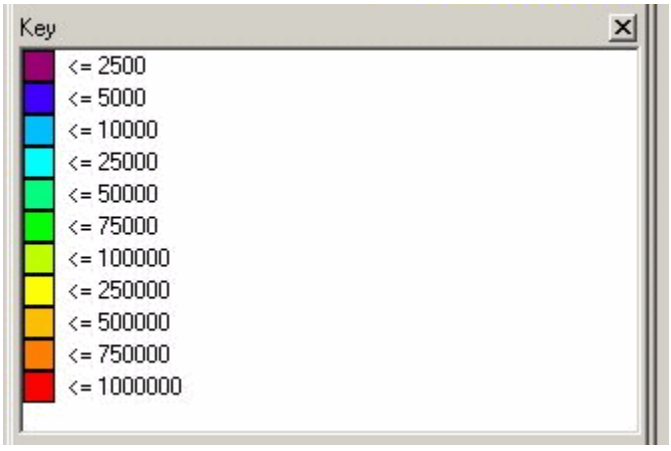


Click + to expand, and - to collapse the hierarchy.

The Key Window

The Key Window indicates the legend that is used to code each fixture.

Figure 7–9 The Key Window

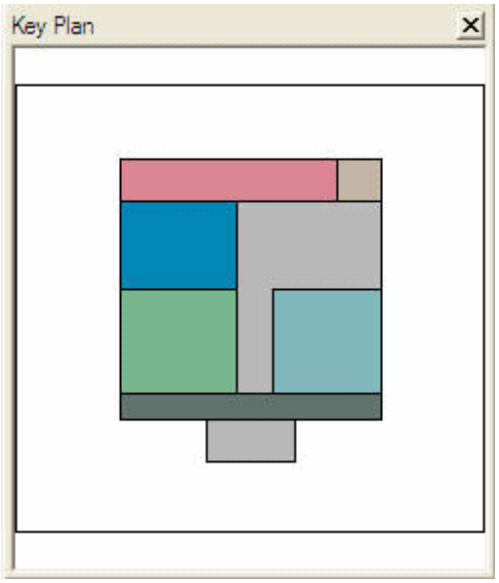


This legend may be either a color or a hatch pattern depending on the choices made in the Options Window.

The Key Plan Window

The Key Plan Window shows which part of the drawing is currently being viewed.

Figure 7–10 The Key Plan Window

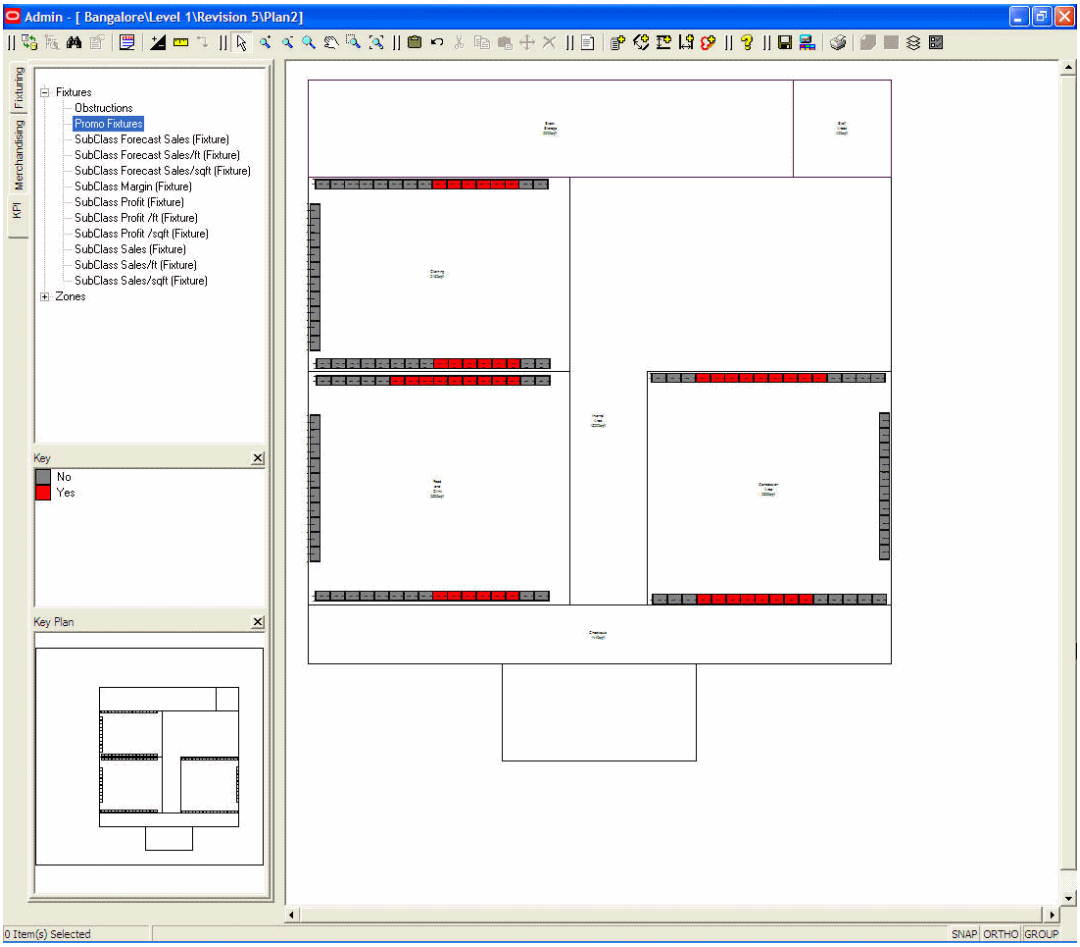


Using KPI

To use a KPI:

1. Click on the KPI tab in the Object Browser to select the KPI facility.
2. Go to the KPI Hierarchy window and left click on the required KPI to activate it. The drawing will then be color coded or hatched with the appropriate results.

Figure 7–11 KPIs Window



8

Troubleshooting

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

Applications Problems and Solutions

The following is a list of some commonly encountered problems and their solutions.

Table 8–1 Application Problems and Solutions

Problem	Solution
File already checked out	If a time out warning is received, users should be aware that selecting the 'No' options will disconnect the software from the server and the program will close.
I can't find an object on the drawing that I know was placed	The Find dialog will only find objects in the currently active parts of the drawing. These are selected in the opening dialog.
I can't see individual files in the Select Store dialog box	The **IN-STORE_STORE_LEVEL_SELECTION** system variable affects the number of levels visible in the Select Store dialog box.
The OK button is grayed out in the Store Selection dialog box	The button will only become active when a valid selection has been made.
Time Out Warning	If a time out warning is received, users should be aware that selecting the 'No' options will disconnect the software from the server and the program will close.