

Oracle® Retail In-Store Space Collaboration
User Guide
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Preface

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

Audience

This User Guide is for users and administrators of Oracle Retail In-Store Space Collaboration. This includes merchandisers, buyers, business analysts, and administrative personnel.

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Related Documents

For more information, see the following documents:

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

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- Screen shots of each step you take

Review Patch Documentation

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

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

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

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

Conventions

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

This is a code sample

It is used to display examples of code

Getting Started

Overview of Macro Space Planning

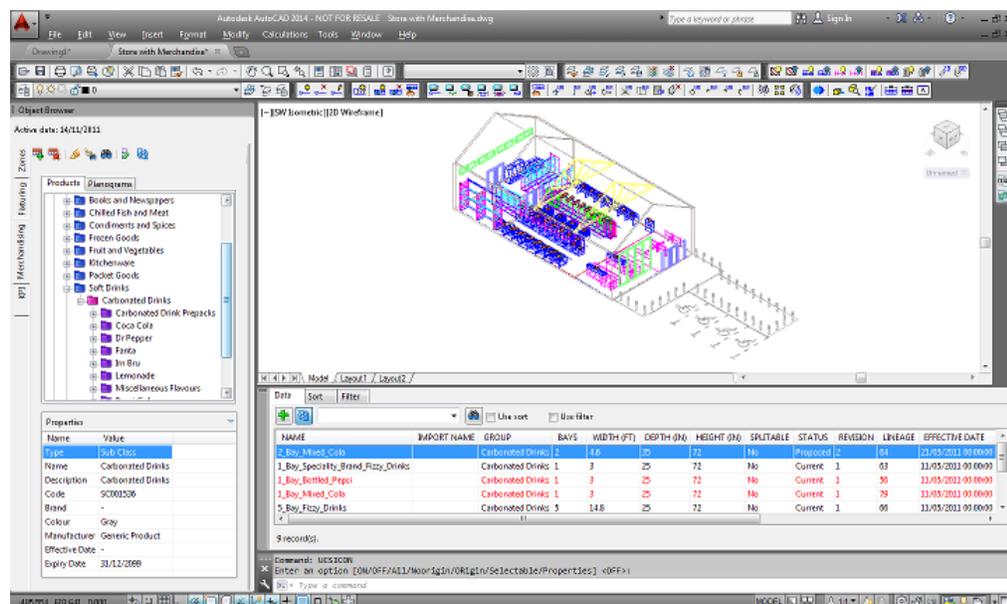
The Macro Space Planning suite consists of two applications:

- Macro Space Management
- In-Store Space Collaboration

In Store Space Collaboration consists of ISSC itself and an extension called ISSC Mobile.

Macro Space Management

Macro Space Management is software primarily intended for centralized planning. It is typically located at head or regional offices and is normally operated over a Local Area Network. The application is a complex, integrated program that allows users to carry out sophisticated store planning, fixturing and merchandising operations. It also allows them to monitor retail performance using KPI and reports.



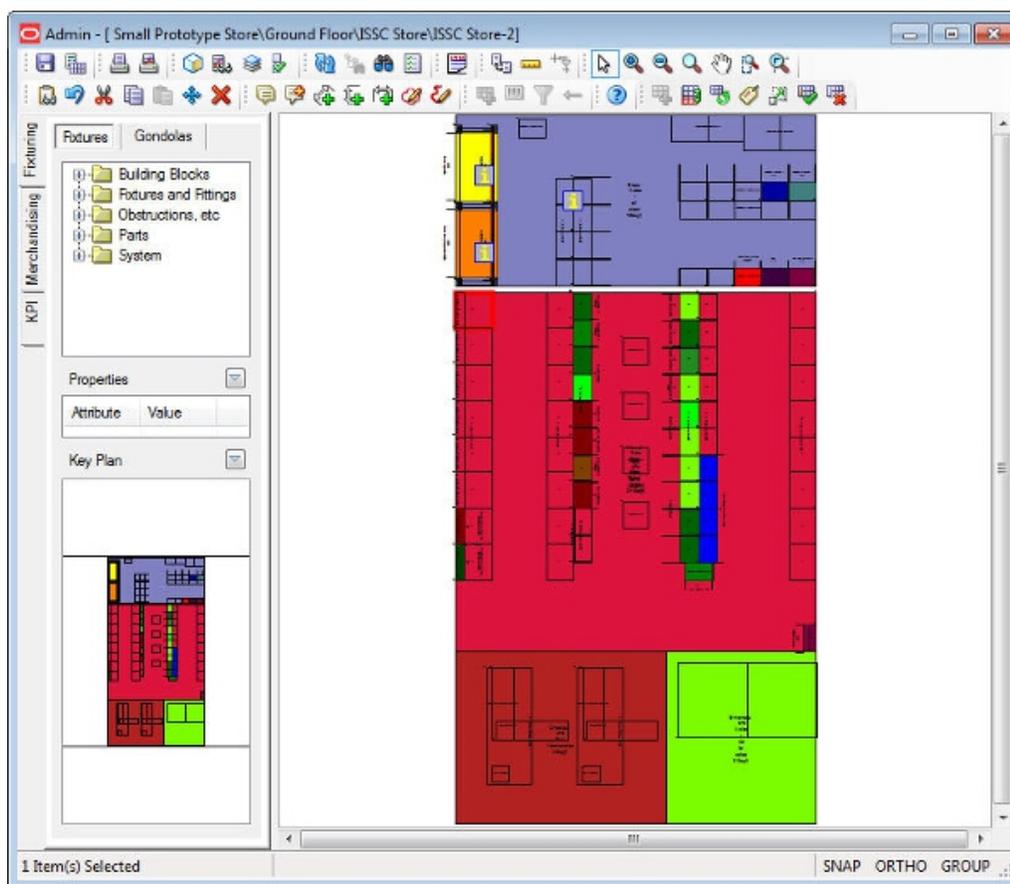
The results of all these activities are stored in a database common to both Macro Space Management and In-Store Space Collaboration.

In-Store Space Collaboration

ISSC Desktop

In-Store Space Collaboration is intended for use on laptop computers, often at stores within a retail chain. It allows Internet based access to store planning, merchandising and performance information held within the central Macro Space Planning database. In-Store Space Collaboration can carry out many (but not all) of the functions of Macro Space Management. These primarily include:

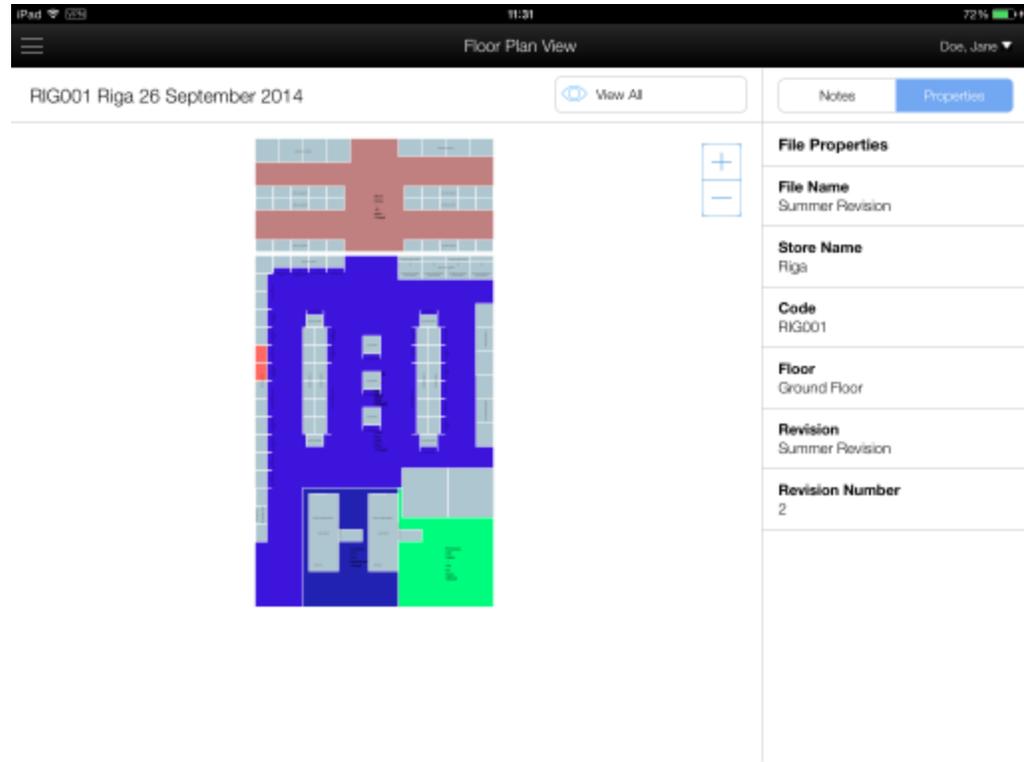
- Adding, editing and deleting fixtures, fittings and gondolas in a floor plan.
- Adding, editing and deleting products and planograms in a floor plan.
- Using KPIs and reports to look at the effectiveness of the arrangements within the floor plan.
- Using notes, dimensions and mark-ups to annotate a drawing (often used in surveying stores or highlighting compliance issues).
- Ensuring that the actual contents of the store match those specified in the floor plan (compliance).



This information is accessed from the central Macro Space Planning database. After adding, editing and deleting fixtures and merchandise within In-Store Space Collaboration, the results are saved back to the central MSP database. This allows planners at headquarters to cooperate with regional managers and store managers.

ISSC Mobile

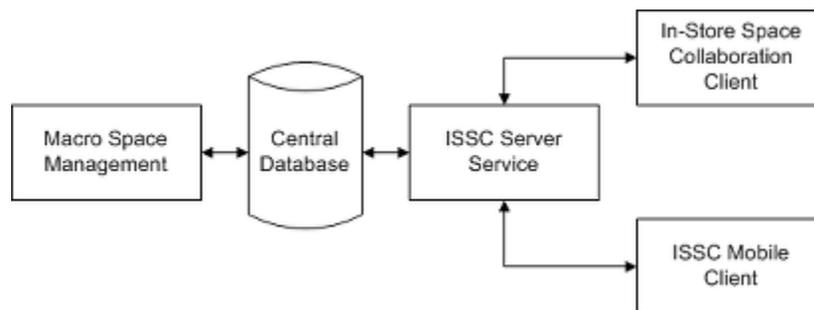
ISSC Mobile is an extension for ISSC. It allows a user, typically a store associate, to see changes to fixturing and merchandise in the store they are working in. It also allows the ISSC mobile user to communicate with ISSC and MSM users via Notes.



How ISSC Communicates with the Database

Note: This section is primarily intended for Administrators.

A basic overview of the normal way the ISSC application is configured is as follows:



MSP Database

The Macro Space Planning database is a central repository of information for MSM, ISSC and ISSC Mobile.

ISSC Server Service

The ISSC Server Service enables the ISSC Client (the application that runs on a laptop) to connect to the MSP database. Changes made to floor plans by the client can thus be written back to the database. The ISSC Server Service also allows ISSC Mobile to connect to the database.

ISSC Client

The ISSC client is the user interface for ISSC. The ISSC client runs the local copy of the application and holds connection details for the ISSC Server Service. The ISSC Server Service provides a means of communication with the database.

ISSC Mobile Client

The ISSC Mobile client is the user interface for ISSC Mobile. This client runs the local copy of the application and holds connection details for the ISSC Server Service. The ISSC Server Service provides a means of communication with the database.

ISSC and System Variables

Users with access to the Administration module in Macro Space Management have the ability to set the value of a number of system variables that affect how In-Store Space Collaboration operates. These changes are immediately written back to the MSP database. They will not take effect in the ISSC Clients until the ISSC Server Service has been stopped and started. This is because the existing values of the system variables are held in its memory. Stopping and starting the ISSC Server Service updates the values the Server Service holds.

Note: See the *Macro Space Management Administration Module User Guide* for full details of these system variables and their effect.

Configuring Access Privileges for ISSC

Connecting to the Central Macro Space Planning Database

The Macro Space Planning software suite consists of three applications; Macro Space Management (MSM), In-Store Space Collaboration (ISSC) and its extension In-Store Space Collaboration mobile (ISSC Mobile). They share a common database. Before In-Store Space Collaboration can be used on your computer, the following must have been carried out:

- In-Store Space Collaboration Client must be installed and configured on your computer. The client runs the user interface on your computer and communicates with the In-Store Space Collaboration Server.
- In-Store Space Collaboration Server is installed on a server. It communicates with both the In-Store Space Collaboration Client and the Macro Space Planning database.

Note: Refer to the *Macro Space Planning Installation Guide* for information on how to configure the client and server.

Changes made to floor plans in Macro Space Management become visible in In-store Space Collaboration and vice versa.

System Variables

There are a number of system variables that affect how In-Store Space Collaboration looks and operates. They are using the System Variables dialog box in the Macro Space Management Administration Module. In-Store Space Collaboration users cannot access these settings - they must be configured by a user with access rights to the Macro Space Management Administration module.

Note: for a full description of system variables affecting In-Store Space Collaboration, see the *Oracle Retail Macro Space Management Administration Module User Guide*.

Access Privileges for In-Store Space Collaboration

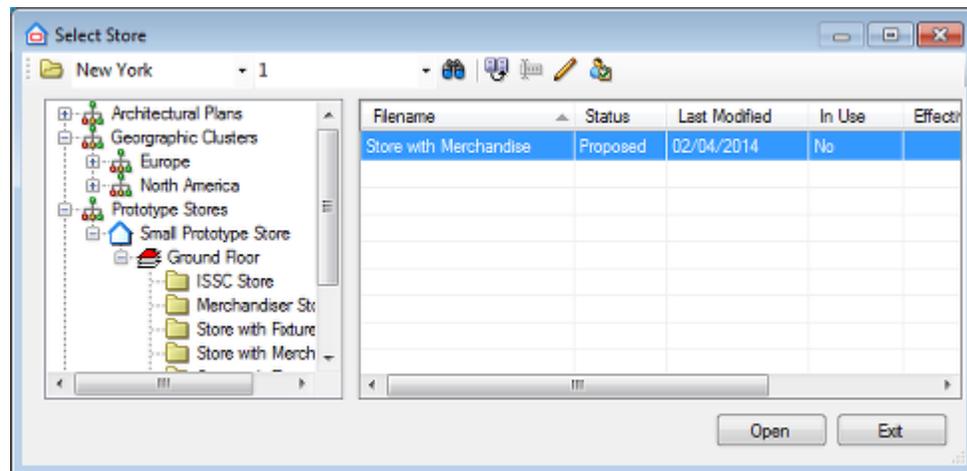
Access privileges for ISSC take several forms:

- The stores and which floor plan statuses users can access
- The merchandise a user can access for placement purposes.
- The options available on the ISSC toolbar
- The functions available when a floor plan is saved.

These are configured in the Administration module of Macro Space Management and cannot be affected from within ISSC.

Stores and Floor Plans Users Can Access

When the Select Store dialog box appears, it will have a subset of the available stores and floor plans available.



The stores and floor plans that a user can see are determined by the **User Group** that the user belongs to. The User Group has its privileges set using the Data Security option in the Administration module of Macro Space Management. These privileges determine which stores members of the user group can see, together with what status the floor plans are accessible at in ISSC. If the User Group does not have the correct access rights, then a user will not be able to see specific stores and floor plans.

Options Available on the ISSC Toolbar

The options available to a specific user group are a combination of the Role assigned to the User Group configuration directly in the Macro Space Planning database. When a new user group is created it does not have rights to any of the functionality on the toolbar. Until those rights are assigned, user will see a grayed out toolbar even if they have been assigned rights to access stores and floor plans.



Note: See the Security section of the *Administration Module User Guide* for information on how to assign privileges for the ISSC toolbar.

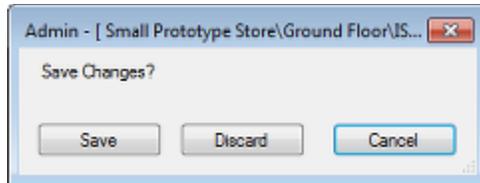
It is possible to grant limited access to the toolbar. For example, an ISSC user group responsible only for equipment could be given access to the fixturing and gondola options, but not access to the product and planogram options.

Save Options

There are three forms of the Save dialog box available. These will appear when the user closes a floor plan without first having saved any changes. Which dialog box appears is determined by which User Group the user belongs to and the status level the floor plan is at.

Save

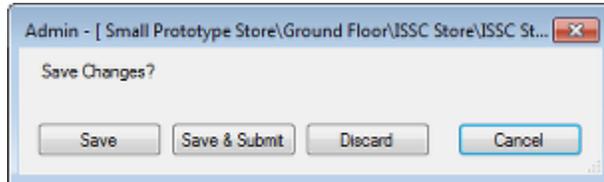
The Save option allows users to save changes back to the database.



No changes will be made to the status of the floor plan.

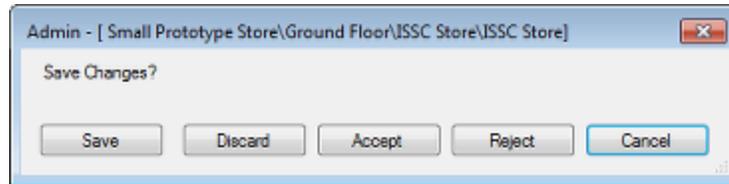
Save and Submit

The Save and Submit option allows users to save changes back to the database and to advance the status of the floor plan by clicking the Submit button.



Accept and Reject

The Accept and Reject option allows users to save changes back to the database. It also allows users to change the status of the floor plan by means of the Accept or Reject buttons.

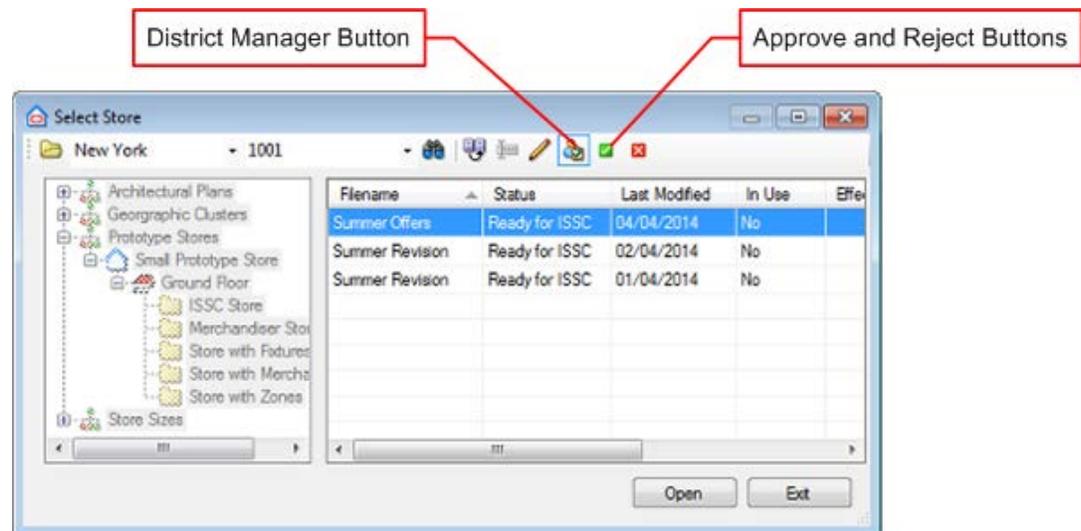


Configuring the Save Options

The Save options for each User Group are configured directly in the database in the **Process Flow** and **Process Flow Option** tables. See the *Oracle Retail Macro Space Planning Data Model* for more details.

The District Manager Option

The District Manager option allows users with the correct User Group role and privileges to accept or reject floor plans in bulk.



Access to the District Manager button requires additional configuration during implementation.

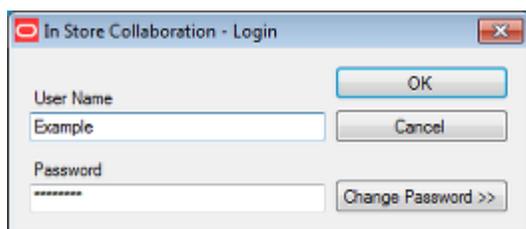
Logging in to In-Store Space Collaboration

When the In-Store Space Collaboration Client is started a login dialog box will appear. The user will be asked for a User Name and a Password. The User 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: Users are managed in the Administration Module of Macro Space Management.

To log in to In-Store Space Collaboration:

1. Double click In-Store Space Collaboration Client on the desktop. The In-Store Space Collaboration - Login dialog box opens.

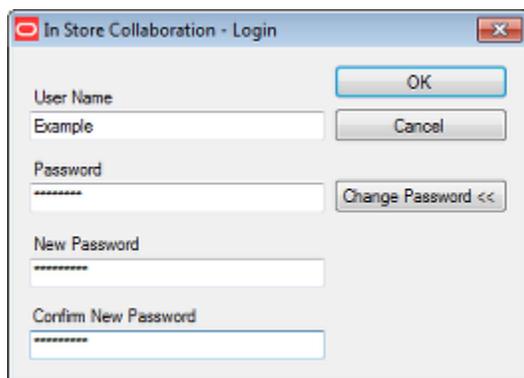


2. Enter your user name and password. Click OK or use the Enter button.

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 the user during login by clicking on the Change Password button. This will bring up additional fields that allow the user to set a new password.

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



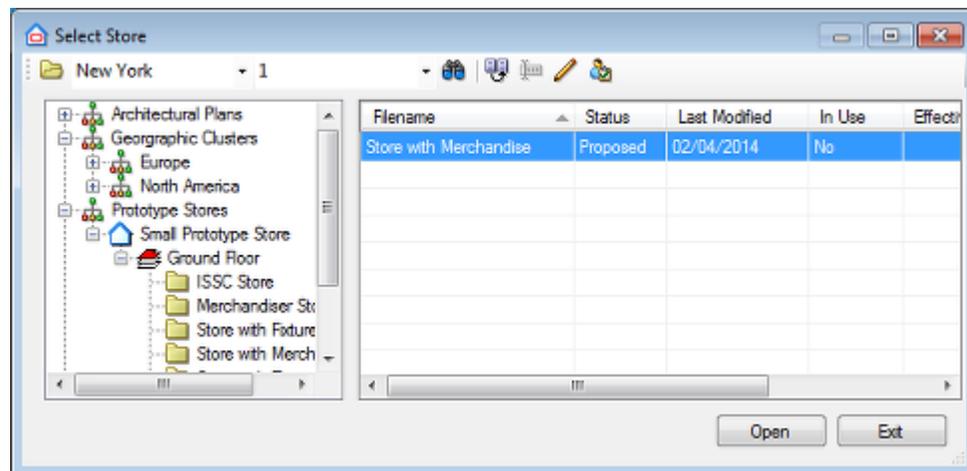
The Micro Space Management Administration module allows an administrator to specify the format of the password including the minimum and maximum lengths and whether upper case, lower case, numeric and special characters are required. Consult your local administrator for information on password requirements. It also allows an administrator to force users to change passwords at preset intervals. The criteria for passwords will be displayed each time an invalid password is entered during an attempt to change it. Users must ensure their passwords meet these criteria before they are accepted.



Note: The above screenshot is an example - the actual criteria will vary from retailer to retailer.

Selecting the Floor Plan

After logging in, the Select Store dialog box opens. The stores and floor plans that are visible for selection will be determined by the privileges assigned to the user's User Group in the Administration module in Macro Space Management.

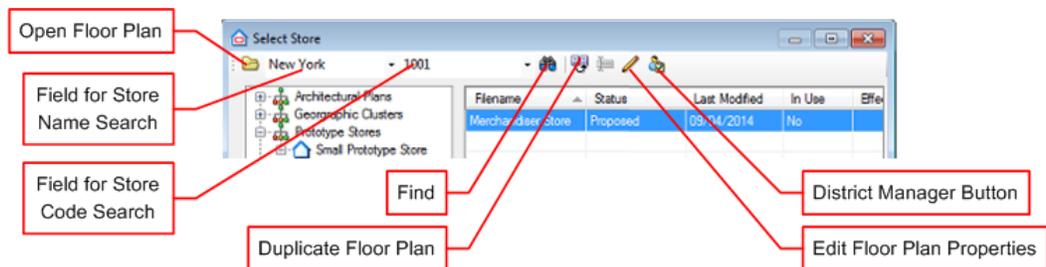


The pane on the left contains a list of all the stores that the user can access. Objects are organized in a hierarchy. The following icons represent the type of object within the hierarchy.

Field	Description	Comment
	Cluster or sub-cluster	Clusters serve as 'containers' for stores sharing a common characteristic. It is possible for stores to belong to multiple clusters; for example Medium Stores and Rest of World . Retailers can set up these clusters (in MSM) for use in grouping stores by any desired characteristic - such as location, size, turnover or customer demographic.
	Store	A store is a single sales outlet.
	Floor	A floor is a distinct physical level on a store, for example Ground Floor .
	Revision	A revision is a folder for floor plans sharing a common characteristic. In the above example, there are floor plans for the Spring season.

Toolbar Options

Note: The options available may be dependent on your privileges.



- Open Floor Plan will cause the currently highlighted floor plan to open in ISSC for viewing or editing.
- Field for Store Name Search enables a text string to be entered for search purposes.
- Field for Store Code Search enables a code to be entered for search purposes.
- Find will highlight a store in the store hierarchy based on information entered in either the Store Name or Store Code fields.
- Duplicate Floor Plan will cause a duplicate of the currently highlighted floor plan to be created in the current revision folder.
- Edit Floor Plan Properties enables a user to edit the properties of the currently highlighted floor plan.
- The District Manager button can be toggled on or off. If toggled on, it will cause all floor plans that the District Manager has permissions for to show. Additional toolbar options will also become available. Unless users have been granted District Manager privileges, this button will be grayed out and unavailable.

Using the Search Options

Any floor plan can be selected for editing by using the search functionality. To search by Store Name:

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

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 code:

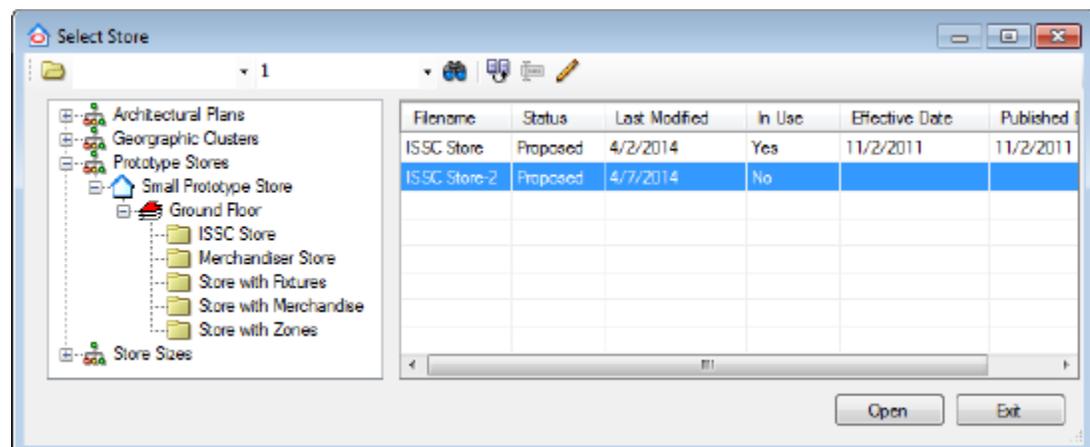
1. On the Select Store window, enter the required store code.
2. Click Find.

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 **Open**. The Select Data dialog box opens.

Selecting the Floor Plan

To select the floor plan:

1. After logging into In-Store Space Collaboration, select the floor plan from the Select Store window.
2. Click Open. The Select Data - Store window opens. The purpose of this dialog box is to allow the user to select which parts of the floor plan they wish to display. A user working with the food and drink area might wish to restrict the floor plan to those areas.



3. This dialog box allows users to select which of the zones in the drawing they wish to work in. Select the data to be displayed in the floor plan.
4. Click OK. The selected drawing opens in In-Store Space Collaboration.

Note: Display of this dialog box can be controlled with the **SKIP_ZONE_SELECT** system variable. This is set in the **System Variable dialog box** called from the General menu of the Administration module. If **SKIP_ZONE_SELECT** is set to 1 (on) the dialog box will not appear.

Checking In and Checking Out

The Macro Space Planning database holds many floor plans. It is important that only one person can make changes to a specific floor plan at a given time. If more than one person simultaneously makes changes to a floor plan, the data will rapidly become confused and corrupted. This is overcome by **Checking Out** and **Checking In** floor plans. When an In-Store Space Collaboration floor plan is opened, it is automatically registered as Checked Out. Only the user it is checked out to can then alter it. Other users can view the floor plan in Read Only mode, but they cannot save any changes. Checked in floor plans are floor plans that have been closed and saved by their current user. Checked in floor plans can be opened and altered by any other In-Store Space Collaboration user.

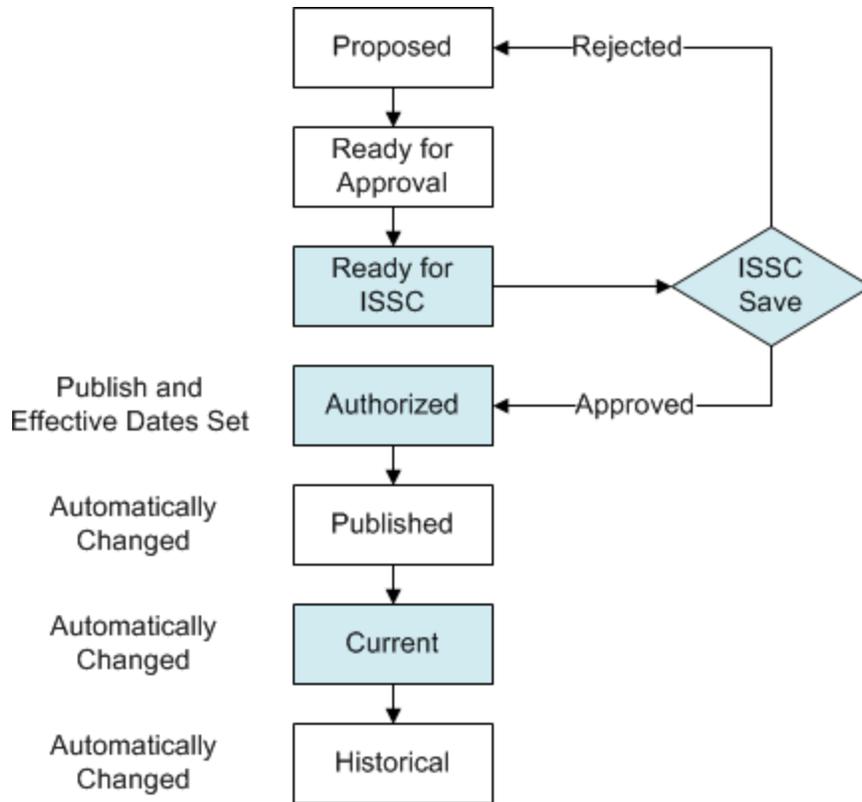
Checking Out and Checking In are normally automatic, but some floor plans may have to be manually checked in if (for example) a user has gone on vacation without checking in that floor plan. Manual check in can only be done using Store Manager in Macro Space Management. You cannot manually check in files in In-Store Space Collaboration. If there is a system failure (for example if there is a power cut) and a floor plan remains checked out, the user who has it checked out can re-open it, continue to work on it and then save and close.

Read Only Data

Read Only Files are files the user has 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. Examples would be files at **Current** status (the floor plan currently in service) or **Historical** status (floor plans no longer in service).

Floor Plan Statuses and the Business Life Cycle

Floor plans have statuses assigned; these statuses show where the floor plan is within its business life cycle. The exact status flow is configurable within the Administration module in Macro Space Management. The example below shows a simple example. Details will vary from retailer to retailer.



Overview of Statuses

Note: This is an example; what statuses are visible and what they are named may vary from retailer to retailer. (The blue boxes in the flow chart are typical statuses that would be made visible to ISSC users).

Proposed - Not Visible in ISSC

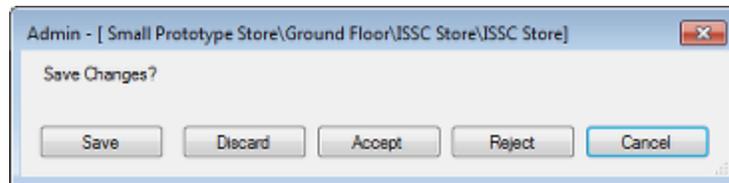
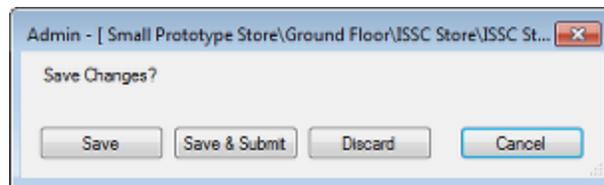
The floor plan would be at this status while it was being laid out.

Ready for Approval - Not Visible in ISSC

On completing the floor plan design, the store planner would set the floor plan status to Ready for Approval. Responsibility then passes to a manager as to whether to approve the floor plan or not. If they decide not to approve it, the status is set back to proposal. If they approve it, the status will be set to Ready for ISSC.

Ready for ISSC - Visible in ISSC

This status is the first floor plan status that is visible in ISSC. ISSC users cannot directly change the status (unlike MSM users) but when exiting the floor plan, some users have a Save dialog box that allows them to Submit/ Approve or Reject the floor plan. This causes the status to move forward or backwards in the business life cycle, the exact statuses being configured in the Administration module of Macro Space Management.



Note: These Save dialog boxes are associated with specific User Groups by direct configuration in the Database. See the *Administration Module User Guide* for further details.

- If the Reject button is clicked the status will revert to Proposed.
- If the Submit or Accept buttons are clicked, the status will be advanced to Authorized.

Authorized - Visible in ISSC

When the floor plan reaches Authorized status it becomes possible to set the Publish and Effective dates in the Select store dialog box.

- The Publish Date is the date at which the floor plan will be changed to Published status.
- The Effective Date is the date at which the floor plan will be changed to Current status.

This is done automatically within Macro Space Planning using a batch tool called **Update Status**. The schedule this batch tool runs on must be configured by the retailer.

Published - Not Visible in ISSC

The floor plan status is generally changed automatically to Published by the update Status tool. When a floor plan reaches Published status, several things are set to occur:

- The floor plan is published and sent to the store so that preparations can be made to put it into effect.
- Any modified planograms in the floor plan are simultaneously sent to the store in preparation.
- A reporting system identifies the equipment and merchandise required for the change and the information is passed to the retailers supply chain.

Individual retailers will configure these actions to suit their specific requirements.

Current - visible in ISSC

The floor plan status is generally changed automatically to Current by the Update Status tool. When a floor plan reaches Current status, the store puts the plan into effect - equipment and merchandise being modified on the floor of the store so they match the previously supplied floor plan and planogram designs. Floor plans at Current status are normally **read only**. This is because the Current floor plan represents the present state of the store and should not be capable of further modification.

Historical - not visible in ISSC

The floor plan status is changed automatically to Historical automatically by the software when a later floor plan is changed to Current status. Floor plans at historic status represent store arrangements that have been taken out of service.

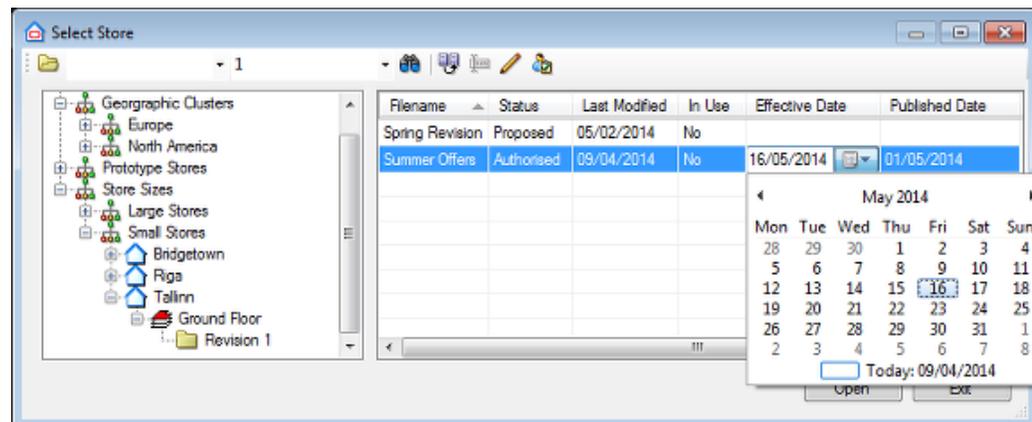
Default Publish and Effective Dates

When a floor plan is set to Authorized status, the Publish and Effective dates are set to default values. These are determined as follows:

- The Publish Date is set to a date based on the date at which the status is changed, plus the number of additional days specified in the System Publishing Lead Period setting in the Floor Plan Publishing Configuration dialog box accessed from the File menu in the Planner Module. If this is set to 14 days, the Publish date will be set 2 weeks ahead of the date the status is changed.
- The Effective Date is set to a date based on the Publish Date, plus the number of additional days specified in the EFFECTIVE_DATE_LEAD_PERIOD system variable. This system variable is set in the System Variable dialog box (General menu) in the Administration module in Macro Space Management.

Modifying Publish and Effective Dates

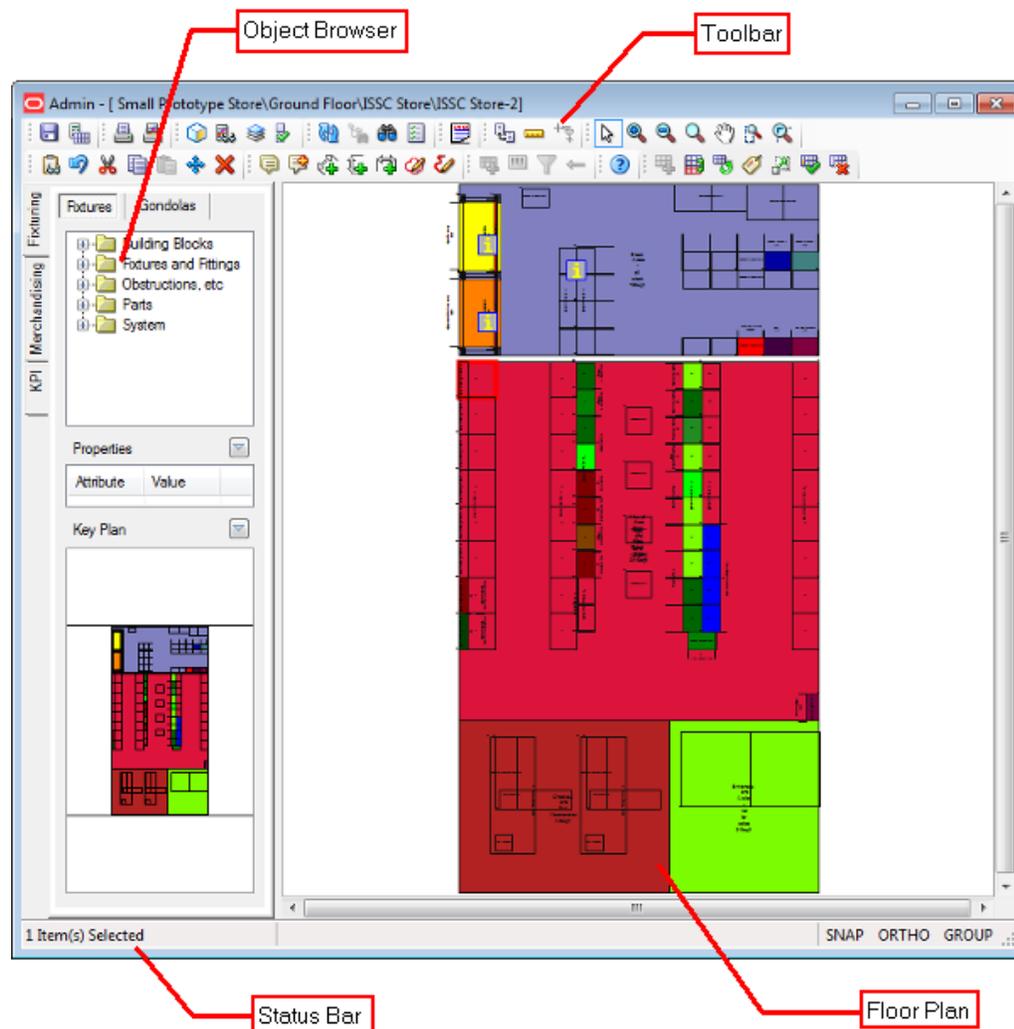
Publish and Effective dates can be modified from the defaults by highlighting the floor plan in the Select Store dialog box and clicking the Edit button on the toolbar.



This enables the Publish and Effective dates to be set to values other than the defaults.

Overview of ISSC Controls

In-Store Space Collaboration opens in Top Graphical view. The window gives access to every component the user has permission to use.



Overview of Controls

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 user's User Group in Macro Space Management. The toolbar also gives access to three further options.

- Front Graphical View - this gives users access to a front view of the selected fixtures
- Shelf Graphical View - this option is accessed from Front Graphical View. It shows the top view of a specified shelf and its associated products.
- Planogram Preview - this option show the planogram design present on a specified fixtures or fixtures.

The Object Browser

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

The Floor Plan

The Floor 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 KPIs.

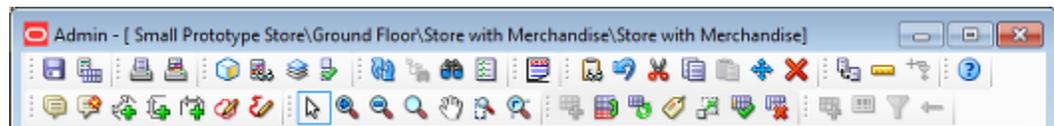
The Status Bar

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, the next action required to manipulate them and instructions for the next action.

Toolbar

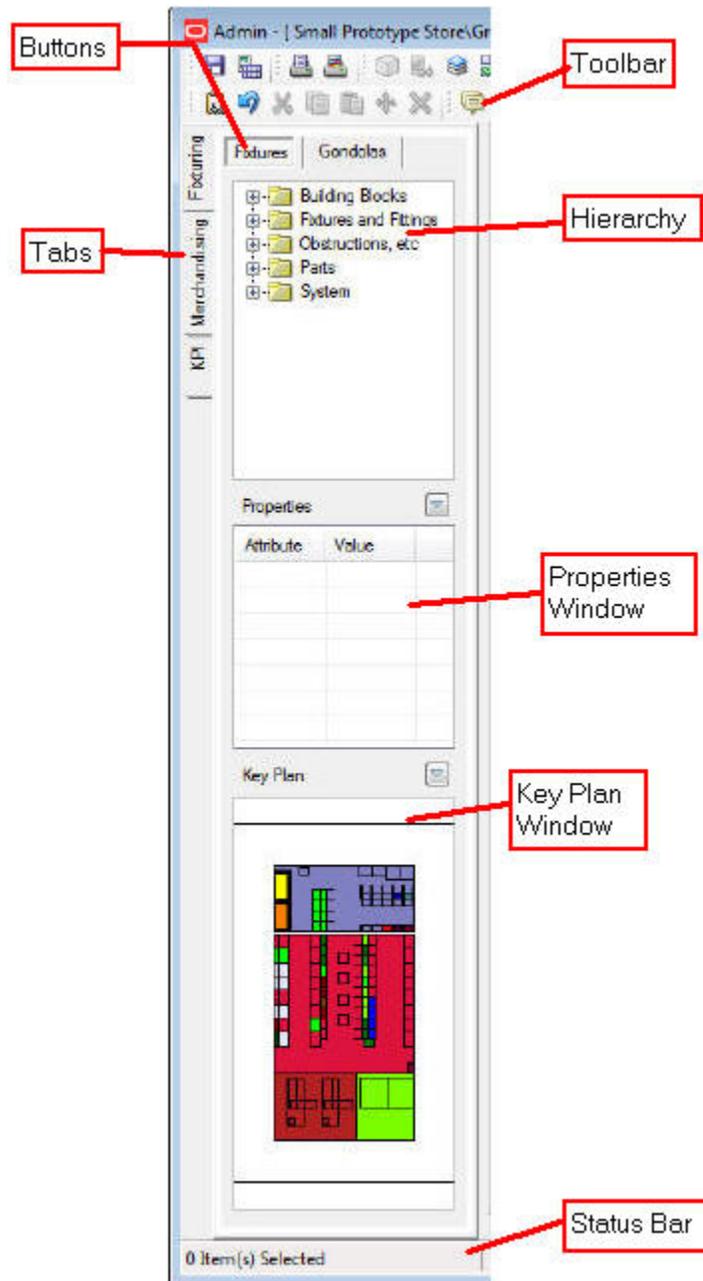
Located at the top of the window, the toolbar gives access to a wide range of In-Store Space Collaboration functions. Different users may have access to slightly different options on the toolbar. This depends on the settings for the parent User Group in Macro Space Management.



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 active options will depend on which tab of the Object Browser is selected.

The Object Browser

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



You can switch between tabs by using the Fixturing, Merchandising, and KPI tabs to the upper left. Switching between options also changes the options that are active. 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. Information on actions is given in the Status Bar.

The Floor Plan

The Floor Plan is a plan view of a selected floor within a store. Depending on the selections made the user 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 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.

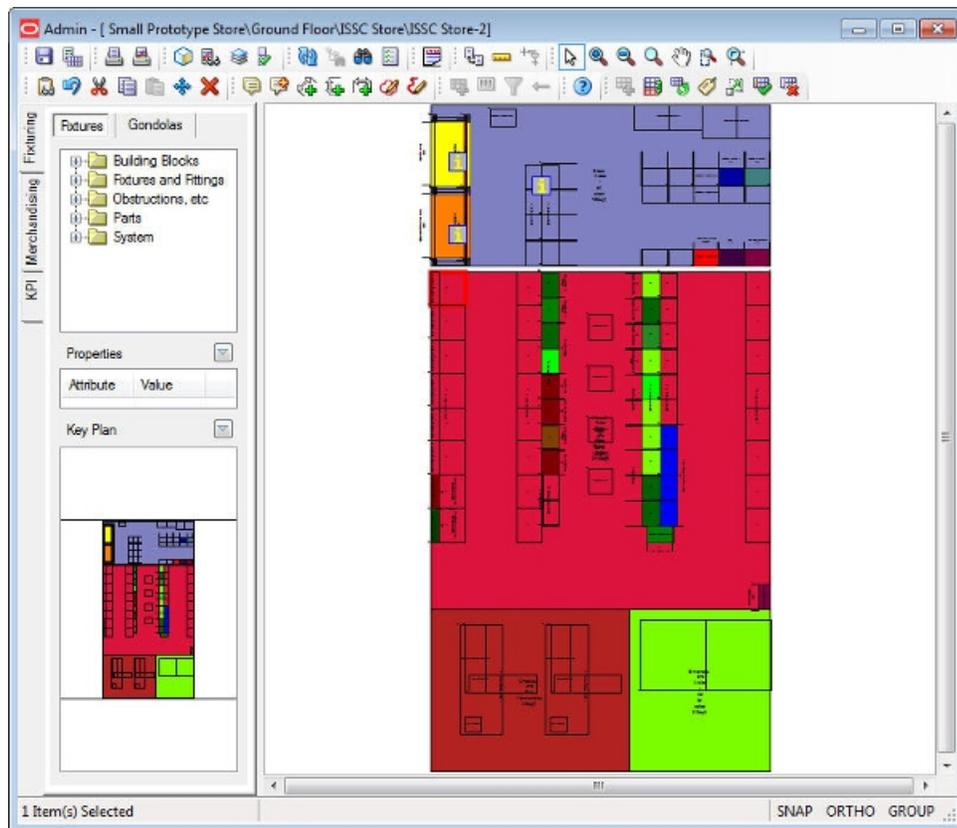


Different Ways of Viewing Data in ISSC

There are several different ways of viewing data in ISSC.

Top Graphical View

Top Graphical View is the initial way users view data for a floor plan. It opens immediately after users open a floor plan. Once the floor plan is open users have the option of selecting fixtures and then viewing the contents of those fixtures using Planogram Preview or Front Graphical View.

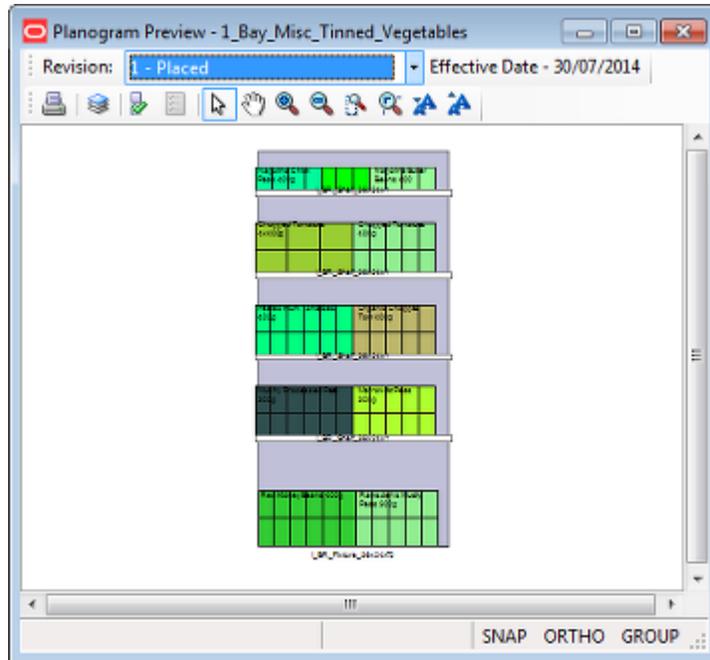


Planogram Preview

Planogram Preview is accessed from the toolbar and shows the planogram as designed.



To use planogram preview, select the fixtures containing a single planogram and click the **Planogram Preview button**. The view will change to a view from the front of the selected planogram. The information displayed is that for the planogram as designed and will not reflect and changes made to the planogram once it has been placed.



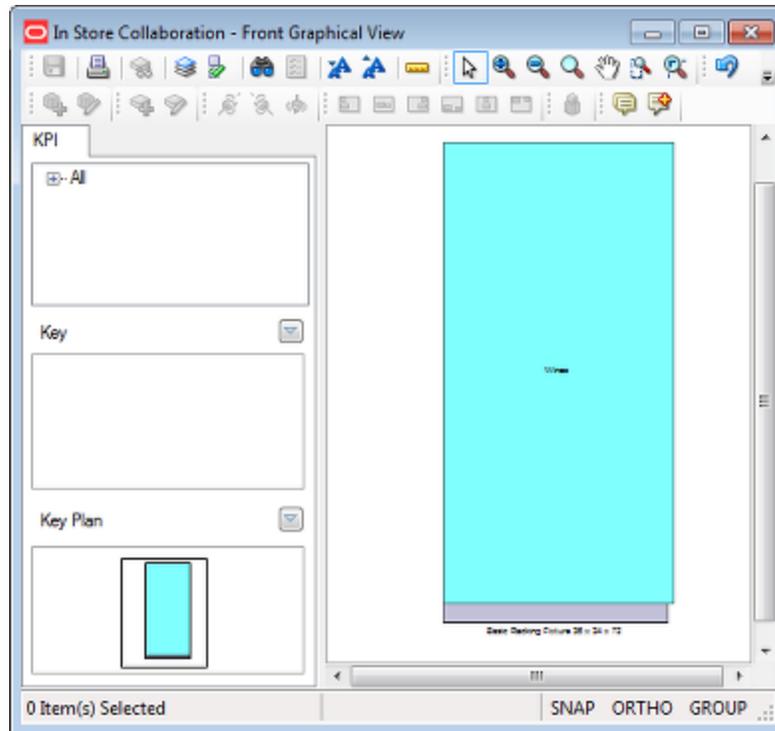
Only one planogram can be viewed at a time. Selecting fixtures containing more than one planogram will result in an error message.

Front Graphical View

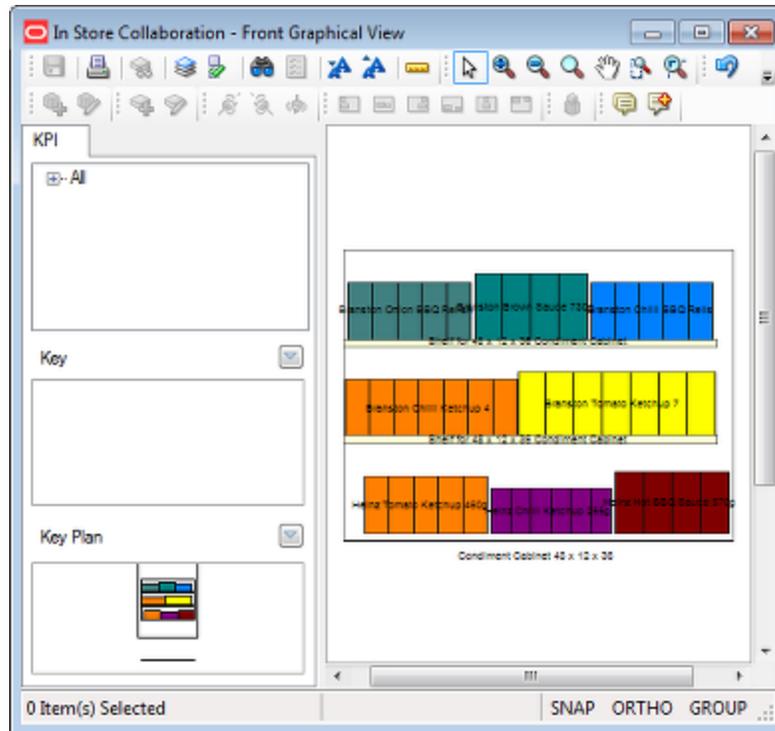
Front Graphical View is accessed from the toolbar and shows the contents of the selected fixtures. The appearance depends on whether the merchandise is in 2D or 3D form. Planograms placed in ISSC and in the Planner module in MSM are always in 2D form. They can be changed to 3D form in the Merchandiser module in MSM.



The screen shot below shows planograms in their 2D form. In this condition they are placeholders showing that the fixture is occupied with a specific planogram.

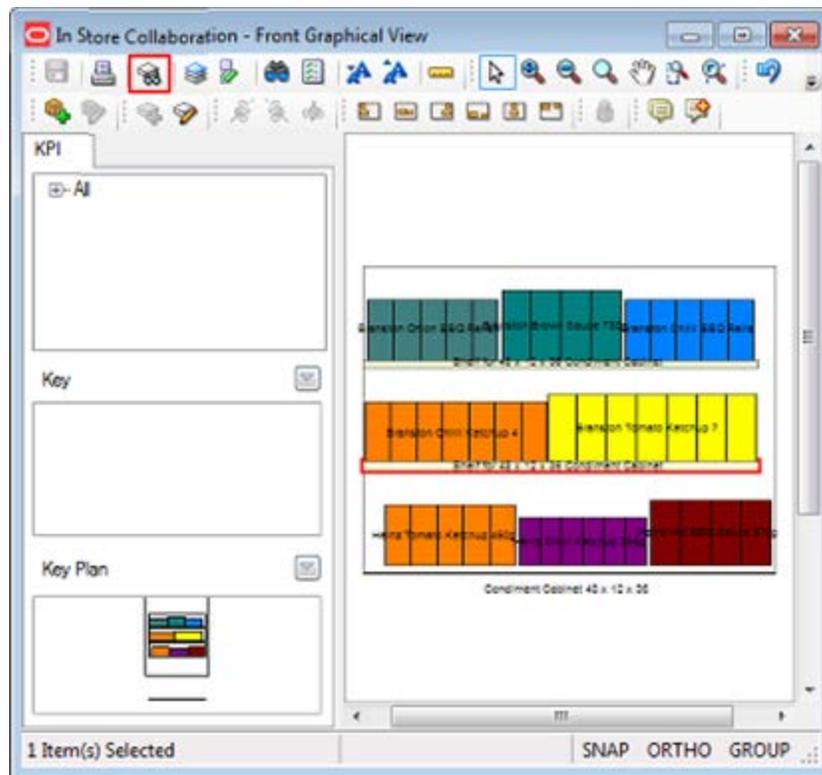


The screen shot below shows planograms in their 3D form. In this condition, the shelves and products in the planogram can be seen in detail. In addition, the equipment and merchandise can be manipulated and the changes saved back to the Macro Space Planning database.

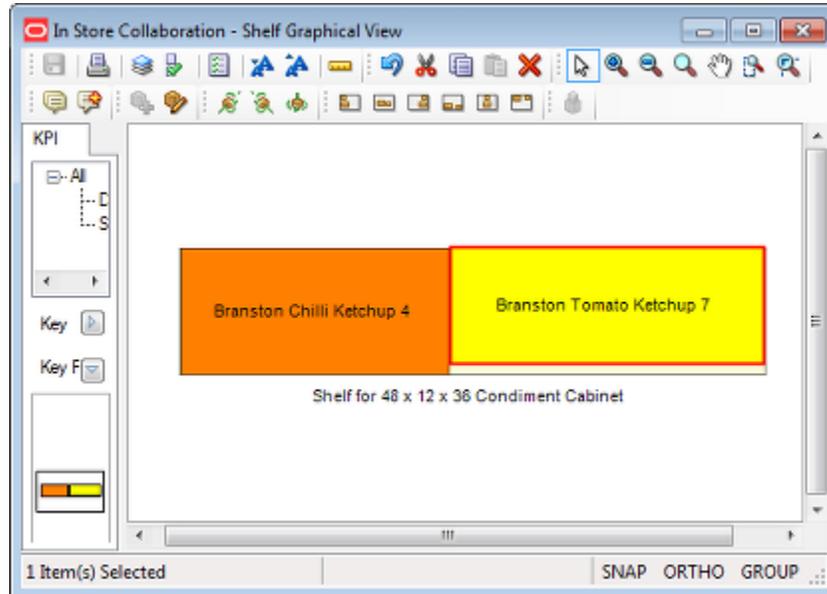


Shelf Graphical View

Shelf Graphical View gives a plan view of a shelf on a fixture. It is selected from Front Graphical View. To do so, highlight a single shelf and then click the Shelf Graphical View icon on the toolbar.



This will bring up Shelf Graphical View. The merchandise on the shelf can be manipulated and the changes saved back to the Macro Space Planning database.



Overview of General Options

In-Store Space Collaboration provides a number of ways of looking at information in a floor plan.

- Top Graphical View: A plan view of a floor plan
- Front Graphical View: The view from the front of selected fixtures.
- Shelf Graphical View: A plan view of a shelf on a selected fixture. (This is accessed from Front Graphical View).
- Planogram Preview: A front view of a planogram design.

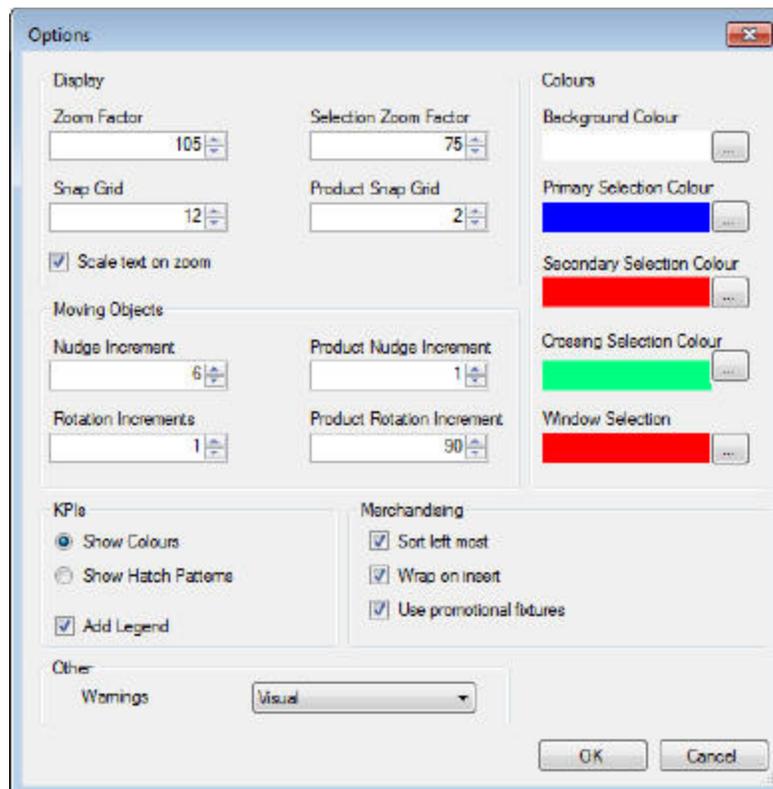
Some functionality is common to two or more of these. This includes:

Options Dialog Box

The Options dialog box enables individual users to customize some aspects of how ISSC works for them. This is accessed from the toolbar within all views. Similar options are available in the toolbars for Front Graphical View, Shelf Graphical View and Planogram Preview.



This will bring up the options dialog box.



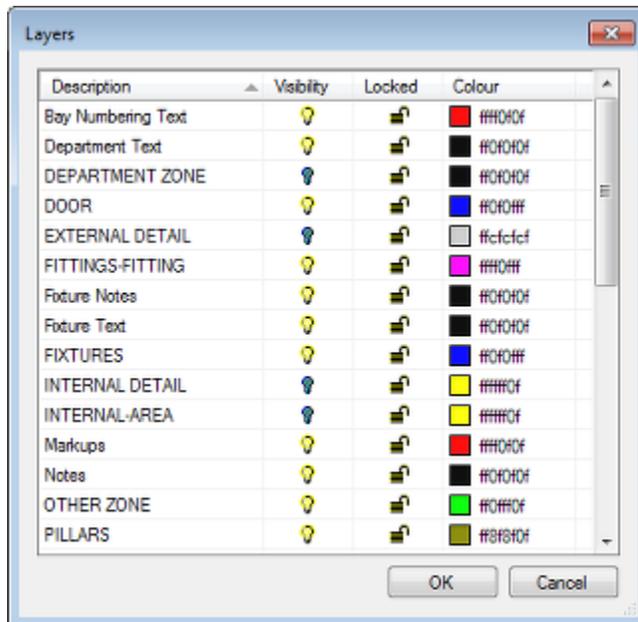
This can be used to customize a series of parameters.

Layers Dialog box

The Layers dialog box enables users to control the visibility of objects and to lock them against change. This is available within all the views. The example below is from the Top Graphical View toolbar. Similar options are available in the toolbars for Front Graphical View, Shelf Graphical view and Schematic Preview.



This will bring up the Layers dialog box.



Operating within the Selected View

ISSC provides a number of ways of moving about within a particular view. These are available within all the views. The example below is from the Top Graphical View toolbar. Similar options are available in the toolbars for Front Graphical View, Shelf Graphical view and Planogram Preview.



Cut, Copy, Paste and Clipboard

ISSC provides a clipboard which information can be cut and copied to. It also allows the information to be pasted back into the current view. This functionality is available within all the views. The example below is from the Top Graphical View toolbar. Similar options are available in the toolbars for Front Graphical View, Shelf Graphical view and Planogram Preview.



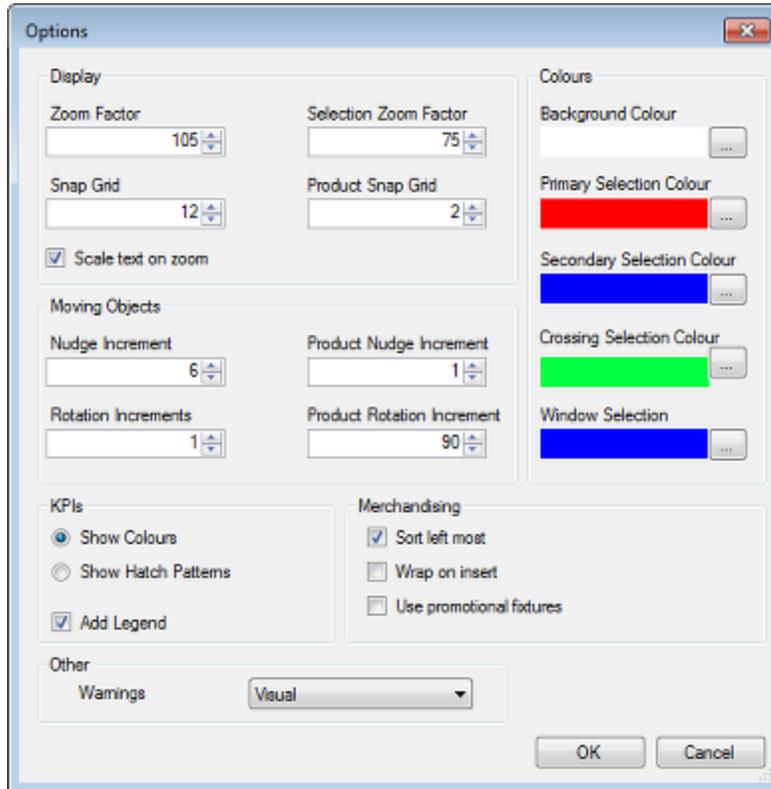
Selecting Objects in ISSC

Objects in ISSC can be selected in one of three ways: Individual selection, crossing selection box or windows selection box. The selected objects form a selection set. Selection sets are additive, so multiple methods can be used to build up a set of selected objects.

Note: Some ISSC operations only work on objects of a single type, so selection sets containing (for example) both shelves and products may not be valid for some operations.

Controlling Colors for Selection

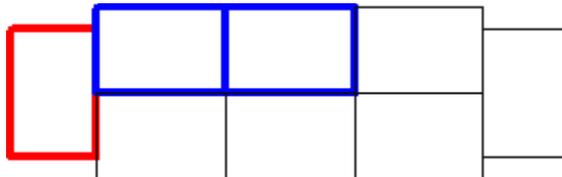
The colors for selection operations can be set in the Options dialog box. This is accessed from the toolbar.



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

Selection Sets

If multiple objects are selected, they will be in two colors.



The first object selected will be in the primary selection color (red in the above example). All other selected objects will be in the secondary selection color (blue in the above example). Clicking any object that is a secondary selection (blue) will remove that object from the selection set. Clicking the first selected object (red) will cancel all selected objects.

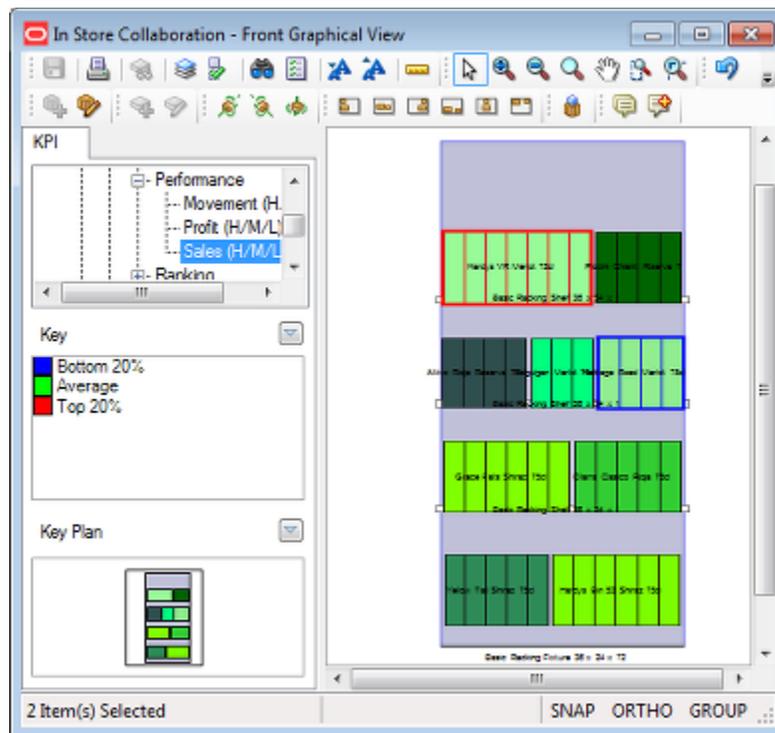
Effect of Grouping Option

There is a **Group** option on the right hand side of the status bar. If Grouping is on, selecting one object (for example a fixture in a gondola) will select all objects placed at the same time. If Grouping is off, individual objects can be selected.

Selection Methods

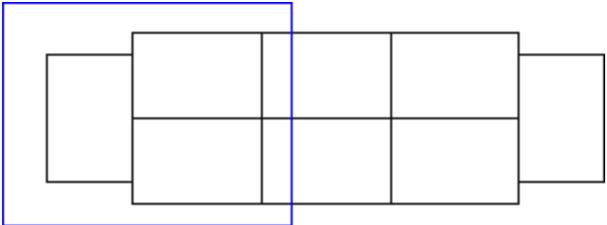
Individual selection

Individual selections are made by clicking on the required objects. It is the only possible method in Front Graphical View, Shelf Graphical View and Planogram Preview. In the example below, individual products have been selected in Front Graphical View.

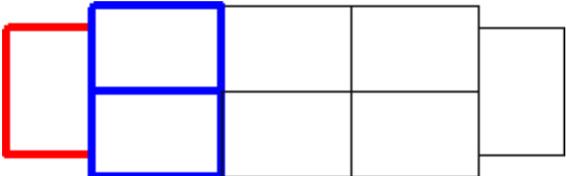


Windows Selection Set

A windows selection set only works in Top Graphical view. It is made by holding down the left mouse key then dragging the mouse to the right of the start point. This will result in a solid rectangle.

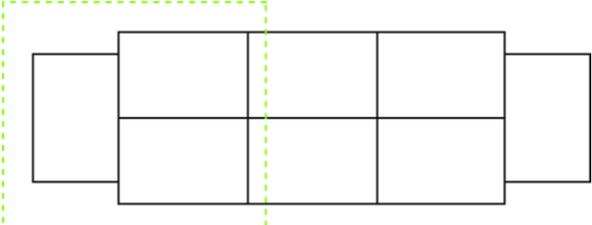


Releasing the mouse button will result in all objects that are fully enclosed by the rectangle being included in the selection set.

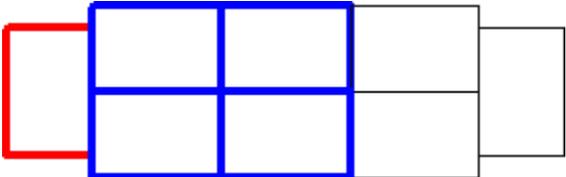


Crossing Selection Set

A crossing selection set only works in Top Graphical view. It is made by holding down the left mouse key then dragging the mouse to the left of the start point. This will result in a dotted rectangle.



Releasing the mouse button will result in all objects that are even enclosed by the rectangle being included in the selection set. In the example below, more fixtures have been included than when using the windows selection set, although the selection rectangle covered approximately the same area.

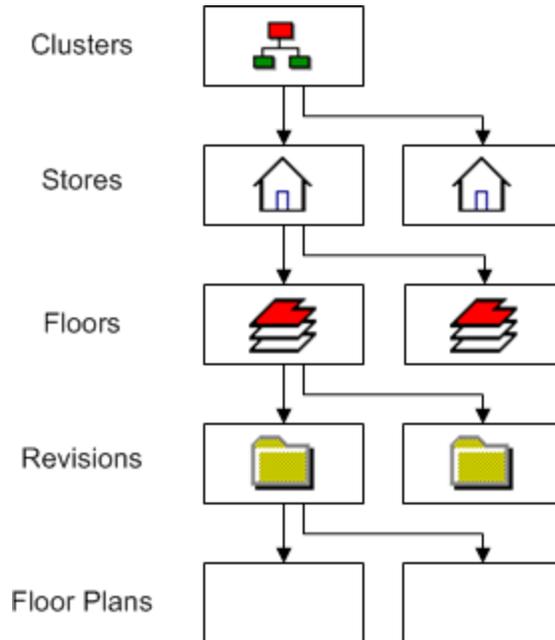


Basic ISSC Concepts

Many aspects of how In-Store Space Collaboration (ISSC) operates are configured in Macro Space Management (MSM). This section briefly explains some of those concepts.

Clusters, Stores, Floors, Revisions and Floor Plans

Clusters, stores, floors, revisions, and floor plans are organized in a hierarchical tree. This tree can only be modified in MSM.

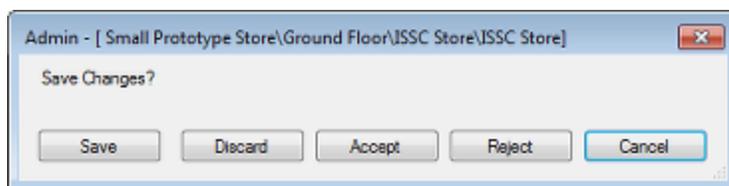


Field	Description	Example
Cluster	A cluster is a group of stores sharing a particular characteristic.	Clusters could be organized by geographic region. A store can belong to multiple clusters.
Store	A store is a 'bricks and mortar' retail outlet.	Stores would be assigned to the most appropriate clusters; for example 'East' and 'Medium Store Size'.
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.
Revisions	Each floor can contain a number of revisions.	Each revision contains floor plans sharing a common characteristic. For example, alternative floor plans for a Spring reset would be grouped together in a single revision folder.
Floor Plan	Each revision can contain a number of floor plans.	Each of these floor plans can contain an alternative arrangement of fixtures and merchandise.

Note: Stores can be assigned to multiple clusters. For example, a store could be assigned to a geographic cluster and also one related to store sizes. Depending on permissions set in MSM, ISSC users may be able to select one or more clusters containing that store. The different clusters thus provide alternative ways of navigating to that store in order to modify a floor plan.

Floor Plans and Floor Plan Statuses

Floor plans go through a business life cycle. They start at the design stage, are approved for use, go into service and are eventually superseded by more recent floor plans. Statuses are assigned in the Store Manager module in Macro Space Management. They cannot be directly changed in In-Store Space Collaboration, but some users are assigned the right to move the status back to an earlier one or forward to a later one in the business life cycle. This is done via the Save dialog box presented on exiting a floor plan.



In this instance, clicking **Reject** will cause the floor plan to revert to an earlier status; clicking **Accept** will advance it to a later status. Because not all statuses for floor plans are accessible in ISSC, clicking Accept or Reject may result in the floor plan no longer being visible to ISSC users.

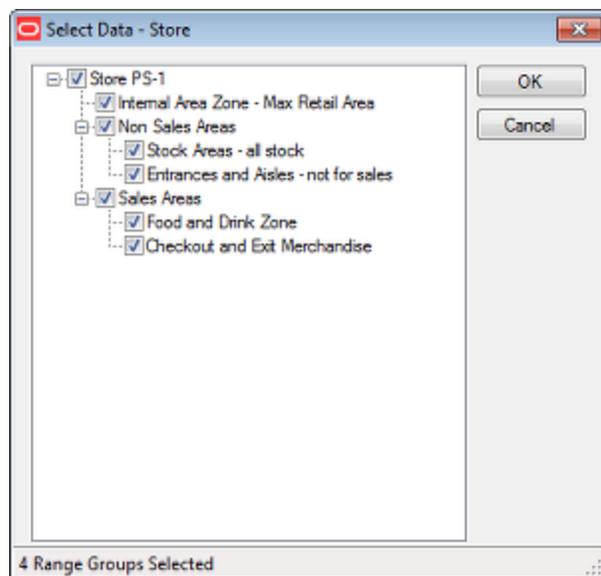
Note: Users can be assigned one of three Save dialog boxes - not all users will have the option to change statuses in this manner.

Zones (Departments)

The floor area in a store is split up into areas of different purpose. These are called zones and in many cases correspond to departments within a store. In Macro Space Planning zones are of three types.

- **Internal Area:** There is normally only one zone of this type in a floor plan. It is used to define the maximum area used for retailing purposes.
- **Department:** This type of zone has a specific use for reporting purposes. Fixtures will normally be unambiguously allocated to one (and only one) zone of type department.
- **Other:** This type of zone is used to assign other levels in the Zone Hierarchy. A fixture may belong to multiple zones of type Other. Using this type of zone for reporting purposes requires careful consideration.

It is possible to control what zones appear in a floor plan by using the Select Data dialog box. This will appear after a floor plan has been selected in the Select Store dialog box. It enables store planners to focus on the specific parts of a floor plan they are responsible for.



Note: Display of this dialog box can be controlled with the `SKIP_ZONE_SELECT` system variable. This is set in the System Variable dialog box called from the General menu of the Administration module in Macro Space Management. If `SKIP_ZONE_SELECT` is set to 1 (on) the dialog box will not appear.

Fixtures, Fittings and Gondolas

Fixtures and fittings have a precise meaning within Macro Space Planning. One key way this affects ISSC is when an attempt is made to merchandise equipment. Fixtures will accept merchandise, fittings will not. Gondola also has a specific meaning within the application. It is an arrangement of fixtures and fittings that is placed as a single entity when Grouping is On in the status bar. Gondolas also allow reports to be generated on which products are next to one another; important for optimizing the arrangement of merchandise in a floor plan.

Fixtures, Gondolas and their respective hierarchies are configured in the Fixture Studio module in Macro Space Management. ISSC users can add, move and delete fixtures and gondolas but they cannot change the way they are configured.

Products and Planograms

The product hierarchy is restricted in ISSC. It only allows the placement of products down to sub-class level in top graphical view. Products can be placed down to display style level in Front Graphical and Shelf Graphical view. Planograms are predefined arrangements of equipment and merchandise designed to go onto fixtures of specific type and size. They can only be viewed and edited in 2D (restricted) form if placed in ISSC. If exploded to 3D form in Macro Space Management's Merchandiser module, they can be viewed in full detail including shelves and precise details of products.

Product and Planogram data is generally imported into the Macro Space Planning. It can be edited respectively in the Product Studio and Merchandiser modules. ISSC users can add, move and delete products and planograms but they cannot change the way they are configured.

General Options

The Toolbar

The toolbar is at the top of the ISSC window. The icons that are visible will depend on what tabs and sub-tabs are selected in the Object Browser. Some icons are common to all forms of the toolbar; some icons vary with what option is currently selected. Thus, the fixturing tab will display one set of icons.



And the KPI toolbar a different set.



Icons Common to all Toolbars

Icon	Description
	Save
	Calculate Fixture Adjacency
	Print
	Print Planogram
	Front View
	Planogram Preview
	Layers
	Options
	Refresh
	Find in Hierarchy
	Find
	Properties
	Quick Reports
	Compare Drawings
	Measure
	Offset
	Select
	Zoom In
	Zoom Out
	Zoom Tool
	Pan
	Zoom Window
	Zoom to Extents
	Clipboard
	Undo
	Cut
	Copy

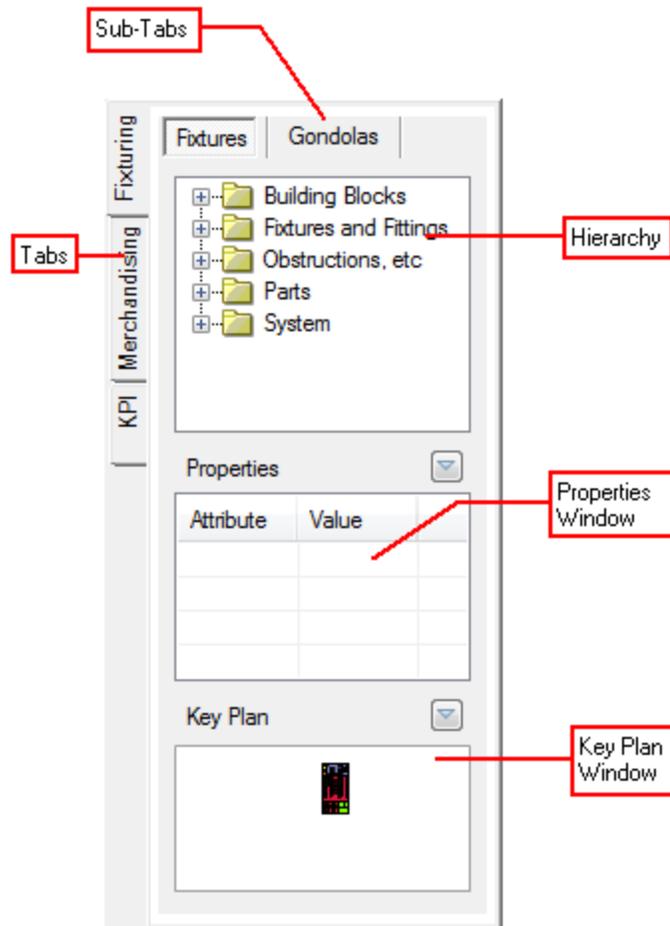
Icon	Description
	Paste
	Move
	Delete
	Notes
	Add Note
	Add Dimension
	Add Vertical Dimension
	Add Horizontal Dimension
	Add Revision Cloud
	Add Freehand Markup
	Help

Icons for Specific Toolbars

Fixturing Tab				Merchandising Tab			
Fixturing Options		Gondola Options		Product Options		Planogram Options	
	Add Fixture		Add Gondola		Add Product		Add Planogram
	Swap Equipment		Rotate Gondola		Planogram Scan		Planogram Scan
	Rotate Fixture						Filter Planograms
	Fixture Attributes						Reverse Planogram
	Resize Fixture						
	Make Promo Fixture						
	Make Standard Fixture						

The Object Browser

The Object Browser is used to display the currently active hierarchy, together with information on the currently selected object in that hierarchy.



Tabs

There are three tabs: Fixturing, Merchandising and KPI's. Switching between them changes the information displayed in the Object Browser. Switching tabs also changes the options available on the toolbar.

Sub Tabs

The Fixturing and Merchandising Tabs have Sub-Tabs. While in the fixturing tab, the sub-tabs allow the user to toggle between fixtures and gondolas. While in the Merchandising tab, the sub tabs allow users to toggle between products and planograms.

Hierarchy

The hierarchy shows the objects available for selection. What is displayed depends on the tabs and sub tabs selected.

- The Fixture hierarchy is configured in Macro Space Management's Fixture Studio Module.
- The Gondola hierarchy is configured in Macro Space Management's Fixture Studio Module.
- The Product hierarchy is configured in Macro Space Management's Product Studio Module.
- The Planogram hierarchy is configured in Macro Space Management's Merchandiser Module.
- The KPI hierarchy can be configured in either of Macro Space Management's Planner or Merchandiser modules.

None of the hierarchies are configurable from within ISSC.

Properties Window

The Properties window gives information on the currently selected object in the hierarchy.

Key Plan Window

The Key Plan Window shows a miniature version of the full floor plan with a rectangle superimposed over it. The rectangle shows which part of the floor plan is visible. Users can move about in the floor plan by putting the mouse cursor inside the rectangle, holding down the left mouse key and dragging it about.

Keyboard and Mouse Shortcuts

The following keyboard shortcuts can be used.

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.
	If in fixturing tab, delete currently selected fixtures, gondolas or merchandise depending on the Object Browser tab selected.
<Esc>	Clear the current selection.
Cursor Keys	<ul style="list-style-type: none"> ▪ Pan Left, Right, Up, and Down. ▪ Nudge if fixtures/fittings are selected.

Mouse Controls

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

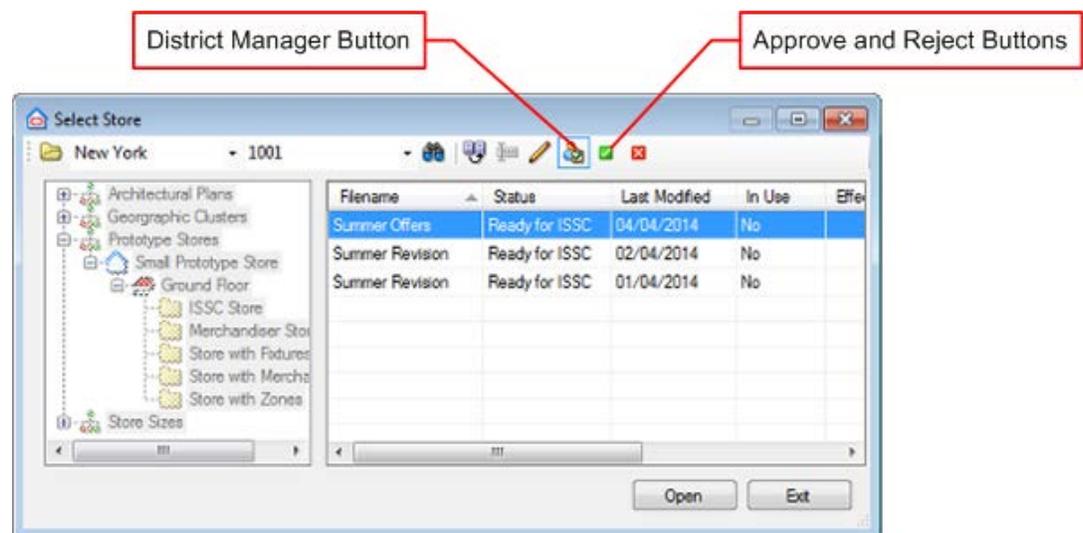
Shortcut	Description
Left Mouse Button	Select/De-select Fixtures
Mouse Wheel Up	Zoom In (relative to mouse pointer position)
Mouse Wheel Down	Zoom Out (relative to mouse pointer position)
Mouse Wheel Drag	Pan

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

Shortcut	Description
	Selection
	Pick Point
	Rotate
	Pan
	Zoom In
	Zoom Out
	Zoom Window

District Manager Option

The District Manager option is open to users who have been assigned the correct User Group role and privileges in the Administration Module in Macro Space Management. It allows users to approve or reject floor plans without the need to open the floor plan and use the **Save & Submit** or **Approve and Reject** dialog boxes.



If a user has District Manager privileges toggling the **District Manager** button to On automatically brings a list of all floor plans the user has access to and which require approval into view. It also causes an extra column called Number of Changes (not shown) to become visible. This shows the number of differences between the currently selected floor plan and its predecessor.

Two extra buttons also appear. These **Approve and Reject** buttons allow the user to move the status of the highlighted floor plan forward or backwards through the business life cycle. If the floor plan has no changes from its predecessor (generally because it is a 'copy and paste' from another revision) the Approve and Reject buttons will be active. If the floor plan is different from its predecessor, the floor plan can only be approved or rejected by means of the Save dialog box once the floor plan has been opened. Clicking the Approve or Reject button may change the status of the floor plan to one no longer visible in ISSC.

Note: If a floor plan has been created from scratch and not copied from a previous floor plan, the Number of Changes column will always show differences and the floor plan can only be Accepted or Rejected by opening the floor plan and using the Save dialog box.

Configuring the District Manager Option

To configure the District Manager option requires a series of steps:

Specify a User Group intended to have District Manager Rights in ISSC

District Manager rights are associated with specific User Groups and the district Manager User Group Role. A decision is required on which User Groups will be granted access to the District Manager button.

Ensure the District Manager Button is Active for Specific User Groups

Access to the District Manager button is configured directly in the database. By default it is off for new user groups and needs to be activated. The method of doing this is specified in the Security section of the *Macro Space Management Administration Module User Guide*.

Configure Access Rights

The access rights for the floor plans a District Manager has access to are determined by the User Groups the district manager belongs to. To access a floor plan, the User Group must have:

- Access to the store containing the floor plan. They must also have been granted access to the pertinent store status.
- Access to the status at which the floor plan is at. (ISSC users can only see floor plans at designated statuses.)

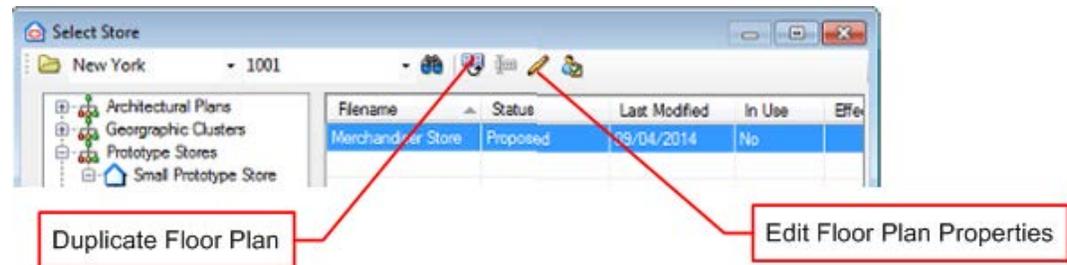
These access rights are specified in the Data Security option (Security menu) of the MSM Administration module.

Ensure the Statuses the Floor Plan will Change to on Accept or Reject are Set

Clicking the Accept or Reject buttons should cause the status of the floor plan to change. These alternative statuses are set in the Status dialog box accessed from the General menu of the MSM Administration module.

Duplicating Floor Plans and Editing Properties

Duplicating floor plans and editing floor plan properties can be done from the toolbar of the Select Store dialog box.



Duplicating Floor Plans

To duplicate a floor plan, highlight a floor plan in the Select store dialog box and click the **Duplicate** button. This button will only be enabled if:

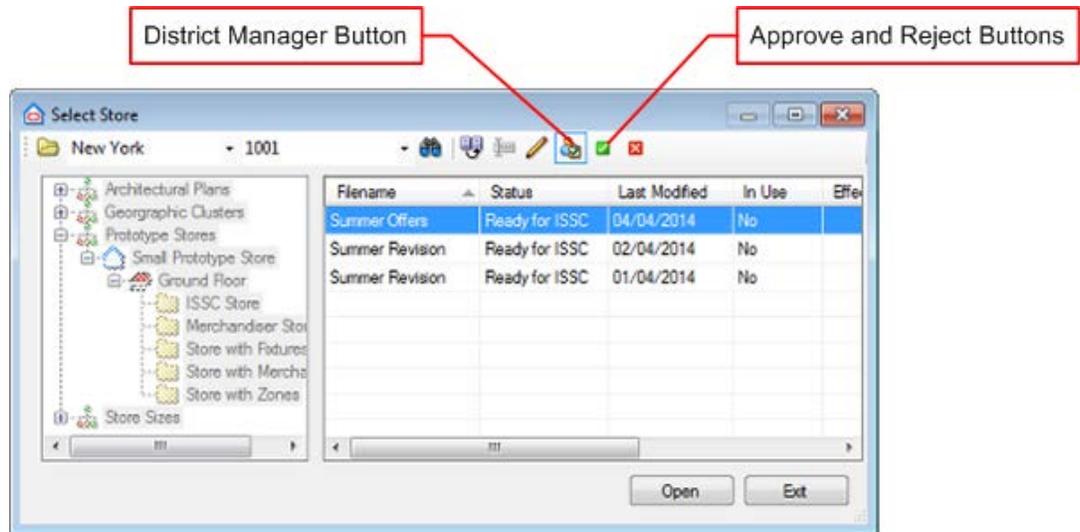
- A floor plan has been highlighted.
- That floor plan is not checked out.

The duplicate floor plan will be created in the same revision as the original and will have a numerical suffix added to the original file name; for example Summer Revision - A will become Summer Revision - A-2. At the same time as the floor plan is duplicated, duplicates will also be created of any DWG or DWF files associated with the original file.

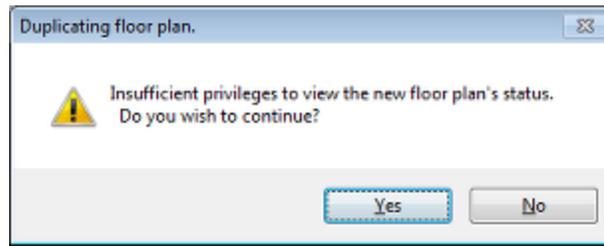
Note: If a floor plan of that name already exists, the suffix on the floor plan name will be further incremented - for example to Summer Revision - A-3.

Floor Plan Status

The status the duplicate floor plan will be set to is determined by the value of the **DUPLICATE_FLOOR_PLAN_STATUS_LEVEL** system variable. This is set using the System Variable dialog box (General menu) in the Administration module. The value of the system variable is the ID of the Status Level for the desired file status. This can be determined in the Status Levels dialog box (General menu) in the Administration Module. If the **DUPLICATE_FLOOR_PLAN_STATUS_LEVEL** system variable is set to 2 (Current), 3 (Historical), 4 (Authorised) or 5 (Published), the status of the floor will be set to Proposed (1). If the System Variable is not set, the status of the floor will also be set to Proposed (1). The status of the duplicated floor plan cannot be set to a status later in the business flow than the status of the original floor plan, although (in some cases) it can be set to the same status as the original.



If the duplicated floor plan is set to a status that will not be visible to the user in In-Store Space Collaboration, a warning will result.



Clicking Yes will still cause the file be duplicated. It will not be visible in to that user in ISSC, but will be visible in Macro Space Management. It may also still be visible to users with other privileges in ISSC.

Floor Plan Properties

The following values will be set for the properties of the duplicated floor plan. These are visible in the File Properties dialog box accessed in the Store Manager module in Macro Space Management. Many of these properties are used for automated processes such as floor plan processing and planogram substitution.

Property	Setting
Publish Date	Set to Null
Effective Date	Set to Null
File Made Current	Set to Null
Last Published Date	Set to Null
Created Date	Set to the Server date and time for that specific server
Expired Date	Set to December 31st, 2999.
File Modified Date	Set to same date as original floor plan
Modified by Automation	Set to same date as original floor plan
Last Modified	Set to same date as original floor plan

Property	Setting
File Predecessor	Set to filename of original floor plan
Cloned File flag (only visible in database)	Set to False

Editing Floor Plan Properties

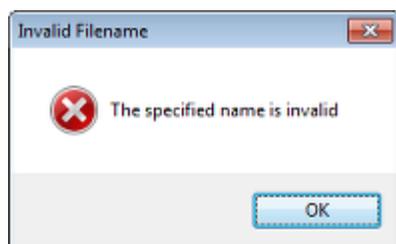
Three floor plan properties can be edited: the floor plan name, the Publish Date and the Effective Date.

Floor Plan Name

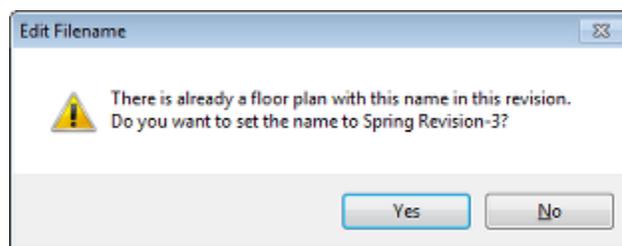
The floor plan name is edited by highlighting it in the Select Store dialog box then clicking the **Edit Properties** button or by single clicking on the name when the floor plan is highlighted.

- File names cannot contain any of the following characters: \ / : * ? " < > | .
- File names cannot be set to any reserved Windows file name. These include CON, PRN, AUX, COM1 and LPT1.

If either of these conditions is breached, an invalid file name warning will result.



If the floor plan name is edited to match an existing file name in the revision the floor plan is in, a warning will result. This warning will suggest a modified file name that is not a duplicate.

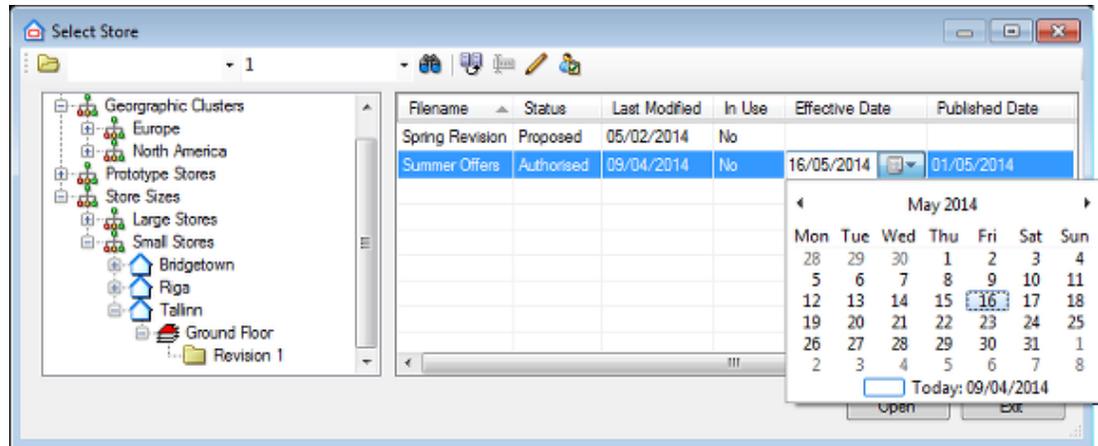


Clicking Yes will save the floor plan with the suggested modified name; clicking No will return the user to the Select Store dialog box so they can type another name.

Publish Date

The Publish Date is the date at which the file will be set to Published status by automated tools. Setting the file to Published status allows the retailer to begin making preparation for the changes. This often involves sending the floor plan to the affected store and using a report to identify and equipment and merchandise that needs to be ordered.

The Published Date can only be edited if the floor plan is at Authorised status. Editing the Publish Date is done by highlighting it in the Select Store dialog box then clicking the **Edit Properties** button. Editing the Publish Date can also be done by single clicking it to activate it.



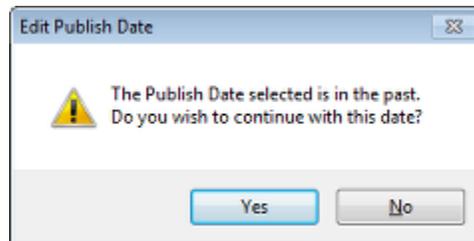
Once the Publish Date has been activated, clicking the down arrow will bring up a calendar control - allowing the Published Date to be set to that required. Alternatively, the date can be typed in.

The Publish Date must obey the in-built business logic of ISSC.

- The Publish Date must be set to a date earlier than the Effective Date.
- The Publish Date must be entered in the specified format. (This format is determined by the Windows regional setting on the user's computer.)

If either of these conditions is infringed, an error message will inform the user of the pertinent error.

A warning will result if the Publish Date is set in the past. This option should be used with caution as setting the Publish Date into the past may lead to problems with reporting systems, and so on.



Note: Once the Publish Date has been set into the past for a specific floor plan, further warnings will be deactivated for that floor plan whilst that floor plan's properties are being edited.

Effective Date

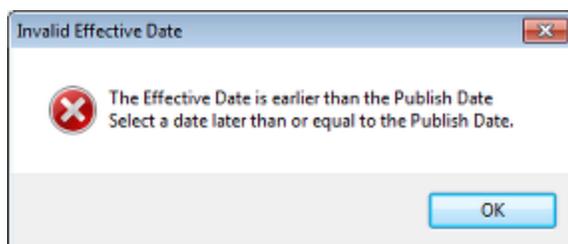
The Effective Date is the date at which the file will be set to Current status by automated tools. This is the date at which the floor plan will be put into service at the store with equipment moved, planograms reset, and so on. The Effective Date can be edited if the floor plan is at Authorised status. The Effective Date can also be edited if the floor plan is at Published status and that status has not been set to Read Only.

Editing the Effective Date is done by highlighting it in the Select Store dialog box then clicking the **Edit Properties** button. Editing the Effective Date can also be done by single clicking it to activate it. Once the Effective Date has been activated, clicking the down arrow will bring up a calendar control - allowing the Effective Date to be set to that required. Alternatively, the date can be typed in.

The Effective Date must obey the in-built business logic of ISSC. Criteria include:

- The Effective Date must be set to a date the same or later than the Publish Date.
- The Effective Date must be entered in the specified format. (This format is determined by the Windows regional setting on the user's computer.)
- The Effective Date cannot be set to a date in the past.
- The Effective Date cannot be the same as another floor plan for the same floor.

If any of these conditions are infringed, an error message will inform the user of the pertinent error:

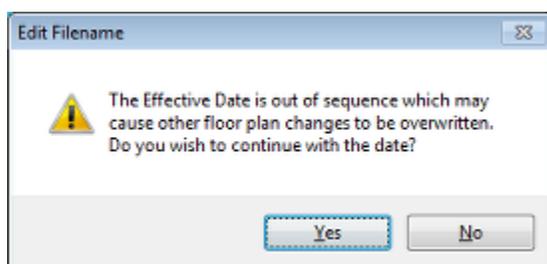


Effective Date Sequences

There are some situations where a chain of floor plans can be created, each linked to its predecessor. This can occur in one of three circumstances:

- The Copy and Paste functions have been used to copy a floor plan within a floor in Store Manager in Macro Space Planning.
- The Duplicate function has been used to copy a floor plan within the ISSC Store Select dialog box.
- Planogram Substitution (a MSM batch tool) has been used to carry out automated planogram substitutions, resulting in 'cloned' floor plans.

When a floor plan is linked to a predecessor, their effective dates must be in a logical sequence. Changing dates from this logical sequence may result in practical difficulties occurring when putting the floor plan into service within a store. If the Effective Date is out of sequence a warning will result. Users then have the option of setting an alternative date or overriding the warning.



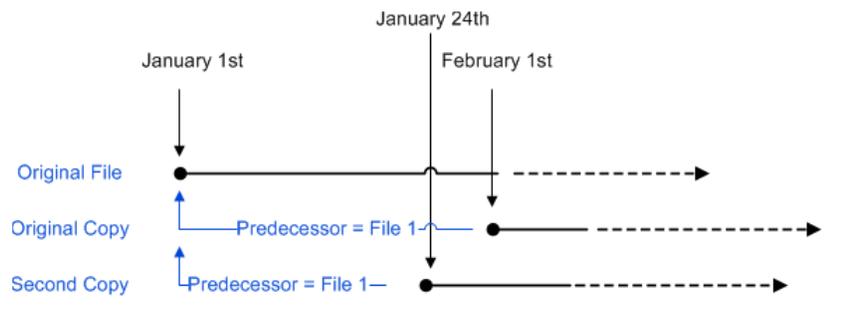
Linking of floor plans is held within the database in the **File** table. These links may not be immediately obvious to the user, so it is recommended that retail organizations create a report showing linked files, their effective dates and whether the linked files have been produced as a result of manual copying or planogram substitution.

Note: Determining which files are linked can also be achieved by use of a naming convention. For more information on the **File** table see the *Oracle Retail Macro Space Planning Data Model*.

1. Manually Copying a Floor Plan

If a floor plan is manually copied the user should set the effective date of the new floor plan to be after the effective date of the original floor plan. This is typically because a floor plan is normally copied to make changes for future implementation, for example for a reset.

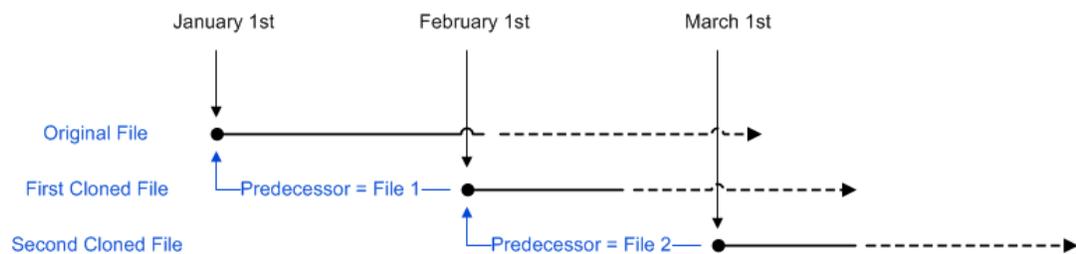
If the original floor plan is manually copied for a second time, the user should set the effective date to be before the date of the first copy, but after the effective date of the original. The usual reason for copying the floor plan for the second time is to make an urgent change to a floor plan prior to the reset coming into effect. An example of this might be a product recall resulting in product being removed from the shelves. If the Effective Date of the second copy of the original floor plan is after the Effective Date of the first copy, there is a risk that the changes made in the first copy will be reflected in the second and thus implemented too early.



Note: If it is necessary to copy a floor plan for a second time, care must also be taken that any changes made to the second copy are also reflected in the first copy.

2. Producing Cloned Floor Plans Through Planogram Substitution

If floor plans are produced through planogram substitution, a series of floor plans at Authorised status results, each with an Effective Date later than its predecessor. This sequence of Effective Dates results in specific planogram substitutions being carried out at specified times. If the Effective Date is manually set to be earlier than its predecessor, this risks the planogram substitutions being executed out of the planned sequence.



Reporting on Effective Date Sequences

The database (**File** table) holds information allowing the sequence of Effective Dates for linked files to be established for reporting purposes. Full information can be found in the *Oracle Retail Macro Space Planning Data Model* but the key information is as follows:

- **File Predecessor:** This field is used to identify the floor plan the current floor plan has been copied or cloned from. If this field is blank, the floor plan has neither been copied nor cloned.
- **Cloned Flag:** This flag is used to identify files that have been generated as a result of a planogram substitution.
- **Effective Date:** This is the date the floor plan is scheduled to come into service.

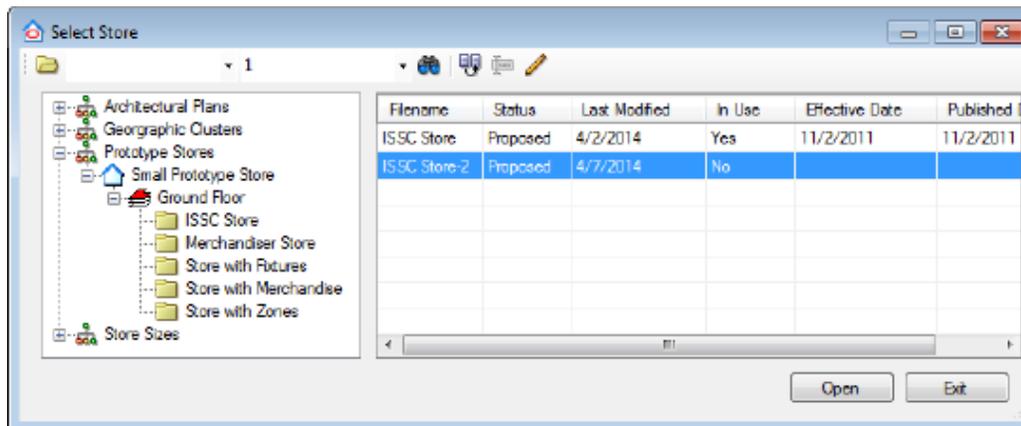
The business logic for the report is relatively straightforward.

- If a file has a predecessor it has been copied or cloned.
- If the Cloned flag has been set to 1, the file has been produced as a result of the planogram substitution process.

The file generation sequence can then be reconstructed using the Created Date field, allowing the Effective Dates to be examined to see if they are in the correct order.

Opening Floor Plans that are Checked-Out or Read Only

Sometimes it is helpful for a user to open a floor plan for viewing only that has either been checked out by another user, or which has been set to Read Only by the application. This allows them to view the floor plan without the ability to save changes to that floor plan. Floor plans are opened from the Select Store dialog box.



If the floor plan is checked out to another user or Read Only status, the user will be advised they have to option to open the file for viewing only.

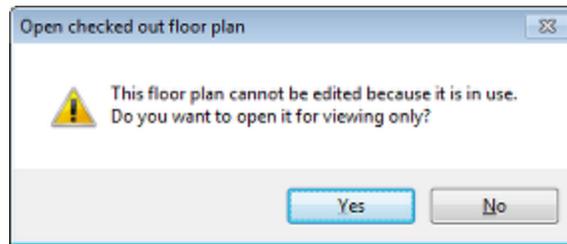
Opening a Floor Plan that has been Checked-Out to the Same User

The floor plan may be already checked out to the same user that is trying to re-open it. This may be because the user is accessing the floor plan from a different computer on the same domain or because the last time the floor plan was accessed ISSC shut down without checking in the floor plan. The user will be able to edit and save the floor plan if they open it from the same computer, but not a different one.

Opening a Floor Plan that has been Checked-Out to another User

Floor plans are checked out if they are in use by another user. This prevents two store planners causing confusion by making changes to a store plan simultaneously. Floor plans can be checked out for use in either Macro Space Planning or In-Store Space Collaboration. Users may open a checked out floor plan for viewing only if they only want to gain information from the floor plan.

Floor plans are opened by selecting the floor plan (if available) in the Select Store dialog box, selecting the required data and clicking OK. This will cause a confirmation dialog box to appear. If the floor plan has already been opened by an ISSC User, that name will appear in the dialog box. If the floor plan has been checked out by a Macro Space Management User, the user will not be identified.



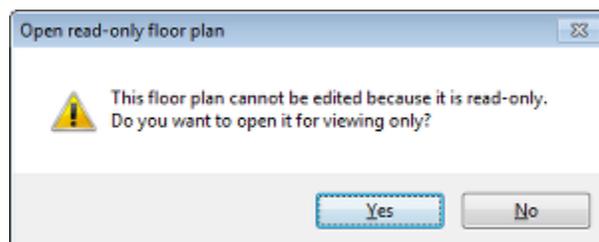
Clicking Yes will cause the floor plan to open for viewing. Any changes temporarily made in the floor plan (and which cannot be saved) will not be visible to other users.

Opening a Floor Plan at Read Only Status

Some floor plans can be set to Read Only status by the application. Examples include:

- Floor Plans at Published Status. These floor plans are authorized to go into service; as such preparation like ordering equipment and merchandise is in progress. As such, many business processes do not allow further modifications to floor plans that have reached this stage.
- Floor Plans at Current Status. These floor plans are in service and as such should not be modified. Store Managers may wish to open them to run KPIs and Quick Reports to get information on how their store is functioning.
- Floor Plans at Historical Status. These floor plans represent arrangements that have been taken out of service and no longer exist. As such, there is no business reason to be able to modify these plans.

Floor plans are opened by selecting the floor plan (if available) in the Select Store dialog box, selecting the data and clicking OK. This will cause a confirmatory dialog box to appear.

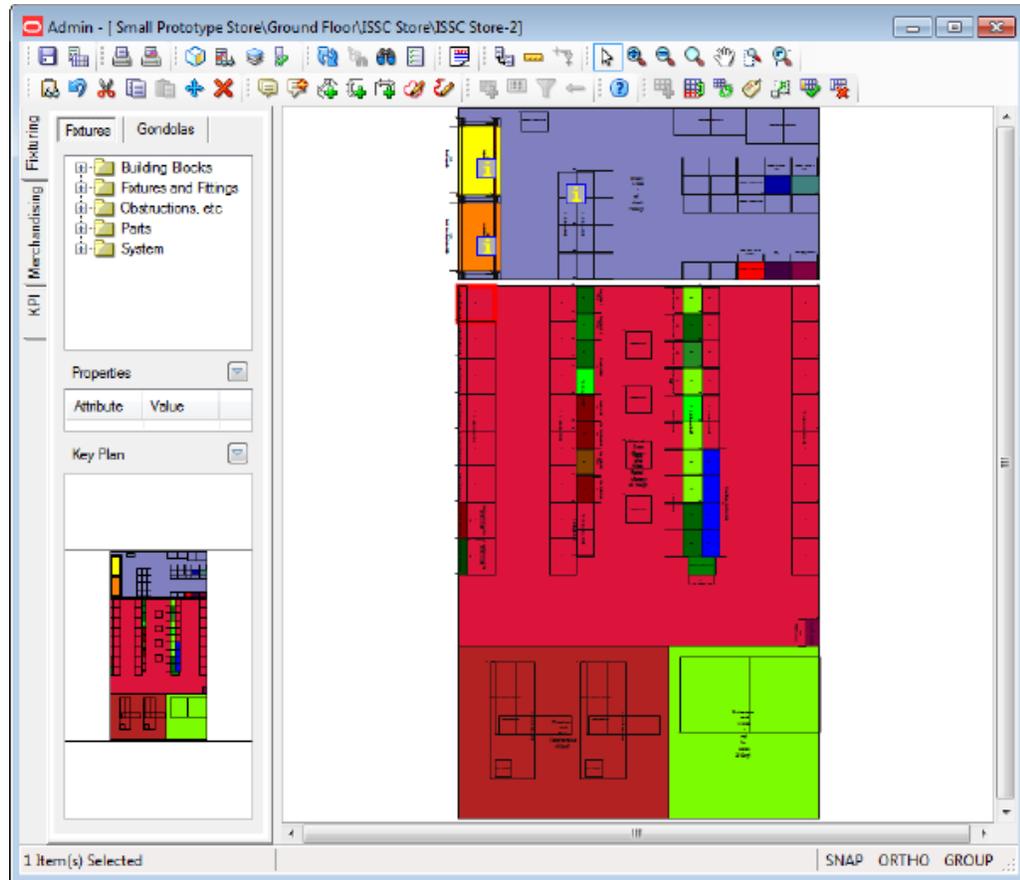


Clicking Yes will cause the floor plan to open for viewing.

Open Floor Plans

When the floor plan is opened for viewing purposes, many of the icons will be grayed out and disabled. The remaining options allow user to execute tasks such as viewing different parts of the floor plan, turning layers on or off, finding objects, determining object properties, reading fixture attributes and measuring distances. The floor plan cannot be saved, so any changes that result will not be permanent.

Note: The exception is **Notes** which can be added to floor plans at Read Only status.



Tooltips

Overview of Tooltips

Tooltips are small information windows that come up when the mouse pointer is held over specific objects. Different tooltips are available depending on what form of view is in use. The example below is a zone tooltip.



Top Graphical View

Tooltips are available for zones and fixtures.

Front Graphical View

Tooltips are available for fixtures, shelves and products.

Planogram Preview

Tooltips are available for fixtures, shelves and products.

Configuring Tooltips

Tooltips can be configured to display implementation specific information. Administrators can do this directly in the database by changing information in the **Custom SQL** table. The entries that need to be changed are:

- IN-STORE_ZONE_TOOLTIP
- IN-STORE_FIXTURE_TOOLTIP
- IN-STORE_SCHEMATIC_PRODUCT_TOOLTIP (This system variable is used by Planogram Preview).
- IN-STORE_SCHEMATIC_SHELF_TOOLTIP (This system variable is used by Planogram Preview).
- IN-STORE_SCHEMATIC_FIXTURE_TOOLTIP (This system variable is used by Planogram Preview).

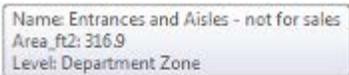
The information displayed depends on a slightly modified form of SQL stored in the CSQ_SQL field. Modifying this SQL will change the information displayed.

Note: For information on the Custom SQL table see the *Oracle Retail Macro Space Planning Data Model*.

Details of Tooltips

Zone Tooltips

Zone tooltips are only available in Top Graphical View. They enable users to get basic information on the zones in the floor plan.



Name: Entrances and Aisles - not for sales
Area_ft2: 316.9
Level: Department Zone

Fixture Tooltips

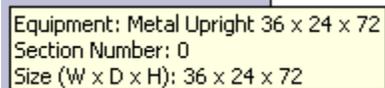
Fixture tooltips are available in Top Graphical View, Front Graphical View and Planogram Preview. The information displayed in Top Graphical View can be different from the information displayed in Front Graphical View and Planogram Preview.



Equipment: Basic Racking Fixture 36 x 24 x 72
Type: Fixture
Bay Number:
Fixture ID: 460
Size (WW x DD x HH): 35x24x72
Product:
Planogram:
POG Code:
Product ID:
Product Type:

Shelf Tooltips

Shelf tooltips are available in Front Graphical View and Planogram Preview. For the shelves to be visible in Front Graphical View, the selected fixtures must contain a planogram and that planogram must be in exploded (3D) format.



Equipment: Metal Upright 36 x 24 x 72
Section Number: 0
Size (W x D x H): 36 x 24 x 72

Product Tooltips

Product tooltips are available in Front Graphical View and Planogram Preview. For the products to be visible in Front Graphical View, the selected fixtures must contain a planogram and that planogram must be in exploded (3D) format.



NAME: 800g Sliced Granary Loaf
DESCRIPTION: 800g Sliced Granary Loaf
COLOUR: 13753856

Note: Planograms are placed in 2D format in ISSC. To explode them to 3D format can only be done in Macro Space Management's Merchandiser module.

The Measure Option

The Measure Option is used to determine distances in Top Graphical View, Front Graphical View and Shelf Graphical View. The option is invoked from the toolbar. The screen shot below shows the Top Graphical View toolbar.

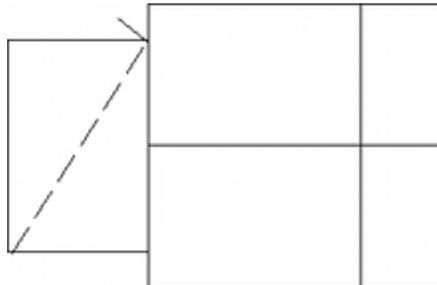


There are two options: measuring a distance and measuring a path.

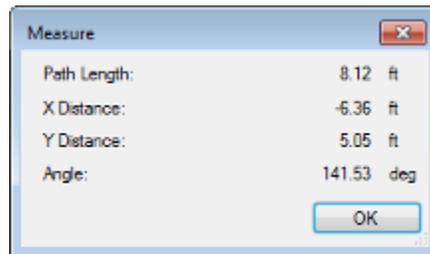
Measuring a Distance

Distances are often used to establish fixture dimensions, and so on. To measure a distance:

1. When the measure icon is clicked, a prompt will appear in the lower left of the screen asking the user 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. There will now be a dotted line in the view.



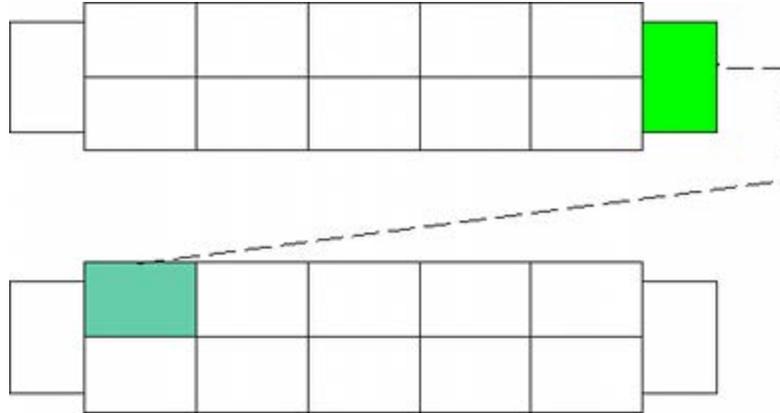
4. Press Return and a dialog box will appear giving information on the line.



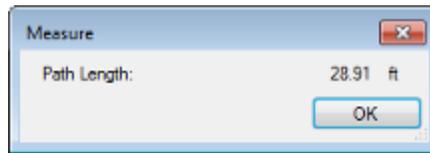
Measuring a Path

Measuring a path happens when there is more than one segment to the measurement line being drawn. To measure a path:

1. When the measure icon is clicked, a prompt will appear in the lower left of the screen asking the user 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.



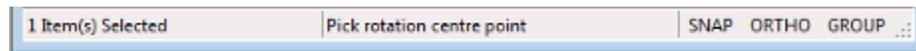
5. Press Return and a dialog box will appear giving information on the line.



In the above example, the Measurement function has been used to determine the distance a customer might walk from one product to another. This sort of information is useful when considering product affinities.

The Status Bar

The **Status Bar** can be found at the bottom of the In-Store Space Collaboration window. It is similar for Top Graphical View, Front Graphical View, Shelf Graphical View and Planogram Preview.



Status Bar Options

Selected Items

The number of items selected is displayed on the left hand side of the Status Bar. The total is interactive and will continually update as objects are selected or deselected.

Prompt

Instructions for executing the current command are displayed in the Prompt section. This section will be blank unless there is a command in the process of being executed. If the command is to be executed in a series of stages, the prompt will change as the actions for the command progress.

Snap

The Snap button is found to the right hand side of the Status Bar. When the Snap option is enabled, it allows objects to be snapped to a grid of specified spacing. 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 spacing of the grid is specified in the Options dialog box (accessed from the toolbar). The Snap Grid specifies the grid dimensions that will be used in Top Graphical view, while the Product grid settings are used in Planogram Preview.

Ortho

The Ortho button is found to the right hand side of the Status Bar. When enabled, it will ensure that operations can only be carried out in orthogonal directions: (0, 90, 180 and 270 degrees). 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.

Group

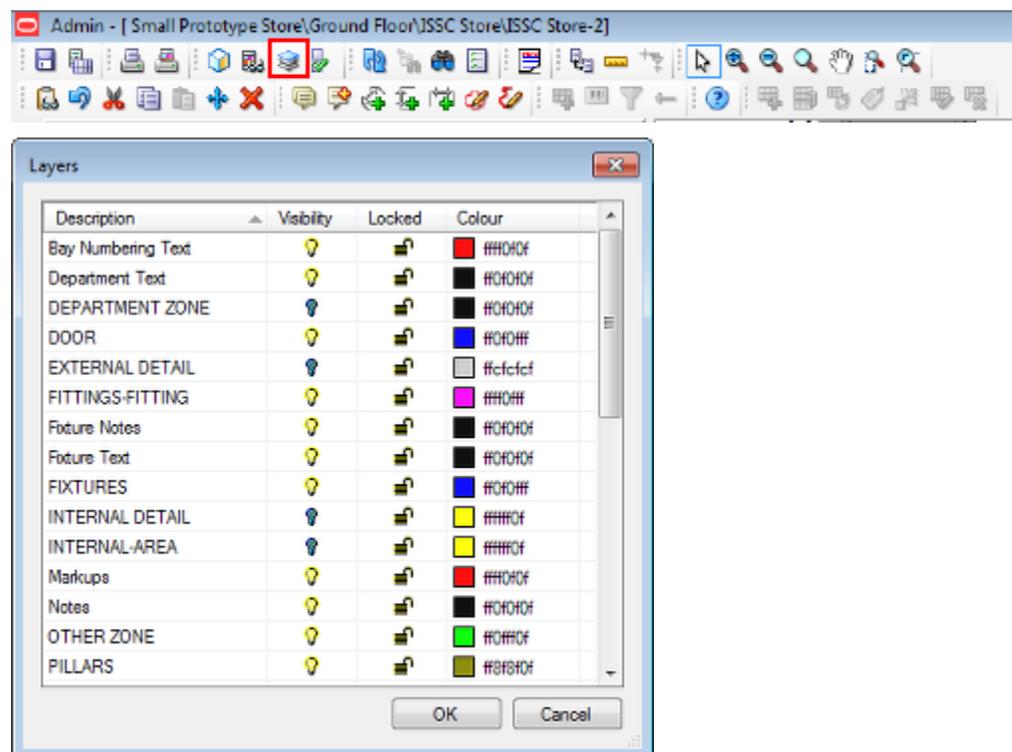
The Group button is found to the right hand side of the Status Bar. When grouping is on all objects that have been placed simultaneously can be selected by clicking on any member of the group.

- While in the fixturing tab in the object browser, clicking on any fixture in a gondola will select all fixtures in the gondola.
- While in the merchandising tab in the object browser, clicking on any fixture holding a multi-bay planogram will select all fixtures holding that planogram.

When grouping is off fixtures and planogram bays 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.

The Layers Dialog Box

The Layers dialog box enables a user to turn layers on or off, enabling them to control which objects are visible. It also enables a user to lock layers, preventing objects on those layers from being edited. To access the Layers dialog box, click the layer icon on the toolbar.



Layers can be selected by clicking individually or by standard multi-select options. Once selected, layers can be turned off or on or locked/unlocked by clicking the appropriate icon.

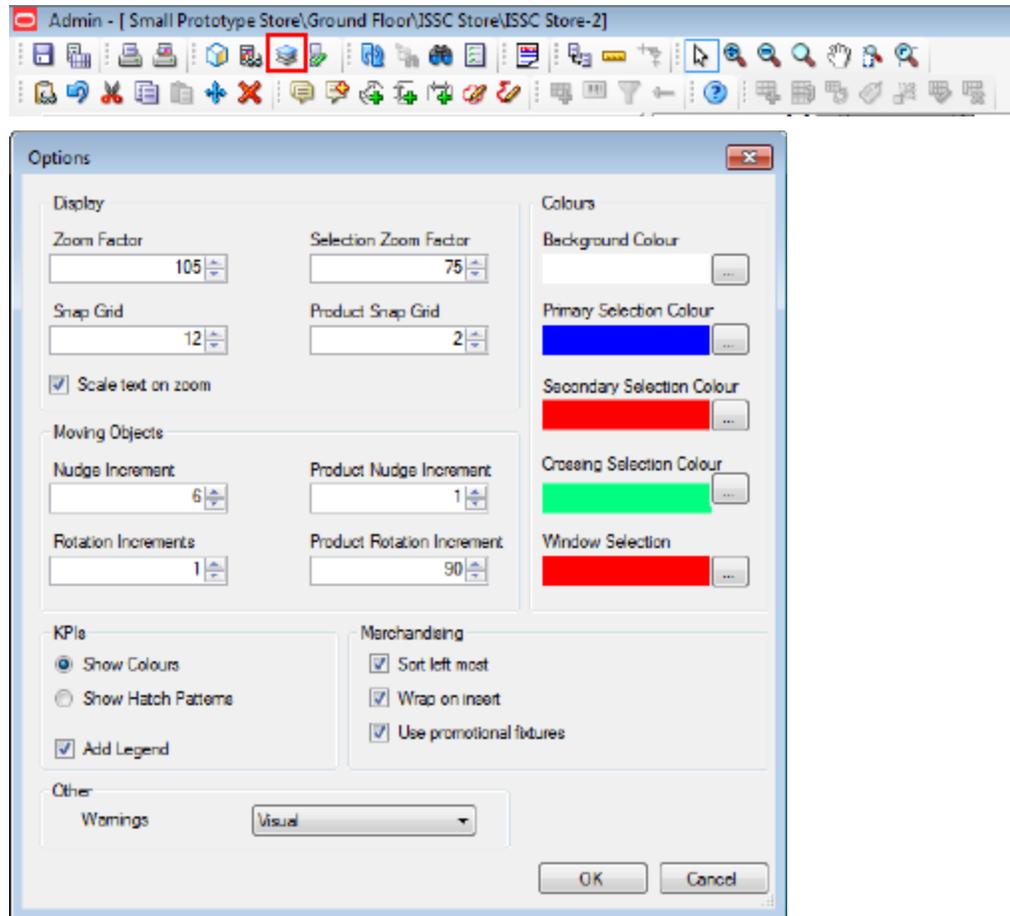
Icon	Description
	Show Layer in floor plan
	Hide Layer in floor plan
	Layer unlocked
	Layer locked

Colors for some of the layers (primarily text layers) can be modified by clicking in the Color column in the Layers dialog box. This will bring up the Color pallet, allowing an alternative color to be selected.



Options Dialog Box

The Options dialog box allows users to customize the way many of the details of In-Store Space Collaboration operate for them personally. It is accessed from the toolbar.



- The Display frame affects how objects zoom and the size of the grid they can be 'snapped' to.
- The Moving Objects frame determines how objects move with the aid of the cursor keys.
- The Colors frame enables users to set their preferences for colors associated with actions in Top Graphical View.
- The KPIs frame allows users to specify whether printed KPIs color or hatch.
- The Merchandising frame determines how merchandise behaves while being placed on multiple fixtures.
- The Other frame allows users to specify the form of warning they receive.

Display Frame

Zoom Factor

The Zoom Factor affects the amount the floor plan is zoomed, 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 right of the status bar in Top Graphical View.

Scale Text on Zoom

This option applies to Planogram Preview. If checked, the text size will change as users scroll in or out to ensure it stays readable. If not checked, the text size will stay a single fixed size, irrespective of the level of zoom.

Note: If **Scale Text on Zoom** is not selected, text size can still be manually changed by means in the Increase or Decrease Text Size buttons on the toolbar.

Moving Objects Frame

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

Nudge Increment

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

Product Nudge Increment

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

Rotation Increments

Rotation Increments allows the user 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 the user 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.

Colors Frame

The **Colors Frame** allows you to specify colors used for selection. In each case, clicking on the button to the right of the option will bring up the color selection pallet.

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

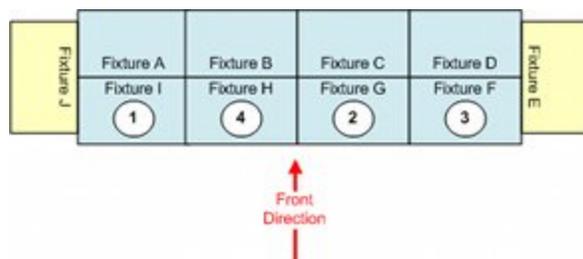
Note: Crossing Selection will select every object that the window encloses or crosses. Crossing Selection occurs when the user selects a start point then moves the cursor left. Window Selection will only select objects that the window completely encloses. Window Selection occurs when the user selects a start point then moves the cursor right.

Merchandising Frame

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

Sort Leftmost

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



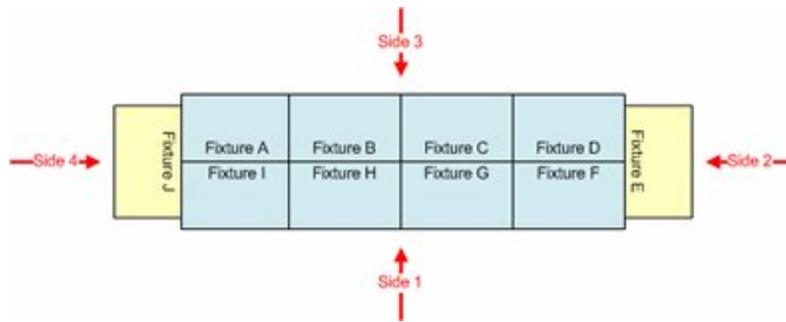
In the above example, fixtures F - I have been selected in the numbered sequence. The table below shows the effect of Sort Leftmost on the sequence the fixtures will populate with a 4 bay planogram:

Selection Sequence	Fixture	Sort Leftmost Off Population Sequence	Sort Leftmost on Population Sequence
1	Fixture I	Fixture I	Fixture I
2	Fixture G	Fixture G	Fixture H
3	Fixture F	Fixture F	Fixture G
4	Fixture H	Fixture H	Fixture F

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.

Wrap on Insert

If the Wrap on Insert option is checked, the planograms being added or displaced may move to adjacent free fixtures on other sides of the gondola. If this option is not checked, the planograms being added or displaced will be confined to the current side of the gondola.

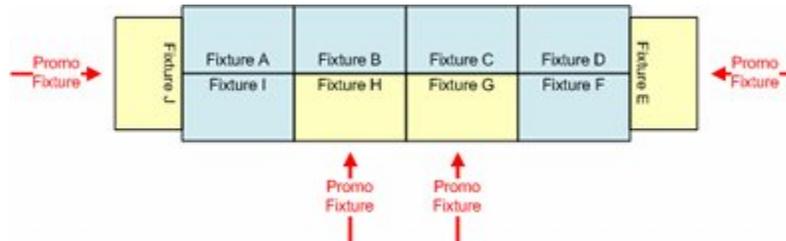


In the above example, the gondola has four sides. If the Wrap on Insert option is on, a 4-bay gondola placed starting at Fixture G will occupy Fixtures G, F, E and D. If the Wrap on Insert option is off, the 4 bay gondola will only be able to occupy Fixtures G and F on side 1 - this will generate a message saying there is not enough space available.

Use Promotional Fixtures

If the Populate Promo option is checked, then planograms being added or displaced may move onto fixtures designated as Promotional Fixtures. If this option is not checked, the promotional fixtures will not be available for merchandising purposes.

Note: Promotional fixtures are often end caps. However, some retail organizations also designate fixtures in the center of gondola runs as promotional fixtures.



In the above example, the two fixtures designated as promotional Fixtures (G and H) in the center of the gondola size will populate if that side of the gondola is selected. If it is required to populate the end caps (Fixtures E and J) then Wrap on Insert must also be checked because the end caps are on different sides.

KPI Frame

The **KPI Frame** allows options to be set for Key Performance Indicators. 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. They can also be of assistance to color blind users.

- 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.

Other Frame

The **Other Frame** allows users to set the options for warnings when user initiated actions suffer errors. The drop down list allows users to swap between Visible & Audible warnings and purely Visual warnings.

Operating in the Floor Plan

The user can change the amount and location of the floor plan visible by use of the provided controls.



Option	Description
	Select
	Zoom In
	Zoom Out
	Zoom
	Pan
	Zoom Window
	Zoom to Extents

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.

Zoom In

Zoom In will increase the magnification and the corresponding amount of detail visible in the floor plan. The center 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 dialog box.

Note: Zooming in is also possible via rotating the mouse wheel.

Zoom Out

Zoom Out will decrease the magnification and the corresponding level of detail visible in the floor plan. The center of the drawing will remain centered in the screen while zooming out. This option is operated by clicking it. Each click will decrease the scale of the drawing by the Zoom Factor set in the Options dialog box.

Note: Zooming out is also possible via rotating the mouse wheel.

Zoom Tool

When this option is selected, each left or right button click will increase or decrease the scale of the drawing by the Zoom Factor set in the Options Window.

Panning

Panning enables the user to move the visible part of the floor plan left or right, up or down. When the option is selected, the mouse cursor will change to the Panning icon. The floor plan can then be moved by holding down the left mouse button and dragging the drawing in the required direction. This option is toggled on by clicking it. It is turned off by clicking on another option.

Zoom Window

Zoom Window gives the user 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, the user 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. The user will then be prompted to select a second selection point. This will define a rectangle and the screen will zoom to show the selected area.

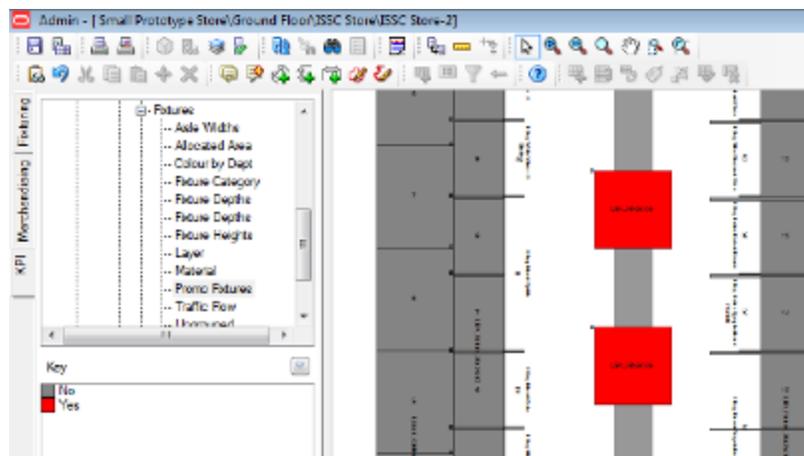
Zoom to Extents

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 objects are selected in the floor plan then the drawing will zoom to the extents that all selected fixtures can be seen.

About KPIs

Key Performance Indicators (KPIs) are used in parallel with Quick Reports and BI Publisher reports to give information on the currently active floor plan. Quick Reports and BI Publisher reports give tabulated information; KPIs are used to color code the floor plan with performance related criteria. They can be used for the following types of objects:

- Zones (Top Graphical View)
- Fixtures (Top Graphical View and Front Graphical View)
- Shelves (Front Graphical View)
- Products (Front Graphical View)



In the above example, a KPI has been used to identify promotional fixtures in the floor plan - promotional fixtures are colored red; the remaining fixtures in gray.

KPIs are configured in Macro Space Management. In-Store Space Collaboration users can then select from the available reports. Examples of KPI's that could be configured for use include:

- Sales turnover by week, month or quarter
- Profit by week, month or quarter.
- Merchandise over or underachieving planned sales volumes
- Categories of merchandise - Destination, Seasonal, Cash Generator, etc
- Seasonal merchandise due for replacement
- Illegally placed merchandise
- Merchandise showing a light level of wastage (shoplifting)

If configured appropriately, these KPI's can be used at differing levels of detail. For example a KPI could be developed to show sales performance by zone (macro performance). This could be complimented by a KPI that shows sales performance for individual products in a planogram (micro performance).

Configuring KPIs

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

Note: This section is intended to give In-Store Space Collaboration users an overview of the process. For more detailed information see the Macro Space Management documentation.

There are three basic stages in creating Key Performance indicators:



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. 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 knowledge of the database schema.

Note: New KPI's cannot use the Table or View option. This option is being kept for backward compatibility with existing KPIs.

- **SQL Statement**

A 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.

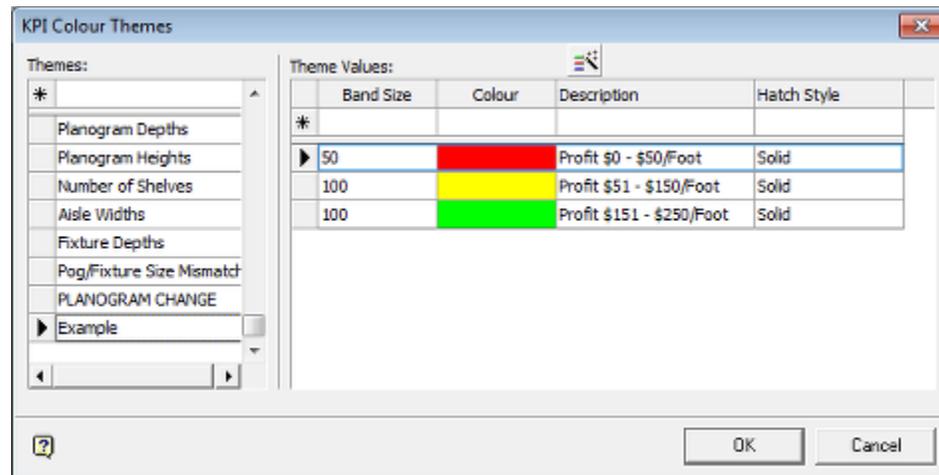
- **Stored Procedures**

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.

Note: Stored Procedures are the most efficient way to generate data for KPIs as the data set can be pre-filtered to only include data for the current floor plan. If a View is used, it populates with data for all floor plans. This data is then filtered down to a subset for the currently open floor plan - a less efficient procedure.

Creating Themes

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



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 KPIColor 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.

The screenshot shows the 'Key Performance Indicators' dialog box. On the left, a list of KPI names is shown, with 'Adjacency Rules' selected. The main area contains the following configuration details:

- Name:** Adjacency Rules
- Description:** Check for Product Adjacency Rules
- Data source:** SELECT DISTINCT PRO.FIX_ID, STR_ID, CAL_ID, PRO.PRO_ID, PRO.FIL_ID, NVL(AST_ID,0) SEVERITY FROM
- Column:** SEVERITY
- Units:** Pure number
- Colour Theme:** Adjacency Rules
- Legend Min:** 0
- Legend Max:** 3
- KPI Type:** Fixture
- Query Type:** SQL statement

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

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.

Notes

Notes are a way for different users to comment on floor plans with information they wish to use for future reference or to share with others. Notes are also a way of communicating information between MSM, ISSC and ISSC Mobile. This section covers notes in ISSC.

Types of Notes

There are two basic types of notes: file notes and notes associated with objects in a floor plan. Both types of notes can be added to files at any status including Current.

File Notes

File notes are general to the floor plan and not associated with any specific object within it. In ISSC, they are added to a floor plan by selecting the Notes option from the toolbar. This option is available in Top Graphical view, Front Graphical View and Shelf Graphical View. (See below for details).

Object Notes

Notes can also be added to specific objects in the floor plan.

	Top Graphical View	Front Graphical View	Planogram Preview	Shelf Graphical View
Fixture Notes	X	X		
Product/Planogram Placeholder Notes		X	X	
Shelf Notes		X		X
SKU Notes		X		X
Zone Notes	X			

It will only be possible to add Planogram Placeholder Notes in Front Graphical view if the planogram is in 2D form and has not been exploded to 3D form. It will only be possible to add shelf and SKU notes in Front Graphical View or Shelf Graphical View if the planogram is in 3D (exploded form). If the planogram has been placed in ISSC it will be in 2D form and must be changed to 3D form in MSM's Merchandiser module.

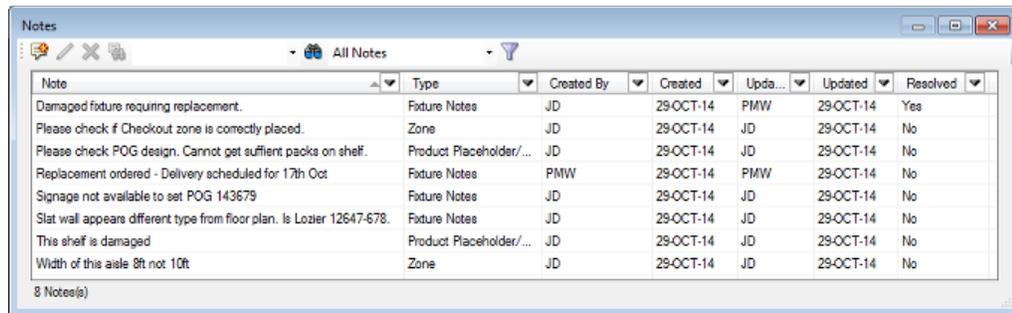
Using Notes in ISSC

File Notes

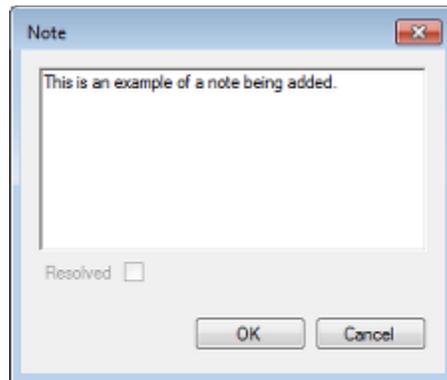
File Notes can be added to a floor plan by selecting the Notes option from the toolbar. This option is available in Top Graphical view, Front Graphical View and Shelf Graphical View.



This will bring up the Notes dialog box.



Files notes are added by clicking the Add icon. This will bring up the Note dialog box.



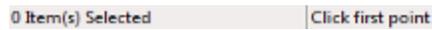
On clicking **OK**, the file note will be added to the Notes dialog box. The Resolved checkbox will be grayed out and unavailable until the Note dialog box is opened from the Notes dialog box. Once added, notes can be added, edited or deleted as required. Filter and Find options are also available.

Add Notes

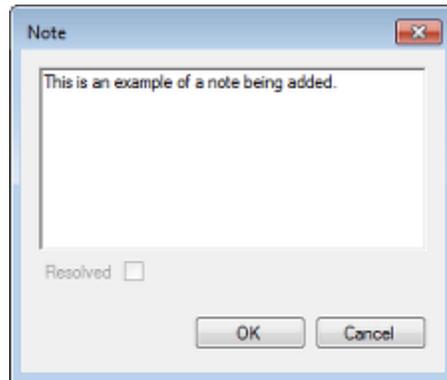
Notes can be added to various types of object in Top Graphical view, Front Graphical View or Planogram Preview. To do so, click the Add Note option in the toolbar.



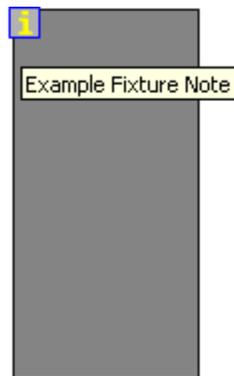
A prompt will appear in the status bar asking the user to select an object.



The type of object selected will determine the type of note. As the next stage, click a fixture. The Notes dialog box will appear. Enter the required text.

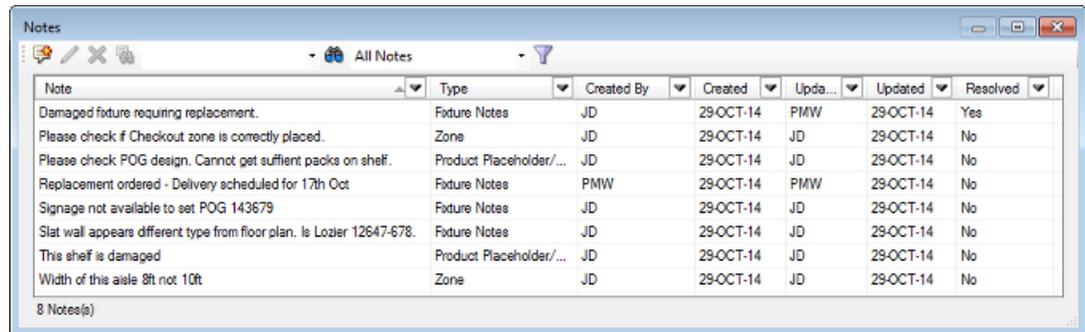


On clicking OK, the information will be added to the fixture in the form of an information icon. The contents of the note can be read as a tooltip by positioning the mouse cursor over it.



Metal Upright 36 x 24 x 72

Once added, the note can also be accessed in the Notes dialog box. If there are multiple fixture notes, clicking the Locate Note button (highlighted) will centre the selected note in the middle of the screen.



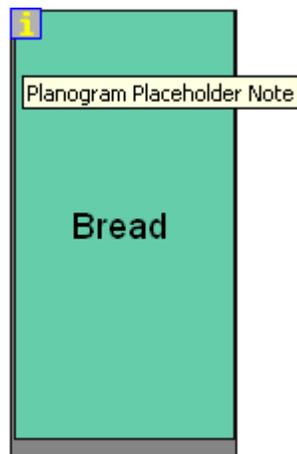
Note	Type	Created By	Created	Update	Updated	Resolved
Damaged fixture requiring replacement.	Fixture Notes	JD	29-OCT-14	PMW	29-OCT-14	Yes
Please check if Checkout zone is correctly placed.	Zone	JD	29-OCT-14	JD	29-OCT-14	No
Please check POG design. Cannot get sufficient packs on shelf.	Product Placeholder/...	JD	29-OCT-14	JD	29-OCT-14	No
Replacement ordered - Delivery scheduled for 17th Oct	Fixture Notes	PMW	29-OCT-14	PMW	29-OCT-14	No
Signage not available to set POG 143679	Fixture Notes	JD	29-OCT-14	JD	29-OCT-14	No
Slat wall appears different type from floor plan. Is Lozier 12647-678.	Fixture Notes	JD	29-OCT-14	JD	29-OCT-14	No
This shelf is damaged	Product Placeholder/...	JD	29-OCT-14	JD	29-OCT-14	No
Width of this aisle 8ft not 10ft	Zone	JD	29-OCT-14	JD	29-OCT-14	No

8 Notes(s)

Product/Planogram Placeholder Notes

Note: Placing Product/Placeholder **Notes** is similar to placing Fixture **Notes**. Only the differences will be discussed in this section.

Product or Planogram Placeholder notes can only be placed in Front Graphical View. For a Planogram Placeholder the planogram must be in 2D (imploded) form. If the planogram is subsequently exploded into 3D form the note will still be present, but may change its position when next displayed. When placing the note, it will be associated with the object selected so care must be taken to select the product or planogram rather than the parent fixture.

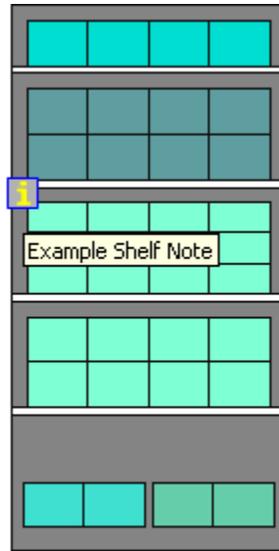


Metal Upright 36 x 24 x 72

Shelf Notes

Note: Placing Shelf **Notes** is similar to placing Fixture **Notes**. Only the differences will be discussed in this section.

Shelf Notes can be placed in Front Graphical View or Shelf Graphical view when a planogram has been exploded to 3D form. (This is done in MSM's Merchandiser module). When placing the note, it will be associated with the object selected so care must be taken to select the shelf rather than other objects available for selection.



Metal Upright 36 x 24 x 72

SKU Notes

Note: Placing SKU **Notes** is similar to placing Fixture **Notes**. Only the differences will be discussed in this section.

SKU Notes can be placed in Front Graphical View or Shelf Graphical view when a planogram has been exploded to 3D form. (This is done in MSM's Merchandiser module). When placing the note, it will be associated with the object selected so care must be taken to select the shelf rather than other objects available for selection.

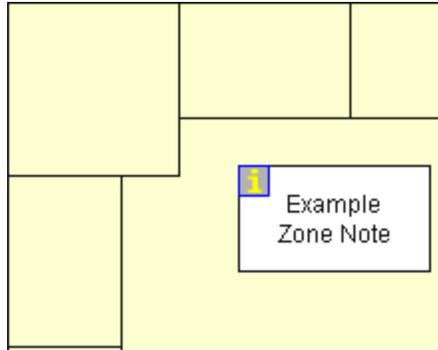


Basic Racking Shelf 36 x 24 x 1

Zone Notes

Note: Placing Zone **Notes** is similar to placing Fixture **Notes**. Only the differences will be discussed in this section.

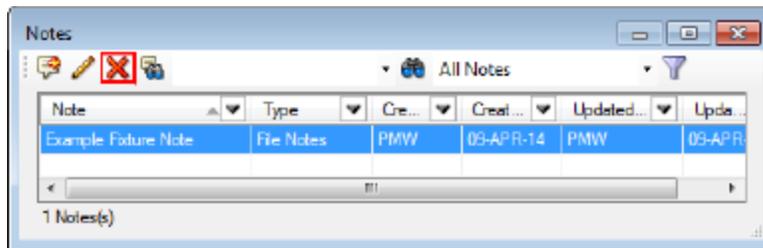
Zone notes can only be placed in Top Graphical View. Unlike other forms of notes, these display the full text. They can be edited by double clicking on them.



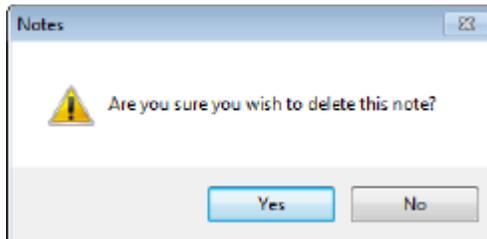
Deleting Notes

To delete a note:

1. Select the Notes option from the toolbar.
2. This will bring up the Notes dialog box. This contains all notes in the floor plan including general notes, zone notes, fixture notes, shelf notes and product notes. This can be filtered using the drop down list or filter options.
3. Highlight the required note and click on the Delete icon.



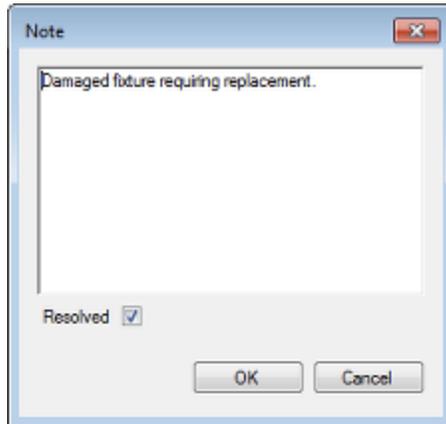
4. A confirmation dialog will appear.



5. Click on Yes to delete the note.

Resolving Notes

Once a note has been created or saved, the Resolved flag become available.



This flag is a simple indication that the matter raised in the note has been addressed. It can be used (for example) to filter the notes showing in the Note dialog box (Resolved column) to only those notes that are not resolved.

Turning Notes On or Off

Note display can be turned on or off by turning the parent layer on or off. This is done within the Layers dialog box accessed from the toolbar. To turn the note display on and off:

1. Click the Layer option on the toolbar.
2. The Layers dialog box will appear.
3. Click the light bulb by Notes to toggle Note display on and off.

Using the Notes Dialog Box

The notes displayed in the Notes dialog box are restricted to the currently active floor plan. However, there may be a substantial number of notes associated with the floor plan. The Notes dialog box has basic and advanced filtering.

Toolbar

The toolbar contains the following options:



Icon Option	Description
 Add File Note	Add a file note to the floor plan.
 Edit Note	Edit a note. The user will be changed in the Updated By column and the date will be modified in the Updated column.
 Delete Note	Deletes the highlighted note

Icon Option	Description
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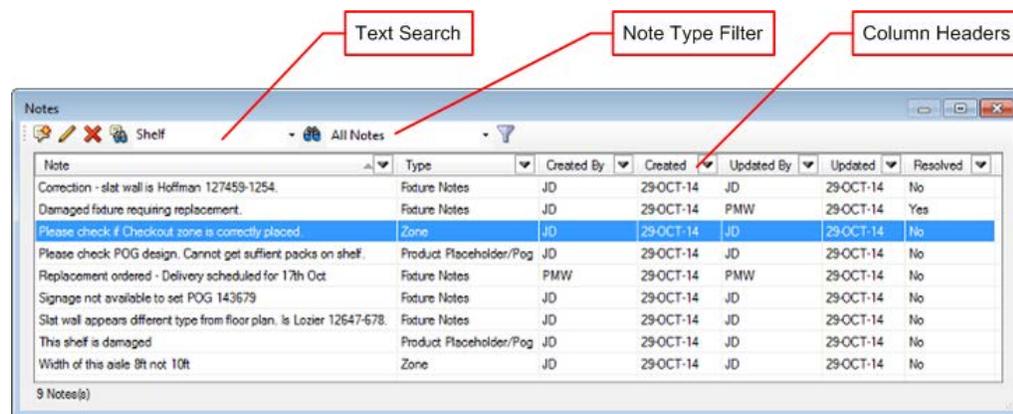
 Locate Note	Zooms to the note in the floor plan.
---	--------------------------------------

Locating Notes

To use the locate note option, highlight the required note in the Notes dialog box and click the **Find Note** icon. The icon for the selected note will be centred in the floor plan. This option works best when zoomed into the floor plan. If zoomed out so that all of the floor plan is visible, it can be difficult to determine which note is centred.

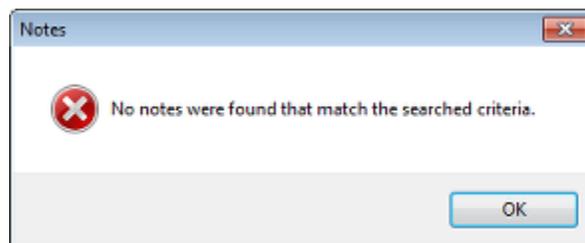
Search and Basic Filtering

There are three basic options available.



Text Search

To find a specific text string in the dialog box, type it into the text box and click the search icon next to it. Each click will move to an item of text in the Note column matching the text string. When all instances have been found, the next click will take the user back to the first item found. If there are no matching items of text a warning will show.



Note Type Filter

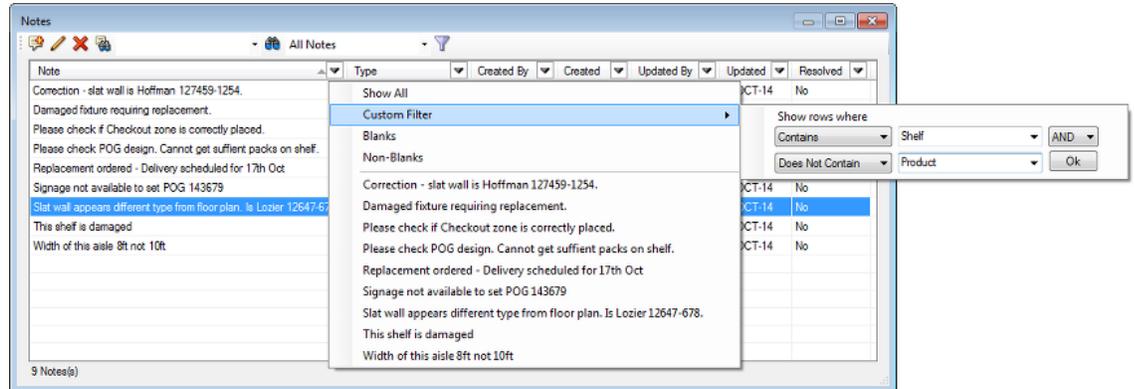
The note type filter allows the user to filter the notes to a specific type. To use it, select the type from the drop down list and click the filter button next to it. The notes will then be filtered to that specific type.

Column Headers

Clicking on a column header will sort the data in that column in ascending or descending order.

Using Filters in the Filtering Tab

The filter icon at the top of each column allows the user to use a more sophisticated set of filters on that column. Setting a filter on one column will affect data in all other columns.



They are used as follows:

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

Boolean logic also includes the use of And or Or. This is used in the Custom Filter option.

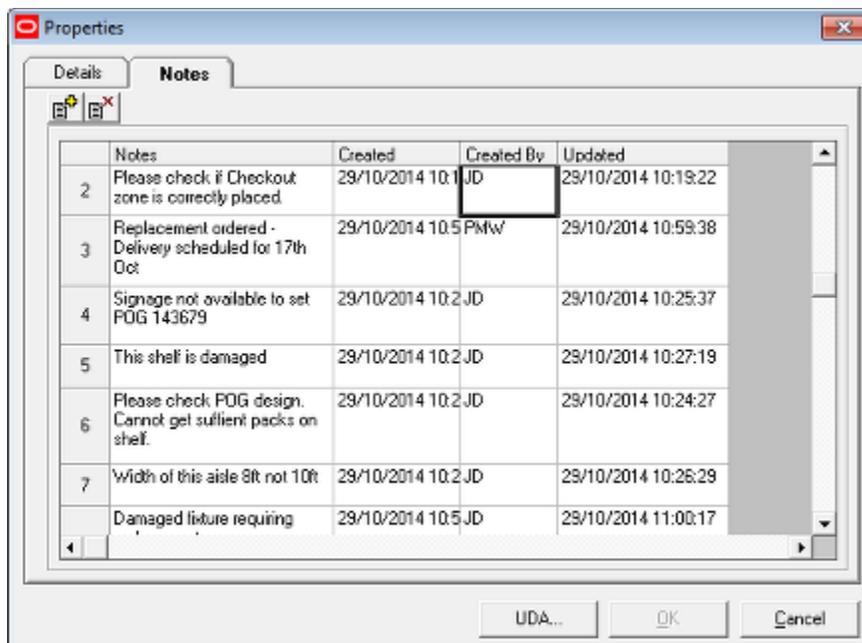
- And means that both conditions must be met. A and B means the data returned must contain both A and B.
- Or means either condition can be met. A or B means the data returned can contain either A or B. It does not need to contain both

Notes in Different Applications

Notes can be used in Macro Space Management, in In-Store Space Collaboration and in ISSC Mobile. However, the functionality for Notes in each application currently differs. The different functionality should be borne in mind when interacting with users in other applications.

MSM

Users in Macro Space Management can interact with Notes in the Notes tab of the File Properties dialog box accessed in the Store Manager module.

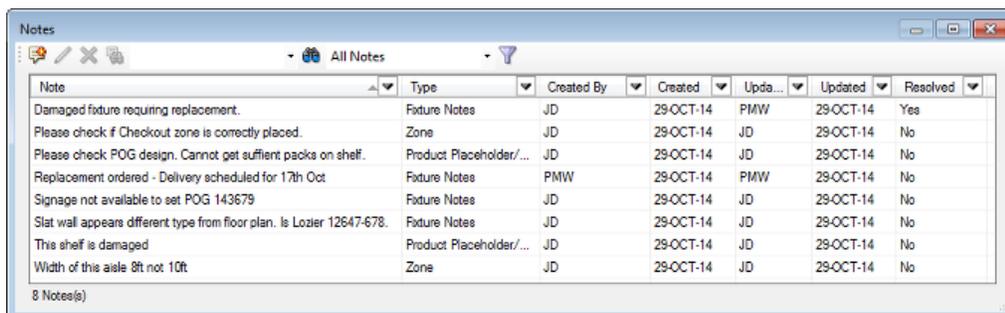


They have three options.

- They can read existing notes (but not respond to them).
- They can create new floor plan notes if the floor plan is not at Current or Historical status.
- They can delete existing notes if the floor plan is not at Current or Historical status.

ISSC

Users in ISSC have a different set of options. The Notes dialog box can be called from the toolbar.

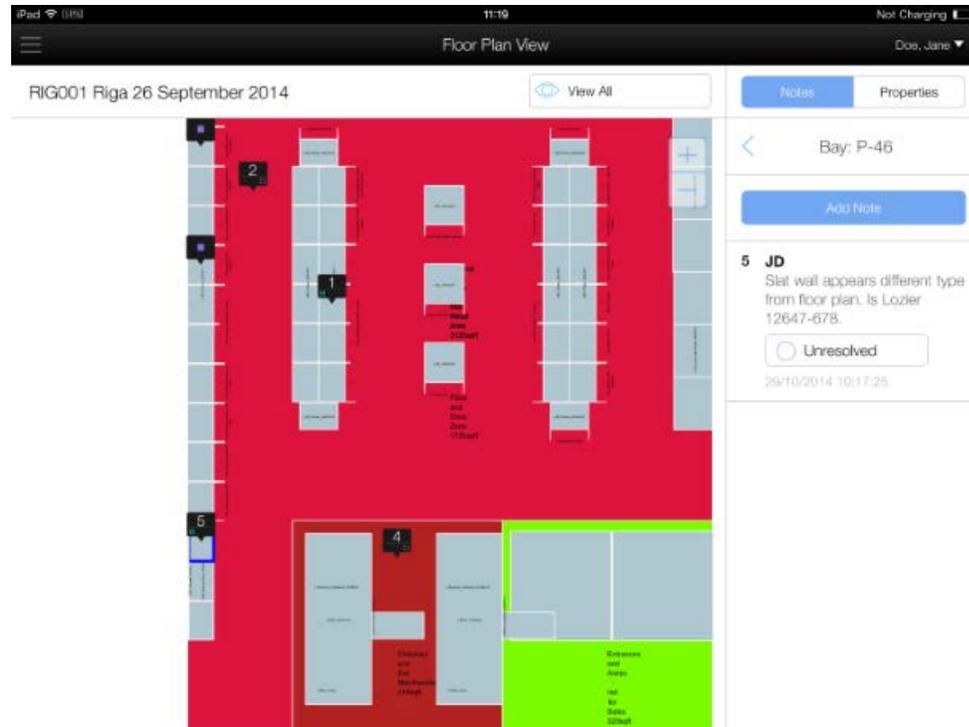


Users have the option to:

- Read existing notes
- Mark their or other user's notes as resolved.
- Edit existing notes. (The User ID will be changed to reflect the person editing the note).
- Add new notes to an object if the existing notes have been marked as resolved.

ISSC Mobile

Users in ISSC Mobile have a third set of options.



Users can:

- Add a note to an object.
- Add additional notes to an existing note - forming a conversation.
- Mark notes as resolved.

Notes and Conversations

When one user replies to another users note, this is known as a conversation. This functionality differs from application to application but may be summarized as follows:

- MSM users can read the notes in a conversation but cannot interact with them (other than to delete them).
- ISSC Users can add a note to a conversation by resolving an existing note than adding a new note to the parent object. They can also start conversations.
- ISSC Mobile users can start new conversations, add notes to existing conversations and mark any note in a conversation as resolved.

Note: For full information on **Notes** functionality in MSM and ISSC see the pertinent help files.

This section covers how to conduct a conversation between ISSC and ISSC mobile. It is not presently possible to join conversations in MSM, although it is possible to read the associated notes.

Conversations

Starting a Conversation in ISSC

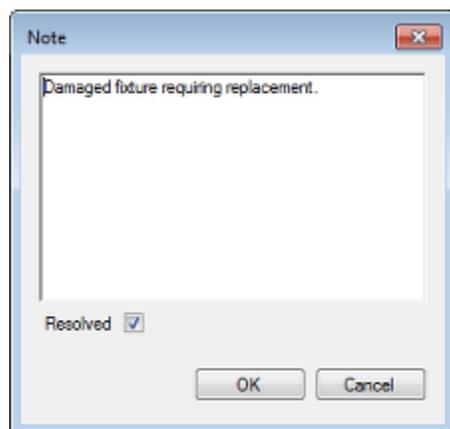
Starting a conversation in ISSC is done through standard functionality. The user selects an object in Top Graphical, Front Graphical View or Planogram Preview to add a note. Once the note is added, it becomes visible to the ISSC mobile user the next time they refresh notes. They can then add their own note to the initial note to continue the conversation.

Continuing a conversation in ISSC

If a conversation has been started in ISSC Mobile and the ISSC user wants to reply, the following actions are required:

1. Identify any existing notes in the conversation and mark them as Resolved using the checkbox in the Note dialog box. Without marking the note as resolved, it will not be possible to add additional notes to the required object. However, if required, the existing note can be edited.

Note: If an ISSC Mobile has added a **Note**, the ISSC user can resolve the first **Note** in the conversation by just using the Add **Note** button on the toolbar and then add a **Note** to the same fixture as a reply. The ISSC Mobile user can then see the response, respond themselves and mark the previous **Note** as resolved. The users can continue to interact like this until the conversation is complete.



2. Add an additional note to the required object. This note will then be visible as part of the conversation in both the Notes dialog box and in ISSC Mobile.

Note: One ISSC users could respond to another in a conversation as well.

Tracking the Conversation

There are two main ways of tracking the notes involved with a specific conversation in the Notes dialog box:

- **Bay Numbers**

Including the Bay Number (assigned in the Planner Module) to the start of each note will allow all notes associated with a specific fixture to be identified by typing in the bay number to the Find Text option at the top of the Notes dialog box.

- **Locate Note**

Using the **Locate Note** option (at the top of the Notes dialog box) will centre the highlighted note in the middle of the screen. This can be used to verify the notes involved.

General Functionality

Saving

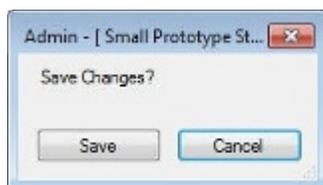
There are two forms of saving: from the toolbar and upon exiting the floor plan.

Saving from the Toolbar

The Save option is to the left of the toolbar. It is used to save work in progress.



When the icon is clicked, it will bring up the Save dialog box.



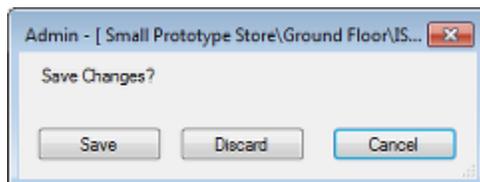
Clicking the Save button updates the common Macro Space Planning database with any changes made to the floor plan open in In-Store Space Collaboration since the last save.

Save on Exiting the Floor Plan

On exiting the floor plan, if there are unsaved options, one of three Save options will come up depending on how the privileges for the user's specific User Group have been configured and what status the floor plan is at. Some Save options have more privileges than others.

Save

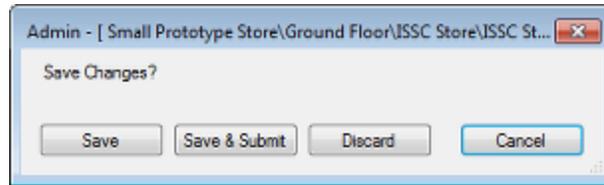
The Save option allows users to save changes back to the database.



No changes will be made to the status of the floor plan.

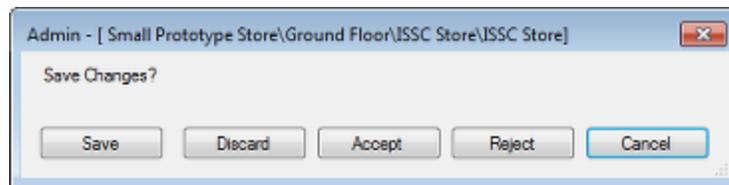
Save and Submit

The Save and Submit option allows users to save changes back to the database and to advance the status of the floor plan by clicking the Submit button. This dialog box is used to submit a floor plan for the next stage of the approval process.



Accept and Reject

The Accept and Reject option allows users to save changes back to the database. It also allows users to change the status of the floor plan by means of the Accept or Reject buttons. These options allow a manager to either accept or reject a floor plan.



Configuring the Save Options

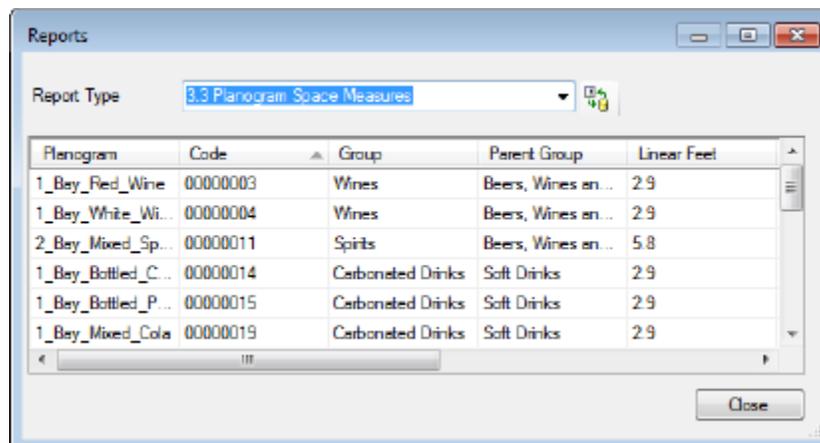
Configuring the save options is done directly in the database. See the *Macro Space Management Administration Module User Guide* for more information.

Quick Reports

Quick Reports are a way of obtaining information on the floor plan being worked on. They are accessed from the toolbar.



Clicking the Quick Report icon will bring up the Reports dialog box.



The report type can be selected from the drop down list. The report is not dynamic so, if changes are made to the floor plan while the report is open, the report must be updated by clicking the refresh button. Multiple reports can be open at one time, enabling the user to have reports on a range of aspects of the floor plan. Reports are fully customizable, although this must be done directly in the database in the **Custom SQL** table in the database. This allows retailers to set up Quick Reports specific to their business processes.

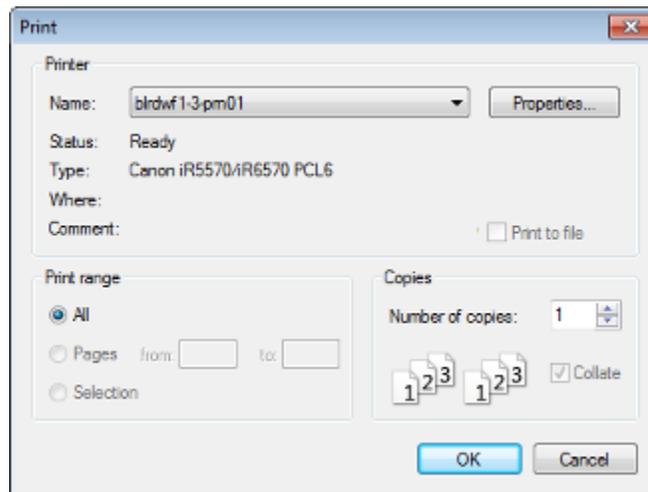
Note: For more information on the **Custom SQL** table see the *Oracle Retail Macro Space Planning Data Model*.

Printing Floor Plans

Printing of floor plans can be initiated by clicking the Print icon on the toolbar.



This will bring up the Print dialog box.



- Printer Name 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 the user to specify whether all the drawing, or merely that part selected to display on the screen will print.
- Scale enables the users to specify how many pages the drawing (or specified part of the drawing) prints over. This will allow the user to print the drawing on multiple pages, which can then be stuck 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.

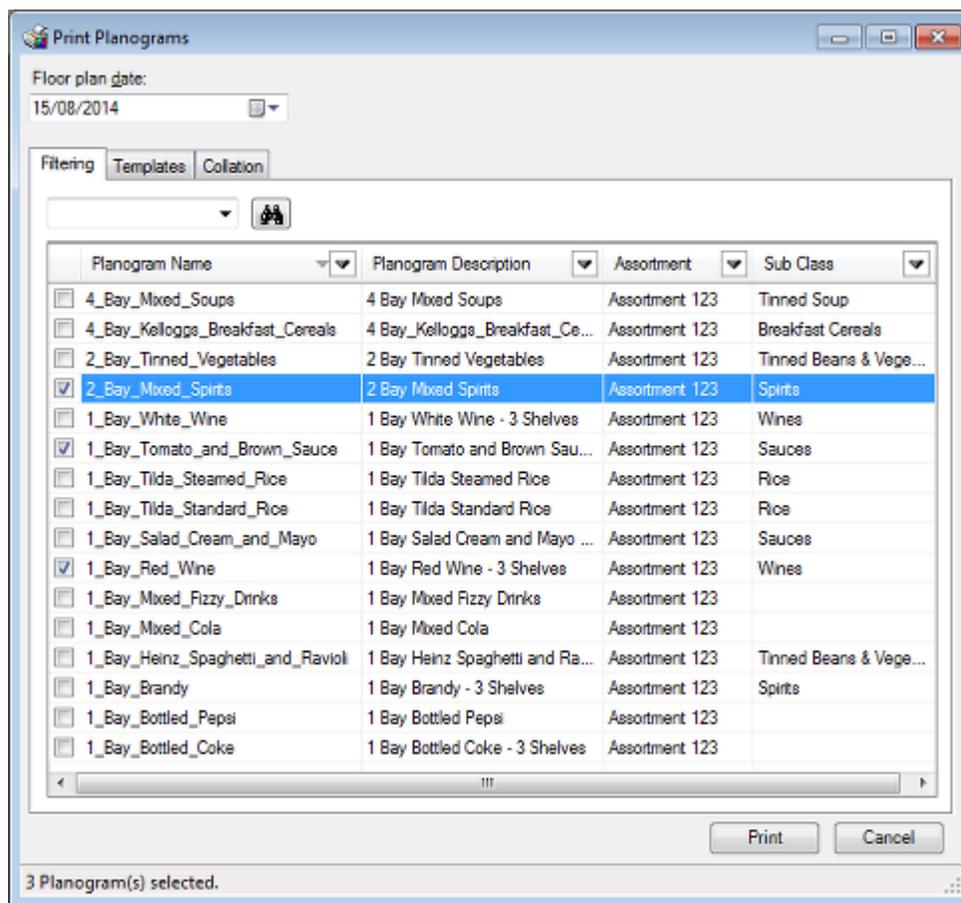
- Orientation enables the user to determine whether the page on which the drawing is printed is in Portrait or Landscape orientation. The orientation will affect the scale of the printed drawing as the drawing will print to the maximum size allowed by the page orientation and number of pages selected.

- Copies enables the user 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.
- Print will result in the specified plan being printed on the specified printer.

Printing Planograms

Planogram Printing allows users to select planograms in the currently active floor plan and print out information on the ones they have permissions to print. If the floor plan uses master planograms, the individual planograms mapped to the master planograms will be listed for printing. (See the information on master planograms in the section on merchandising).

Note: The default settings for this dialog box are derived from settings in the Planogram Publishing Configuration dialog box in the Administration module in Macro Space Management.



Using Planogram Printing

The functionality is used as follows:

1. A floor plan containing planograms is opened in ISSC.
2. The Print Planogram option is selected from the toolbar.
3. The Floor Plan Date is used to select the planograms that are active at the specified date.
4. The appropriate planograms are selected in the Filtering tab of the Print Planograms dialog box.
5. The report to use is specified in the Templates tab.
6. The sequence the selected floor plans are to be printed in is specified in the Collation Tab.
7. On clicking the Print button, the selected planogram reports will be printed on the default printer associated with the user's computer.

Master Planograms and Planogram Printing

- If there is no individual planogram mapped to a master planogram, the master planogram will listed for printing.
- If there is an individual planogram mapped to a master planogram, the individual planogram will be listed for printing.

Accessing the Functionality

The Print Planogram functionality is accessed from the toolbar.



This will bring up the Print Planograms dialog box. This has three tabs, many defaults for which can be configured in the Administration Module in Macro Space Management. It will be populated with all planograms in the currently active floor plan. By default, they will be not be selected. The columns that are displayed in the dialog box are configurable in the Custom SQL option available from the General Menu in the Administration module in Macro Space Management.

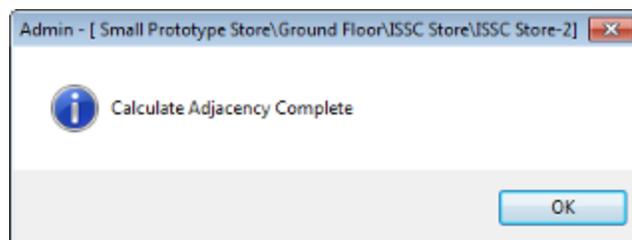
Note: For more details see the part on Planogram Printing in the section on Merchandise.

Fixture Adjacency

Fixture Adjacency is the relationship of one fixture to another within a gondola. Within ISSC, it can be calculated by using the Fixture Adjacency option on the toolbar. It is a necessary precursor to dragging and dropping floor plans.



Once the calculation is complete, a confirmation dialog box will appear.



Fixture adjacencies are used for several purposes including determining the relationship of fixtures in a gondola, whether planogram placement rules are being followed and which fixtures it is permissible to use when placing merchandise using category insertion.

Annotation

Zones, Fixtures, Products and Planograms can be annotated in Top Graphical View. The appearance of each of these forms of annotation can be configured by changing the system variables in the Macro Space Management Administration module. Typical things that can be configured using those system variables includes the information displayed, the position of the annotation and the text font and size.

Note: see the *MSM Administration Module User Guide* for information on the required system variables.

Annotation Types

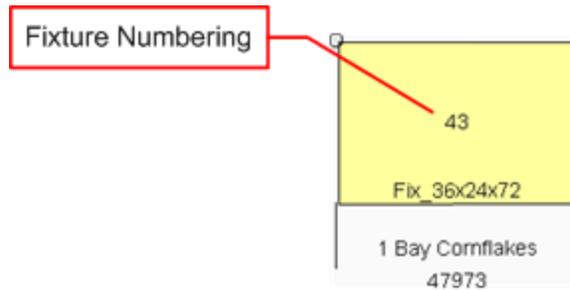
Zone Annotation

Zone annotation is of fixed format and displays the zone name and size for each zone placed in the floor plan.

Food
and
Drink
2360sqft

Fixture Numbering

The Fixture Number can be one of three forms:

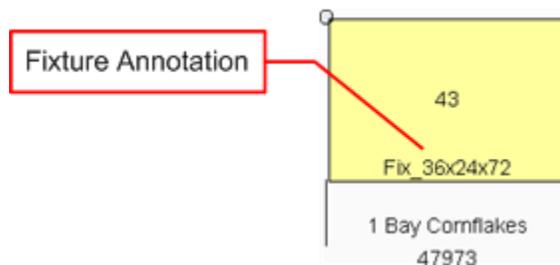


- The Fixture ID in the database
- The Bay Number added in a floor plan in the Planner module in Macro Space Planning
- A Fixture Tag imported into the database

The example above shows the Fixture ID. The intent is that the Fixture Number be a unique identifier for a fixture in a floor plan.

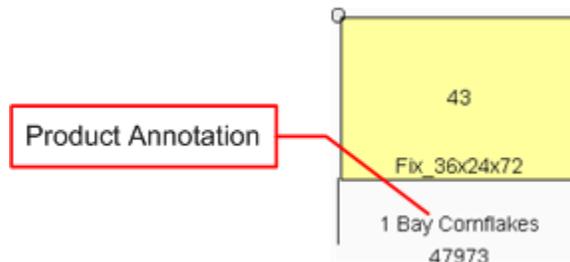
Fixture Annotation

The Fixture Annotation can be used to give information on the fixture such as block name, fixture description or size.



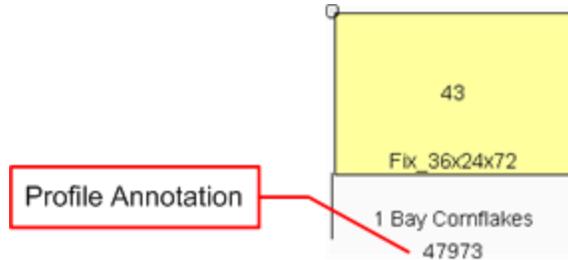
Product Annotation

The Product Annotation can be used to give the name or the product or planogram on the fixture, together with other items of information such as number of bays or length if required. There may be difference in the form of annotation displayed depending on whether the merchandise is a product or a planogram.



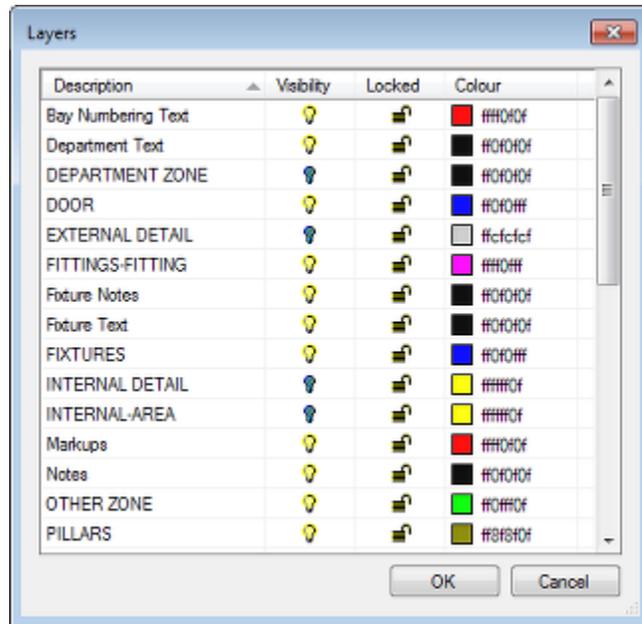
Profile Annotation

The Profile Annotation can be used to give additional information on individual planogram bays. This can include items of information such bay number or assortment code.



Controlling the Visibility of Annotation

Which annotation is visible can be controlled using the Layers dialog box.



Layer names may vary slightly from implementation to implementation as they can be renamed in Macro Space Management, but it will be possible to show or hide each form of annotation.

The Dimension Option

The dimension option can be used to annotate Top Graphical view with dimension lines. This can be used to indicate aisle widths, fire exit clearances, and so on. The Dimension options can be accessed using the Dimension icons on the Toolbar. The Move and Delete commands can also be used.

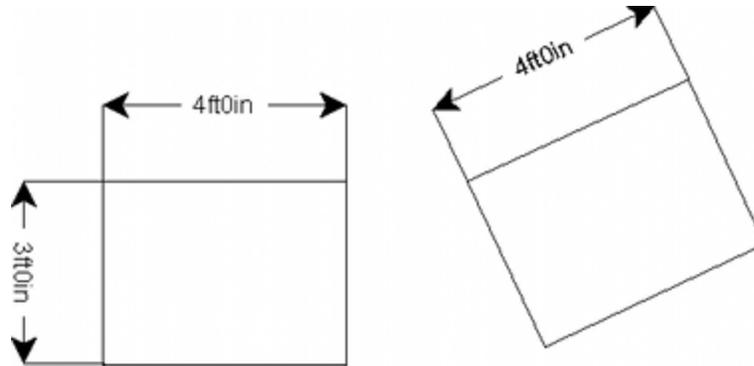


The line color and weight, together with the text font and size can be changed by altering the system variable settings in the database.

Note: See the *Oracle Retail Macro Space Management Administrators User Guide* for more information on these system variables.

Adding Dimensions

The three dimension options allow the addition of horizontal, vertical and angled dimensions.

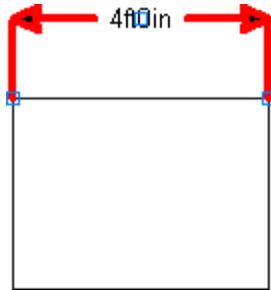


To add a dimension:

1. Click Add Dimension on the toolbar.
2. The prompt in the status will indicate the user should pick the first base point.
3. Left click to set the base point. The prompt will then change to prompt the user 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.

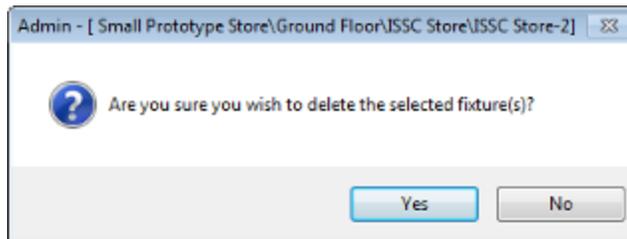
Moving a Dimension

If required dimensions can be move by dragging or dropping, or by means of the Move option on the toolbar. To do this, select dimension so it is active. It can then be dragged and dropped or moved.



Deleting A Dimension

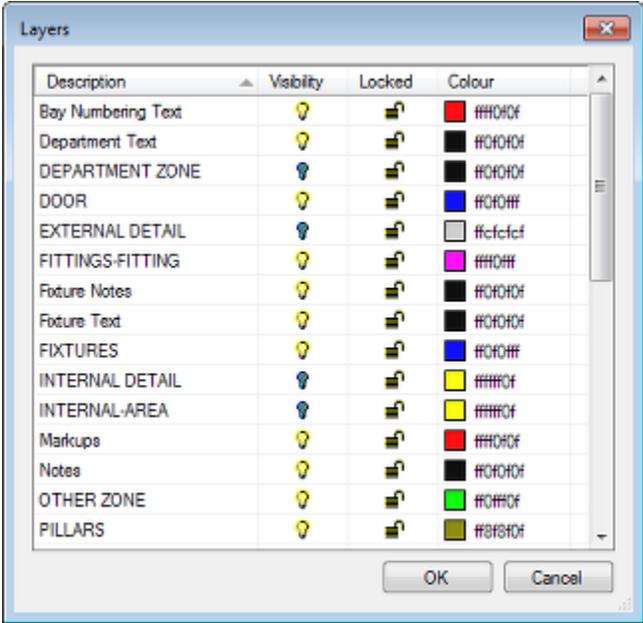
To delete a dimension, select the dimension then click the Delete option on the toolbar. A confirmatory dialog box will appear.



On clicking Yes, the selected dimensions will be deleted.

Turning Dimension Display On or Off

Dimension Display can be turned on or off by switching the **Markups** layer on or off in the Layers dialog box.



Note: This will also switch markups on or off.

The Mark Up and Revision Cloud Options

There are two options available for annotating Top Graphical View. Markups are freehand lines; Revision Clouds are a more precise oval shape. They are invoked from the toolbar. The Move and Delete commands can also be used.



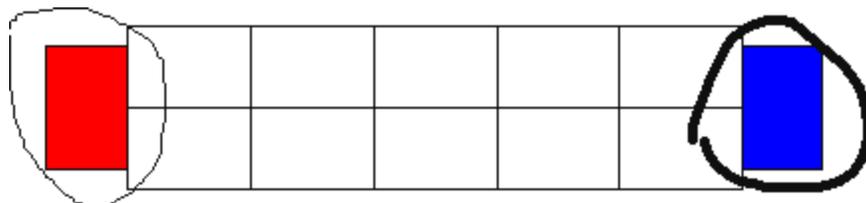
Markup Option

The markup option can be used to annotate Top Graphical View with freehand lines. This can be used to indicate aisle widths, fire exit clearances, and so on. The Mark Up options option can be accessed using the Mark Up icons on the Toolbar. The line weight can be changed by altering the system variable settings in the database - these settings will also affect the width of any Revision Clouds.

Note: See the *Oracle Retail Macro Space Management Administrators User Guide* for more information on these system variables.

Adding Markups

Markups are freehand lines. They can be drawn in two line weights.

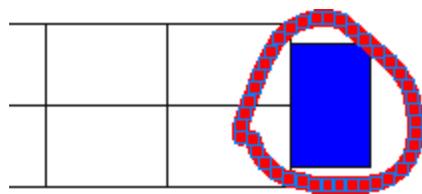


To add a markup:

1. Toggle Markups on by clicking the icon on the toolbar.
2. Hold down either the left or right mouse button and freehand draw the markup.
3. Release the mouse button to stop drawing the markup.
4. When all marks are drawn toggle the option off on the toolbar.

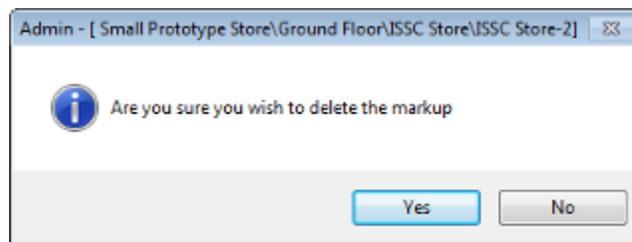
Moving a Markup

If required, markups can be moved by dragging or dropping, or by means of the Move option on the toolbar. To do this, select the markup so it is active. It can then be dragged and dropped or moved.



Deleting A Markup

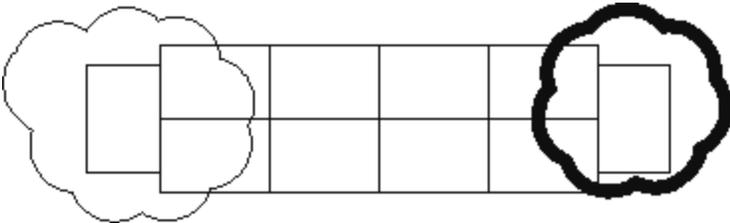
To delete a markup, select the markup then click the Delete option on the toolbar. A confirmatory dialog box will appear.



On clicking Yes, the selected dimensions will be deleted.

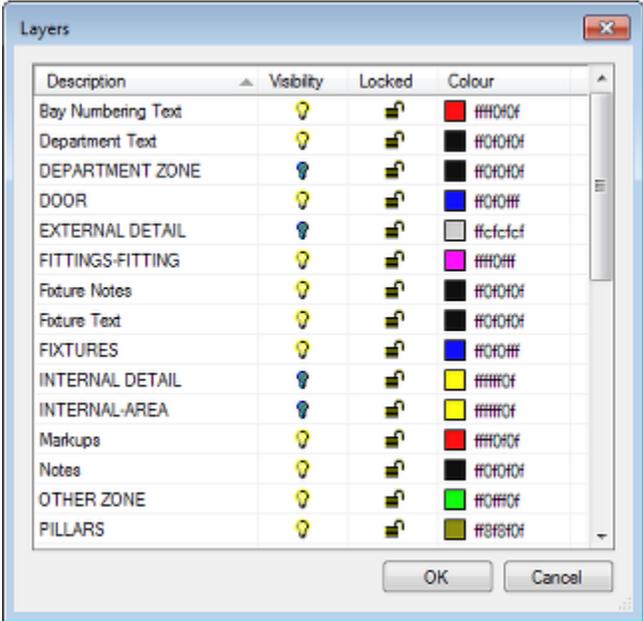
Revision Cloud Option

Revision clouds are added, moved and deleted in an identical way to Markups. When drawing a revision cloud, click the icon on the toolbar, hold down either the left or right mouse button and draw freehand in a circle. When the mouse cursor approaches the origin of the revision cloud, the shape will automatically close, resulting in a continuous cloud shape.



Turning Markup and Revision Cloud Display On or Off

Markup and Revision Cloud display can be turned on or off by switching the **Markups** layer on or off in the Layers dialog box.



Note: This will also switch dimensions on or off.

The Refresh Option

Clicking on the Refresh Option updates the currently active hierarchical trees with information from the central Macro Space Planning database. This may be required if information such as fixture information or planogram designs are being concurrently added or updated in Macro Space Management. Using Refresh ensures that the information in ISSC is kept up to date.



The data the refresh operation updates will be determined by the tab selected on the Object Browser.

- If in the Fixturing tab, information on fixtures and gondolas will be updated.
- If in the Merchandising tab, information on products and planograms will be updated.
- If in the KPI tab, KPI definitions will be updated.

Some information (such as system variable changes) is not updated by Refresh. For this form of update the ISSC Server Service must stopped and restarted. This will generally be done by an administrator. As stopping and restarting this service will interrupt the connection all current users have with the database, careful scheduling is required.

The Find Dialog Box

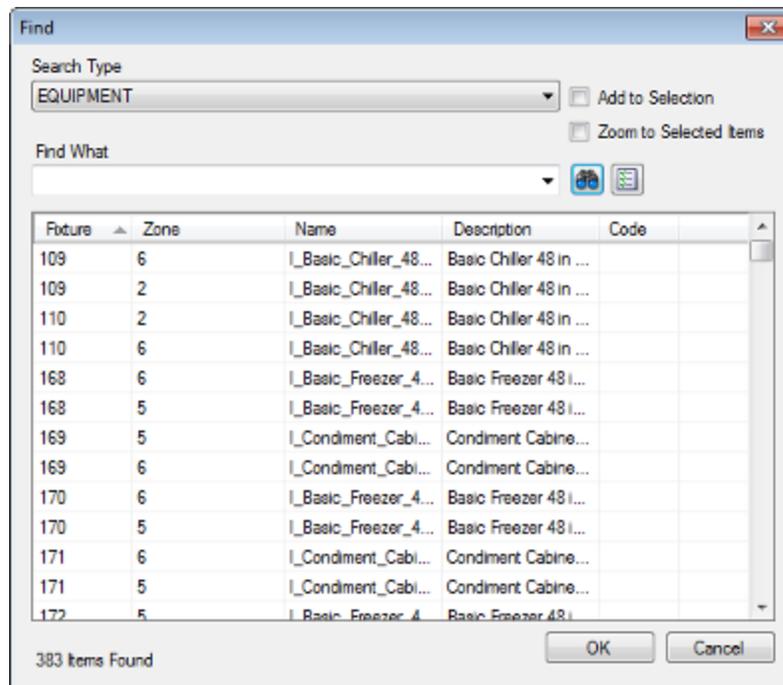
The find dialog box can be used to find bay numbers, fixtures or items of merchandise in the floor plan.

Note: In order to find Bay Numbers, they must first have been added to the floor plan in the Planner module in Macro Space Planning.

The Find option is activated from the Toolbar.



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



Note: Find will only operate on the zones in the floor plan 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.

Search Type

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

- Bay Numbers will find any Bay Numbers in the floor plan (if previously added in the planner module in MSM)
- Equipment will find any fixtures and fittings in the floor plan.
- Article will find any merchandise in the floor plan.

Find What

Find What will search for matching text strings. The search uses implied wildcards but will also accept explicit wildcards and is not case-sensitive.

Wild Card

? Any single character.

* Any sequence of characters.

The last 10 search strings entered are retained and are available from the drop down list. On clicking the Find icon, the dialog box will populate with the selected results. Results can be added to previous selections by ensuring the **Add to Selection** checkbox is checked before clicking the Find icon.

Using the Results

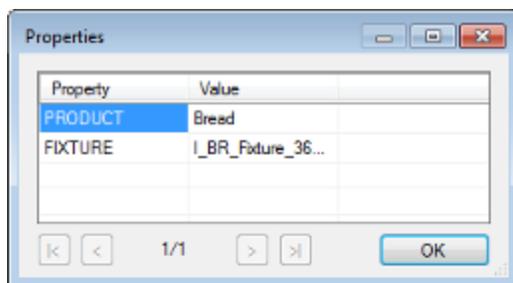
To use the results, highlight the selected items, check the **Zoom to Selected** option and click OK. The required objects will then be highlighted in the floor plan.

The Properties Window

The Properties dialog box can be used to identify the fixture and general type of merchandise on those fixtures. It will only populate when the Merchandising tab is selected on the Object Browser. It is activated from the toolbar - although the icon will only become active when one or more fixtures have been selected in the floor plan.



On clicking the icon, the Properties window will appear.



This window contains details of the fixture and the general type of merchandise it contains. The number of objects can be seen at the bottom of the window. The arrowheads allow the user to move through the records if multiple fixtures have been selected.

Note: The results returned are configurable and are controlled by information in the **Custom SQL table**. This can only be configured by administrators with access to the database.

Fixture Operations

Equipment Concepts

Equipment consists of fixtures, fittings and shelves.

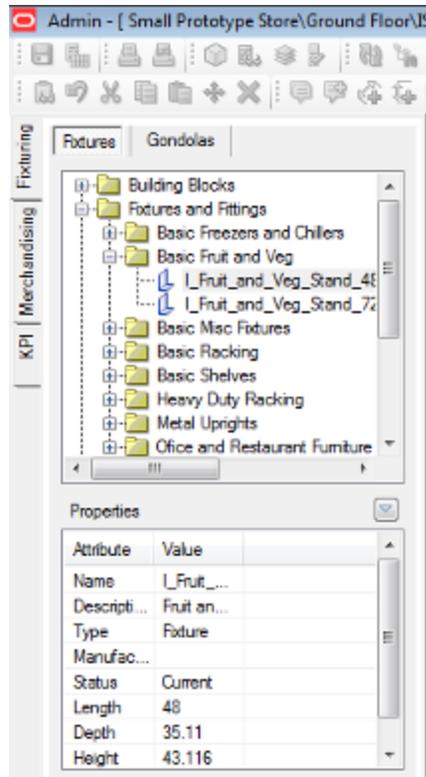
- **Fixtures**
Fixtures are items of equipment that sit on the floor (or are wall mounted) and can hold merchandise. Fixtures are added, edited and deleted in Top Graphical View.
- **Fittings**
Fittings cannot hold merchandise. Some fittings stand directly on the floor. Others can be attached to other items of equipment - for example dividers on shelves. Fittings are typically added, edited and deleted in Top Graphical View.
- **Shelves**
Shelves can hold merchandise. They must go on a parent fixture. Shelves are added, edited and deleted in Front Graphical View.

Creating Equipment

Equipment is typically drawn in Macro Space Management's Fixture Studio module and assigned specific properties that govern its behavior in both MSM and ISSC. This behavior can only be specified and modified by MSM users with access to the Fixture Studio module.

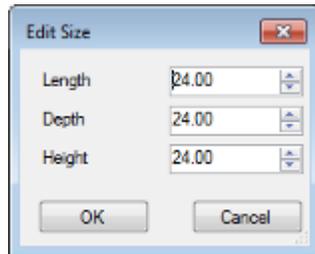
The Fixture Hierarchy

The Fixture Hierarchy is created in Macro Space Management's Fixture Studio module. It appears in the Object Browser. It consists of a series of Fixture Groups, each containing a set of fixtures of similar type. Brief information on the highlighted fixture is given in the Properties window.



Stretchable Fixtures

Some fixtures can be configured in a specialised way in MSM's Fixture Studio module. They can have the ability to adopt a range of sizes while in a floor plan. Such blocks are known as stretchable. When a stretchable block is placed in top graphical view, a dialog box will appear allowing the user to specify the size of the fixture.



Once a stretchable block has been placed in a floor plan, it can be re-sized if necessary by highlighting it and clicking the Resize option on the toolbar.



This will cause the re-size dialog box to reappear.

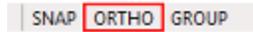
Adding Fixtures

Options for Fixture Addition

Several options can assist accurate placement of fixtures.

Ortho Option

The Ortho Option can be found on the Status Bar.



If toggled on, fixture placement angles will be restricted to 0, 90, 180 and 270 degrees. This ensures that fixtures will be placed either parallel to each other or at precise right angles.

Snap Option

The Snap option can be found on the status bar.



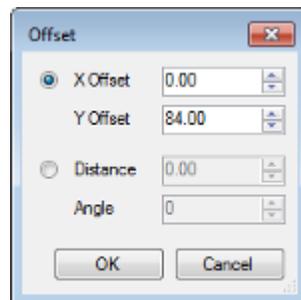
If toggled on, the cursor will snap to a grid specified in the Options dialog box. If (for example) the snap grid is set to 72 inches (6 feet), the centers of successive fixtures will be placed at a precise spacing from each other.

Offset Option

The Offset Option can be found on the toolbar. It will become active immediately after the Add Fixture option is clicked.



If it is desired to use the Offset option, click it immediately after the Add Fixture option is clicked. This will bring up the Offset dialog box.



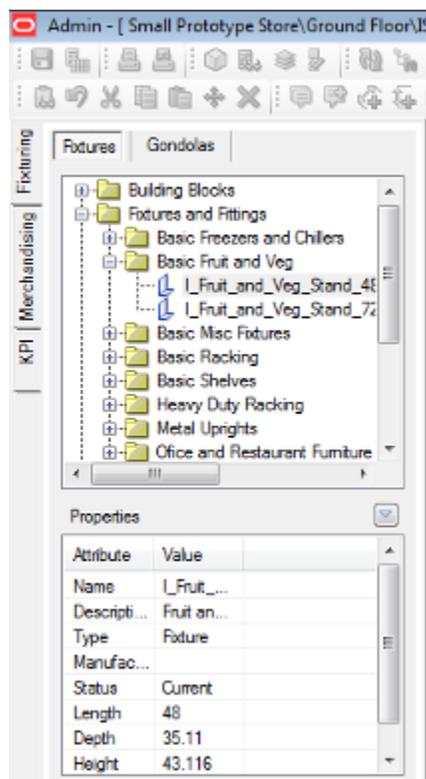
Once the distances are set, the start point for the fixture can be placed the specified distance from a datum point. In the example below, the start point for the fixture being added is being offset from the corner of an existing gondola. (Note the two cursor crosses).

+



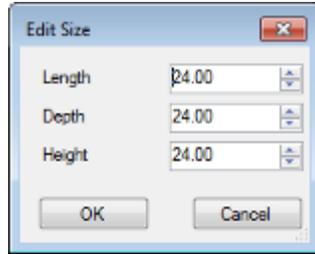
Adding Fixtures

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



To add a fixture:

1. On the Fixtures tab, select a fixture from the Fixture Hierarchical Tree.
2. Click Add Fixture in the toolbar.
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.



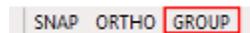
7. Click OK to complete the insertion of the fixture.

Note: Fixtures can also be added by dragging and dropping.

Moving, Rotating and Deleting Fixtures

Effect of Grouping Operation

The Grouping button can be found on the Status Bar.



If Grouping is turned on while in the Fixturing tab of the Object Browser, clicking on a single fixture will select all fixtures that were placed at a single time. This typically will be fixtures placed as a gondola. Within a gondola will select all the fixtures that form that gondola. This is useful when moving, rotating or deleting gondolas.

Fixture Operations

The fixturing toolbar contains options for moving, rotating and deleting fixtures.



Fixtures can be moved in three ways:

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

Using the keyboard cursor keys

Once a fixture 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 Options dialog box accessed from the toolbar.

Moving by dragging and dropping

A second way of moving fixtures is by dragging and dropping using the mouse. To move a fixture by dragging and dropping:

1. Click to select a fixture.
2. Position the cursor inside the selected fixture and hold down the left mouse button. The mouse pointer will change to a hand. The fixture can then be dragged to the new position.
3. A dotted outline will show the new position for the fixture.

4. When in the required position, release the mouse button. The fixture will be moved to its new position.

Using the move icon on the toolbar

Once selected the fixtures may be moved by clicking on the move icon in the Gondolas toolbar. To move a gondola using the move option:

1. Select the fixtures to move.
2. Click Move. A prompt will appear in the prompt window of the status bar at the bottom of the screen.

1 Item(s) Selected | Pick first base point

3. Click to set the first base point. A second prompt will appear.

1 Item(s) Selected | Pick second point

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.

Rotating a Fixture

To rotate fixtures:

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

1 Item(s) Selected | Pick rotation centre point

4. Click at a selected point to specify the base point for the rotation. A dotted outline will show the new position of the fixtures. The angle of rotation will also show in the status bar.

1 Item(s) Selected | Choose rotation angle (Current = 18.5)

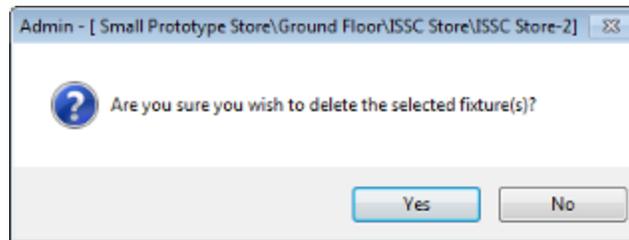
5. Click at a selected point to specify the new angle. The fixtures will rotate to the new angle.
6. All dependent objects including shelves, merchandise, and annotation will also rotate along with the fixture(s).

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

Deleting a Fixture

Fixtures can be **deleted** using the Delete Selection icon on the fixturing toolbar. To delete fixtures:

1. Select the fixtures to be deleted.
2. Click Delete on the toolbar. A confirmation message will appear.



3. Click Yes to delete the selected fixtures.

Other Fixture Options

There are a number of other options available for fixtures.

Fixture Attributes

Fixture Attributes are configured in the Fixture Studio module of Macro Space Management. They allow a set of customized values to be set on a fixture by fixture basis in a floor plan. These attributes can be numeric, text, from a drop down list, dates or Boolean.

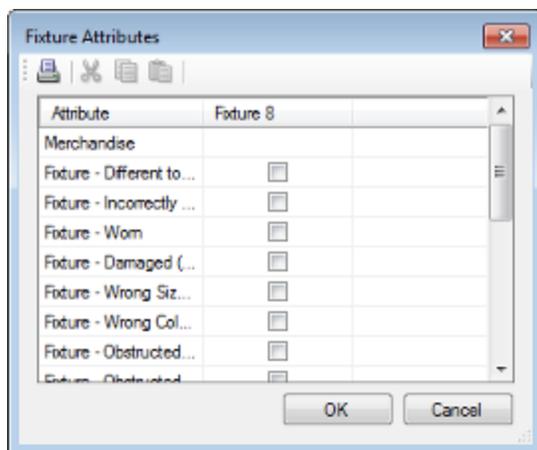
One use of this feature is in store surveys. For example a series of attributes can be created with Yes/No check boxes. When the store is surveyed, the check boxes can be selected as appropriate for each fixture. this information can then be used to generate a report for the store and initiate the appropriate corrective action.

To define fixture attributes:

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



3. The Fixture Attributes window opens.



4. 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.
5. Click OK to change all selected fixtures. Attributes without a value (often for fixtures with differing attributes) will not be overwritten.

Promotional Fixtures

Promotional Fixtures are fixtures that can be flagged for use in promotions. They are assigned or removed via the Promotional Fixtures option on the toolbar.



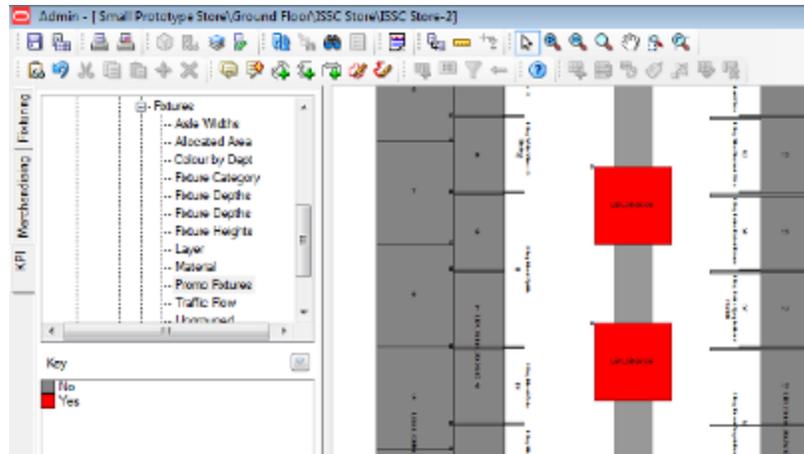
To assign a fixture as a promotional fixture:

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

To remove a fixture as a promotional fixture:

3. Click to select the fixture.
4. Click Set as Standard Fixture.

Promotional fixtures can be identified by running the appropriate KPI.



Promotional fixtures can also be identified using Quick Reports, BI Publisher Reports, and so on.

Resizing Fixtures

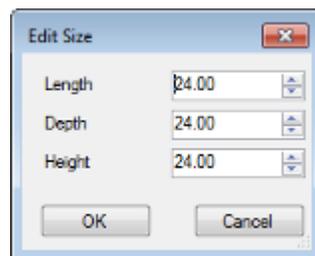
Some fixtures can be assigned a range of possible sizes in Macro Space Management's Fixture Studio module. Such fixtures are known as 'stretchable'. Their size can be specified when initially placed in the floor plan. It is also possible to resize those fixtures when placed in the floor plan. Only stretchable fixtures can be resized. A stretchable fixture can be created in Macro Space Management, by changing the properties of that fixture in the Fixture Studio module.

To resize a fixture:

1. Select a fixture or fixtures.
2. Click Resize on the Fixturing toolbar.



The **Edit Size** window opens.



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 vary will be blank.

3. Enter the required values and click OK. 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.

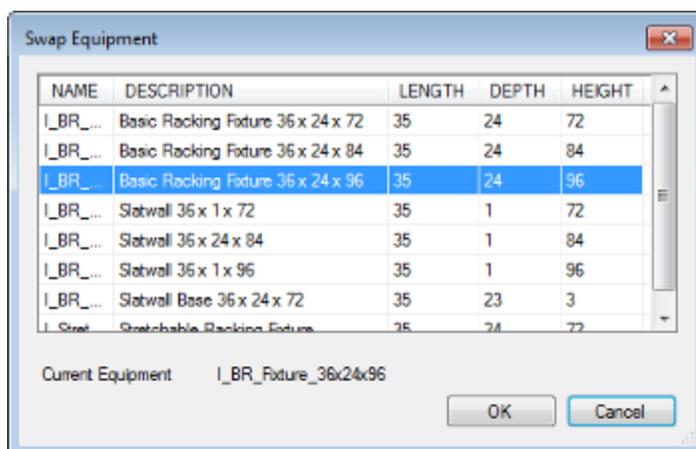
Swapping Fixtures

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 the Swap option on the toolbar.



3. The Swap Equipment window opens.



Note: All compatible equipment is displayed.

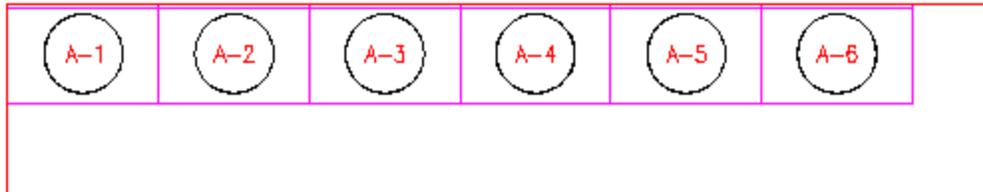
4. Click the column header to sort by that column.
5. Click the equipment to select it for swapping with the current fixture.
6. Click OK to swap the selected fixtures or fitting for the new object. If a fixture populated with merchandise is swapped, this will be refreshed in case the dimensions have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

Fixture Numbering

Fixtures may be numbered in one of three ways. This annotation is used for reference purposes, enabling fixtures to be uniquely identified in reports and subsequently located by users examining a floor plan.

Annotation Based on Bay Numbering

The bay numbering must first be created in the Planner module.



The numbers can then be seen in ISSC.

A-1	A-2	A-3	A-4	A-5	A-6
-----	-----	-----	-----	-----	-----

Annotation Based on the Fixture Tag

TAG-1	TAG-2	TAG-3	TAG-4	TAG-5	TAG-6
-------	-------	-------	-------	-------	-------

Note: This example has been produced by populating the field in the database using a SQL statement.

Annotation Based on Fixture ID

1	2	3	4	5	6
---	---	---	---	---	---

Controlling the Annotation

Fixture Annotation is controlled by system variables. These can be configured in the System Variable dialog box (General Menu) in the MSM Administration module. The ISSC_BAY_ANNOTATION system variable determines the form of annotation. There are three options:

SV Value	Description
0	This will use the Bay Number Prefix and Bay Number from the Fixture table. This option will result in the same bay numbering appearing as is present in the Planner module of Macro Space Management. If the floor plan has not been bay numbered in the Planner module, no bay numbers will be present in the ISSC version of the floor plan.
1	This will use the Fixture Tag (FIX_TAG) from the Fixture table. This value can only be populated from data import. If data is not imported, no bay numbers will be present in the ISSC version of the floor plan.
2	This will use the fixture ID (FIX_ID) from the Fixture table. This will ensure that all fixtures within a floor plan have a unique number allocated. These numbers will be allocated in the sequence that the fixtures were placed in the floor plan. Accordingly, numbers may not run in adjacent sequences. In addition, as fittings are excluded from this form of numbering, their FIX_ID's will be omitted from the annotation, resulting in gaps in the numbering.

Note: For more information on the **Fixture** table see the *Oracle Retail Macro Space Planning Data Model*.

The TEXT_FIXTURE_TEXTSIZE system variable controls the size of the text.



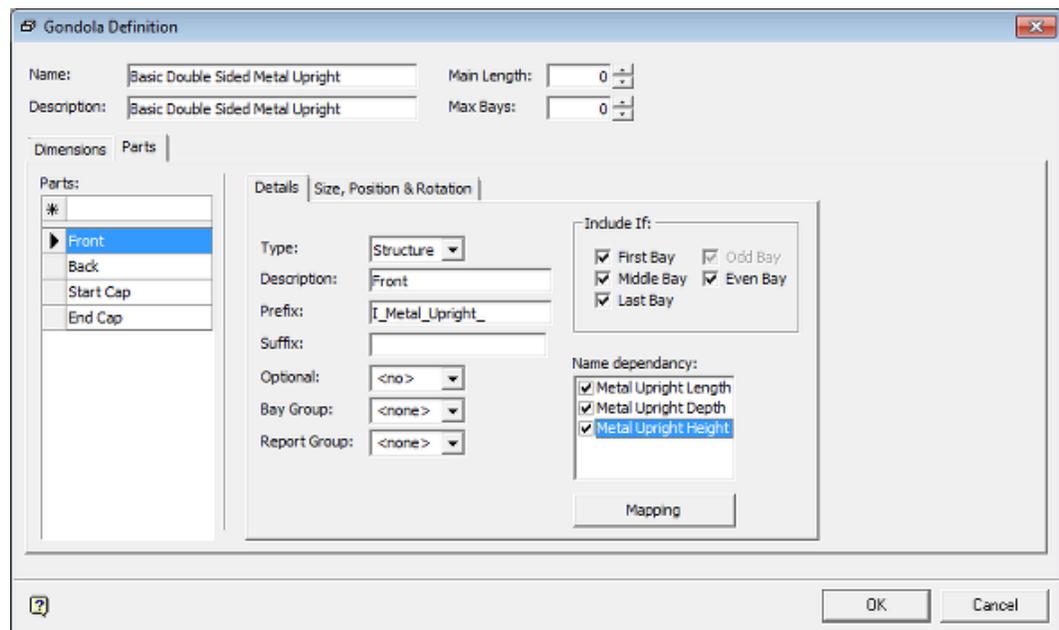
Gondola Operations

Gondola Concepts

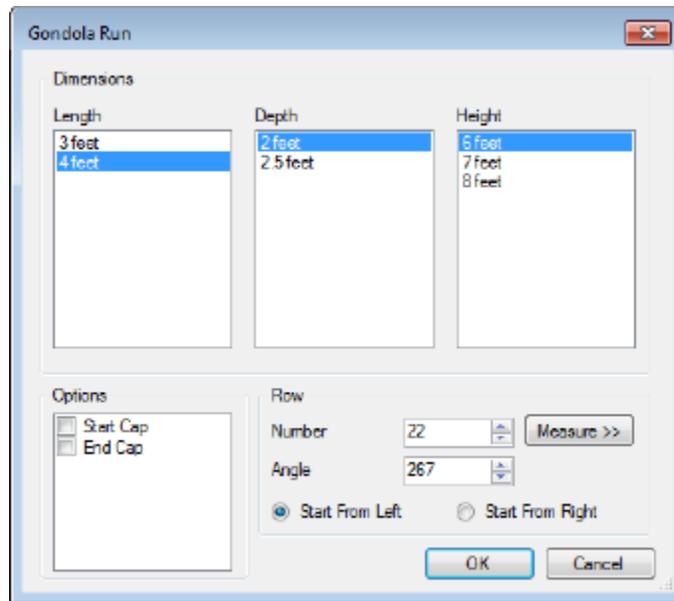
Gondolas are predefined arrangements of fixtures and fittings that can be placed as a single entity. Once placed, they can also be moved or rotated as a single entity (providing Grouping is on).

Creating Gondolas

Gondolas are created in Macro Space Management's Fixture Studio module.

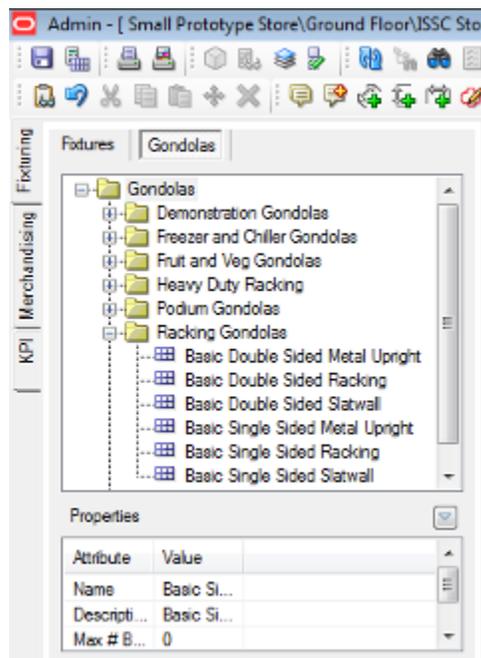


The way the gondola is configured in Fixture Studio determines the options a user sees in the Add Gondola dialog box that appears when placing gondolas in ISSC.



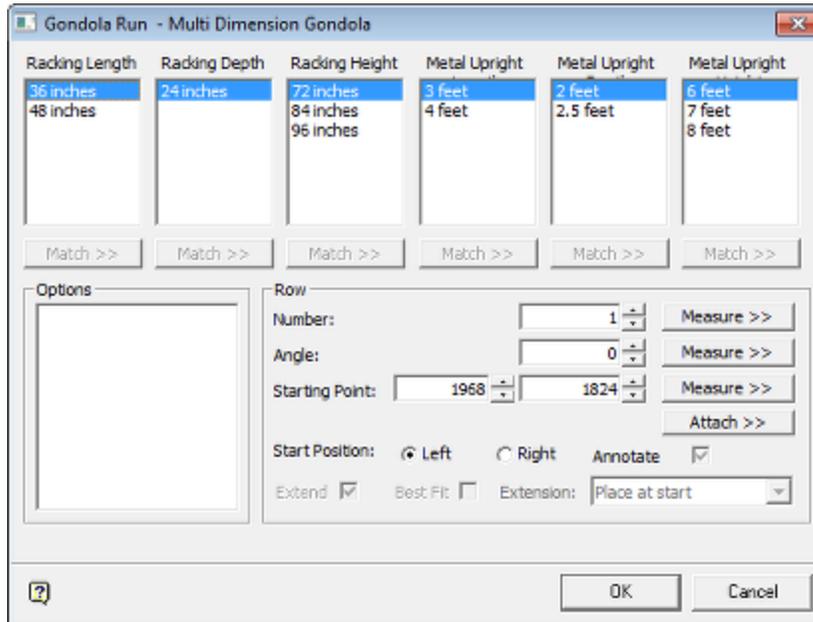
The Gondola Hierarchy

The gondola hierarchy is also created in Macro Space Management's Fixture Studio module. It appears in the Object Browser. It consists of a series of Gondola Groups, each containing a set of gondolas of similar type. Brief information on the highlighted gondola is given in the Properties window.

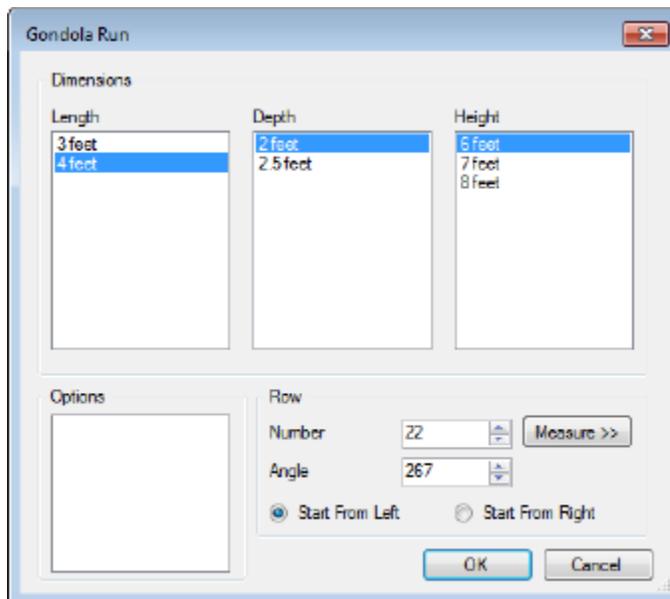


Constraints on Adding Gondolas

Gondolas placed in Macro Space Management can have up to eight dimensions assigned.



However, the only gondolas that can be placed in ISSC are those with three dimensions in the order Length, Depth, Height. If an attempt is made to place a gondola with more than three dimensions in ISSC, only three dimensions will show.

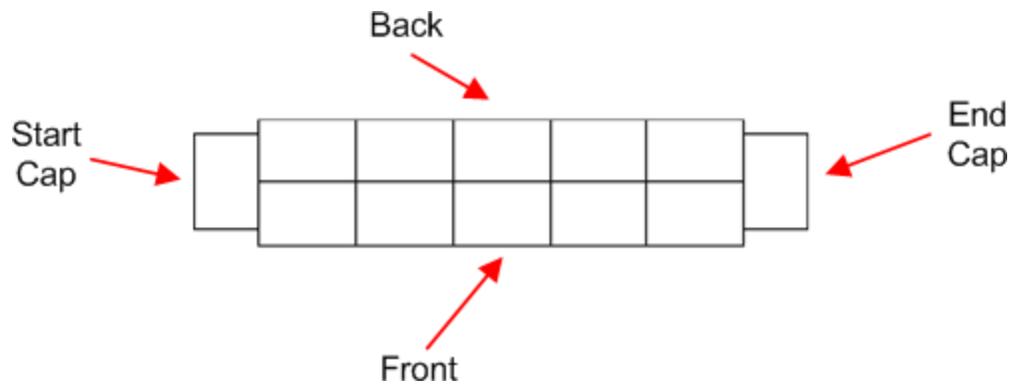


When the OK button is clicked, an error message will result.

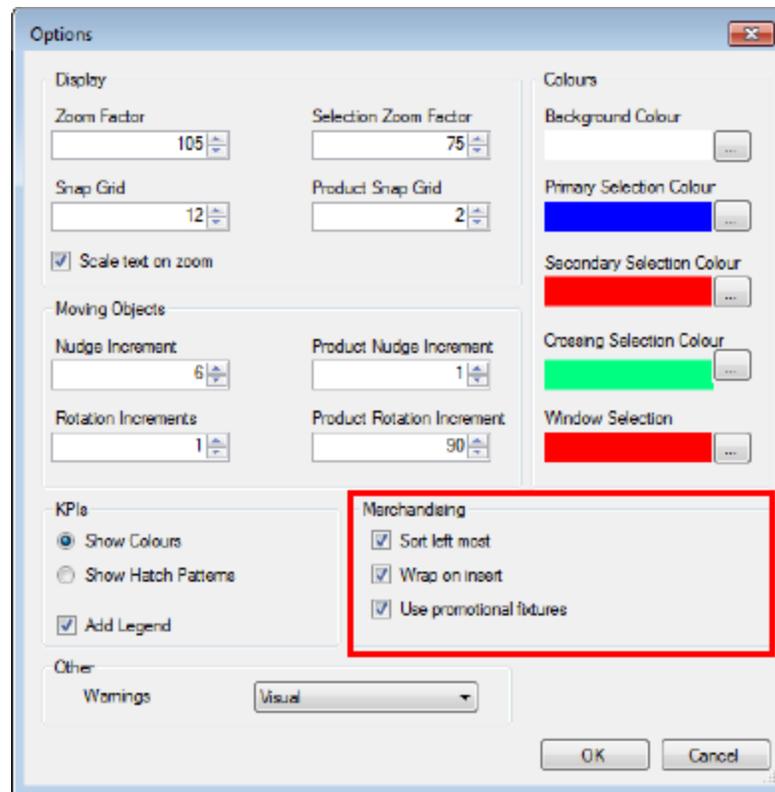


Gondola Parts

A gondola run is made up of a number of sides. In the example below, the gondola has four sides: Front, Back, Start Cap and End Cap. Some fixtures within the gondola can also be designated as Promotional Fixtures - start and end caps being a typical example. This influences how product placeholders and planograms are placed.

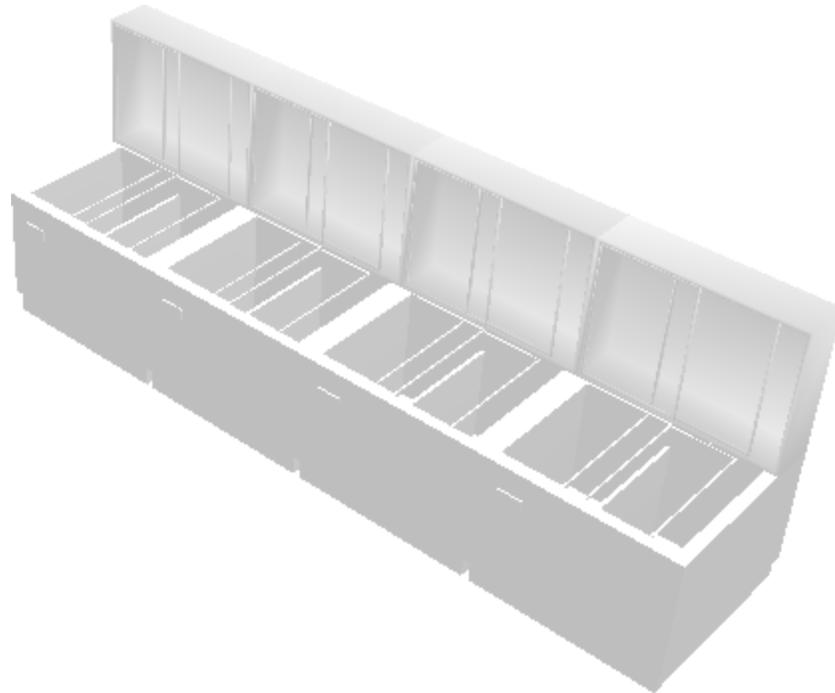


The Options dialog box has a series of merchandising options. These determine whether products and planograms being placed via Category Insertion can wrap round from one side to another or whether they can wrap onto promotional fixtures.



Gondolas on Multiple Levels

Some gondolas are designed with multiple levels. An example of this is condiment cabinets above freezers. The example below shows this arrangement in Macro space Management's Merchandiser module. The freezer units are at floor level with the condiments a level above.



The same arrangement in ISSC is not so distinctive and may need the use of tool tips or Front Graphical View to identify it. The image below shows how the same gondola is represented in Top Graphical View.

Adding Gondolas

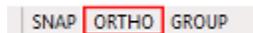
Gondolas can be added in ISSC as follows:

Options for Gondola Addition

Several options can assist accurate placement of gondolas.

Ortho Option

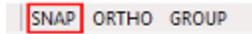
The Ortho Option can be found on the Status Bar.



If toggled on, gondola placement angles will be restricted to 0, 90, 180 and 270 degrees. This ensures that gondolas will be placed either parallel to each other or at precise right angles.

Snap Option

The Snap option can be found on the status bar.



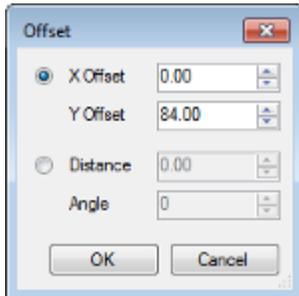
If toggled on, the cursor will snap to a grid specified in the Options dialog box. If (for example) the snap grid id set to 120 inches (10 feet), the centres of successive gondolas will be placed at a precise spacing from each other.

Offset Option

The Offset Option can be found on the toolbar. It will become active immediately after the Add Gondola option is clicked.

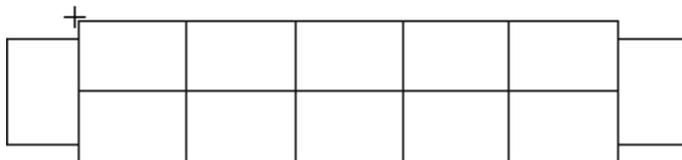


If it is desired to use the Offset option, click it immediately after the Add Gondola option is clicked. this will bring up the Offset dialog box.



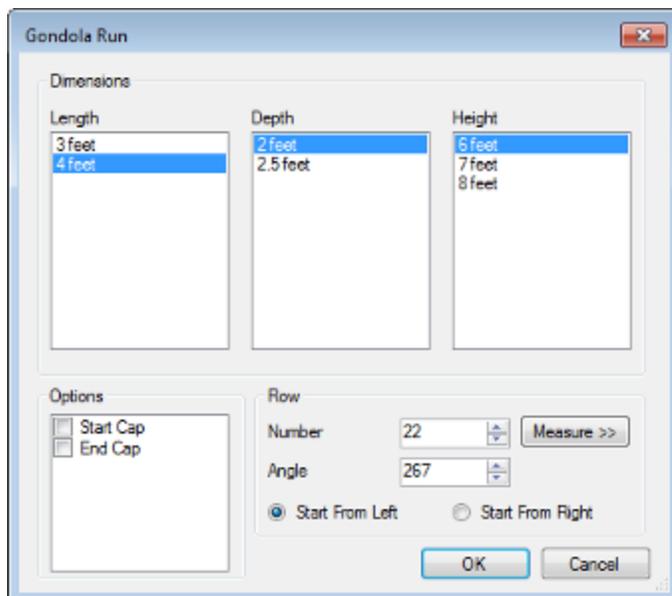
Once the distances are set, the start point for the gondola can be placed the specified distance from a datum point. In the example below, the start point for the next gondola is being offset from the corner of an existing gondola. (Note the two cursor crosses).

+



Gondola Run Dialog Box

The **Gondola Run** dialog box allows a series of options to be specified for the gondola being inserted. The permissible options are defined when the gondola definition is created in Macro Space Management's Fixture Studio module.



Dimensions

Gondolas are generally defined with a range of possible dimensions. Highlight the required combination of dimensions. Sometimes not all possible combinations are valid. If this is the case, a warning dialog box will appear. In this event, try selecting another combination of dimensions.



Options

The Options Frame allows you to specify optional parts. They can be selected or deselected by checking or unchecking the appropriate box.

Row

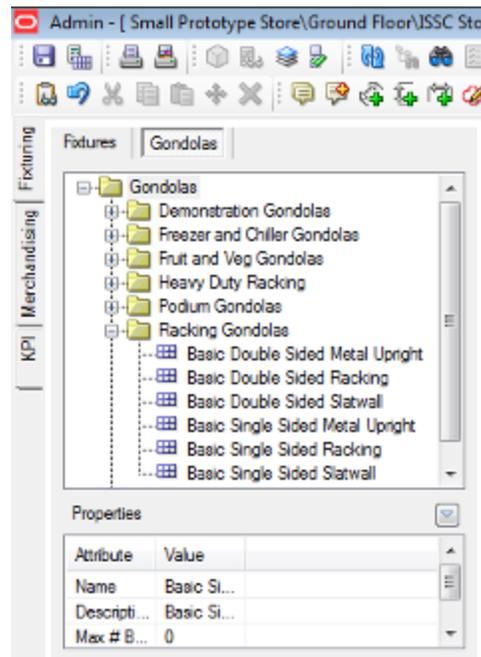
The Row Frame allows the placement angle and number of fixtures in the gondola to be changed, if necessary. It also allows the start direction of the gondola to be specified.

- 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 determine whether the gondola is drawn starting from the left hand end or the right hand end of the line that has been drawn to determine the position of the gondola. This is generally used to align gondolas in the corners of walls, and so on.

Adding a Gondola

To add a gondola, highlight the required gondola in the Object Browser.



The toolbar will have changed to show the gondola options. Select the Add Gondola option.



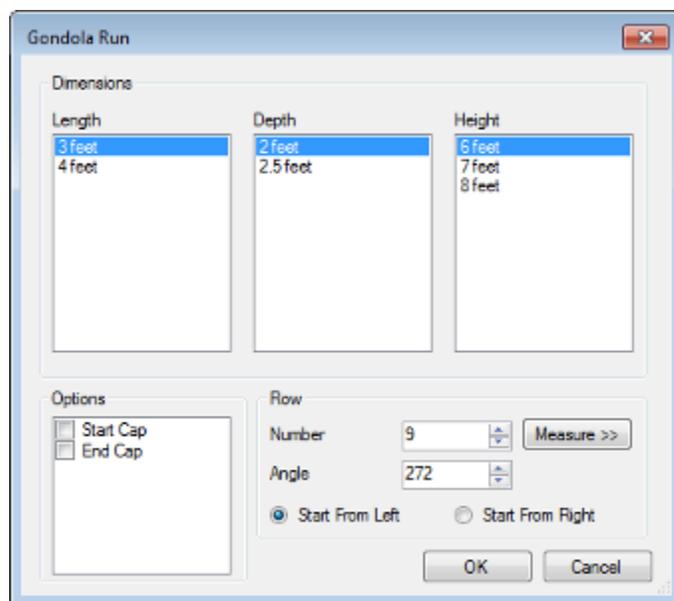
A prompt will appear in the status bar asking the user to select the start point of the gondola run. Click a starting location in the floor plan.

0 Item(s) Selected | Pick start point of gondola run

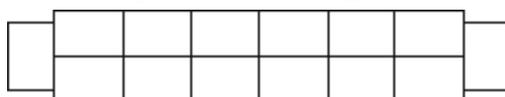
Once the start point has been selected, a second prompt will appear asking the user to select the end point of the gondola run. (Alternatively, the left mouse button can be held down and the cursor 'dragged' to the end point of the gondola).

0 Item(s) Selected | Pick end point of gondola run (Length = 0 Angle = 0)

On clicking the second point, the Add Gondola dialog box will appear.



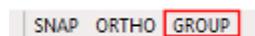
Select the required dimensions, optional parts and adjust the number, angle and start point as required. On clicking OK, the gondola will be placed.



Moving, Rotating and Deleting Gondolas

Effect of Grouping Operation

The Grouping button can be found on the Status Bar.



If Grouping is turned on while in the Fixturing tab of the Object Browser, clicking on a single fixture within a gondola will select all the fixtures that form that gondola. This is useful when moving, rotating or deleting gondolas.

Gondola Operations

The Gondolas Toolbar

The gondolas toolbar contains options for moving, rotating and deleting gondolas.



Gondolas can be moved in three ways:

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

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 Options dialog box accessed from the toolbar.

Moving by dragging and dropping

A second way of moving gondolas is by dragging and dropping using the mouse. To move gondola by dragging and dropping:

1. Click to select a 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 its new position.

Using the move icon on the toolbar

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.

1 Item(s) Selected Pick first base point

3. Click to set the first base point. A second prompt will appear.

1 Item(s) Selected Pick second point

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.

Rotating a Gondola

To rotate gondolas:

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

1 Item(s) Selected Pick rotation centre point

4. 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.

1 Item(s) Selected Choose rotation angle (Current = 18.5)

5. Click at a selected point to specify the new angle. The gondolas will rotate to the new angle.
6. All dependent objects including shelves, merchandise, and annotation will also rotate along with the fixture(s).

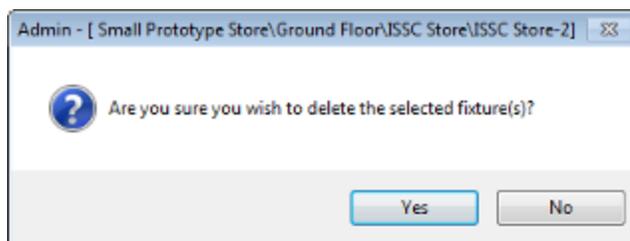
Note: After Rotate Gondola is selected, you can also enter the required rotation angle and press enter.

Deleting a Gondola

Gondolas can be **deleted** using the Delete Selection icon on the gondola toolbar. To delete gondolas:

1. Select the gondolas to be deleted.
2. Click Delete on the toolbar.

A confirmation message will appear.



3. Click Yes to delete the selected gondolas.

Merchandising

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 merchandising. There are slightly different options depending on whether the Products or Planogram options are selected.

Products

The Products Toolbar contains a series of icons allowing various operations to be carried out on products. Some may be grayed out if they are not available during the current operation.



Field	Description
	Clipboard
	Undo
	Cut
	Paste
	Move
	Delete
	Assign Merchandise
	POG (Planogram) Scan
Not available for products	Filter Planogram
Not available for products	Reverse Planogram

Planograms

The toolbar contains a series of icons allowing various operations to be carried out on Planograms. Some may be grayed out if they are not available during the current operation.



Field Description

	Clipboard
	Undo
	Cut
	Paste
	Move
	Delete
	Assign Merchandise
	POG (Planogram) Scan
	Filter Planogram
	Reverse Planogram

The Filter Planogram and Reverse Planogram options are not available for products and have been grayed out.

Merchandising Options

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

- Creation of new products and planograms definitions.
- Editing the properties of products and planograms.
- Deleting outdated product and planogram definitions.
- Creating and maintaining the hierarchical tree of products and planograms.

The MERCH_MULTI_PROFILE System Variable

The MERCH_MULTI_PROFILE system variable determines how fixtures populate with products and planograms. This is configured in the Administration module of Macro Space Management. Depending on the setting, one of three merchandising behaviors will occur in ISSC:

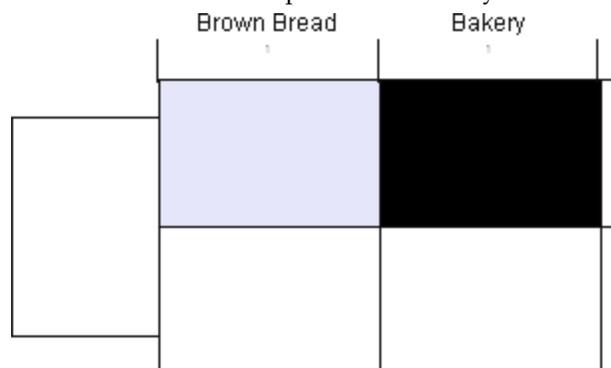
SV Value	Description	Comment
0	Allow fixtures to be multi-profiled	This option allows fixtures to be multi-profiled. A fixture is allowed to contain more than one planogram or product placeholder.
1	Don't allow fixtures to be multi-profiled	This option will only allow fixtures to be populated if there is sufficient room for the new merchandise.
2	Replace Merchandise on fixture	This option will allow fixtures to be populated if there is insufficient room by removing pre-existing merchandise from the fixtures.

System Variable = 0: Multi-Profiling Allowed

Note: Most of the diagrams in this section are schematic only for illustrative purposes.

Products

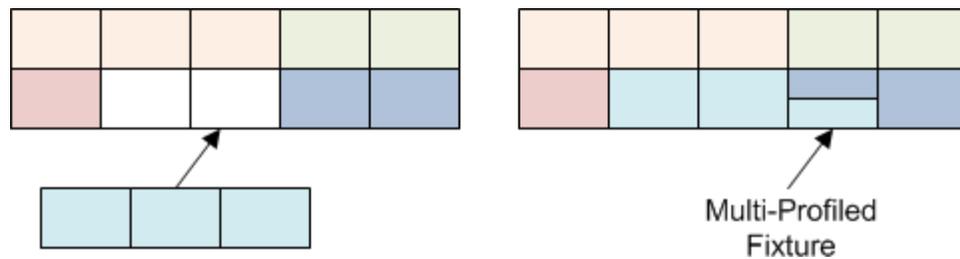
If product placeholders are multi-profiled, only a single line of annotation will be placed. This will be the lowest common node in the hierarchy encompassing both products. In the example below, a Brown Bread product placeholder was placed on two fixtures. A Brown Roll placeholder was then placed on the right hand of the two fixtures. The annotation now says Bakery, which is the lowest common node between Brown Bread and Brown Rolls in the product hierarchy.



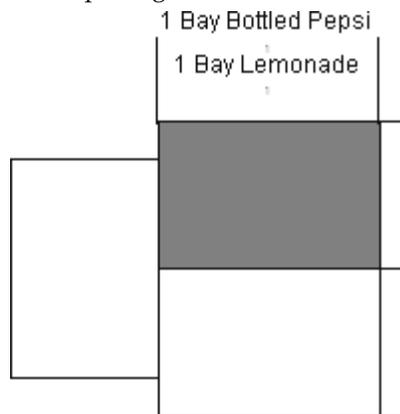
Note: KPIs are a quick way of identifying multi-profiled products.

Planograms

In the example below, a 3-bay planogram is to be inserted into a space where only two fixtures are available.

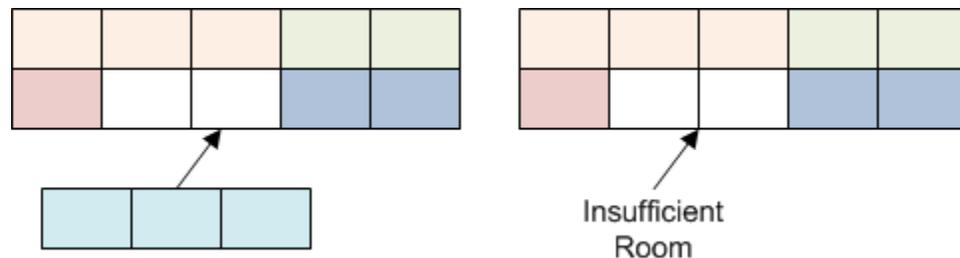


In this instance, one fixture will be multi-profiled with two planograms being present on the fixture. Multi-placed planograms can be identified by the multiple lines of annotation - each planogram will have its own line of annotation.



System Variable = 1: No Multi-Profiling Allowed

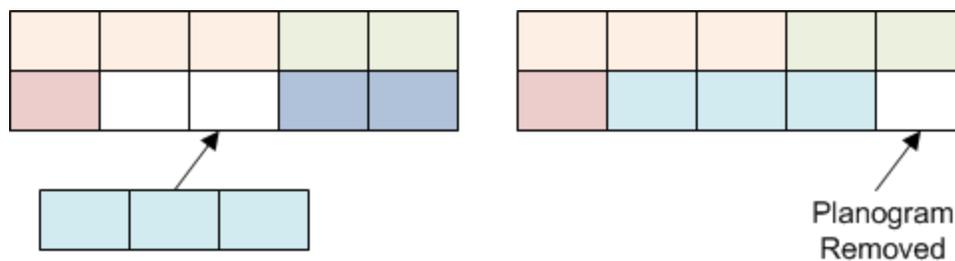
In the example below, a 3-bay planogram is to be inserted into a space where only two fixtures are available.



In this instance, the 3-bay planogram cannot be placed and a warning will appear in the status bar..

System Variable = 2: Replace Merchandise

In the example below, a 3-bay planogram is to be inserted into a space where only two fixtures are available.



In this instance, an existing planogram will be removed to make room for the 3-bay planogram being placed. All bays of the planogram being taken off will be removed even though only one bay might be needed for the new merchandise.

Summary of Ways of Adding Merchandise

ISSC provides a number of ways of adding merchandise. The main ways are summarized below.

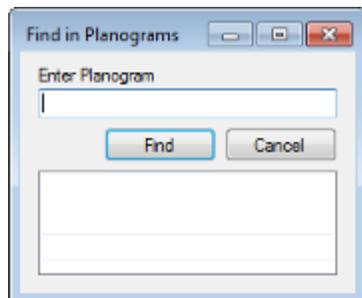
- Merchandise can be added by means of selecting it in the hierarchy, selecting the parent fixtures and clicking the Assign Merchandise icon.
- If fixtures are preselected along with a planogram group and the Assign Merchandise icon clicked, the final planogram to be added can be selected from the Add Planogram dialog box.
- Merchandise can be 'dragged and dropped' from the product or planogram hierarchies on the Object Browser.
- If already placed it can be 'dragged and dropped' from fixtures to the aisle and from there to other fixtures.
- It can be copied and pasted via the clipboard.
- If the Planogram Scan dialog box is in use to identify planograms that have been physically placed in the store, planograms can be added from this dialog box.

Find In Hierarchy Option

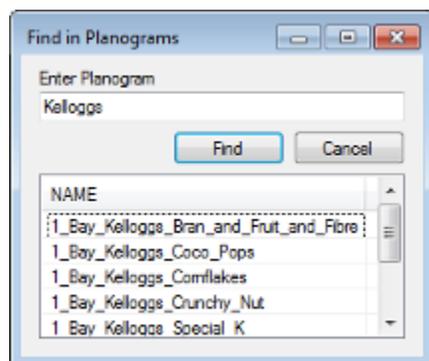
The Find In Hierarchy Option is only active in the toolbar when the Merchandising Tab is selected in the Object Browser.



Clicking this icon will bring up a Search dialog box. It can be used to find with products or planograms depending on whether the Product or Planogram sub-tab is currently selected.



To use the dialog box, enter a text string and click OK (implied wild cards are used). This will expand the dialog box to bring up a list of results.



Highlight an entry and double click it to be taken to that object in the hierarchy in the Object Browser.

Factors Affecting Merchandise Operations

A number of factors affect merchandise operations.

MULTI_MERCH_PROFILE System Variable

The MULTI_MERCH_PROFILE system variable is configured in the Administration Module of Macro Space Management. It has a global effect on how users may add merchandise in In-Store Space Collaboration. Depending on its setting users may be able to:

- Put multiple products or planograms onto the same fixture.
- Only add products or planograms if there is room.
- Automatically remove other merchandise when adding a new product or planogram if there is insufficient room.

ISSC users should consult their administrator to determine which option is in use.

Adjacency Calculations

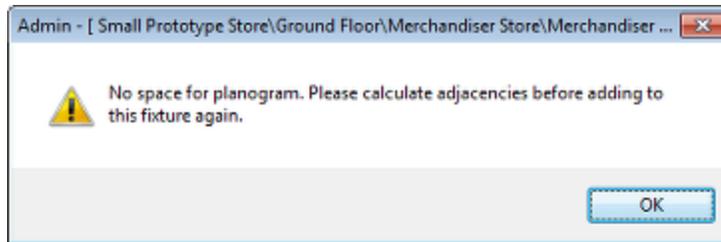
The toolbar contains an option to calculate Fixture Adjacencies.



This option writes back two sets of information to the database:

- It identifies whether individual fixtures are left, right, behind or above one another.
- It identifies which fixtures form gondolas and the relationship of those fixtures within a gondola.

The results of these adjacency calculations are required for Category Insertion to work. If Fixture Adjacency has not been carried out, the application will not be able to identify the relationship of one fixture to another and Category Insertion will not work correctly.



Grouping

Fixtures

When the fixtures were placed in the floor plan, if more than one fixture was placed at one time (for example if a gondola was placed) it is possible to select all fixtures that were placed together, or individual fixtures. This is controlled by the Grouping option on the Fixturing toolbar. If Grouping is on and the fixturing tab is selected in the Object Browser, selecting a single fixture in a gondola will select all fixtures in that gondola. If grouping is off, single fixtures within a gondola can be selected.

Merchandise

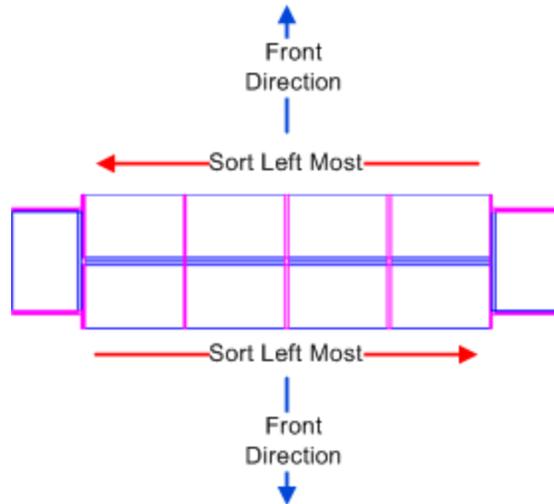
If (for example) a multi-bay planogram has been placed in the floor plan, and the user has selected the Merchandising tab in the Object Browser, the Grouping option will determine what is selected. If grouping is on, selecting one bay of a multi-bay planogram will select all bays. If grouping is off, individual bays can be selected.

Fixtures and Fittings

The floor plan can contain a mixture of fixtures and fittings. Only fixtures can accept merchandise. If an attempt is made to merchandise a fitting, the Add Planogram icon on the toolbar will remain grayed out and unavailable.

Sort Left Most

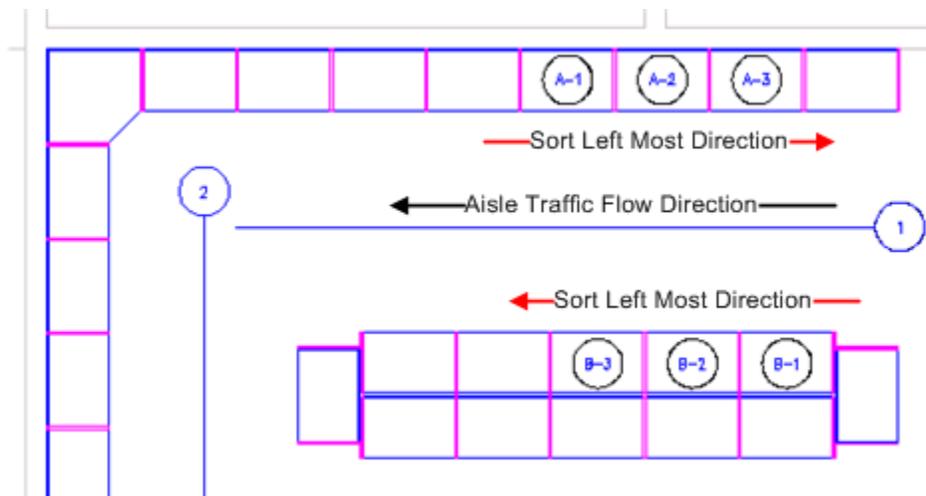
When selecting fixtures, if selecting by individual left clicks, the fixtures are added to the selection in the sequence they are selected. If the fixtures are selected by a Windows or Crossing selection box, the fixtures in the selection are ordered in the sequence they were placed in the drawing. For multi-bay planogram placement, it is generally necessary to place the bays in a specified sequence; functionality called **Sort Left Most** can be activated from the Options dialog box. (This can be accessed by from the toolbar). The selected fixtures will them be populated left most first.



The left most fixture is based on viewing the fixtures from the front. The apparent front direction will change when the back face of a gondola is considered relative to the front.

Planogram Reversal

Some multi-bay planograms are designed to be viewed from a specific direction. How the bays are placed depends on the traffic flow along an aisle.



When aisles are drawn, they can be used to show the direction of traffic flow along an aisle. It is from the head of the aisle (denoted by its name or number), to the other end. In the above diagram, traffic predominately flows from right to left. If it is desired to place a 3 bay planogram with Bay 1 the first to be viewed by shoppers, then how it is placed will depend on which side of the aisle it is placed. If it is placed on the island gondola (Bays B-1, B-2 and B-3) with sort left most on, it can be placed in its normal sequence.

If it is placed on the wall gondola (Bays A-1, A-2 and A-3) the effect of sort left most will be to place the first bay at A-1, where it will be the last bay to be seen by a customer following the normal direction of travel along an aisle. This can be corrected by using the Reverse Planogram option on the planogram toolbar.



The effect of this is to reverse the sequence the bays are placed, with Bay 3 being placed first. Bay 1 will thus end up on fixture A-3 and will be the first bay seen by a customer.

Exploded Planograms

In Macro Space Management planograms can be placed in two main forms: 2D (imploded) and 3D (exploded). 2D planograms are placeholders with no information of equipment or merchandise; 3D planograms have the full detail. In the diagram below, the planogram on the left is in 2D form and the one on the right is in 3D form.



Planograms placed in the Planner module are always placed in 2D form, with no details of products or shelves visible. Planograms in the Merchandiser module can be toggled between 2D and 3D form. If exploded to 3D form in Merchandiser, the planograms will no longer be directly visible in Planner. Planograms placed in ISSC are always placed in 2D form and must be exploded in MSM's Merchandiser module before they the shelves and product can be seen in Front Graphical View and Shelf Graphical View.

Master Planograms

Overview of Master Planograms

Master Planograms are a way of reducing the frequency with which floor plans need to be modified and published. They act as placeholders in a floor plan. The floor plan or planogram publishing batch processes are then run at intervals to determine if the floor plan or planograms need publishing. If master planograms are present in the floor plan, they will have a mapping to an individual planogram. The individual planogram is then published in place of the master planogram. As the underlying master planograms remain unchanged, this reduces the frequency with which floor plans need to be updated and published. Master planograms are identified by a specific icon.

Icon Description

	Master Planogram
	Standard Planogram

Creating and Configuring Master Planograms

Creating and configuring master planograms is done in Macro Space Management. This section gives a brief outline. For more information on configuring master planograms see the white paper on My Oracle Support. For information on manually creating master planograms see the *Oracle Retail Macro Space Management Merchandiser help file*.

Configuring Master Planogram Functionality

Master Planograms are placeholders placed in a floor plan. The planogram definition contains a number of fields that can be compared with similar fields in the individual planograms. If the fields in both the master planogram and the specific individual planogram match, the specific individual planogram will be substituted for the master planogram during the Planogram Publishing process. Other fields are used for more aspects of planogram functionality. For example the Publish date is used during the planogram publishing process to determine when it is appropriate to publish a planogram. Similarly, the status shows where the planogram is within its business life cycle.

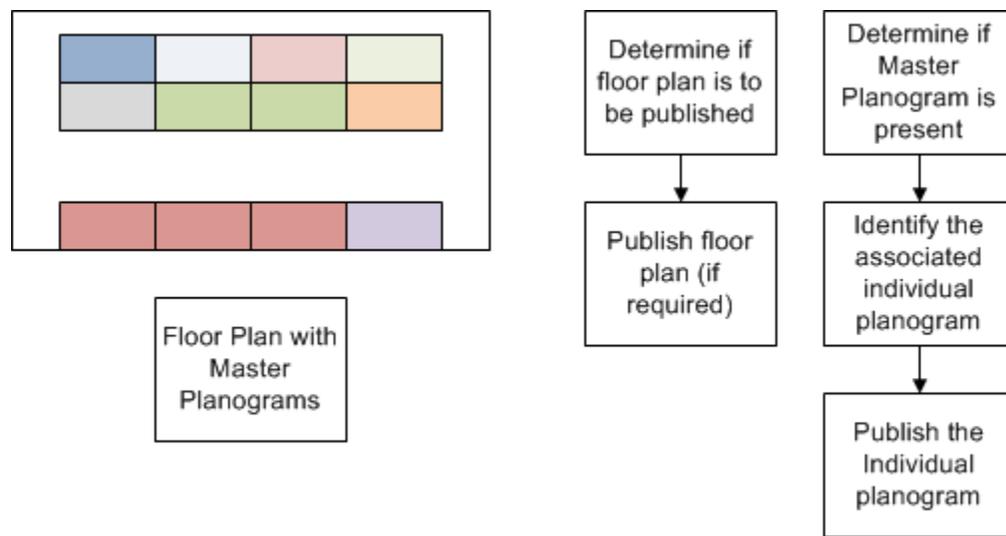
Note: In order for the Master Planogram functionality to work, considerable configuration has to be carried out during the implementation of the software. If this has not been done, it will not be possible to use Master Planograms. Describing how to configure the functionality is outside the scope of this help file. The information is available in a white paper on My Oracle Support.

Creating Master Planograms

Master planograms can be imported from a third party planogram design tool, created in Macro Space Management's Merchandiser module or created directly in the database by means of a SQL statement or stored procedure. The details of creating of master planograms is outside of the scope of this help file but is described in detail in the Macro Space Management documentation.

Overview of General Process

The basic process for using master planograms is seen below.



A floor plan has been created with master planograms present. A batch process is run at regular intervals.

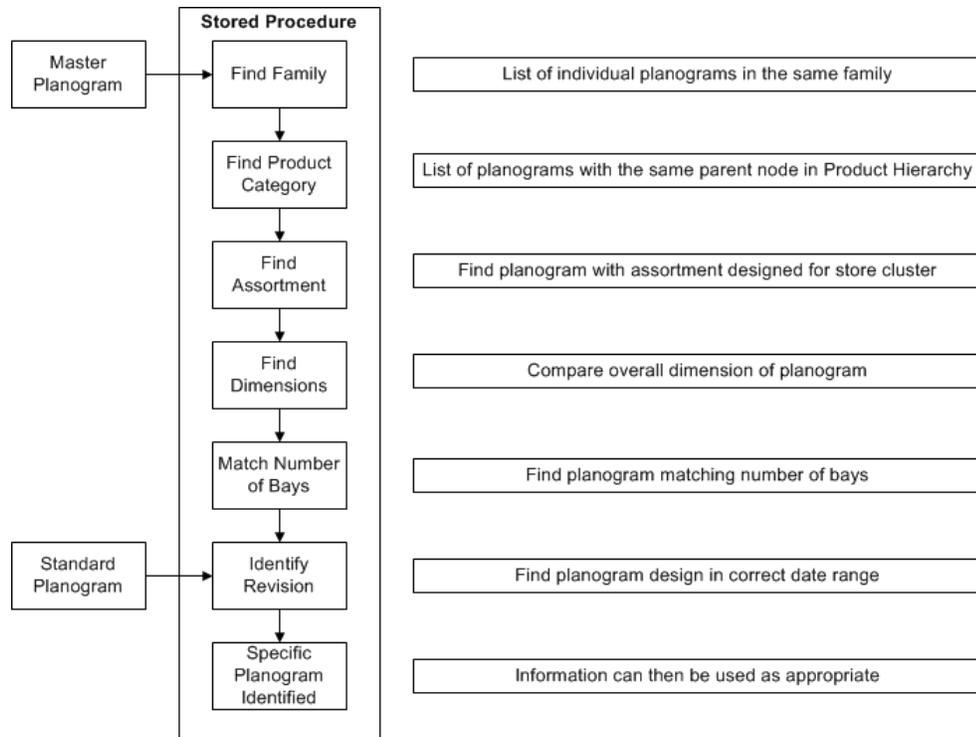
- The floor plan publishing batch process determines if the floor plan has been superseded by a more recent design. If so the floor plan would be published (and later made current). If a floor plan contains purely master planograms, the general reason for revising the floor plan would be to change the position of those master planograms. If the position is not changed, there would be no need for a revised floor plan.
- The planogram publishing batch process identifies the individual planograms associated with each master planogram. If it identifies a new or revised planogram that has met or exceeded its publish date, the planogram will be published (and later made effective).

The advantage of master planograms can thus be seen: if individual planograms were used, the floor plan would need to be updated and republished each time a planogram was changed. With this method the floor plan only needs updating when the space allocated to categories/sub-categories is changed. This saves effort in the store planning process.

Overview of Selection Method for Individual Planograms

The basic flow for selecting the individual planogram related to a master planogram is shown in the flowchart below. The core of the process is a stored procedure which is referenced by other parts of the application - for example the batch process for publishing planograms. This stored procedure is customizable. Providing the basic parameters are left unchanged it can be modified to meet retail chain specific requirements.

Note: Individual aspects of the process will be discussed in more detail later.



Steps in Selection Method

Note: This is a simplified form of the flowchart used to explain the basic concepts. The information used will obviously vary from retail chain to retail chain.

1. Finding Planograms of a Common Family

The first stage of finding an individual planogram is to list all planograms that belong to the same family that has been assigned to the Master Planogram. This family is identified in the **Family Code** field of the Details tab of the Planogram Design dialog box.

2. Find Product Category Master Planogram Belongs To

The next stage is to find the subset of individual planograms that belong to both the same Family and Product Category as the Master Planogram. The Product Category is identified in the **Parent Product** field of the Properties tab of the Planogram Design dialog box.

3. Find Assortment

The sub-set of individual planograms can be further reduced in size by looking for planograms with a product assortment that matches the Master Planogram. This information is held in the **Assortment Code** field of the Details tab of the Planogram Design dialog box.

4. Find Dimensions

The Master Planogram will have been placed on one or more fixtures. The dimensions of those fixtures will be summed to find the overall dimensions for the planogram - for example 12 feet. The subset of individual planograms is further reduced to match the cumulative dimensions of the fixtures the master planogram has been placed on. This information is displayed in the **Size** field of the Properties tab of the Planogram Design dialog box.

5. Find Number of Bays

As part of the continuing process of reducing the number in individual planograms in the sub-set matching the data for the master planogram, the number of fixtures the master planogram has been placed on is compared to the number of bays the individual planogram is designed for. This enables the software to differentiate between a 12 foot planogram made up for 3 x 4ft bays and a 12 foot planogram made up for 4 x 3ft bays. The number of bays is displayed in the **Number of Bays** field of the Properties tab of the Planogram Design dialog box.

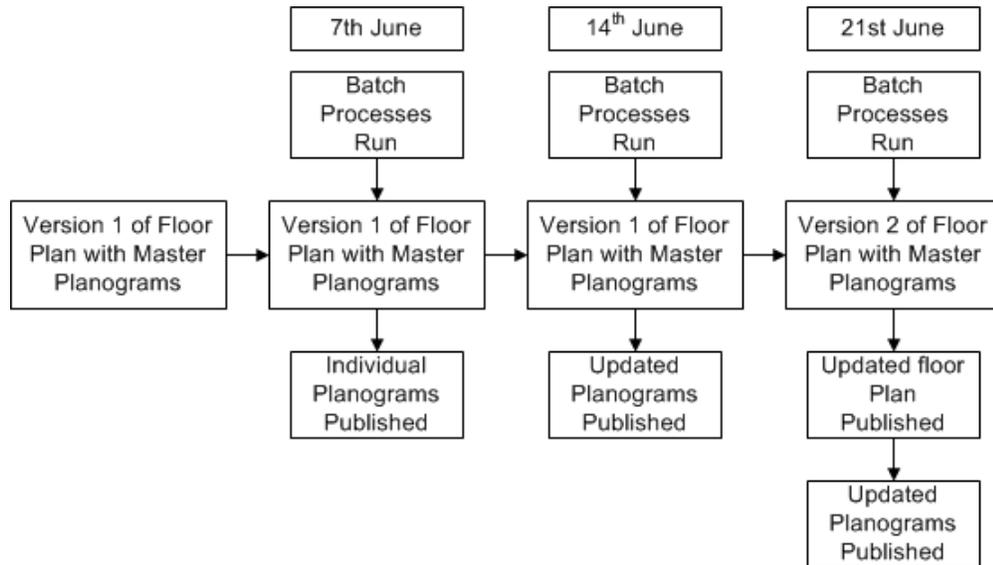
6. Identify Revision

The final stage in identifying the individual planogram to use relative to the Master Planogram is to look at the **Publish Date** and **Effective Date**. These are used to determine whether an existing planogram should be replaced by a newer one. If the Publish Date has been met or exceeded, running the batch process will result in the planogram being published. If the Effective Date has been met or exceeded, running the batch process will result in the planogram being made current.

Note: If no specific individual planogram could be identified, this should be identified by a process set up by the retailer. Failure to do so may result in problems with the replenishment system.

Example of Use

The following simplified example shows the Master Planogram functionality in use.



1. Version 1 of the floor plan is in service.

This version of the floor plan has been in service for some time.

2. Batch Processes Execute on 7th June.

The Floor Plan batch processes executes on the 7th June. It does not find a more recent floor plan with a Publish or effective date that has been met or exceeded, so the current version of the floor plan remains in force. The Planogram Publishing batch process also executes. It identifies any individual planograms associated with Master Planograms that have Publish Dates or Effective Dates met or exceeded and with publishes them or makes them current.

3. Batch Processes Execute on 14th June.

The Floor Plan batch processes executes again on the 14th June. It still does not find a more recent floor plan with a Publish or effective date that has been met or exceeded, so the current version of the floor plan remains in force. The Planogram Publishing batch process also executes. It identifies any individual planograms associated with Master Planograms that have Publish Dates or Effective Dates met or exceeded and updates as required..

4. Batch Processes Execute on 21st June.

The Floor Plan batch processes executes again on the 21st June. The floor plan publishing process finds another version of the floor plan with a Publish Date that has been met or exceeded, so the floor plan is published. The Planogram Publishing batch process also executes. It identifies any individual planograms associated with Master Planograms that have Publish Dates or Effective Dates met or exceeded and updates as required.

On the 7th June and 14th June the floor plan did not require modification and thus the use of master planograms streamlined the store planning process.

Working with Master Planograms

The master planogram functionality

Identifying Master Planograms

Master Planograms can be identified in the planogram hierarchy by the icons.

Icon Description

 Master Planogram

 Standard Planogram

The simplest way to identify master planograms in the floor plan is via a KPI. This KPI is not provided by default with the application and must be configured during implementation. The details will vary from retail chain to retail chain, but the KPI will generally show:

- Planograms that are individual planograms.
- Master planograms that have individual planograms mapped to them.
- Master planograms that not have individual planograms mapped to them.

Unmapped Master Planograms

If there are master planograms that not have individual planograms mapped to them there will be problems as (depending on how they were configured) the master planogram may be published. This will result in a planogram design that probably can't be executed being sent being sent to the store and incorrect information being sent to the replenishment system. Accordingly, if unmapped master plan

Placing Master Planograms

Master Planograms are placed in a similar way to individual planograms.

1. The required number of fixtures is selected.
2. The master planogram is highlighted in the planogram hierarchy in the Object Browser.
3. The Add button is clicked on the toolbar.
4. The master planogram will place.

Master Planogram Functionality in ISSC

There are two items of functionality that users can use manually verify that master planograms have mapped to individual planograms.

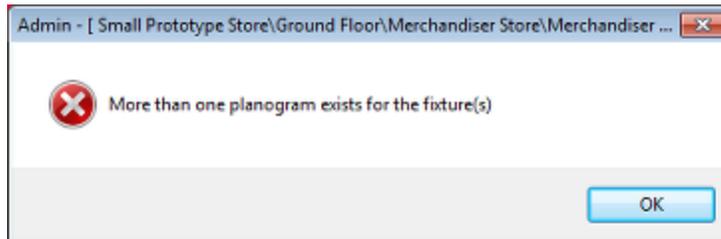
Print Planogram

The Print Planogram functionality is accessed from the toolbar. This will bring up the Print Planogram dialog box. Ensure that the value in the **Floor Plan Date** field is set beyond the Publish Date of the planogram. The master planogram in the floor plan will have been substituted for by an individual planogram - the functionality having mapped the correct individual planogram to the master planogram. On clicking **Print**, the individual planogram will print to the designated printer, confirming the master planogram has mapped correctly.

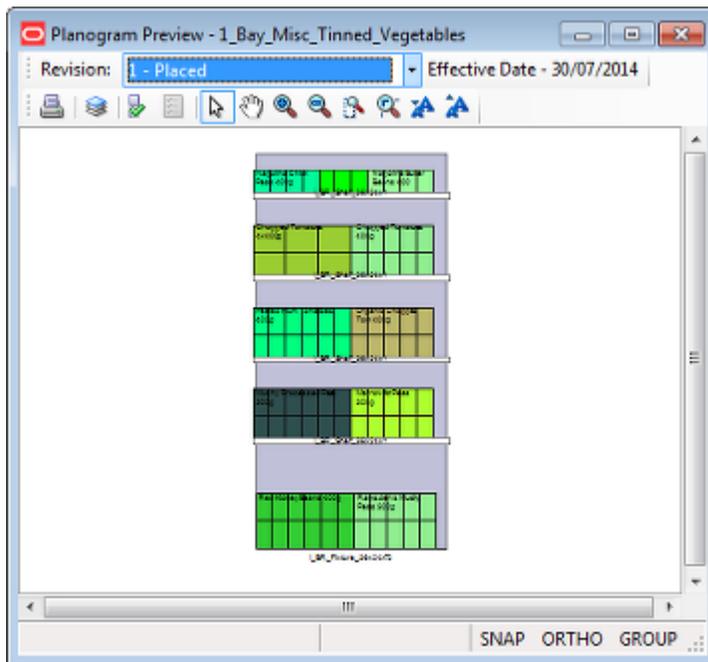
Next, click Planogram Preview on the toolbar.



If the fixtures selected contain multiple planograms, an error message will result. The fixture selection will then have to be modified.



If the fixtures selected only contain a single planogram, the Planogram Preview window will open.

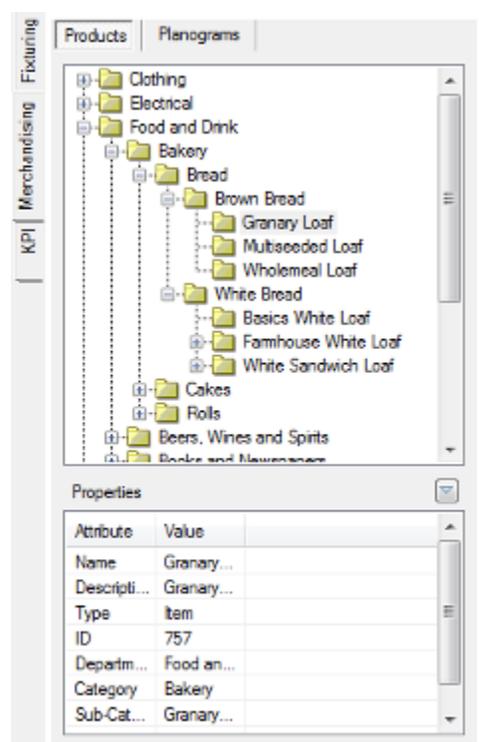


- If there is no individual planogram mapped to a master planogram, the master planogram will be displayed.
- If there is an individual planogram mapped to a master planogram, the individual planogram will be displayed.

Product Operations

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. Products can only be merchandised down to **Item** level in Top Graphical view. In order to merchandise down to Display Style level, merchandising must be carried out in Front Graphical view or Shelf Graphical view. There are then two ways to add products: by clicking on the **Assign Merchandise** icon and by dragging and dropping.



Using the Assign Merchandise Icon

When the product has been selected, the **Assign Merchandise** icon (which may have been grayed out) will become active.

1. Select the fixtures to be populated.
2. Click Assign Merchandise in the toolbar. The selected product will be added to the specified fixtures.

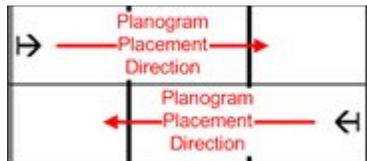
Dragging and Dropping

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.

Another way of merchandising is to drag and drop a product from the product hierarchy. To do this, highlight an item in the product hierarchy then, with the left mouse button held down, drag the mouse cursor over the fixture it is intended to merchandise. When the mouse cursor is over the fixture, it will change to one of two forms.

The unidirectional arrow indicates that product placement will occur in the direction indicated by the arrow. It will appear when the mouse cursor is brought close to the left or right side of the fixture. The unidirectional arrow indicates that existing merchandise will be shuffled along the gondola in order to make room for the merchandise being placed. How the merchandise is shuffled will depend on the Sort Leftmost, Wrap on Insert and Use Promotional Fixtures settings in the Options dialog box. How shuffle operates is also independent of the effects of the MULTI_MERCH_PROFILE system variable.



Note: Fixtures will also be populated according to the choices selected in the Merchandising Frame of the Options dialog box.

Restrictions of the Product Hierarchy

While in Top Graphical View, the product hierarchy is only available down to **Item** level. In order to place or edit products at more level of detail (for example at Display Style level), the user must be in Front Graphical View or Shelf Graphical View

Effect of the MULTI_MERCH_PROFILE System Variable

The MULTI_MERCH_PROFILE system variable is configured in the Administration Module of Macro Space Management. It has a global effect on how users may add merchandise in In-Store Space Collaboration. Depending on its setting users may be able to:

- Put multiple products onto the same fixture.
- Only add a product if there is room.
- Automatically remove other products when adding a new product if there is insufficient room.

ISSC users should consult their administrator to determine which option is in use.

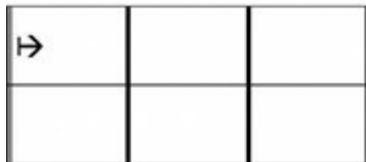
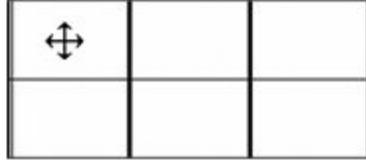
Selecting Fixtures to be Merchandised

There are two broad ways that fixtures can be selected for products to be added.

- Drag and Drop
- Pre-Selection

Drag and Drop

One way of merchandising is to drag and drop an item of merchandise from the product hierarchy. To do this, highlight an item in the product hierarchy then, with the left mouse button held down, drag the mouse cursor over the fixture it is intended to merchandise. When the mouse cursor is over the fixture, it will change to one of two forms.



The multi-directional arrow in the top set of fixtures indicates that only that fixture has been selected to have products added. The unidirectional arrow in the bottom set of fixtures indicates that merchandising will occur in the direction indicated by the arrow and any existing merchandise will be moved to make room prior to placement. It will appear when the mouse cursor is brought close to the left or right side of the fixture.

Note: As products are only added to a single fixture during a 'drag and drop' operation, the unidirectional arrow will have no practical effect

Pre-selection

The other way of adding products to a fixture is to preselect the fixtures before adding products. 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

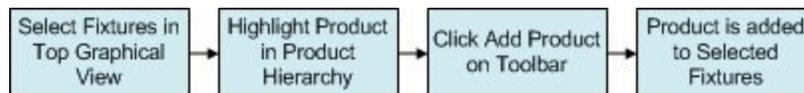
A Crossing Selection is made using a selection box where the cursor is moved to the left of the original selection point. Crossing Selections have a dotted outline and include all fixtures totally or partially within the selection box.

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.

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 dialog box.

Once the fixtures have been selected, products can be added as follows:



Canceling the Selection of Fixtures to be Merchandised

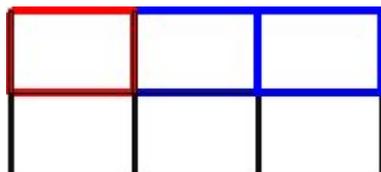
Where fixtures have been pre-selected for merchandising, selection can be cancelled in two ways:

- Individually clicking on fixtures
- Using the Escape Key

Individually clicking on fixtures

When multiple fixtures are selected, the initial fixture selected will be highlighted in one color; the second and subsequent fixtures in a different color.

Note: The colors for the first and subsequently selected fixtures are specified in the Options dialog box.



1. If the initial fixture in the selection set (differentiated by its color) is clicked for a second time, all selected fixtures will be de-selected.
2. If any other fixture in the selection set is clicked for a second time, only that fixture will be removed from the selection set.

As fixtures are removed from the selection set, their highlighting will also be removed.

Using the Escape Key

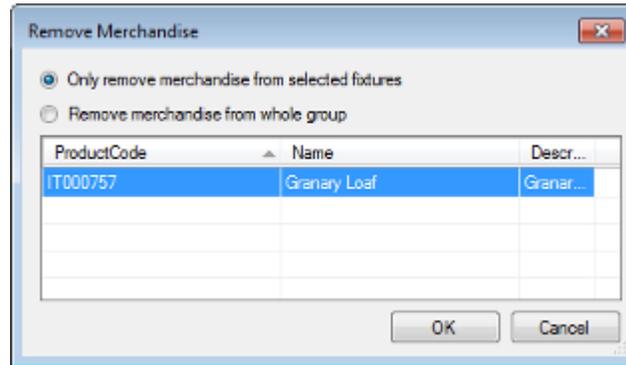
Clicking Escape cancels all selections.

Removing Products

Products can be removed by using the Delete icon on the Products toolbar while in the Merchandising Tab of the Object Browser.

To remove a product:

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



Note: The dialog box can be resized.

3. Click the Radio button at the top of the dialog box to switch between the two options.
 - a. Click Only remove merchandise from selected fixtures to remove products from the selected fixtures.
 - b. 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.

4. The window shows all products on the selected fixtures. Select a single product to be removed from the list.
5. 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.

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

Planogram Operations

Adding Planograms

Planograms can be added while in the Planogram sub-tab of the Merchandising tab of the Object Browser. The method of adding planograms is identical for master planograms and specific individual planograms.

Setting the Planogram Filters

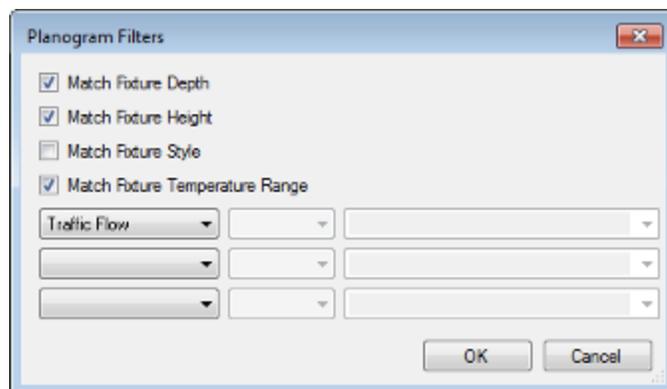
When adding planograms to a floor plan, it is important to ensure that planograms are placed onto fixtures of the correct size and type. Failure to do so may result in problems when the planograms are executed in the store. At worst case a planogram may be placed on an incompatible fixture - for example a planogram that is designed for a freezer unit could be placed on open shelving.

Even if the planogram can be placed, there could still be compliance issues. For example if the planogram is designed for fixtures totaling 12 feet long and it is placed on fixtures only 10 feet long, the person setting the planogram in the store may reduce the number of facings to get it to fit. The planogram will then perform worse than designed because the product visibility is less than intended.

The planogram filters are set in the Planogram filters dialog box. This is accessed from the toolbar when the Planogram sub-tab of the Merchandising Tab is selected in the Object Browser.



This will bring up the Planogram Filters dialog box. The default settings for this dialog box on initial opening of ISSC are specified using the IN-STORE_DEFAULT_POG_FILTERS system variable. This is set using the System Variable dialog box (General Menu) in Macro Space Management's Administration Module.



Planogram Filter Options

- **Match Fixture Depth:** This option will ensure the planogram is placed on fixtures the same depth as it was designed for. If a fixtures is of shallower depth, there will be less products on the fixture and hence a greater risk of out of stocks.
- **Match Fixture Height:** This option will ensure that the fixture is the same height as the planogram is designed for. If the fixture is a different height, it may not be possible to set the shelves at the designed height.
- **Match Fixture Style:** This option will ensure the planogram goes onto compatible fixtures. For example car batteries might need to go onto a fixture with a 'heavy weights' style because standard fixtures will bot withstand the load.
- **Match Fixture Temperature:** This option will ensure that products requiring temperature control (such as butter and cheese) go onto chiller fixtures and not freezers or standard shelving.

Planogram Filter Drop Down Options

The planogram filter drop down options are configured in the **Custom SQL** table in the database. Only database administrators can make the necessary changes. The left hand drop down list enables the user to set a filter, the middle the comparison operator and the right hand text box/ drop down list the data to be used as a basis for comparison.

The following comparison operators can be used when filtering planograms for placement.

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
=<	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

Operator	Result
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 may offer a more restricted list.

Examples of the use of filters include:

- Description = Baked Beans* will find all examples of baked 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:

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, and so on.
- Beer-???? will find Beer-1664, Beer-Lite, and so on.
- 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.

Selecting Fixtures for Adding Planograms

There are two broad ways that fixtures can be selected for planograms to be added.

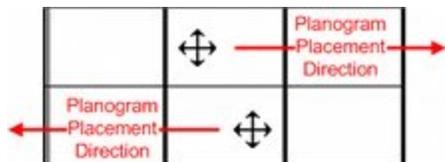
- Drag and Drop
- Pre-Selection

Drag and Drop

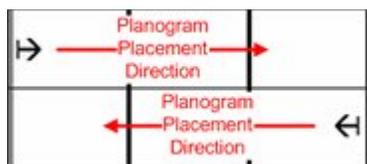
One way of merchandising is to drag and drop a planogram from the planogram hierarchy. To do this, highlight an item in the planogram hierarchy then, with the left mouse button held down, drag the mouse cursor over the fixture it is intended to merchandise. When the mouse cursor is over the fixture, it will change to one of two forms.

If the planogram is multi-bay the following will apply:

1. The multi-directional arrow indicates that the planogram will be placed in a direction indicated by the cursor position. If the cursor is over to the left of the fixture, the additional bays of the planogram will be placed to the right. If the cursor is over to the right, the additional bays will be placed to the left.



2. The unidirectional arrow indicates that planogram placement will occur in the direction indicated by the arrow. It will appear when the mouse cursor is brought close to the left or right side of the fixture. The unidirectional arrow indicates that existing merchandise will be shuffled along the gondola in order to make room for the merchandise being placed. How the merchandise is shuffled will depend on the Sort Leftmost, Wrap on Insert and Use Promotional Fixtures settings in the Options dialog box. How shuffle operates is also independent of the effects of the MULTI_MERCH_PROFILE system variable.



Note: Fixtures will also be populated according to the choices selected in the Merchandising Frame of the Options dialog box.

Pre-selection

The other way of adding planograms to a fixture is to preselect the fixtures before adding merchandise. 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

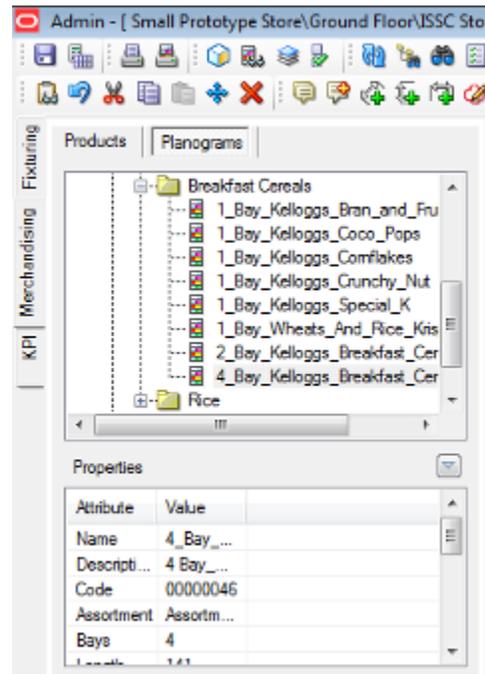
A Window Selection is made using a selection box where the cursor is moved to the right of the original selection point. Window Selections have a solid outline and only include fixtures totally within the selection box. When selected by Individual, Crossing or Window Selection, the outline of the fixture increases in thickness and changes in color.

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 dialog box.

The sequence in which the fixtures are populated for a multi-bay planogram will be governed by whether Sort Leftmost is selected in the Options dialog box.

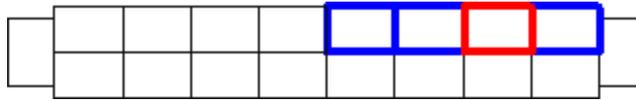
Adding Planograms

Once the planogram filters have been set, planograms can now be placed. The initial step is to select the required planogram from the Planogram Hierarchical Tree in the Object Browser.



How planogram addition goes beyond this point depends on a number of factors including the setting of the MERCH_MULTI_PROFILE system variable in Macro Space Management's Administration module and whether the planogram is being added by pre-selecting fixtures or by Category Insertion. This example deals with adding planograms by preselecting fixtures. There is more information on adding planograms by Category Insertion in the pertinent section.

The next state is to highlight the required fixtures.



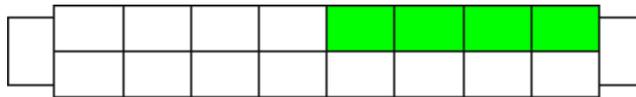
The first fixture selected is highlighted in red, with successive fixtures highlighted in blue. How the planogram will place depends on where the Select Leftmost option has been checked in the Options dialog box. It also depends on whether the Reverse Planogram option has been toggled on in the toolbar.

- If Sort Leftmost is on, the planogram bays will place in a left to right sequence as viewed from the front of the fixture.
- If Sort Leftmost is off, the planogram bays will place in the sequence the fixtures will be selected. In the above example, the first bay of the planogram will place towards the centre of the planogram.
- If Reverse Planogram is selected, the planogram will place in reverse sequence, i.e. with the last bay being placed first.

The final stage is to select the Add Planogram option on the toolbar.



This will cause the planogram to add.

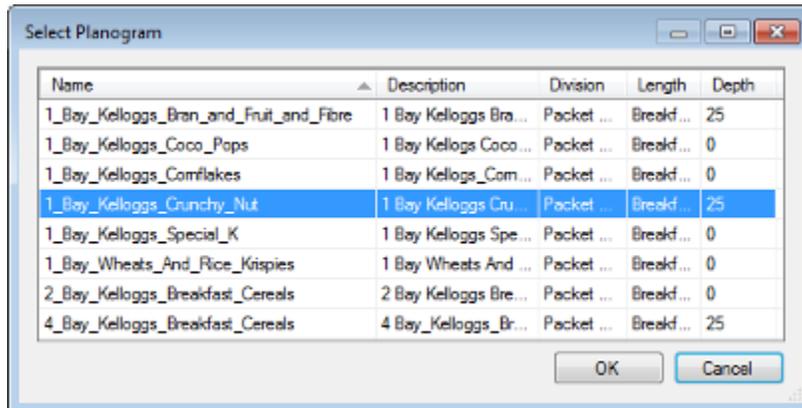


Annotation (not shown) will be added at the same time as the planogram is added.

Adding repeated planograms of the same class

To add repeated planograms of the same class:

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

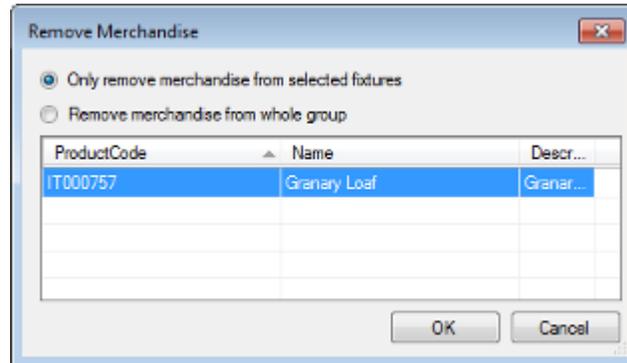


4. Highlight the required planogram, and then click OK.

Removing Planograms

Planograms can be removed while in the Merchandising tab of the Object Browser. To remove a planogram:

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



3. Click the Radio button at the top of the dialog box to switch between the two options.
 - a. Click Only remove merchandise from selected fixtures to remove products from the selected fixtures.
 - b. Click Remove merchandise from whole group to remove the specified planograms from other (unselected) fixtures as well as the selected one.
4. The window shows all planograms on the selected fixtures. Select one or more planograms to be removed from the list.
5. Click OK to remove the select products from the drawing.

Scanning Planograms

Compliance

Compliance is a major issue for retail chains with studies showing that a significant number of planograms in a store are incorrectly placed, placed on fixtures of an incorrect size or are not correctly set. This can cause a number of problems including:

- Actual planogram performance being different to planned planogram performance because the planogram is in the wrong location.
- Planograms performing differently to that planned because they are on the wrong sized fixtures and the planogram cannot be executed as designed.
- Products in planograms performing different to planned because they are in the wrong position or have a different number of facings.

ISSC's planogram scanning functionality is intended to help retailers address the problem. This can be done by:

1. Scanning products on a planogram in the store to identify the planogram.
2. Verifying in Top Graphical View that the planogram is in on the intended fixtures and that the fixtures are the correct size.
3. Verifying in Planogram Preview that the shelves and products are correctly positioned according to the planogram design.

Note: Once the planogram has been identified, it is also possible to print off information using the Print Planogram option on the toolbar.

Using Planogram Scan

ISSC allows users to attach a barcode scanner to the computer being used (normally a laptop). If the laptop and store are wifi enabled, the user can go to a specific location in the store and start scanning product bar codes. As each successive bar code is scanned, the software will suggest a list of possible planograms. When enough products have been scanned, the list of possible planograms should be narrowed to the planogram on the fixtures. This will allow the user to identify an unknown planogram or to verify the planogram in place is that specified in the store plan.

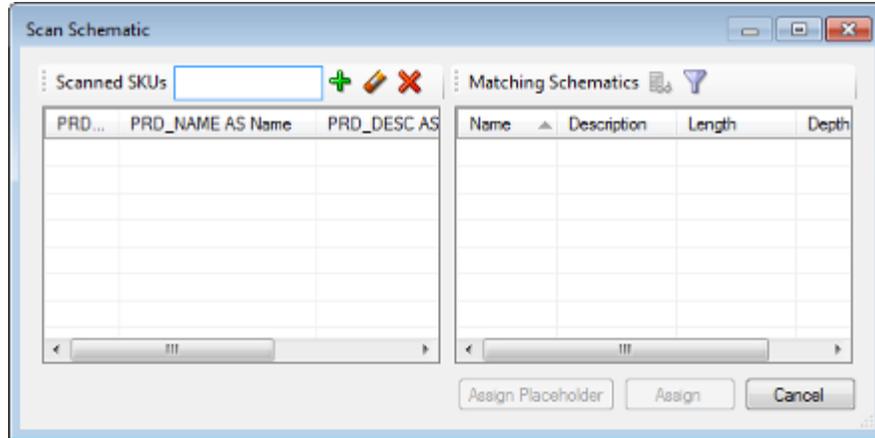
Using the Functionality

To invoke the functionality click the Planogram Scan icon on the toolbar. There are two ways of entering the SKU code for a product in the planogram: manually or by a device such as a barcode scanner.



Manually entry is done by typing the SKU code into the Scanner SKUs field of the Planogram Scan dialog box. If a barcode scanner is attached to your computer and the scan button is clicked the field will be automatically populated. To add to the list of products below, click the Add button. 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 type of scanner, it may be necessary to click the Scan button in the program then press the trigger on the scanner.



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.

Add Button

The Add button will add the current SKU code to the list of previously scanned codes. The more codes that have been scanned, the more accurate the identification of the planogram will become.

Clear Button

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

Delete Button

The delete button allows the user to remove single or multiple items from the list of scanned merchandise. This is useful if the user 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 Planogram Preview.

Assign Placeholder Button

If no matching planogram can be found, then the user 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, the user 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 Planogram Scan dialog box will close.

The following rules apply:

- If the planogram is longer than the selected fixture(s) length, then the last bays of the planogram will not be placed.
- If the planogram is shorter than the selected fixture(s) length, the planogram will only be placed on the fixtures it has sufficient bays to populate.

Cancel Button

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

Category Insertion for Products and Planograms

Overview of Category Insertion

Category Insertion provides a way of repositioning products and planograms on fixtures without the need to delete and replace them. It can only be used for individual planograms, not master planograms.

Note: Fixture Adjacencies should have been calculated before using Category Insertion.

Effect of the MERCH_MULTI_PROFILE System Variable

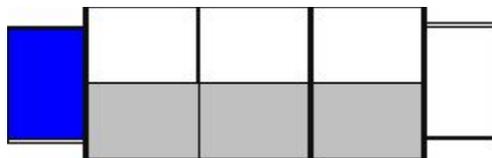
The MULTI_MERCH_PROFILE system variable is configured in the Administration Module of Macro Space Management. It has a global effect on how users may add merchandise in In-Store Space Collaboration. Depending on its setting users may be able to:

- Put multiple products or planograms onto the same fixture.
- Only add products or planograms if there is room.
- Automatically remove other merchandise when adding a new product or planogram if there is insufficient room.

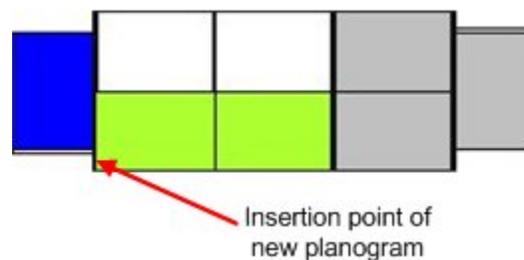
ISSC users should consult their administrator to determine which option is in use.

Example of Inserting a New Planogram

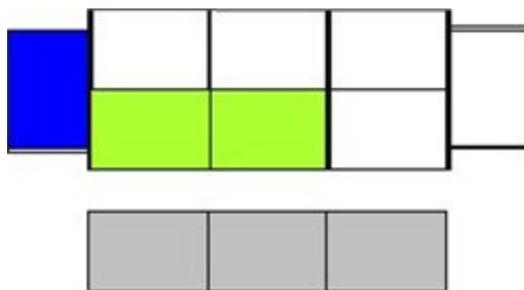
Consider the following small gondola with two planograms already placed.



The user has the option of inserting other product placeholders or planograms onto the gondola. If there is space, the existing planograms will move to make room.



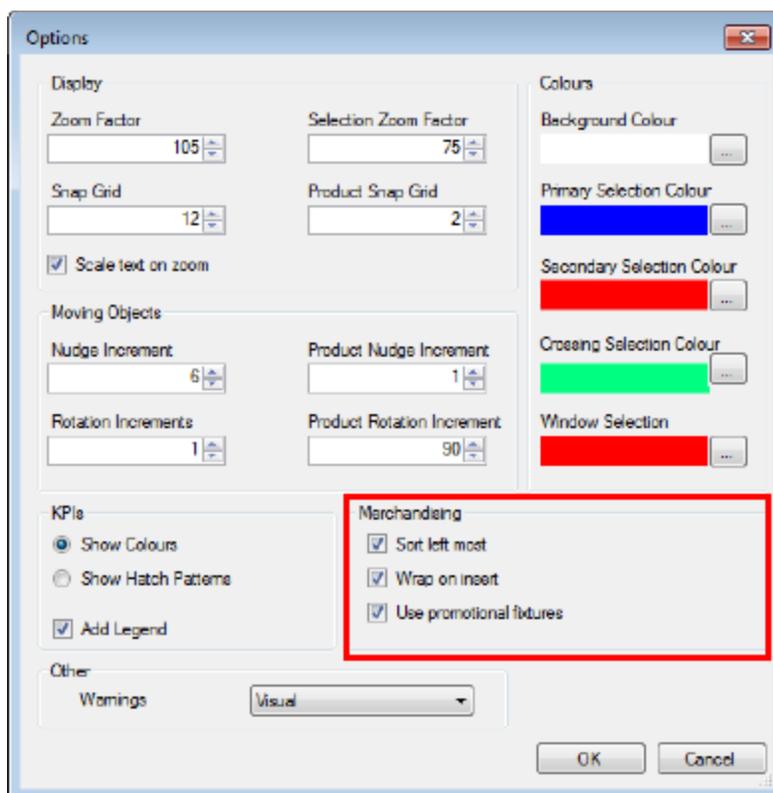
The user also has the option of temporarily moving existing planograms to the floor to make room for other product placeholders or planograms on the gondola.



These planograms can either be 'dragged and dropped' to another position on the gondola, or moved to other fixtures or gondolas.

Options Dialog Box

How Category Insertion behaves depends on settings in the Options dialog box (accessed from the toolbar).



If checked:

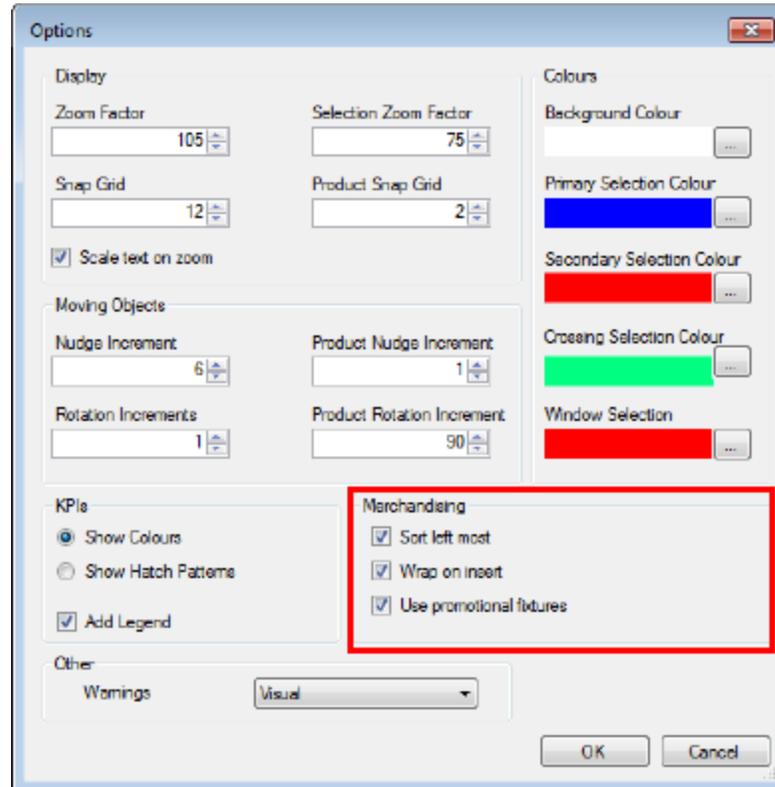
- Sort left most will populate the fixtures from the left most first as viewed from the front of the fixtures. (This has no influence on Category Insertion).
- Wrap on insert will allow fixtures on more than one side of the gondola to be populated.
- Use Promotional Fixtures will allow fixtures that have been tagged as promotional fixtures to be populated.

Adding Products to a Gondola

Category insertion enables a user to add product placeholders to a gondola, with the existing product placeholders or planograms moving to make room if required.

Note: Fixture Adjacencies should have been calculated before using Category Insertion.

Two of the settings in the Options dialog box affect how Category Insertion operates:



1. Wrap on Insert determines whether the product placeholders being inserted will be confined to a single side, or allowed to 'wrap' round onto other sides of the gondola.
2. Use Promotional Fixtures determines whether category insertion will include fixtures designated as Promotional Fixtures, or whether these will be excluded.

Category Insertion

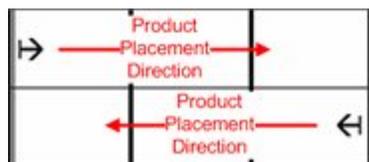
To carry out category insertion:

1. Ensure Calculate Adjacencies has been run if required. (This will require running every time fixtures/gondolas are added, moved or deleted in the floor plan).



2. Check that the appropriate settings have been made in the Options dialog box.
3. Highlight a product placeholder in the product hierarchy in the Object Browser, hold down the left mouse button and drag the planogram to the fixture it will be inserted at.

- When the mouse cursor is over the fixture, it should be brought close to the left or right side. This will cause the Category insertion icon to appear

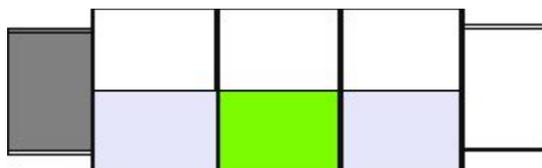


- On releasing the left mouse button, the product placeholder will place.

Note: If the mouse icon is a multi directional arrow (as opposed to the above example) then the product placeholder will be placed normally - not inserted via Category Insertion.

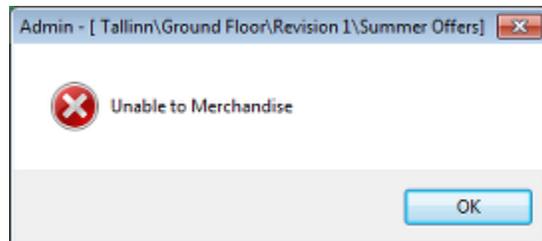
Worked Examples

Consider a small gondola with both endcaps set as promotional fixtures and with three product placeholders placed.



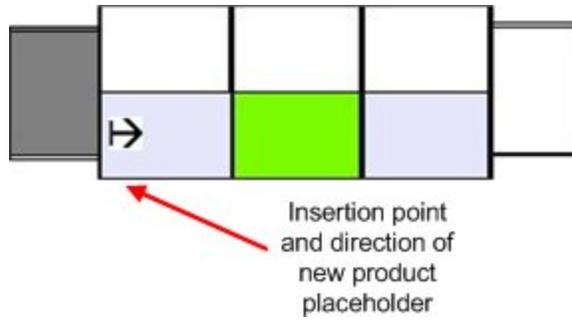
Case 1 - Wrap on Insert and Use Promotional Fixtures Off

In this case, there is no room to place an additional placeholder on the side that has already been merchandised and a warning will result.

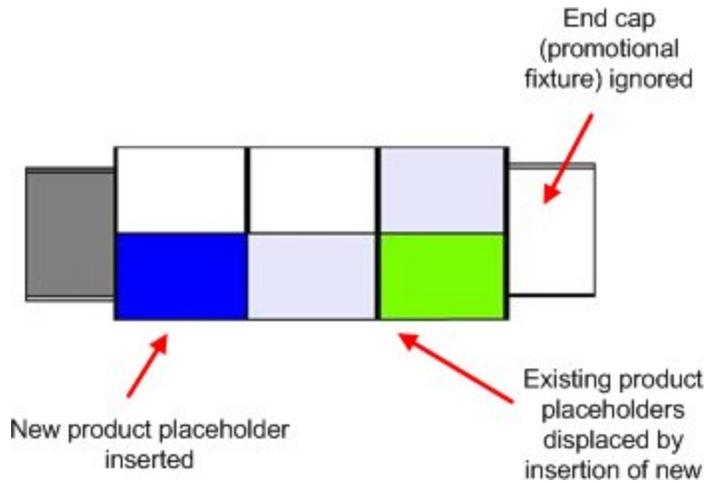


Case 2 - Wrap on Insert On and Use Promotional Fixture Off

In this case, it is possible to place an additional placeholder. The start point can be selected by selecting a planogram in the planogram hierarchy and dragging it to the required fixture. When the mouse cursor is close to the left hand side of the fixture the directional arrow appears, indicating that the other merchandise will be shifted to the right.



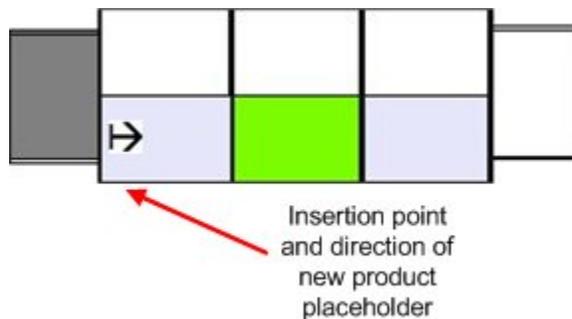
If a new product placeholder is inserted, the result is as follows:



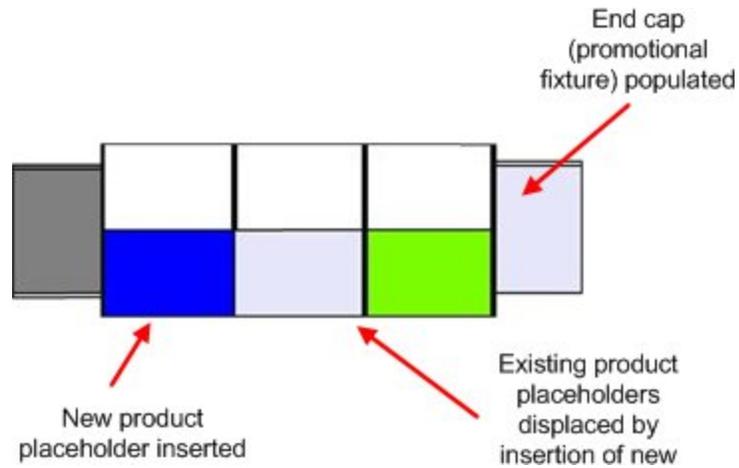
The new product placeholder has displaced the existing product placeholders to the right. Because the end cap was a promotional fixture (and Use Promotional Fixtures was off), it has not been populated.

Case 3 - Wrap on Insert and Use Promotional Fixtures On

In this case, it is possible to place an additional placeholder. The start point can be selected by selecting a planogram in the planogram hierarchy and dragging it to the required fixture. When the mouse cursor is close to the left hand side of the fixture the directional arrow appears, indicating that the other merchandise will be shifted to the right.



If a new product placeholder is inserted, the result is as follows:



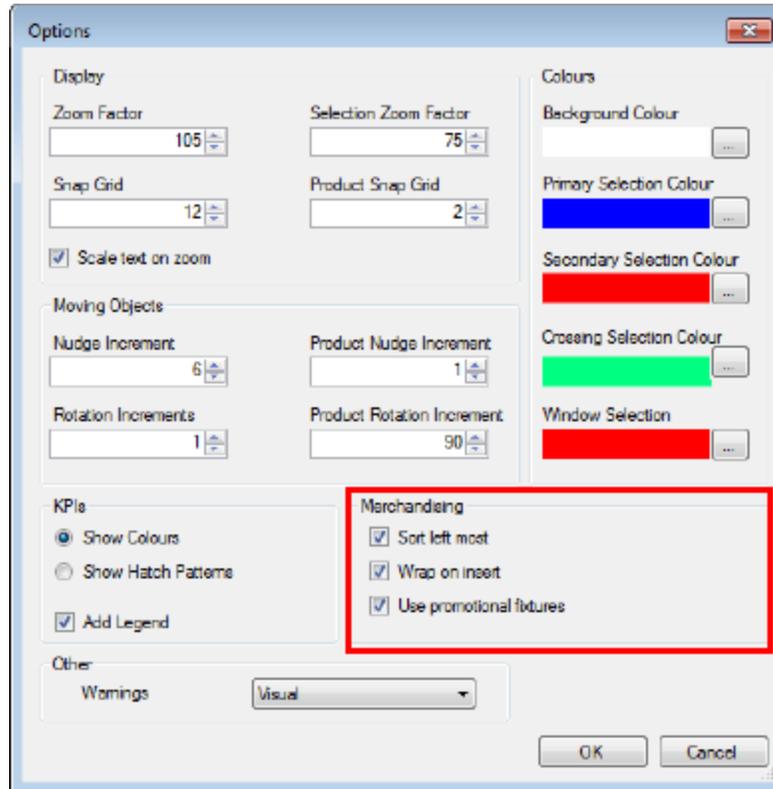
The new product placeholder has displaced the existing product placeholders to the right. Because the end cap is a promotional fixture (and Use Promotional Fixtures is on), it was populated.

Adding Planograms to a Gondola

Category insertion enables a user to add planograms to a gondola, with the existing planograms moving to make room if required. It can only be used for individual planograms, not master planograms.

Note: Fixture Adjacencies should have been calculated before using Category Insertion.

Three of the settings in the Options dialog box affect how Category Insertion operates:



1. Sort Left Most determines whether the planogram bays are added in sequence starting from the leftmost fixture as viewed from the front of the planogram.
2. Wrap on Insert determines whether the planograms being inserted will be confined to a single side, or allowed to 'wrap' round onto other sides of the gondola.
3. Add Promotional Fixtures determines whether category insertion will include fixtures designated as Promotional Fixtures, or whether these will be excluded.

Category Insertion

To carry out category insertion:

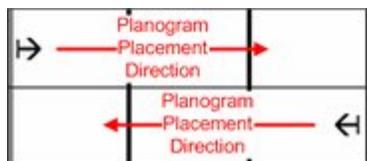
1. Ensure Calculate Adjacencies has been run if required. (This will require running every time fixtures/gondolas are added, moved or deleted in the floor plan).



2. Check that the appropriate settings have been made in the Options dialog box.
3. Verify Reverse Planogram is selected if required.



4. Highlight a planogram in the planogram hierarchy in the Object Browser, hold down the left mouse button and drag the planogram to the fixture it will be inserted at.
5. When the mouse cursor is over the fixture, it should be brought close to the left or right side. This will cause the Category insertion icon to appear

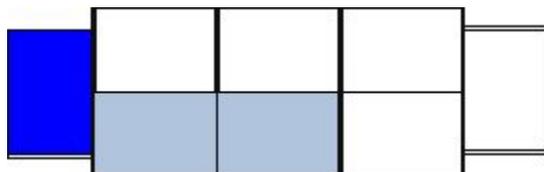


6. On releasing the left mouse button, the planogram will place.

Note: If the mouse icon is a multi directional arrow (as opposed to the above example) then the planogram will be placed normally - not inserted via Category Insertion.

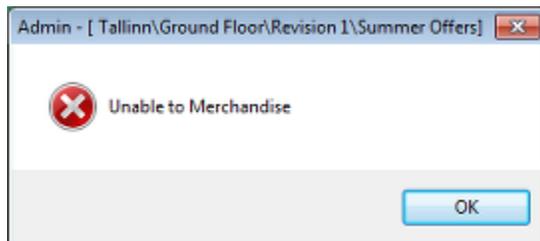
Worked Examples

Consider a small gondola with both endcaps set as promotional fixtures and with a 1 bay planogram placed and a 2 bay planogram placed.



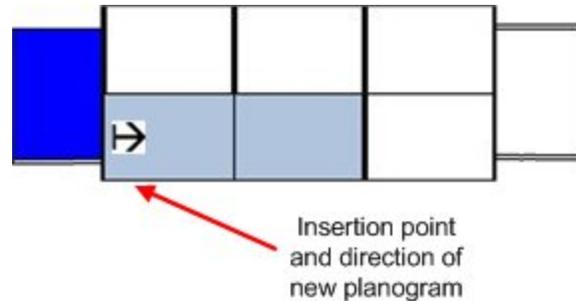
Case 1 - Wrap on Insert and Use Promotional Fixtures Off

In this case, there is only sufficient room for a 1 bay planogram to place. In the event that the user attempts to place a multi-bay planogram, no planogram will place and a warning will result.

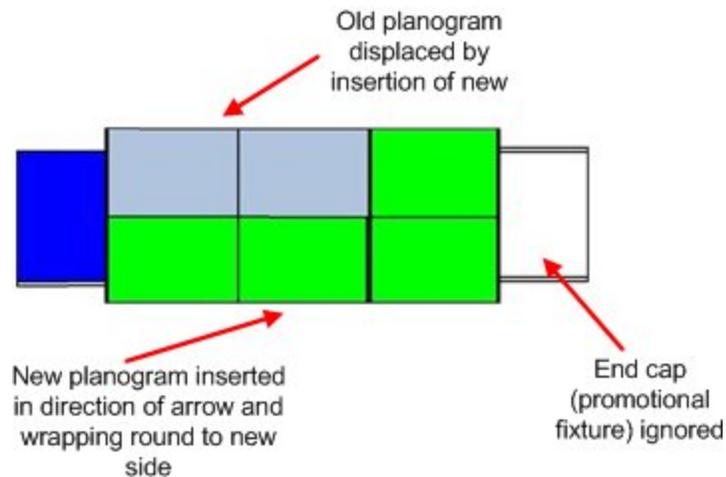


Case 2 - Wrap on Insert On and Use Promotional Fixtures Off

In this case, it is possible to place a multi-bay planogram. The start point can be selected by selecting a planogram in the planogram hierarchy and dragging it to the required fixture. When the mouse cursor is close to the left hand side of the fixture the directional arrow appears, indicating that the planogram will be inserted to the right.



If a 4 bay planogram is inserted, the result is as follows:

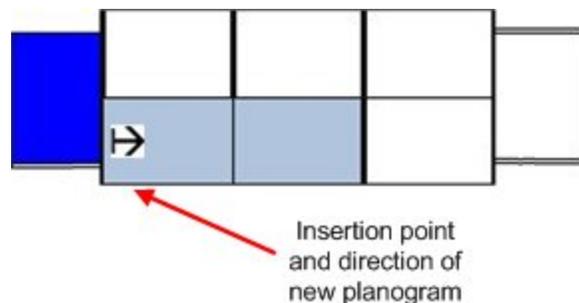


A four bay planogram has been inserted and in doing so has displaced the 2 bay planogram to the opposite side of the fixture. Because the end cap was a promotional fixture (and Use Promotional Fixtures was off), it has not been populated.

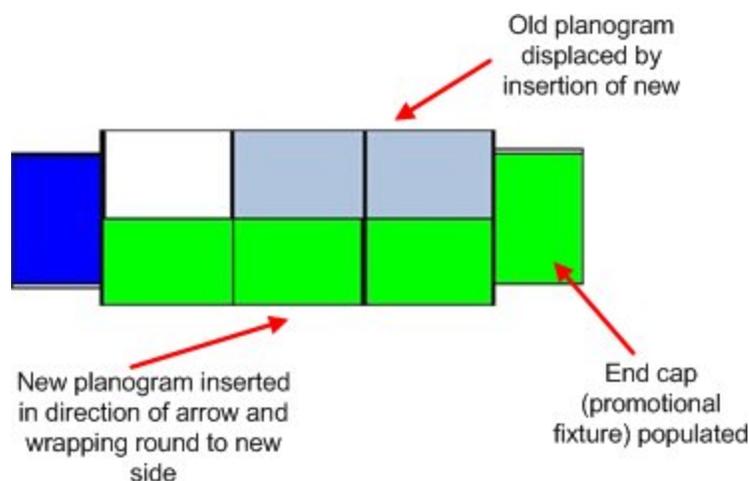
Note: The sequence the bays will insert in depends on whether Reverse Planogram (toolbar) is on or not.

Case 3 - Wrap on Inset and Promote Promo On

Again, it is possible to place a multi-bay planogram. The start point can be selected by selecting a planogram in the planogram hierarchy and dragging it to the required fixture. When the mouse cursor is close to the left hand side of the fixture the directional arrow appears, indicating that the planogram will be inserted to the right.



If a 4 bay planogram is inserted, the result is as follows:



A four bay planogram has been inserted and in doing so has displaced the 2 bay planogram to the opposite side of the fixture. Because the end cap is a promotional fixture (and Use Promotional Fixtures is on), it was populated.

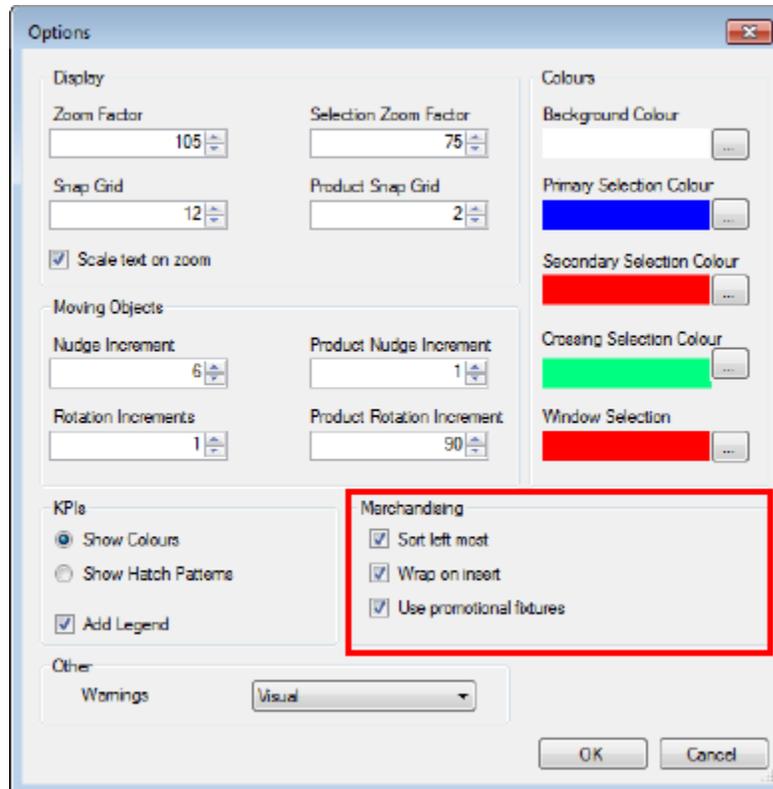
Note: The sequence the bays will insert in depends on whether Reverse Planogram (toolbar) is on or not.

Moving Products to the Floor

Category Insertion also allows planograms to be moved to the floor. This frees up space on the fixtures. The planograms on the floor can then be 'dragged and dropped' in order to rearrange them.

Note: Fixture Adjacencies should have been calculated before using Category Insertion.

As in adding planograms, two of the settings in the Options dialog box affect how Category Insertion operates when the products are moved back to fixtures:



- Wrap on Insert determines whether the planograms being inserted will be confined to a single side, or allowed to 'wrap' round onto other sides of the gondola.
- Use Promotional Fixtures determines whether category insertion will include fixtures designated as Promotional Fixtures, or whether these will be excluded.

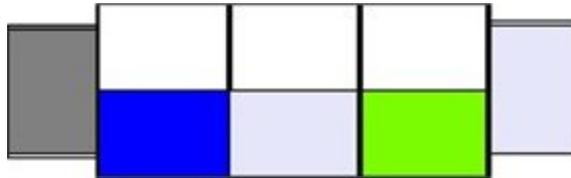
The grouping option on the status bar determines how planograms are selected.



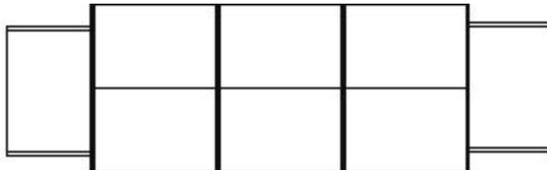
- If Grouping is Off, then all required bays of the planogram have to be selected.
- If Grouping is On, then selecting one bay of the planogram will select them all.

Moving to Floor

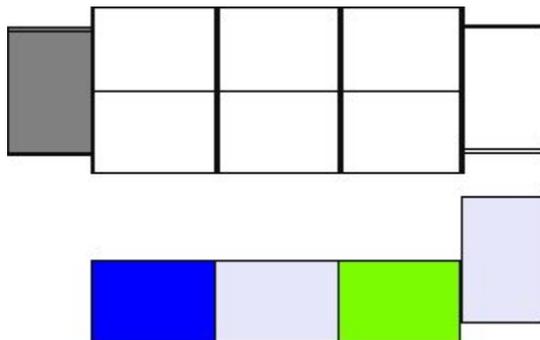
To move products to the floor, select them in the floor plan by clicking them, then drag them to the floor. The shape they occupy on the floor will depend on what is selected.



If product placeholders placed at the same time (for example the same placeholder placed onto multiple fixtures) are dragged onto the floor, they will assume a straight line.

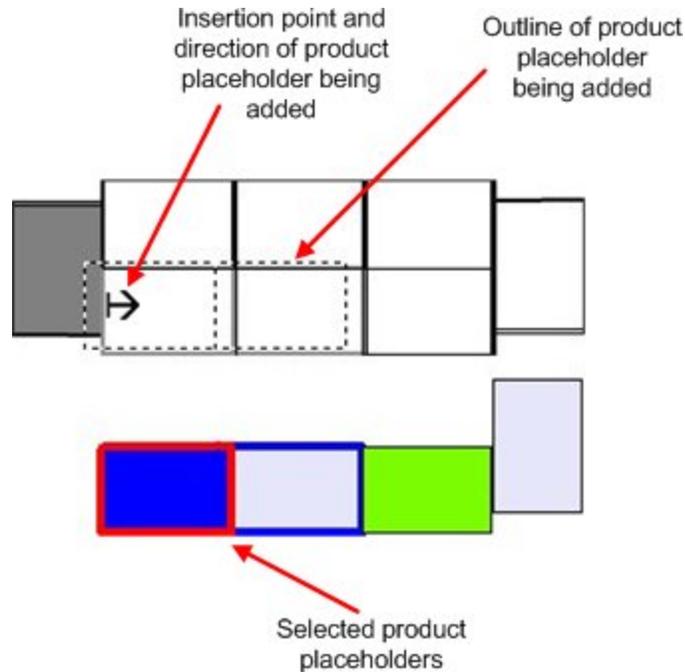


Otherwise, the product placeholders will retain the shape they occupied on the original fixtures.



Adding Back onto Fixtures

To add product placeholders back to fixtures, select the required product placeholders from the floor by individual selection or using crossing or windows selection boxes, then drag them to the required start point. The unidirectional arrow should appear to show the direction the planogram being added should be inserted in.



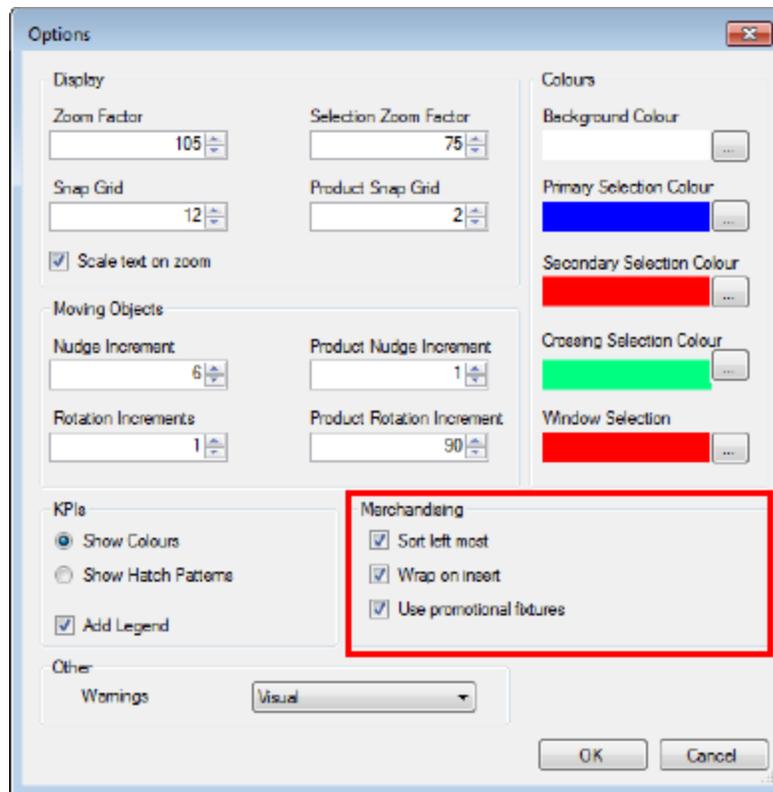
The product placeholders will then insert, displacing other product placeholders if required.

Moving Planograms to the Floor

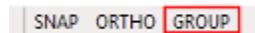
Category Insertion also allows both individual and master planograms to be moved to the floor. This frees up space on the fixtures. The planograms on the floor can then be 'dragged and dropped' in order to rearrange them.

Note: Fixture Adjacencies should have been calculated before using Category Insertion.

Add in adding planograms, two of the settings in the Options dialog box affect how Category Insertion operates when the products are moved back to fixtures:



- Wrap on Insert determines whether the planograms being inserted will be confined to a single side, or allowed to 'wrap' round onto other sides of the gondola.
- Populate Promo determines whether category insertion will include fixtures designated as Promotional Fixtures, or whether these will be excluded.
- The grouping option on the status bar determines how planograms are selected.



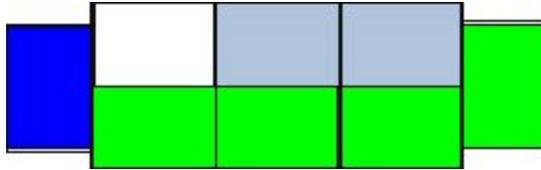
- If Grouping is Off, then all required bays of the planogram have to be selected.
- If Grouping is On, then selecting one bay of the planogram will select them all.

Finally, the Reverse Planogram option on the toolbar determines whether the planogram will be placed in normal or reversed sequence when it is placed back onto fixtures.

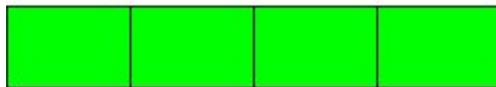
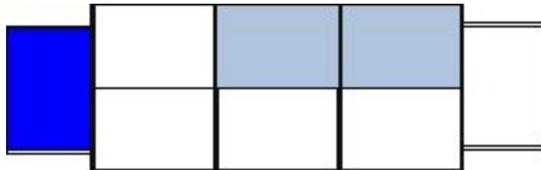


Moving to Floor

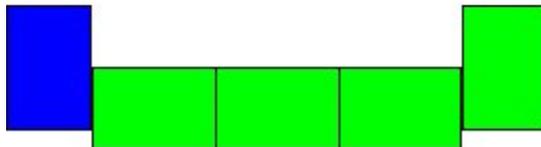
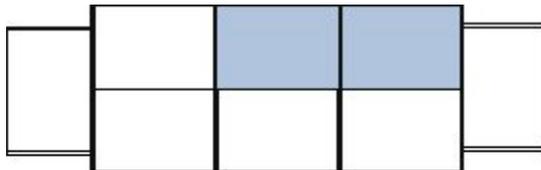
To move planograms to the floor, select them in the floor plan by clicking them, then drag them to the floor. The shape they occupy on the floor will depend on what is selected.



Consider the above gondola with a 1 bay, a 2 bay and a 4 bay planogram.



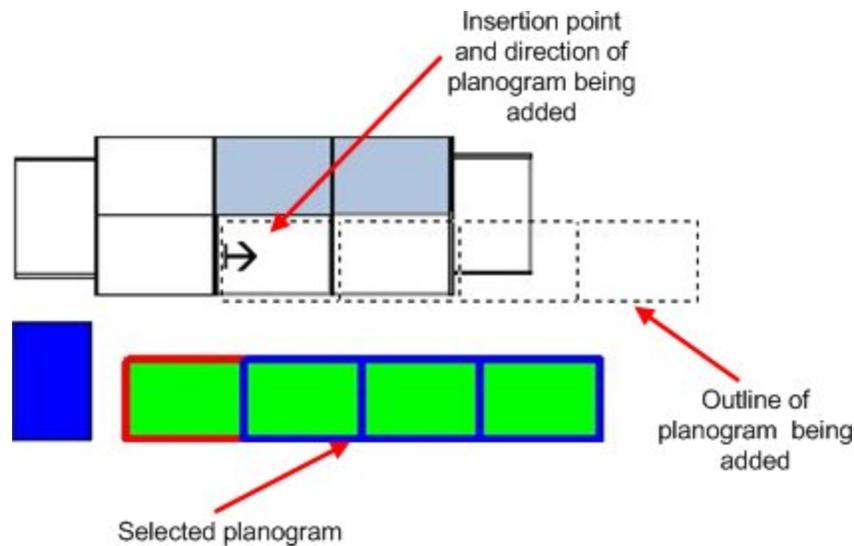
If (as above) a single planogram is selected, it will be straightened out to form a single line of bays.



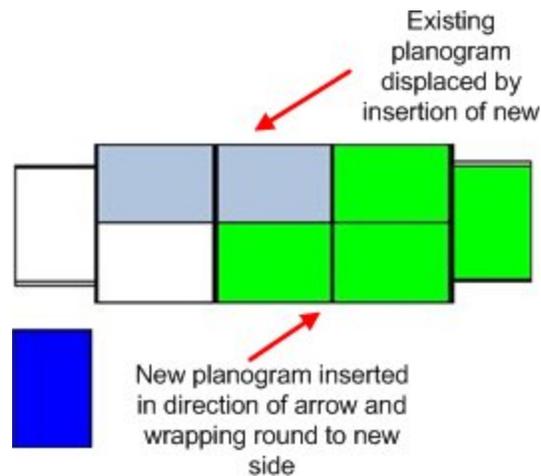
If multiple planograms are selected, then the individual bays will retain the shape they occupied on the original fixtures.

Adding Back onto Fixtures

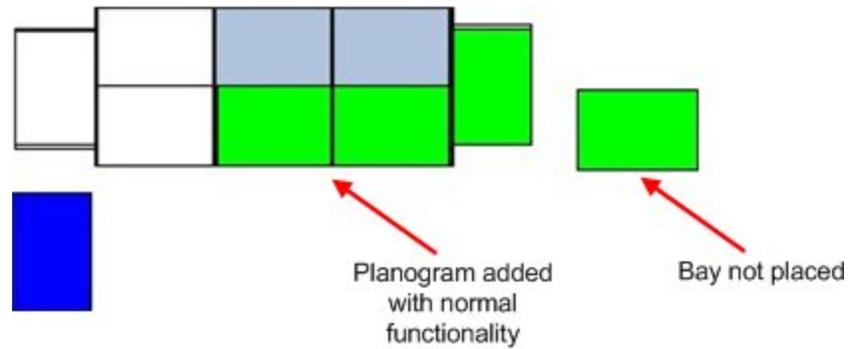
To add a planogram back to fixtures, select the required planogram from the floor by means of clicking the bays or using crossing or windows selection boxes, then drag the planogram to the required start point. The unidirectional arrow should appear to show the direction the planogram being added should be inserted in.



The planogram will then insert, displacing other planograms as required.



Users should take care that the unidirectional arrow appears - if it does not, the planogram will be added back without displacing any existing planograms.



In the above example, there was only space for three bays, and the fourth bay remains on the floor.

Considerations for Category Insertion

Leaving Product Placeholders or Planograms on the Floor

If planograms are moved on to the floor during Category Insertion operations and left there after the floor plan is saved and closed, this may have a significant effect on reporting accuracy. This is because the fixtures, products and planograms may be included in Fixture, Product and Aisle Adjacency calculations and subsequently appear in reports.

When placed on the floor, the planograms have a special parent fixture. This is called normally called Module (for metric databases) and I_Module (for Imperial databases). It is specified in the MODULE_BLK_ID system variable.

Note: It may be good practice to develop a KPI or BI Publisher report that identifies all modules in floor plans of specified status.

Moving Planograms to Fixtures of Different Size

Using Category Insertion, planograms may be moved from fixtures of one size to fixtures of a completely different size. This may result in planograms being on inappropriately sized fixtures.

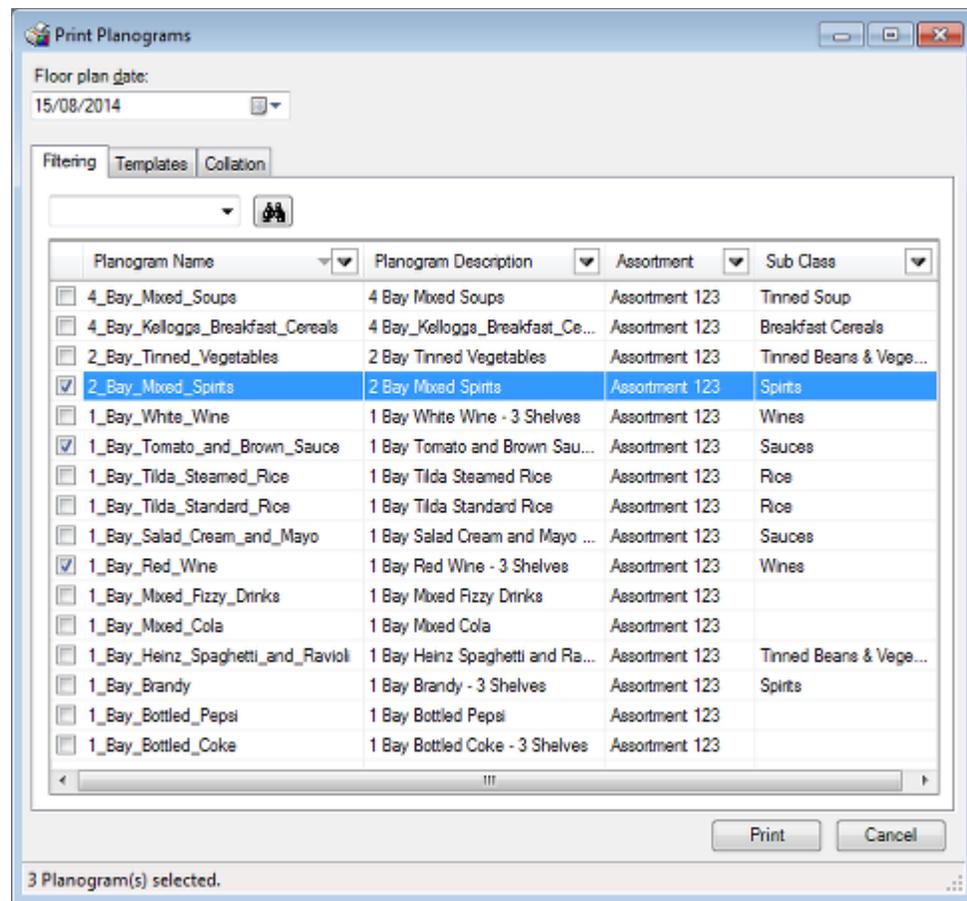
Note: It may be good practice to develop a KPI or BI Publisher report that identifies all planograms on inappropriately sized fixtures.

Printing Planograms

Overview of Planogram Printing

Planogram Printing allows users to select planograms in the currently active floor plan and print out information on the ones they have permissions to print.

Note: The default settings for this dialog box are derived from settings in the Planogram Publishing Configuration dialog box in the Administration module in Macro Space Management.



If master planograms are in use:

- If there is an individual planogram mapped to the master planogram, the individual planogram will be displayed in the Print Planogram dialog box.
- If there is no individual planogram mapped to the master planogram, the master planogram will be displayed in the Print Planogram dialog box.

Using Planogram Printing

The functionality is used as follows:

1. A floor plan containing planograms is opened in ISSC.
2. The Print Planogram option is selected from the toolbar.
3. The appropriate floor plan date is selected to list the correct planograms.
4. The appropriate planograms are selected in the Filtering tab of the Print Planograms dialog box.
5. The report to use is specified in the Templates tab.
6. The sequence the selected floor plans are to be printed in is specified in the Collation Tab.
7. On clicking the Print button, the selected planogram reports will be printed on the default printer associated with the user's computer.

Accessing the Functionality

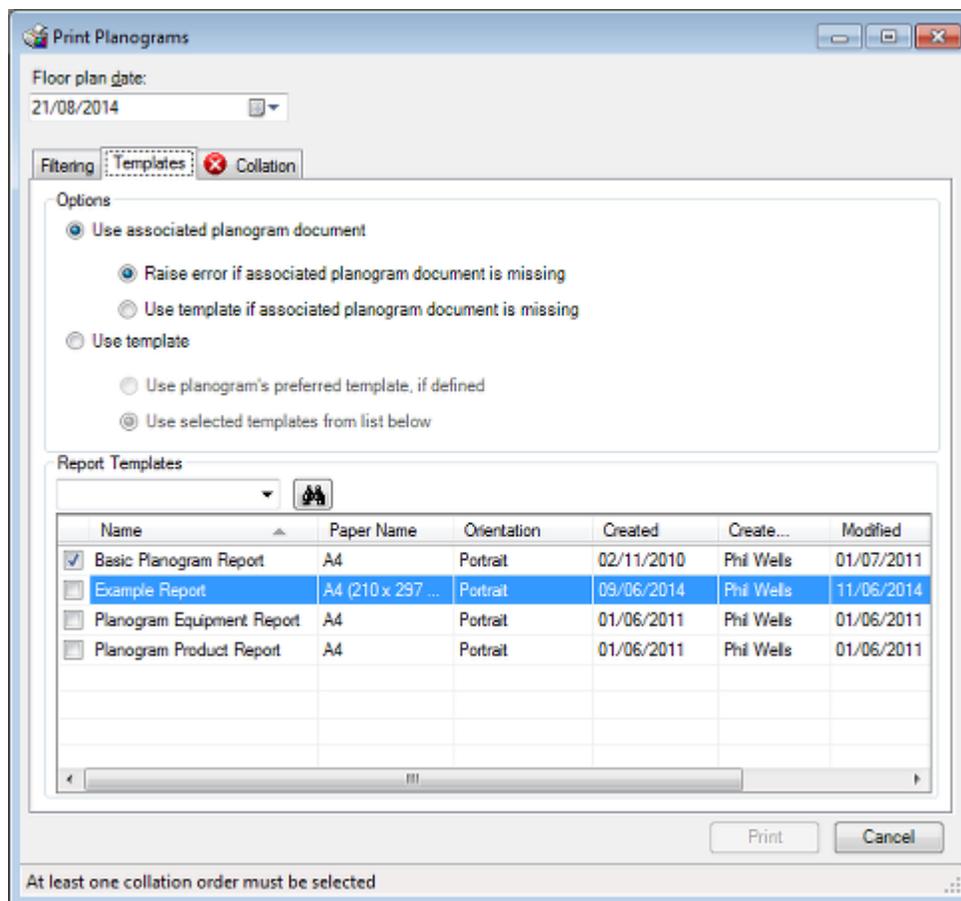
The Print Planogram functionality is accessed from the toolbar.



This will bring up the Print Planograms dialog box. This has three tabs, many defaults for which can be configured in the Administration Module in Macro Space Management. It will be populated with all planograms in the currently active floor plan. By default, they will not be selected. The columns that are displayed in the dialog box are configurable in the Custom SQL option available from the General Menu in the Administration module in Macro Space Management.

Errors and Results

If any critical settings are not set in the Print Planograms dialog box, an error symbol will be displayed on the tab containing the data with the problem. The Print button will also be grayed out and unavailable.



Users must correct the problems before the Print button will activate.

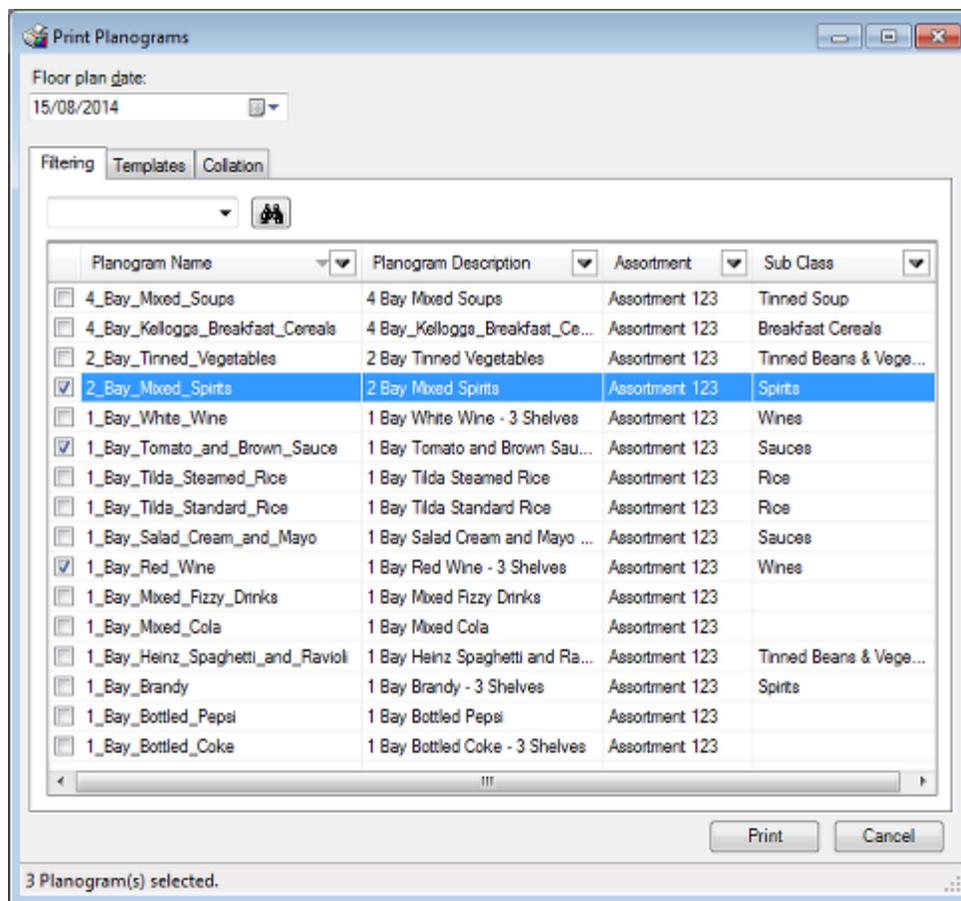
The Filtering Tab

The Filtering tab enables the user to select the Planograms to print. It will populate with all planograms in the currently active floor plan.

Note: If there are multiple instances of a planogram in a floor plan, only a single entry will appear in the list of planograms.

The Filtering tab returns a list of all planograms in the database. If only specific zones have been loaded into the floor plan when it was opened, the Filtering tab will also contain the planograms in the zones that were not loaded.

Note: The option to only load specific zones is controlled by the Express Load option in the Merchandiser tab of the Configuration module.



Planograms may be selected for printing by ticking the appropriate check box. The report to be used can be selected on the Template tab, while the order in which the planograms will print is specified on the Collation tab.

Floor Plan Date

The Floor Plan Date is used to select the correct revisions. It is used to determining which planogram to list. The initial date set depends on the floor plan status.

Status	Initially Set Date
Proposed	The date will be set to the floor plans active date. If this has not been set, it will be set to today's date.
Authorized	The date will be set to the floor plans effective date. If the floor plans effective date has not been set, it will be set to the active date. If neither date has been set, it will be set to today's date.
Published	The date will be set to the floor plans effective date. If the floor plans effective date has not been set, it will be set to the active date. If neither date has been set, it will be set to today's date.
Current	The date will be set to today's date.
Superseded (Historical)	The date will be set to the floor plans expiry date - the date it was replaced by a more recent floor plan.

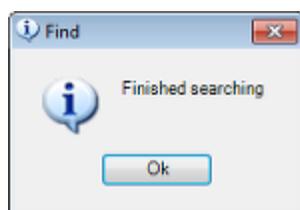
It is possible to use the control to change the set date. If the effective and expiry date have been set, the date can only be varied between those limits. If these dates have not been set, there is no limit to that date can be set.

Floor Plan Date and Master Planograms

If master planograms are in a floor plan, these should map to individual planograms. The individual planogram that will be listed will be the one where the floor plan date is set to between the planograms Effective and Expiry dates.

Find

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



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

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

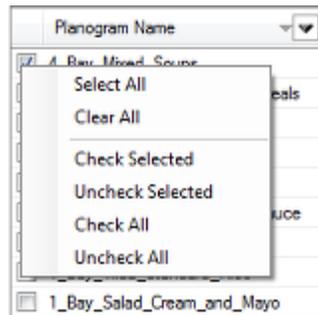
If explicit wild cards are not used, implicit wild cards will be assumed. For example the text entry 'Wine' will be treated as '*wine*' and will find I Bay Red Wine, 1 Bay White Wine, etc.

Pick (Planner Only)

Pick takes the user to the currently active floor plan. They can then use AutoCAD selection methods to select specific planograms. When the AutoCAD selection is completed with a right mouse click, the user will be returned to the Print Planogram dialog box and the dialog box will populate with the selected planograms.

Right Click Menu

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

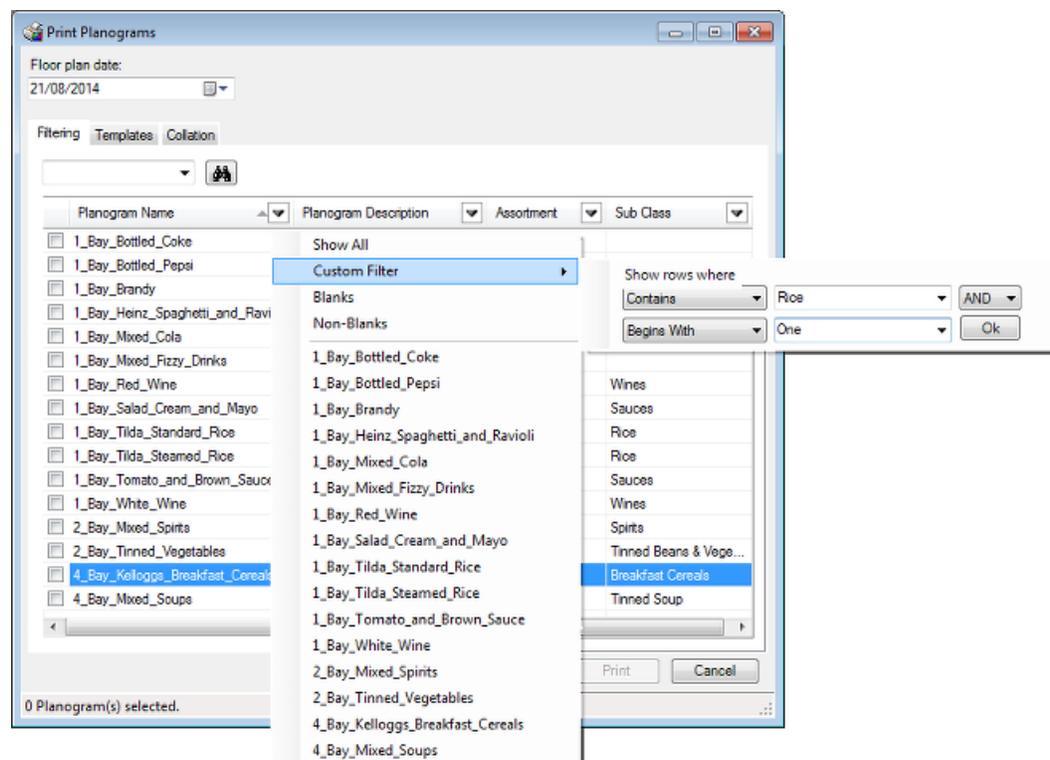


Option	Effect
Select All	This will select (but not check) all rows of data.
Clear All	This will deselect (but not uncheck) all rows of data.
Check Selected	This will check all rows of selected data.
Uncheck Selected	This will uncheck all rows of selected data.
Check All	This will check all rows of data.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

Paste allows users to paste a carriage returned list of floor plan identifiers from the Windows clipboard. All rows in the dialog box that match the pasted information will be checked.

Filters

The Filtering Tab is provided with a series of filters on each column. Setting a filter on one column will affect data in all other columns. If a filter is active it will be shown by the symbol on the column header.



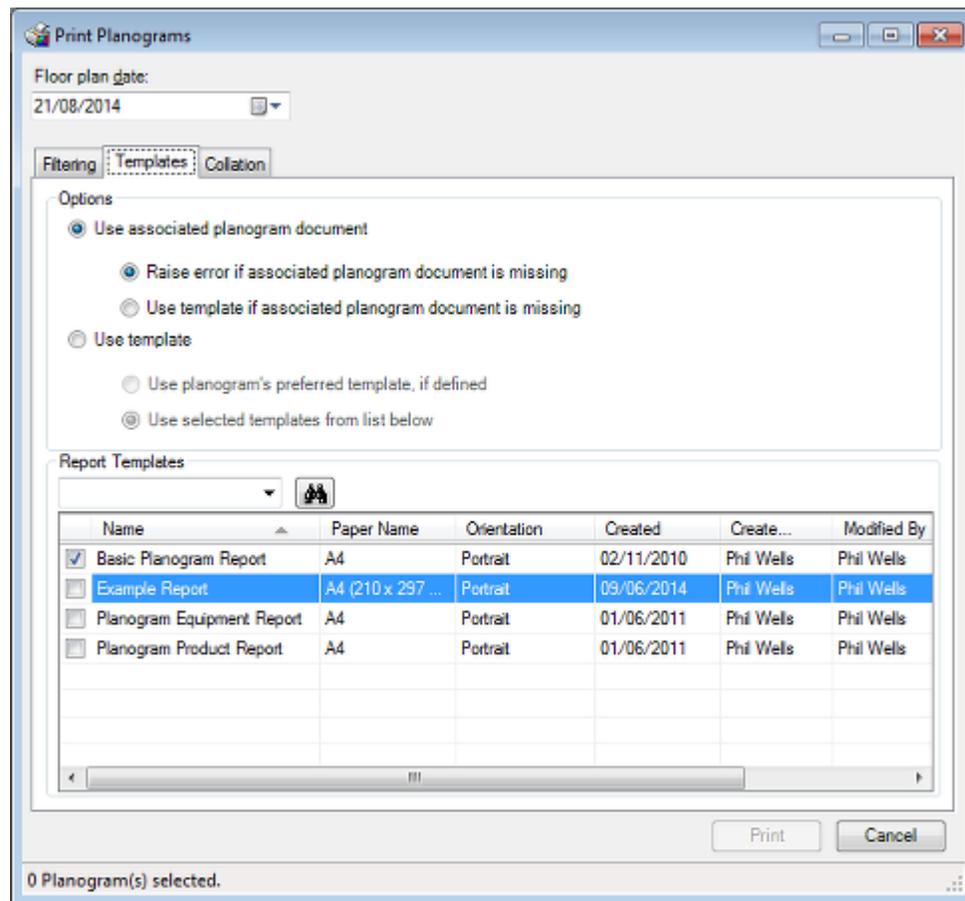
They are used as follows:

Option	Description
Show All	This option shows all results. It can be used to remove the effects of any applied filters.
Custom Filter	<p>This option allows users to set filters using Boolean logic. The options are:</p> <ul style="list-style-type: none"> Equal to: will return rows that are an exact match for the entered text. Not Equal to: will return rows that do not match the text string Contains: will return rows where part of the data matches the text string. (Uses implied wild cards). Does not contain: will return rows where no part of the data matches the text string. (Uses implied wild cards). Begins with: will return rows where the text string is an exact match for the start of the data. Ends with: will return rows where the text string is an exact match for the end of the data. Does not begin with: will return rows where the text string is not an exact match for the start of the data. Does not end with: will return rows where the text string is not an exact match for the end of the data.

Option	Description
Blanks	Column will be filtered to only show rows with no values.
Non-Blanks	Column will be filtered to only show rows containing a value
Planogram list	Column will be filtered to only show the selected result.

The Templates Tab

The **Templates Tab** allows users to specify the template format to be used when printing planogram designs.



The user can use a radio button to specify the form the report will take: an imported 'associated planogram document' or a template that is configured in the Report Designer Module.

Use Associated Planogram document

This option publishes the planogram design information using a pre-generated report using one of the following file formats: BMP, GIF, JPEG, JPG, PDF, PNG, TIFF or WMF. This report will be imported when a planogram is imported using Oracle Data Integrator (ODI). The Associated Document (if a available) is specified in the Associated Document text box in the Details tab of the Planogram Design dialog box in the Merchandiser module.

The screenshot shows the 'Planogram: 2_Bay_Mixed_Cola' dialog box with the 'Details' tab selected. The fields are as follows:

- Name: 2_Bay_Mixed_Cola
- Description: 2 Bay Mixed Cola
- Associated Document: C:\Users\pwells.ORADEV\Documents\BC\60b7d5249e5792c3da.pdf
- Size Description: 72x 24 x 72
- Status: Proposed
- Family Code: Family ABC
- Assortment Code: Assortment 123
- Temperature Range: Ambient Goods
- Weight Range: < No Ranges Selected >
- Publish Date: (empty)
- Effective Date: (empty)
- Expiry Date: 31 December 2999
- Stock Type: Normal
- Autofill Rule: < No Rule Selected >
- Preferred Template: Basic Planogram Report
- Can be Split:
- Client Code: 00000032
- Buddy Family Code: Buddy Family 456
- Units: imperial inch
- Time Units: standard hour
- Manpower Set Time: 1.00
- Manpower Dismantle Time: 0.50
- Category Role: Routine
- Inventory Model: Inventory DEF
- Rank: 0
- Traffic Flow: Left to Right, Right to Left
- Requires Power:

There are two options (selected using the radio button) for when the pre-generated report is missing.

- Write an error to the POG Publish Log table. Information in this table can be read by means of a BI Publisher report or similar.
- Use the default Report Designer template.

Use Template

This option allows the user to define the way the template from the Report Designer module is selected. There are two options (selected using the radio button):

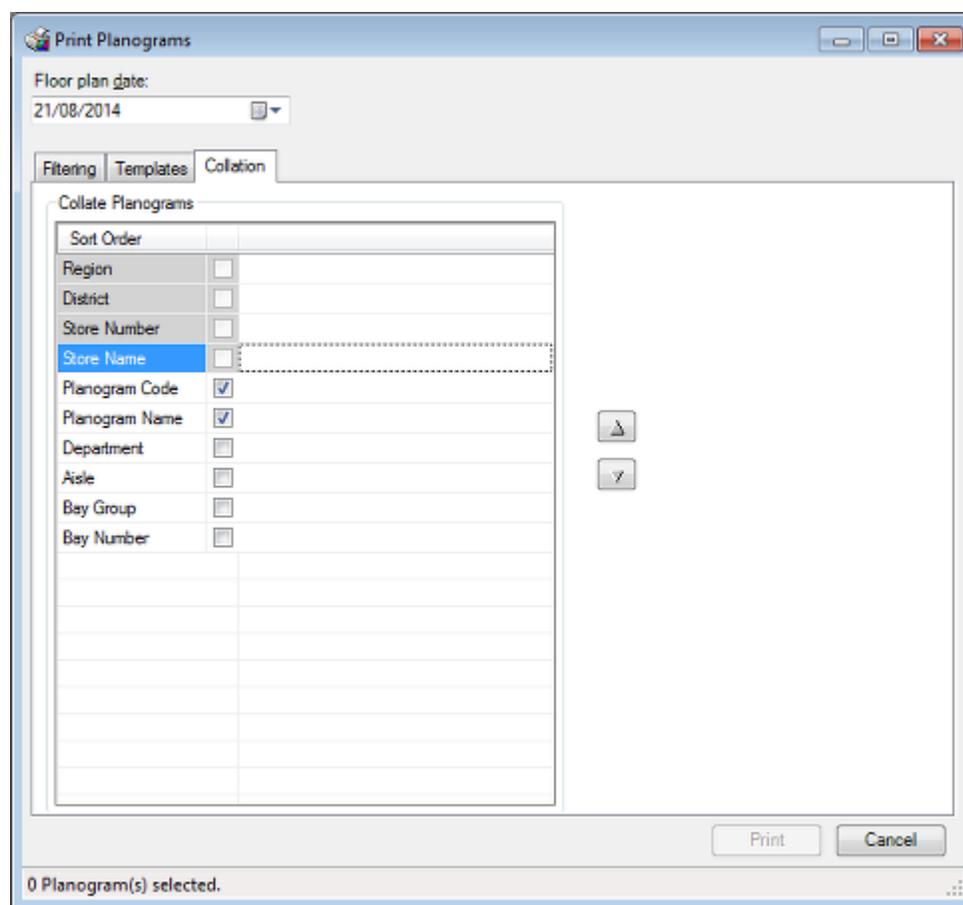
- Use Planograms preferred template, if defined - this option is specified in the Preferred Template drop down list in the Details tab of the Planogram Design dialog box in the Merchandiser module.
- Use Selected Template from List Below - this option can be set by checking items in the list of available templates. One or more templates may be selected. If multiple templates are selected, the name of the template will be added to the file name in brackets - for example 1_Bay_Mixed_Fizzy_Drinks (Basic Planogram Report).pdf

If necessary, the list of templates can be searched by entering a text string into the drop down list, then clicking the Find button. (Actual or implied wild cards can be used). Each click of the Find button will cause the search engine to move forward through the matching results until no results are left.

Note: the last 10 text searches can be selected using the drop down list in the text box.

The Collation Tab

The Collation Tab allows users to specify the sequence the planogram designs will be printed in. Its main use is in printing hard copy versions of the designs where the sequence they are printed in makes it easier to sort and distribute them after printing. At least one collation option must be selected, or the tab will show as having an error. The order of the collation options can be modified highlighting them and then using the **Up** or **Down** arrows.



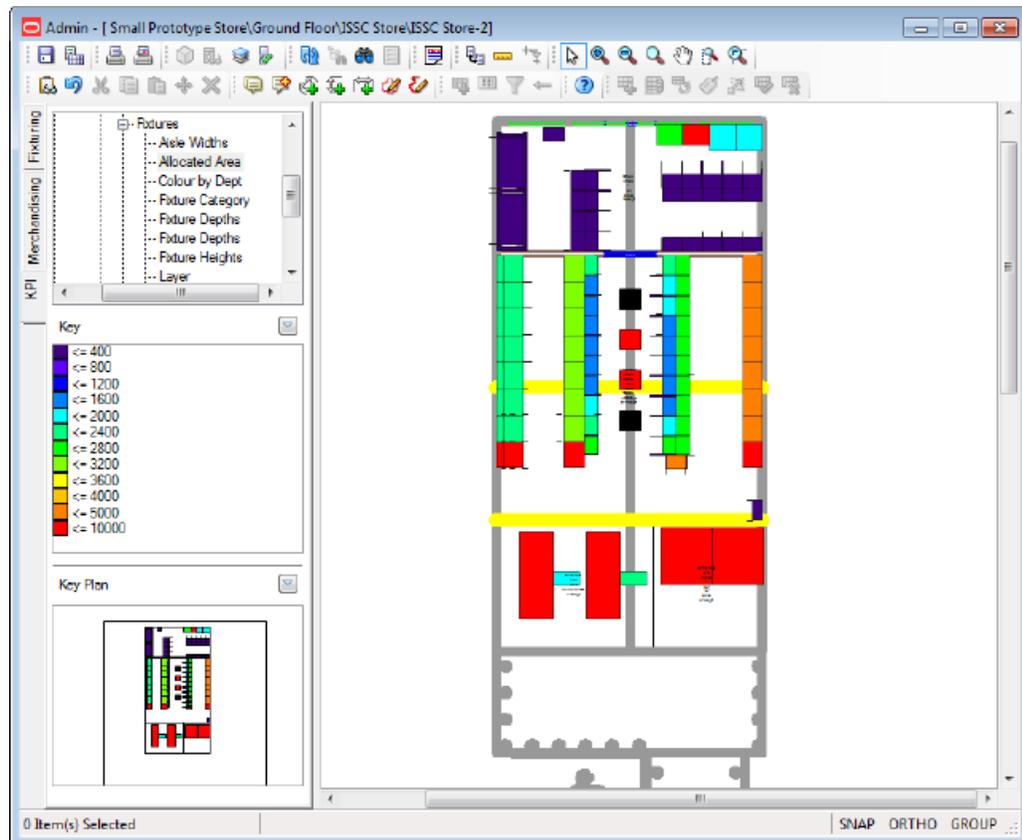
The available options can be ordered by highlighting them, then using the up or down arrows. The options are made active by using the check boxes.

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

- Store Name is the Store Name in the Store dialog box in Store Manager.
- Department is the department (zone) in the floor plan the planogram is associated with.
- Aisle is the aisle the planogram is associated with. For this option to operate, aisles must first be drawn in the floor plan in the Planner module in Macro Space Planning. Aisles are not visible in ISSC.
- Bay Number is the bay number associated with the fixtures the planogram is placed on. For this option to operate, the fixtures in the floor plan must previously have been bay numbered in the Planner Module in Macro space Planning. Whether bay numbering is visible in ISSC depends on the setting of the ISSC_BAY_ANNOTATION system variable. This is configured in the System Variable dialog box (General Menu) in the MSM Administration module.
- Bay Group is the Name assigned to a number of fixtures sharing a common characteristic. It is assigned in the Name field of the Bay Numbering dialog box in the Planner module.
- Planogram Name is the name of the planogram. This is set in the Name field of the Planogram Design dialog box in Merchandiser.
- Planogram Code is the code for the planogram. This is set in the Client Code field of the Planogram Design dialog box in Merchandiser.

Using KPIs in Top Graphical View

The Object Browser for the KPI tab has three windows: The KPI Hierarchy, the Key window and the Key Plan window.



The KPI Hierarchy Window

The KPI Hierarchy window will show a list of the available KPIs. These KPIs will be appropriate for Top Graphical View. (Different KPIs will show in Front Graphical and Shelf Graphical View).

The Key Window

The Key Window indicates the legend that is used to color the selected objects. In Top Graphical view this can be either zones or fixtures. The legend may be either a color or a hatch pattern depending on the settings within the Options dialog box. The colors/hatch patterns and what they represent will vary from KPI to KPI.

The Key Plan Window

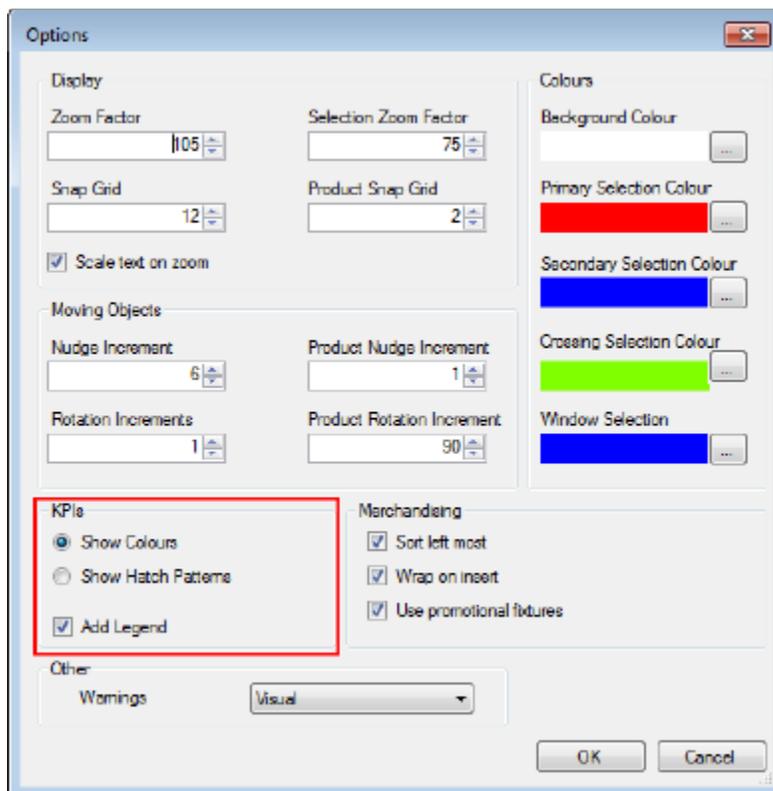
The Key Plan Window shows which part of the drawing is currently being viewed.

To Use a KPI

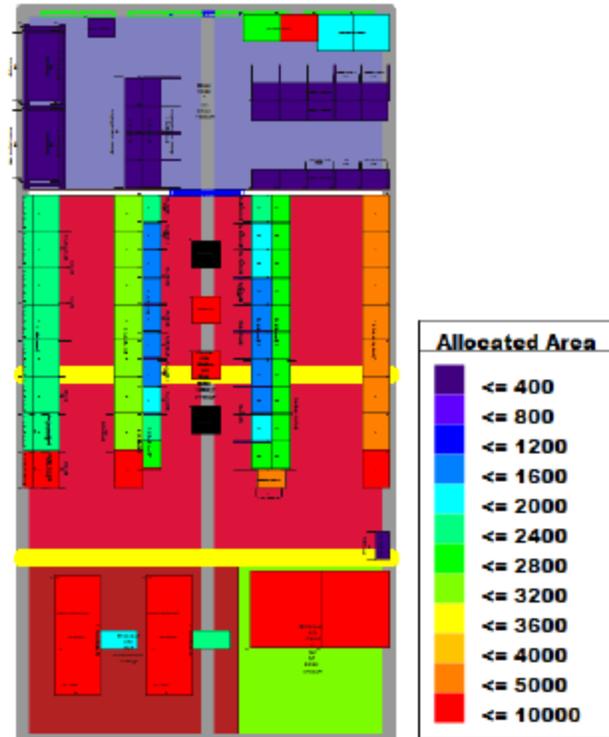
1. Click on the KPI tab in the Object Browser to select the KPI option.
2. Go to the KPI Hierarchy window and left click on the required KPI to activate it. The drawing will then be color-coded or hatched with the appropriate results.

Note: For KPIs involving financial information, EPOS data will previously have been imported into the database.

KPI's can then be printed by means of the Print option on the toolbar. The printing operation is essentially a 'screen grab'. Users can adjust what shows on the screen before printing the KPI. The In-Store Space Collaboration user can configure how KPIs print by changing the settings within the KPI frame in the Options window.



3. The Show colors or Show Hatch Patterns radio button determines whether a floor plan with KPI's prints with objects colored or hatched. Hatching is used for black and white printers where it would be impossible to distinguish between colors like red and orange.
4. Add legend adds a legend to the printed floor plan. The legend will initially be positioned at the origin (0,0) of the floor plan. It may be necessary to drag the legend to a more convenient position before printing.



The above example shows the legend repositioned for printing purposes.

Selecting Objects in the Floor Plan

Depending on the setting for the `IN-STORE_ENABLE_KPI_BLOCK_SELECTION` system variable, users will either be able to select objects in the KPI tab, or will be prevented from selecting objects. This system variable is set in the System Variable dialog box (General Menu) in the Administration Module of Macro Space Management.

Note: The Legend for the KPI can be moved irrespective of the setting for this system variable.

Front and Shelf Graphical Views

Front Graphical View and Shelf Graphical View

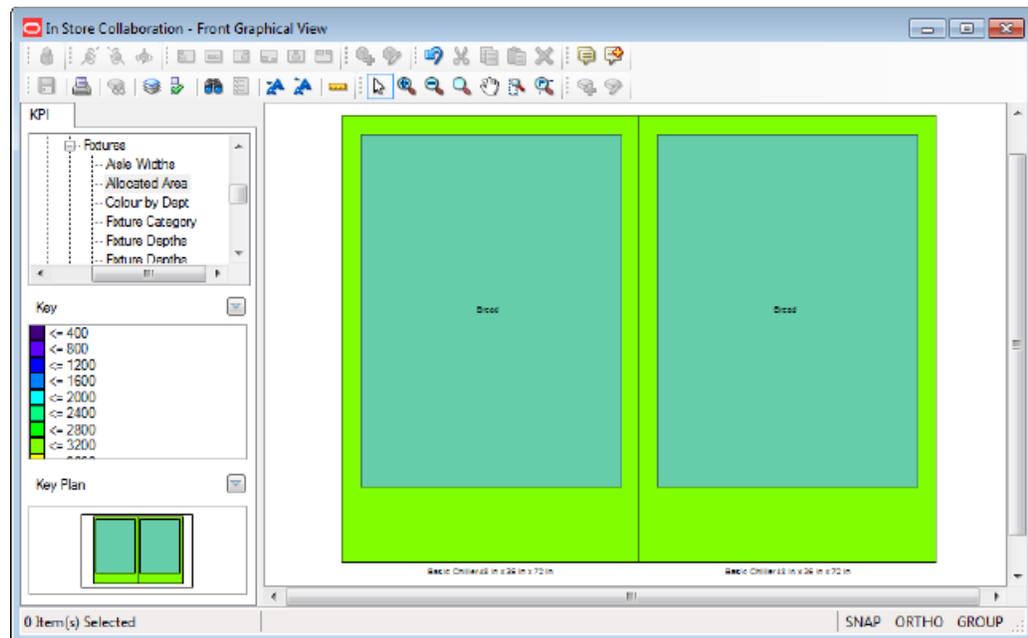
Front Graphical View

Front Graphical View is accessed from the toolbar and shows the contents of the selected fixtures. (The option will not be active until fixtures have been selected). The appearance in front Graphical View depends on whether the merchandise is in 2D or 3D form. Planograms placed in ISSC and in the Planner module in MSM are always in 2D form. They can be changed to 3D form in the Merchandiser module in MSM.

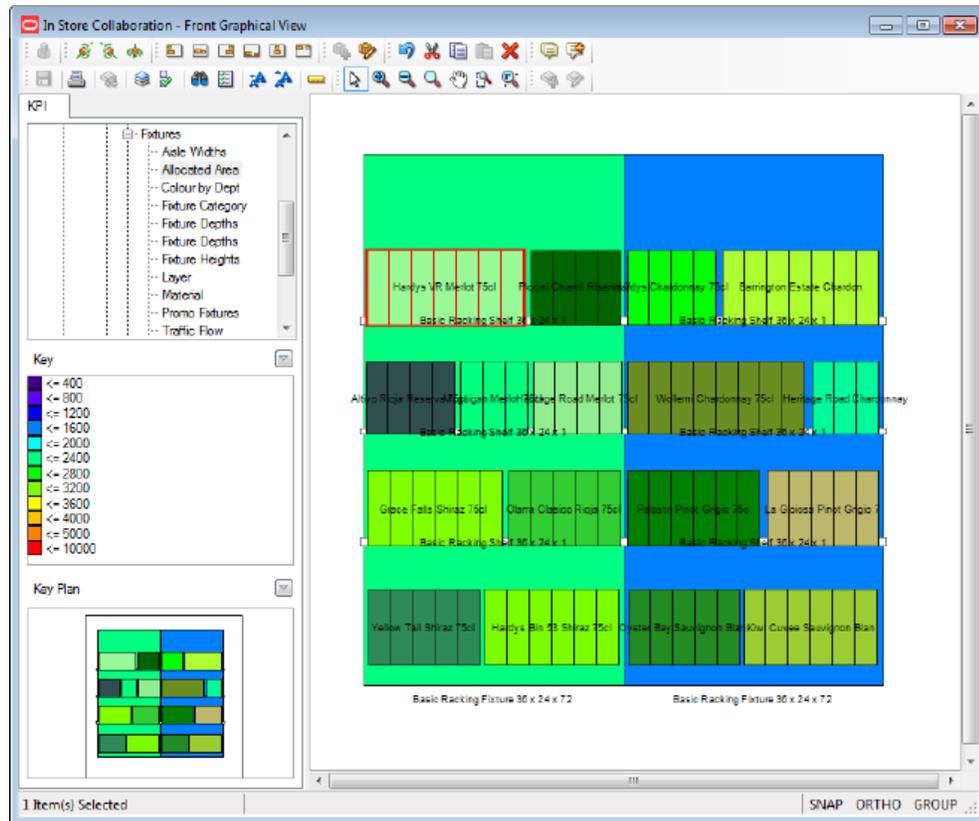
Note: If the planogram is in 2D form and planogram profile images have been assigned in Macro Space Management, Front Graphical View will show a 2D image of the planogram. this image cannot be edited in any way.



The screen shot below shows planograms in their 2D form. In this condition they are placeholders showing that the fixture is occupied with a specific planogram.

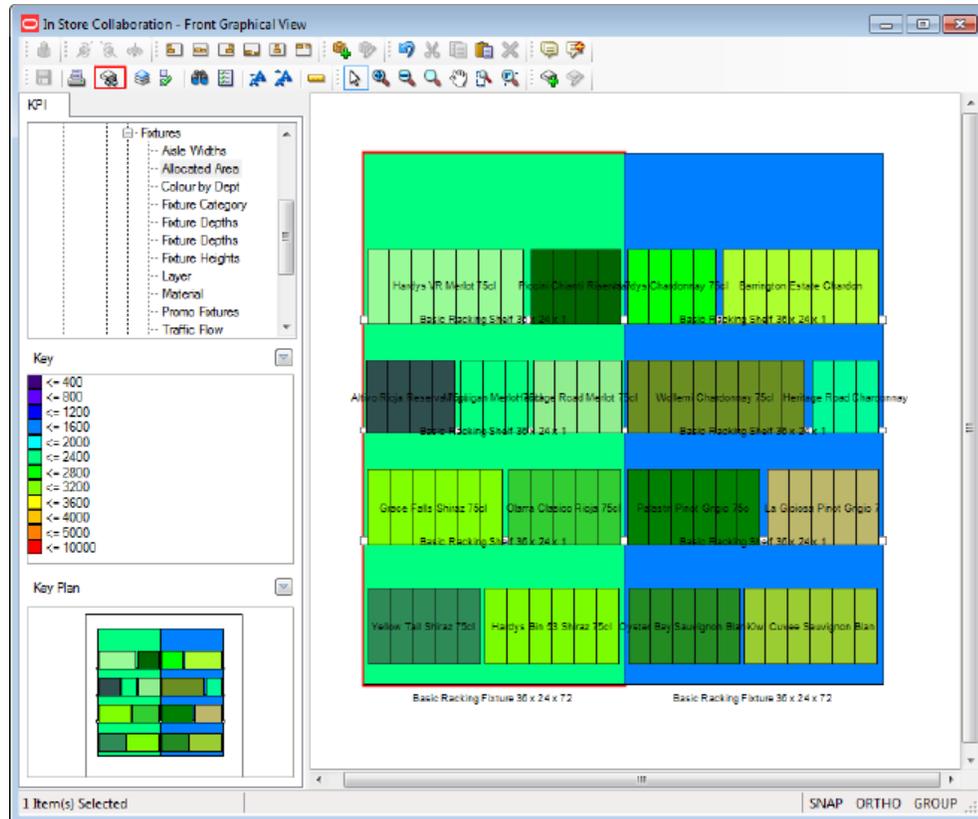


The screen shot below shows planograms in their 3D form. In this condition, the shelves and products in the planogram can be seen in detail. In addition, the equipment and merchandise can be manipulated and the changes saved back to the Macro Space Planning database.

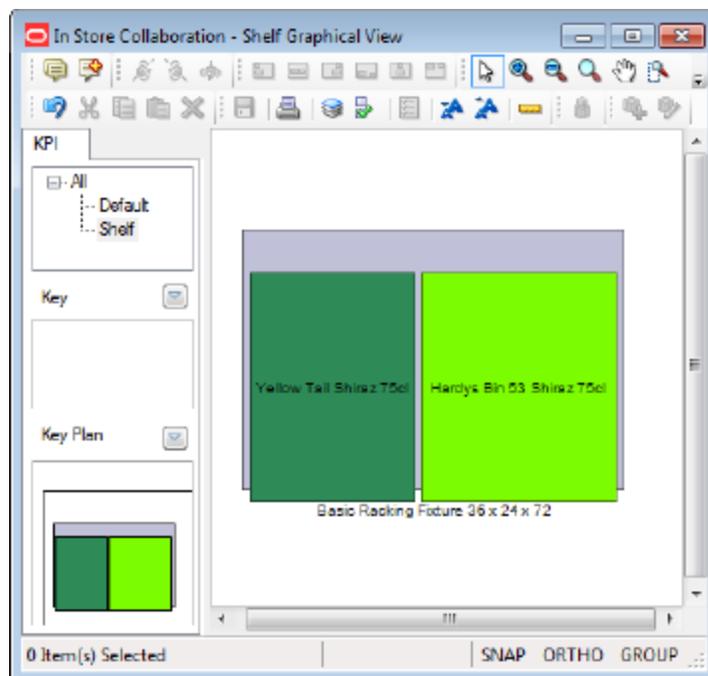


Shelf Graphical View

Shelf Graphical View gives a plan view of a shelf on a fixture. It is selected from Front Graphical View once a shelf has been selected. To do so, highlight a single shelf and then click the Shelf Graphical View icon on the toolbar.



This will bring up Shelf Graphical View. The merchandise on the shelf can be manipulated and the changes saved back to the Macro Space Planning database.



Front Graphical View and Shelf Graphical View

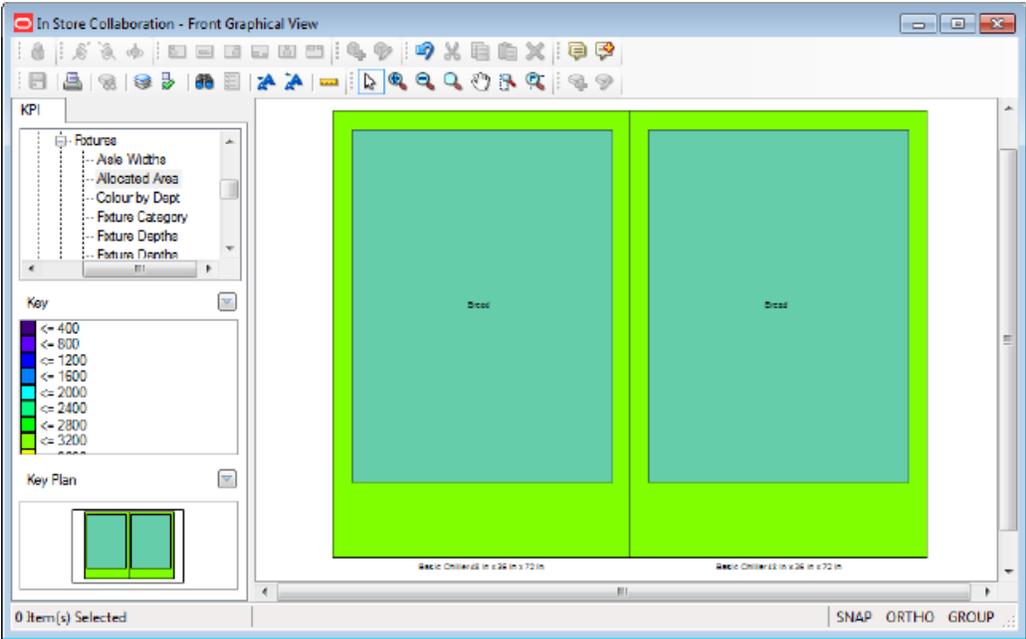
Front Graphical View

Front Graphical View is accessed from the toolbar and shows the contents of the selected fixtures. (The option will not be active until fixtures have been selected). The appearance in front Graphical View depends on whether the merchandise is in 2D or 3D form. Planograms placed in ISSC and in the Planner module in MSM are always in 2D form. They can be changed to 3D form in the Merchandiser module in MSM.

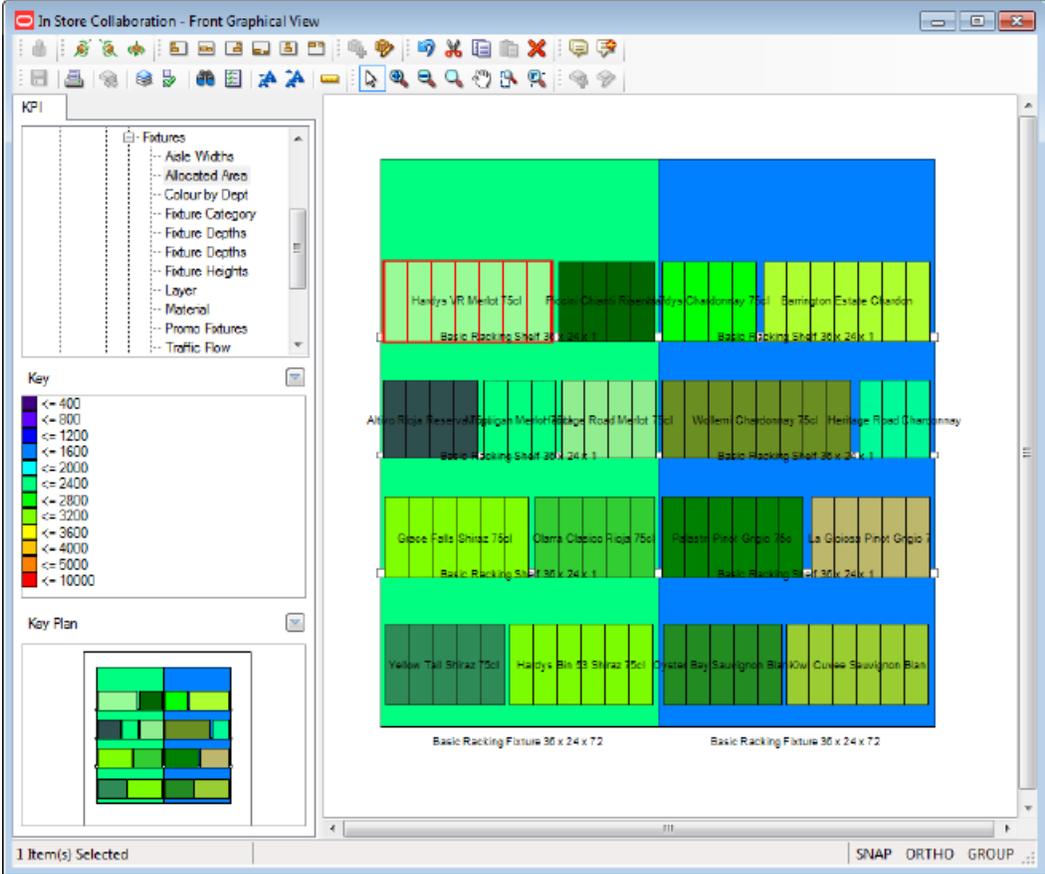
Note: If the planogram is in 2D form and planogram profile images have been assigned in Macro Space Management, Front Graphical View will show a 2D image of the planogram. this image cannot be edited in any way.



The screen shot below shows planograms in their 2D form. In this condition they are placeholders showing that the fixture is occupied with a specific planogram.

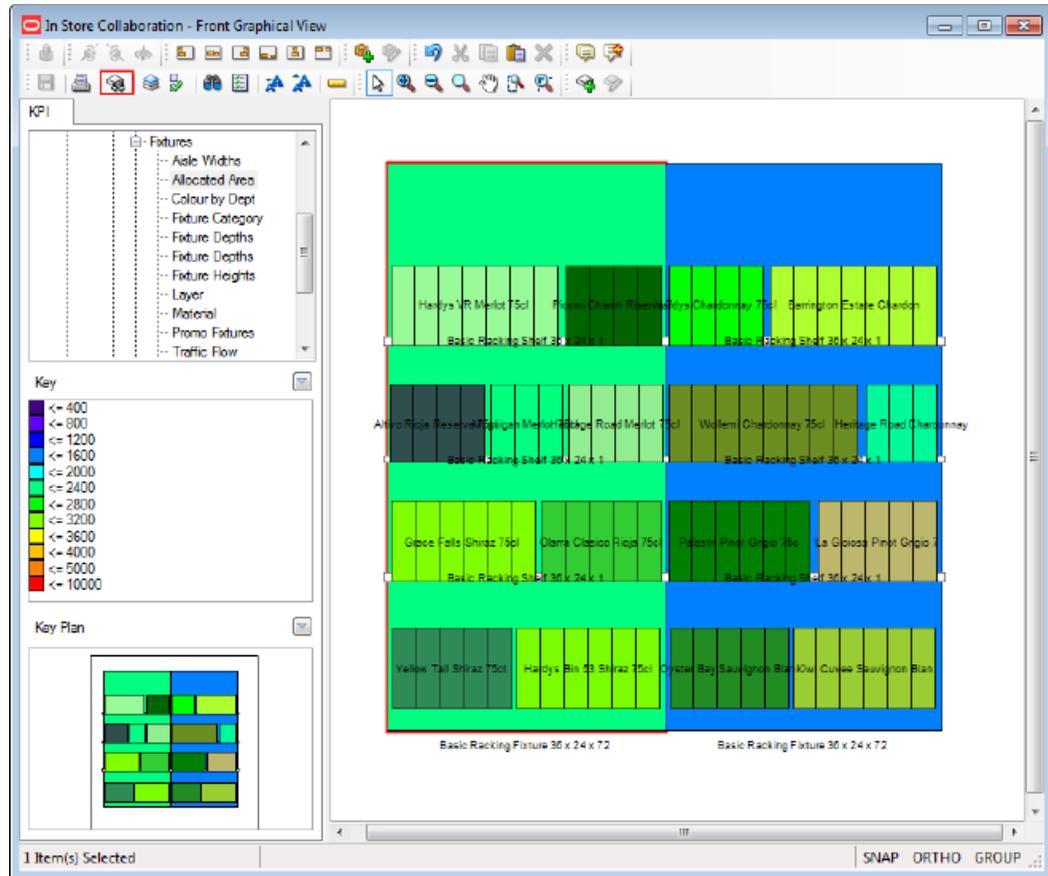


The screen shot below shows planograms in their 3D form. In this condition, the shelves and products in the planogram can be seen in detail. In addition, the equipment and merchandise can be manipulated and the changes saved back to the Macro Space Planning database.

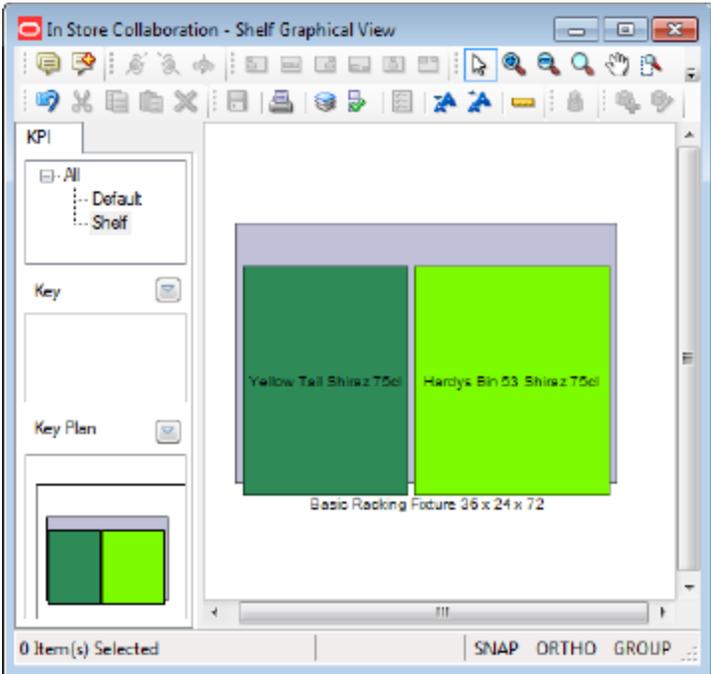


Shelf Graphical View

Shelf Graphical View gives a plan view of a shelf on a fixture. It is selected from Front Graphical View once a shelf has been selected. To do so, highlight a single shelf and then click the Shelf Graphical View icon on the toolbar.



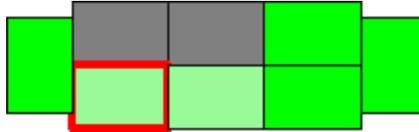
This will bring up Shelf Graphical View. The merchandise on the shelf can be manipulated and the changes saved back to the Macro Space Planning database.



Front Graphical View

Front Graphical View

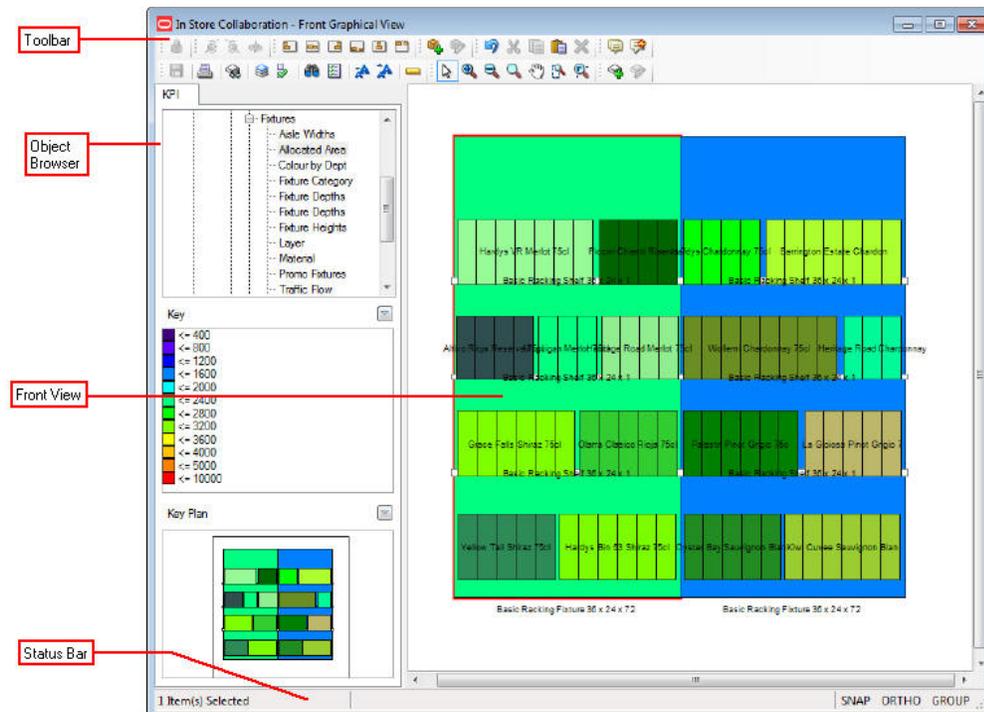
Front Graphical View is used to display the shelves and products present on the selected fixture or fixtures. To access Front Graphical View, first highlight one or more fixtures in Top Graphical View.



Next, click Front Graphical View on the toolbar.



This will bring up the Front Graphical View window.



- The Toolbar gives access to the functionality used to manipulate products in Shelf Graphical View.
- The Object Browser allows users to select KPIs to illustrate the behavior of the selected objects. These KPI's could be for fixtures, shelves or products.

Note: Shelf KPIs would require configuring. None are supplied as defaults with the application.

- The Status Bar gives the user information on the currently active action. It also allows the Snap, Ortho and Group options to be turned on or off.
- Front View gives a plan view of the currently selected fixtures and allows the shelves and products on it to be manipulated.

Toolbar

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

Icon	Description
	Save
	Print
	Layers
	Options
	Properties
	Decrease Text Size
	Increase Text Size
	Measure
	Select
	Zoom In
	Zoom Out
	Pan
	Zoom Window
	Zoom to Extents
	Undo
	Cut
	Copy
	Paste
	Notes

Icon	Description
	Add Notes
	Add Product
	Edit Product
	Delete Product
	Rotate around X axis
	Rotate around Y axis
	Rotate around Z axis
	Align to Left
	Align to Center
	Align to Right
	Align to Front
	Align to Middle
	Align to Back
	Place Product on Top

Adding, Editing and Deleting Shelves in Front Graphical View

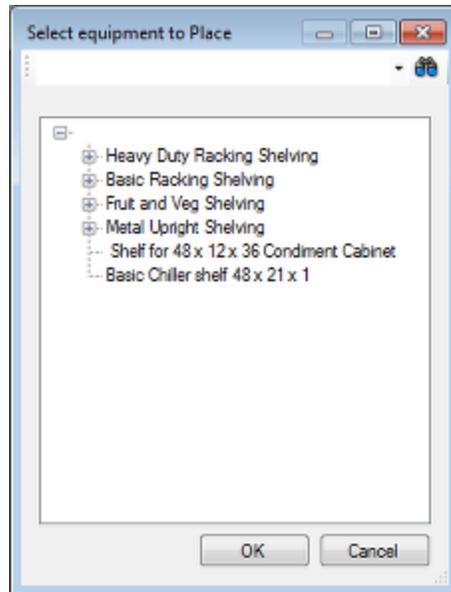
Shelves can be added, Edited or Deleted in Front Graphical View. These options are accessed from the toolbar.



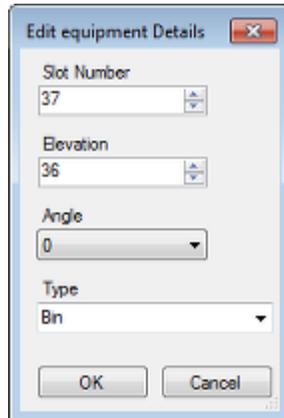
Icon	Meaning	Description
	Add Equipment	Allows the user to add an item of equipment to a selected parent object.
	Edit Equipment	Allows the user to edit an existing item of equipment.

Adding a Shelf

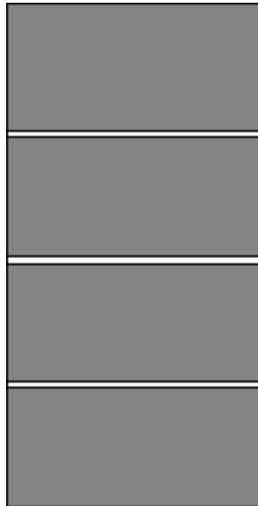
To add a shelf, first select the fixture on which the shelf will be placed. Next click the **Add Shelf** icon on the toolbar. This will bring up the **Select Equipment to Place** dialog box. This contains a list of all available shelves.



Highlight a suitable shelf and click OK. The Edit Equipment dialog box will appear.



Set the shelf to the appropriate height and angle. Also set the type drop down list to an appropriate value. Click OK and the shelf will be placed.



Editing a Shelf

The position of a shelf can be modified in one of two ways: by use of the cursor keys or by means of the Edit Equipment window.

Using the Cursor Keys

To move a shelf by means of the cursor keys:

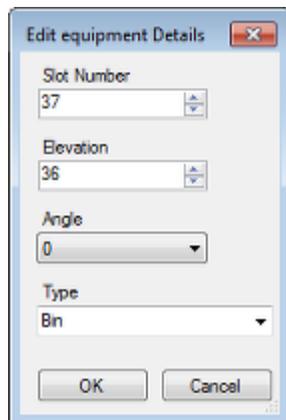
1. Highlight the shelf.
2. Use the cursor keys to move the equipment.

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 shelf to be moved.
2. Click Edit Equipment. The Edit Equipment Details dialog box will open.



3. Edit the details as required and then click OK.

Deleting a Shelf

To delete a shelf, highlight the required shelf then click Delete Equipment on the toolbar. The shelf and its contents will be deleted without further confirmation.

Adding, Editing and Deleting Products in Front Graphical View

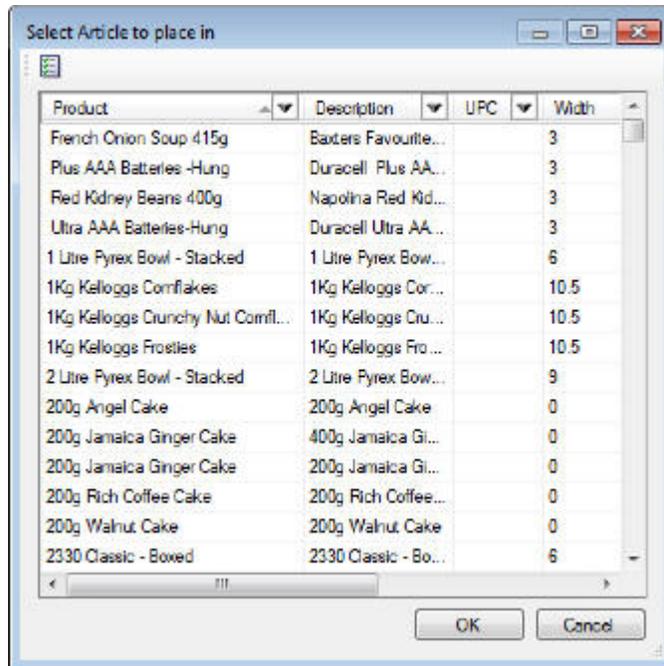
Products can be added, Edited or Deleted in Front Graphical View. These options are accessed from the toolbar.



Icon	Meaning	Description
	Add Product	Allows the user to add an item of equipment to a selected fixture or shelf.
	Edit Product	Allows the user to edit an existing product.

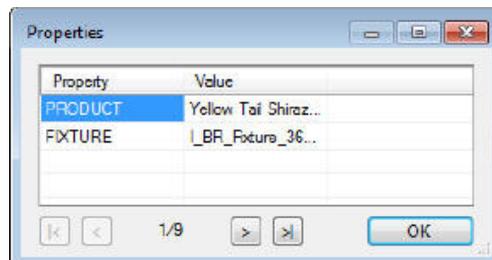
Adding Products

To add a product, first select the fixture or shelf on which the product will be placed. Next click the **Add Product** icon on the toolbar. This will bring up the **Select article to Place In** dialog box.

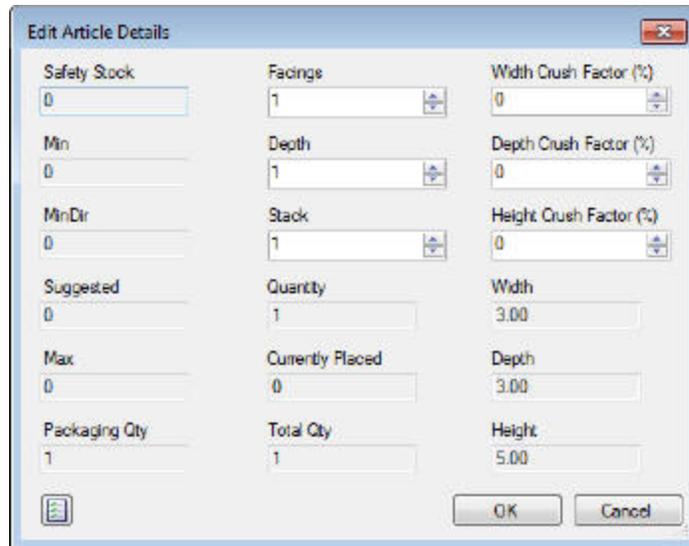


This will initially be blank, but will populate once text is entered into the text box and the filter icon clicked. The text field requires explicit wild cards. The list of products will be automatically restricted to the zone (department) that the parent fixture is in.

If required, more information can be determined by highlighting a product and clicking the properties button to the upper left. This will bring up the Properties dialog box.

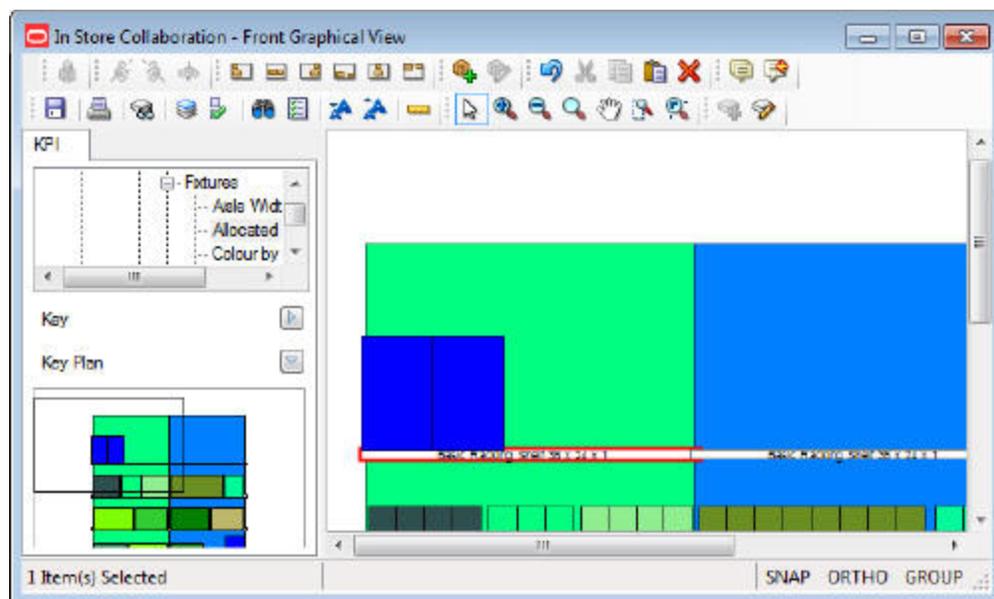


Once a product has been selected in the Select Articles to Place In dialog box and the OK button clicked, the Edit Article Details dialog box will appear. The number of products required can then be set. Clicking OK will result in the product being placed.



Note: There are no restrictions on the number of products that can be placed. Care should be taken not to place more products than the available space has capacity for.

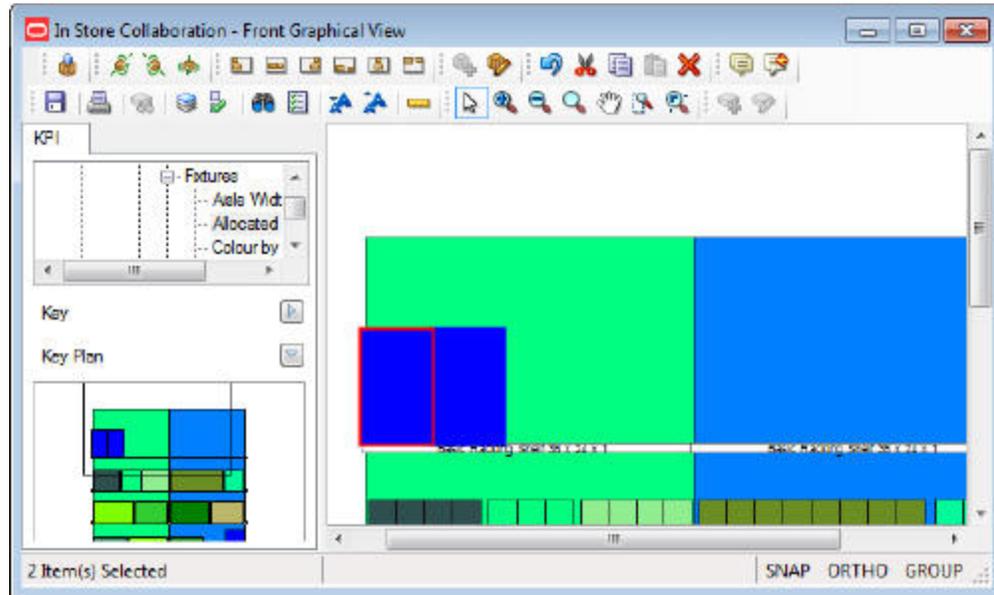
The products will then place on the fixture or shelf.



It will generally be necessary to use the alignment options to position the products exactly where required.

Editing Product Quantities

Product quantities can be changed by selecting a product for editing.



On clicking the Edit product button, the Edit Article Details dialog box will appear. The modified number of products required can then be set. Clicking OK will result in the product quantity being changed.

Deleting Products

To delete a product, highlight the required items then click Delete product on the toolbar. The selected products will be deleted without further confirmation.

Rotating and Aligning Products in Front Graphical View

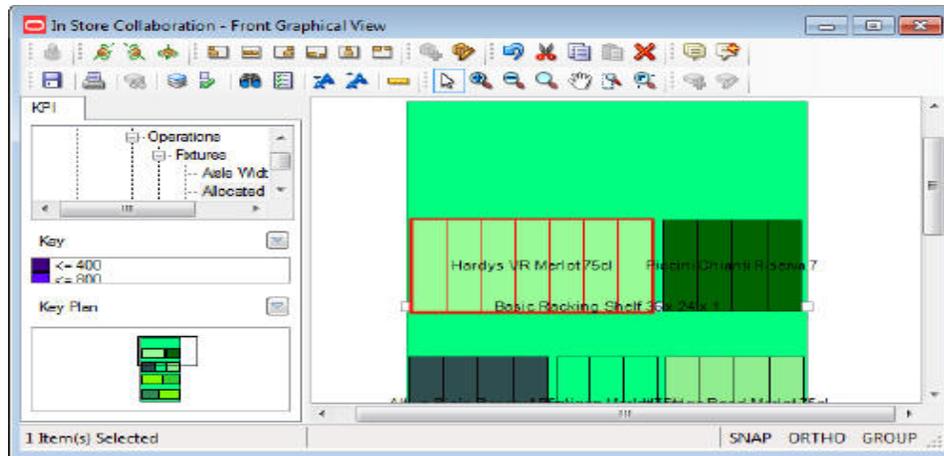
Products can be aligned in two ways in front Graphical view: horizontally along the shelf or by placing one product on top of another.

Aligning Products

There are two ways products can be aligned: by aligning individual products, or by aligning all the products on the shelf.

Aligning Individual Products

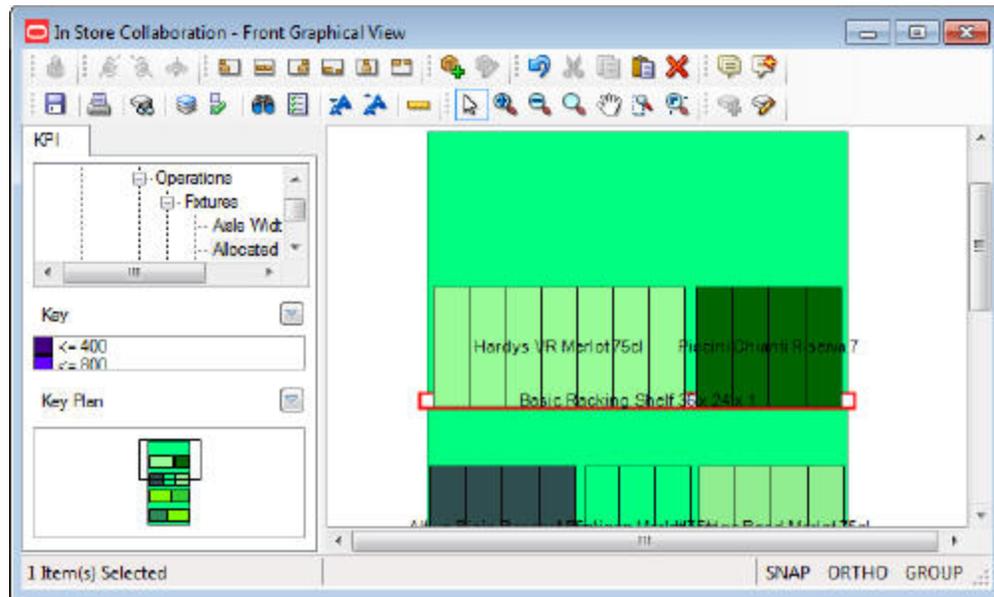
Individual products are aligned by highlighting them, then using the cursor keys to nudge the product left, right, forward or back. There can also be 'dragged and dropped' using the mouse.



This distance the selected product moves with each click of a cursor key is set using the **Product Nudge Increment** in the **Options dialog box** accessed from the toolbar. If the product is 'dragged and dropped', it can be aligned to a grid. The dimensions of this grid are set using the **Product Snap Grid** in the **Options dialog box** accessed from the toolbar. This grid will only be active if the Snap option is toggled on in the status bar.

Aligning All Products

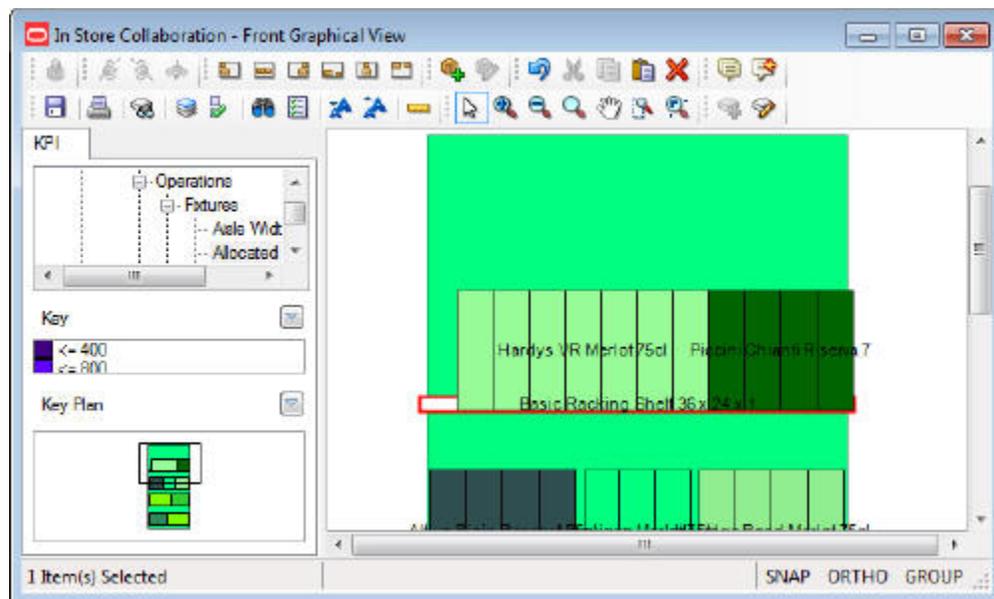
All products on a shelf can be aligned by selecting the parent shelf. The products on it can then be aligned by clicking on the appropriate icons in the toolbar. Multiple options can be used to get the alignment required.



Icon	Description
	Align to Left
	Align to Center

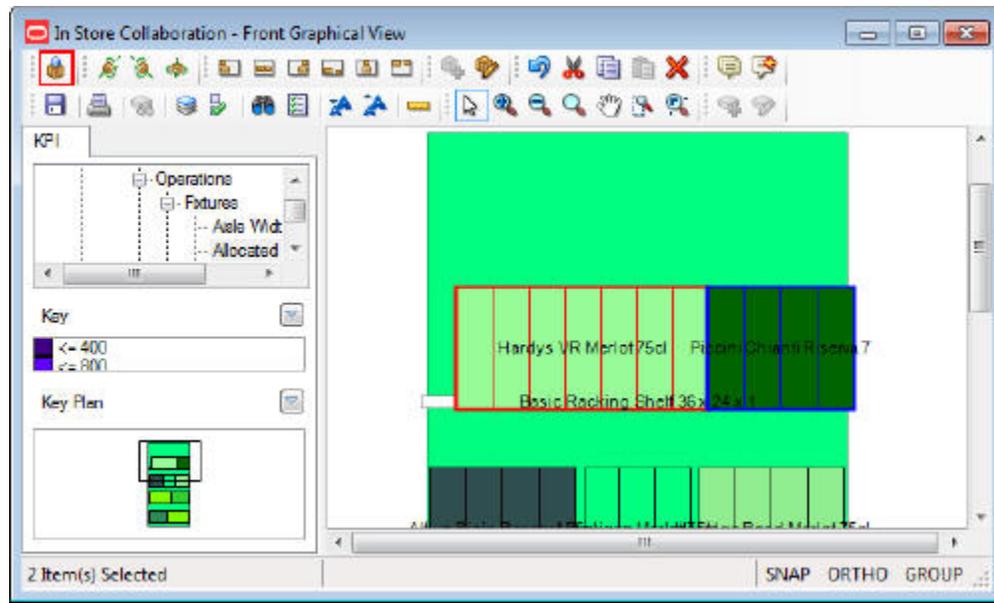
Icon	Description
	Align to Right
	Align to Front
	Align to Middle
	Align to Back

In the example below, the products have been moved to Right, Front.

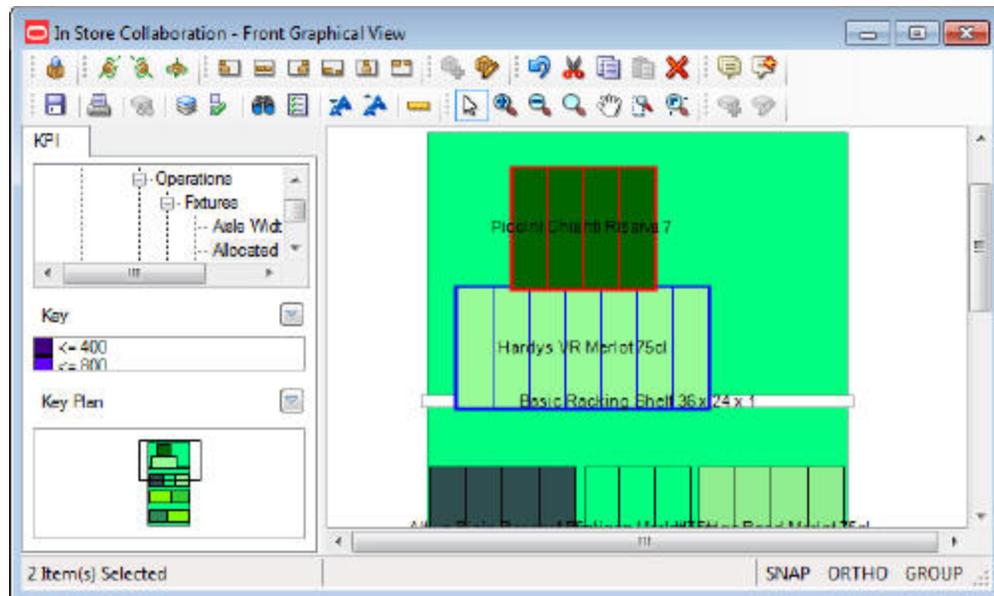


Putting Products on Top of Each Other

As well as aligning products, the possibility also exists to put them on top of each other. The On Top option allows users to place one product on top of another. To do this select a product on a shelf or fixture. This will be highlighted in the first selection color. Then select a second product. This will be highlighted in the second selection color.



Next, click the **On Top** button. This is outlined in red in the above screen shot. The first selected product will then be placed on top of the second.



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.

Rotating Products

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



The rotation increment is set in the **Product Rotation Increment** field in Options dialog. It is suggested the value is set to 90°. Each click on a rotation button will then turn the product onto another side.

Note: When using the rotation options, it is suggested that care is taken that the product be left with the front or top of the packaging is left facing the direction customers will look from.

Other Front Graphical View Functionality

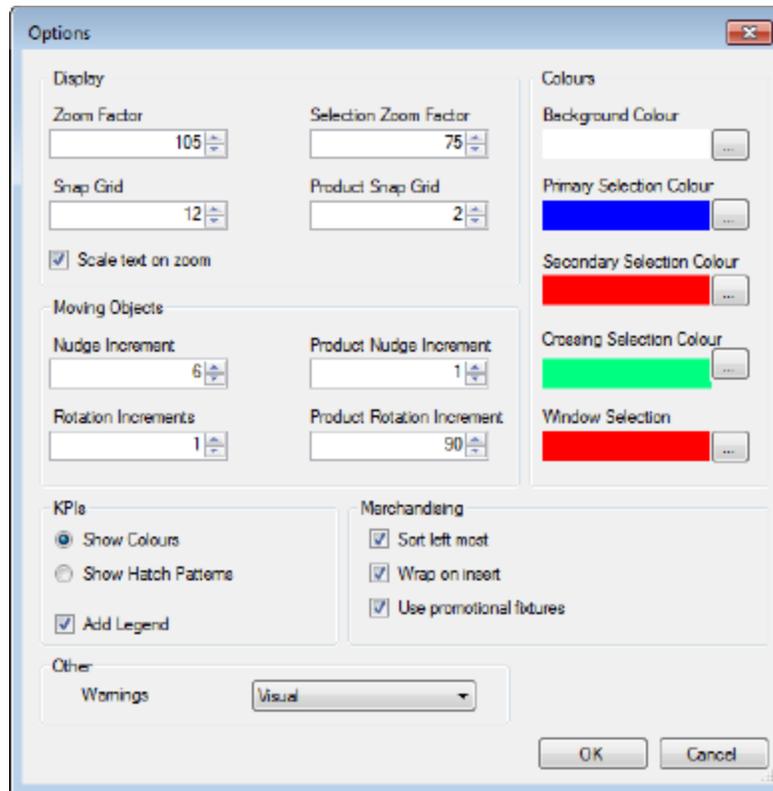
Some functionality within Front Graphical View is common to ISSC. This is described in more detail in the General Options section of this guide, but some of the more common functionality is described below.

Options Dialog Box

The Options dialog box enables individual users to customize some aspects of how ISSC works for them. This is accessed from the toolbar.



This will bring up the options dialog box.



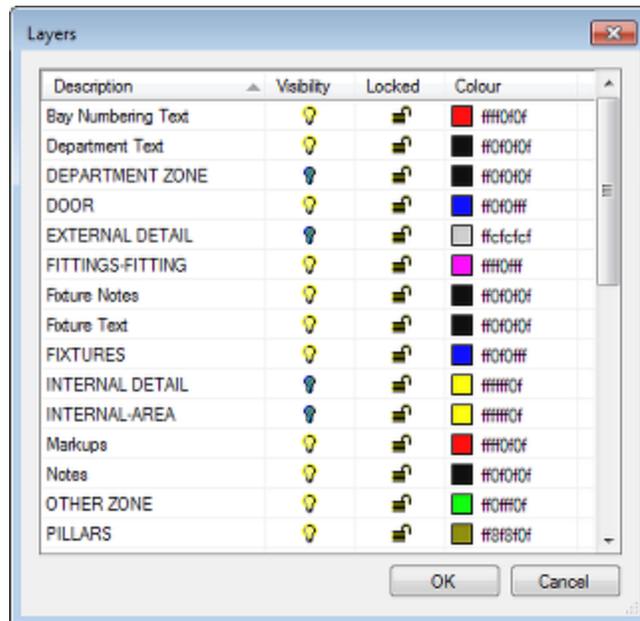
This can be used to customize a series of parameters.

Layers Dialog box

The Layers dialog box enables users to control the visibility of objects and to lock them against change. This is accessed from the toolbar.



This will bring up the Layers dialog box.



Operating within the Selected View

ISSC provides a number of ways of moving about within a particular view. These options are available from the toolbar.



Cut, Copy, Paste and Clipboard

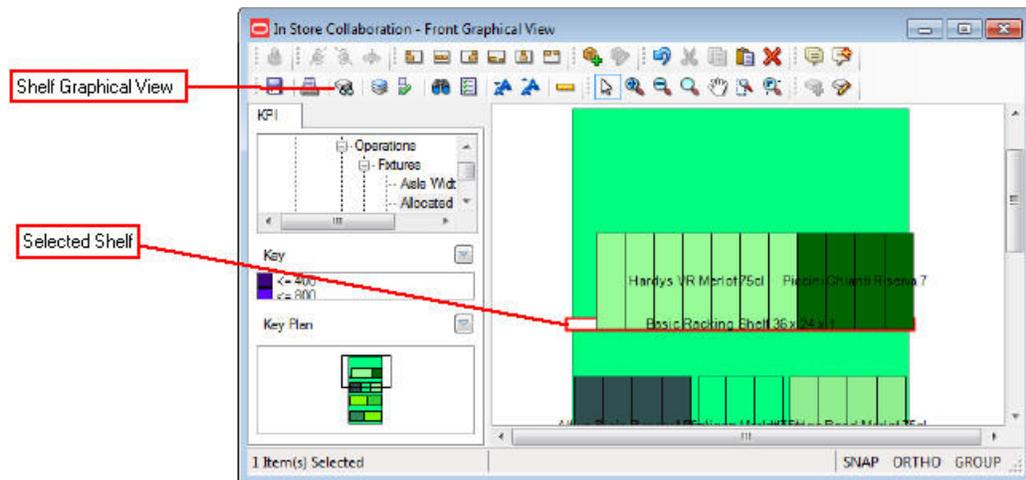
ISSC provides a clipboard which information can be cut and copied to. It also allows the information to be pasted back into the current view. These options are available from the toolbar.



Shelf Graphical View

Shelf Graphical View

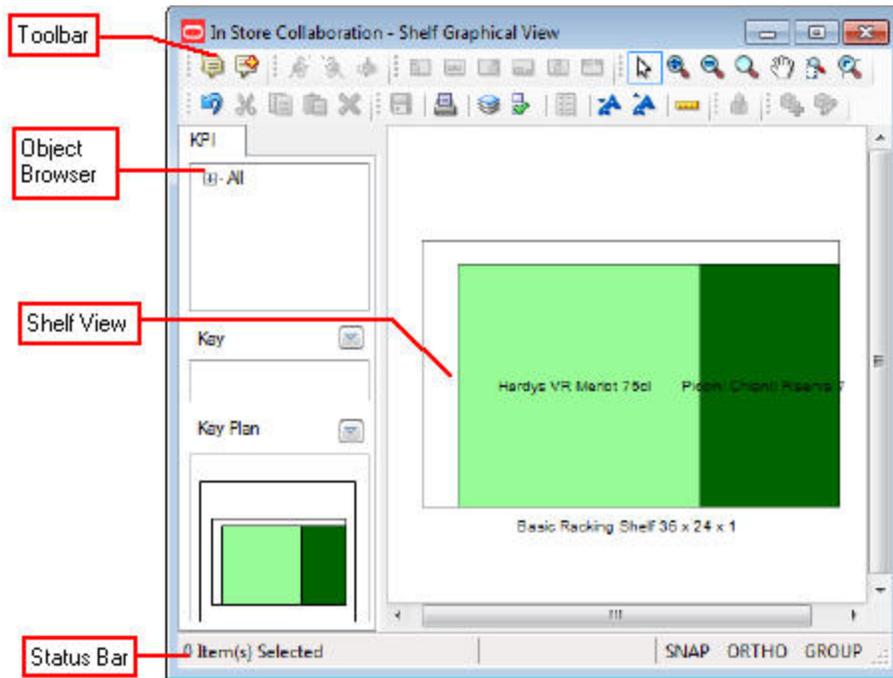
Shelf Graphical View is accessed from Front Graphical View.



1. Select a fixture or fixtures containing shelves in Top Graphical View. This needs to be a planogram in 3D (exploded) format. Planograms placed in 2D exploded format in ISSC and require exploding to 3D format in MSM's Merchandiser module.
2. Open Front Graphical View.
3. Select a single Shelf in Front Graphical View. This will highlight in Red.
4. Click the Shelf Graphical View option on the toolbar.
5. Shelf Graphical View will open.

Overview of Shelf Graphical View

Shelf Graphical view has the following components.



- The Toolbar gives access to the functionality used to manipulate products in Shelf Graphical View. Many icons are only active when an object is selected.
- The Object Browser allows users to select KPIs to illustrate the behavior of the products on the selected shelves.

Note: Shelf KPIs would require configuring. None are supplied as defaults with the application.

- The Status Bar gives the user information on the currently active action. It also allows the Snap, Ortho and Group options to be turned on or off.
- Shelf View gives a plan view of the currently selected shelf and allows the products on it to be manipulated.

Effect of Manipulating Products

If products are manipulated in Shelf Graphical View and the changes saved, this will result in the floor plan containing an arrangement of products that no longer confirms to the original planogram design.

Toolbar

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

Icon	Description
	Save
	Print
	Layers
	Options
	Properties
	Decrease Text Size
	Increase Text Size
	Select
	Zoom In
	Zoom Out
	Pan
	Zoom Window
	Zoom to Extents
	Undo
	Cut
	Copy
	Paste
	Notes
	Add Note
	Add Product
	Edit Product

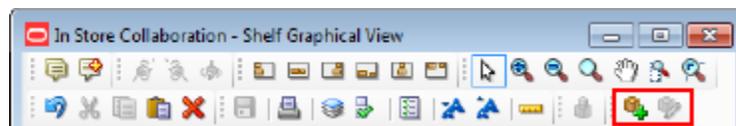
Icon	Description
	Delete Product
	Rotate around X axis
	Rotate around Y axis
	Rotate around Z axis
	Align to Left
	Align to Center
	Align to Right
	Align to Front
	Align to Middle
	Align to Back
	Place Product on Top

Functionality Similar to Top Graphical View

Significant parts of the functionality in Shelf Graphical View operate the same as in Top Graphical View. This functionality includes the Layer and Options dialog boxes, moving about within Shelf Graphical View, notes, and so on. Please see the section on Top Graphical View for information on those options.

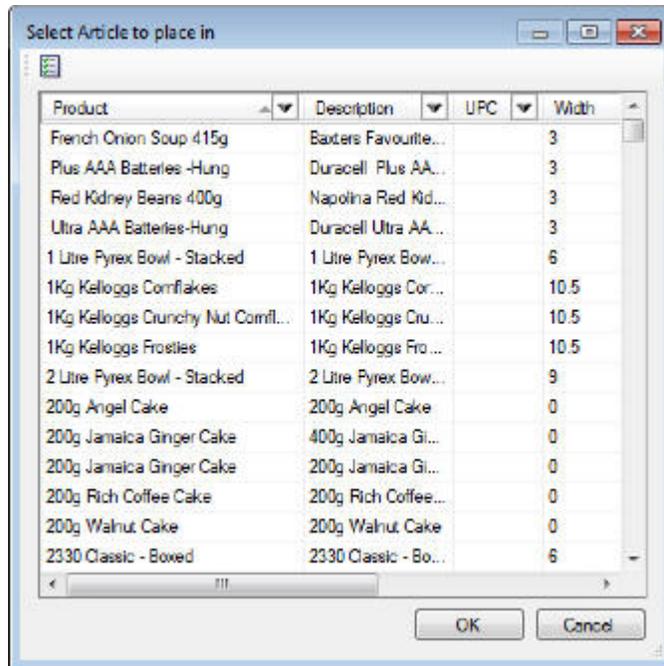
Adding, Editing and Deleting Products in Shelf Graphical View

Products can be added, Edited or Deleted in Shelf Graphical View. These options are accessed from the toolbar.

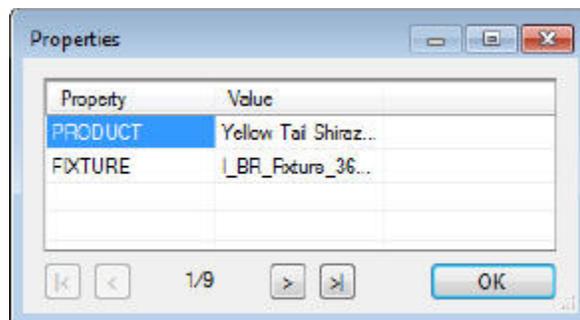


Adding Products

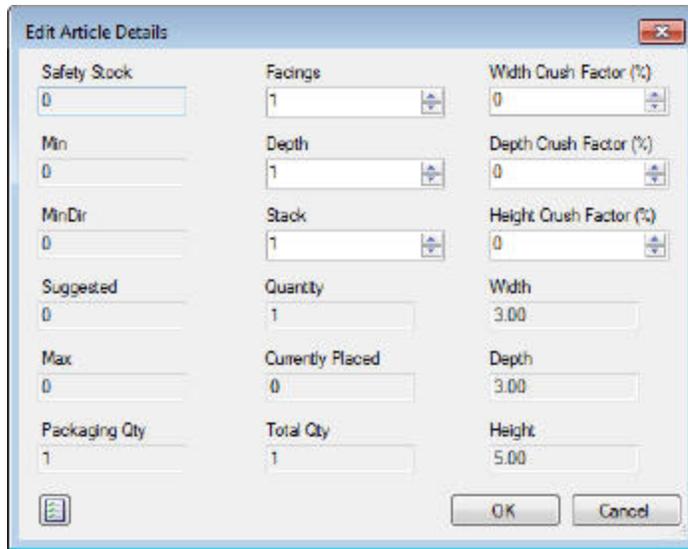
To add a product, first select the shelf on which the product will be placed. Next click the **Add Product** icon on the toolbar. This will bring up the **Select article to Place In** dialog box.



This will initially be blank, but will populate once text is entered into the text box and the filter icon clicked. The text field requires explicit wild cards. The list of products will be automatically restricted to the zone (department) that the parent fixture is in. If required, more information can be determined by highlighting a product and clicking the properties button to the upper left. This will bring up the Properties dialog box.

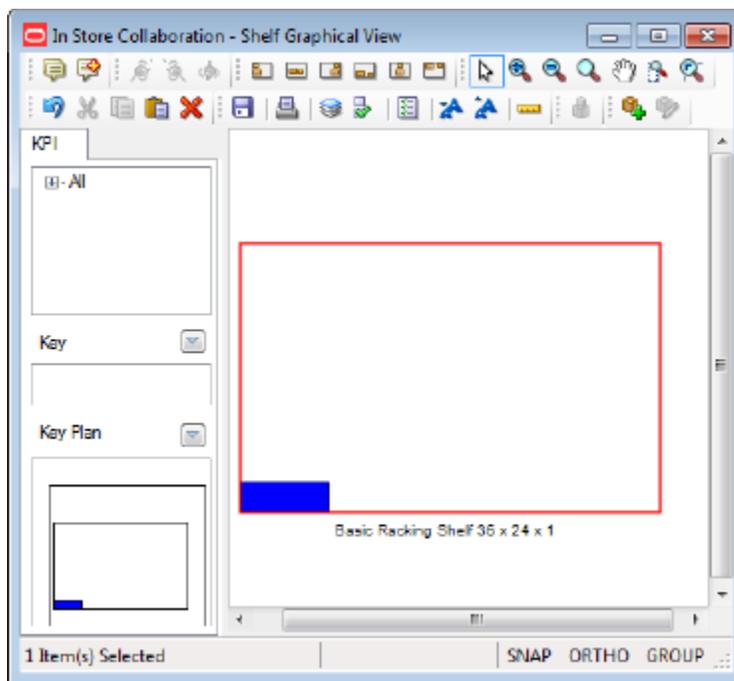


Once a product has been selected in the Select Articles to Place In dialog box and the OK button clicked, the Edit Article Details dialog box will appear. The number of products required can then be set. Clicking OK will result in the product being placed.



Note: There are no restrictions on the number of products that can be placed. Care should be taken not to place more products than the available space has capacity for.

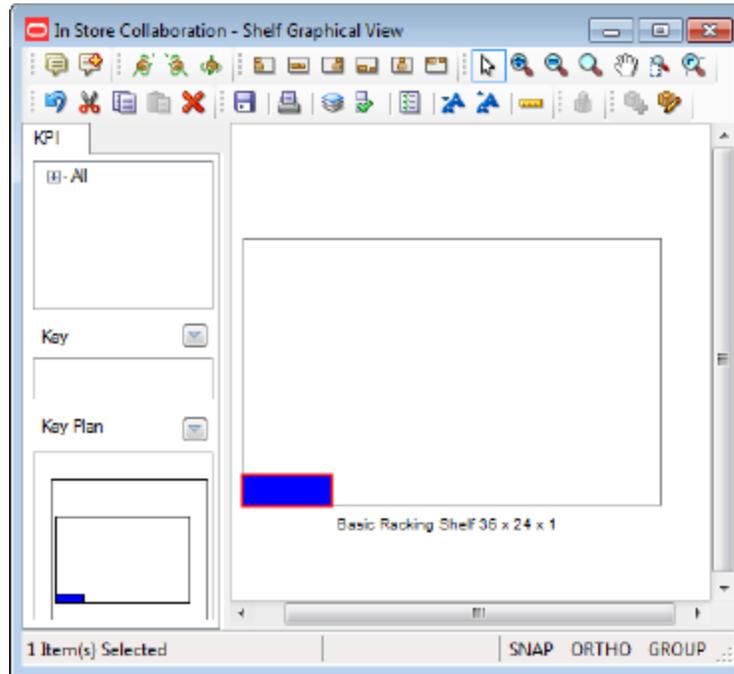
The products will then place on the shelf.



It will generally be necessary to use the alignment options to position the products exactly where required.

Editing Product Quantities

Product quantities can be changed by selecting a product for editing.



On clicking the Edit product button, the Edit Article Details dialog box will appear. The modified number of products required can then be set. Clicking OK will result in the product quantity being changed.

Deleting Products

To delete a product, highlight the required items then click Delete product on the toolbar. The selected products will be deleted without further confirmation.

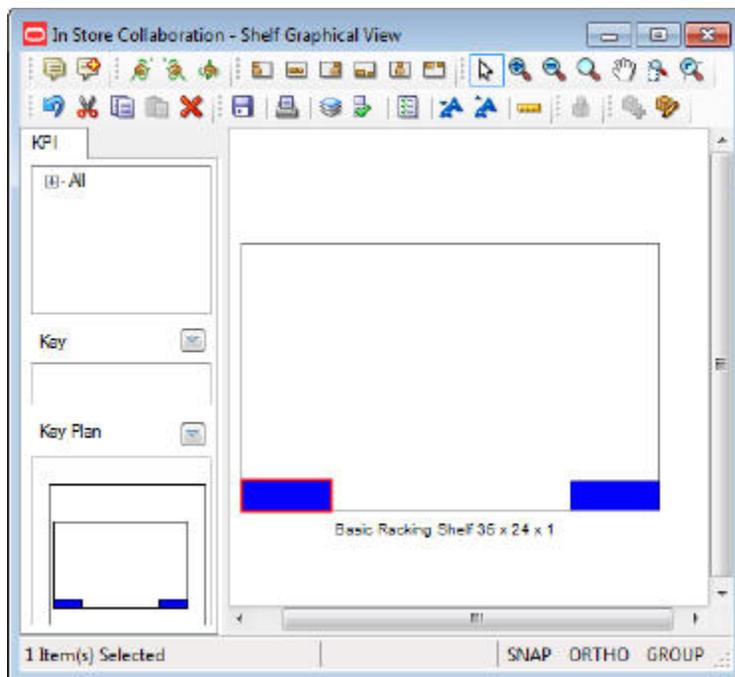
Aligning and Editing Products in Shelf Graphical View

Aligning Products

There are two ways products can be aligned: by aligning individual products, or by aligning all the products on the shelf.

Aligning Individual Products

Individual products are aligned by highlighting them, then using the cursor keys to nudge the product left, right, forward or back. There can also be 'dragged and dropped' using the mouse.

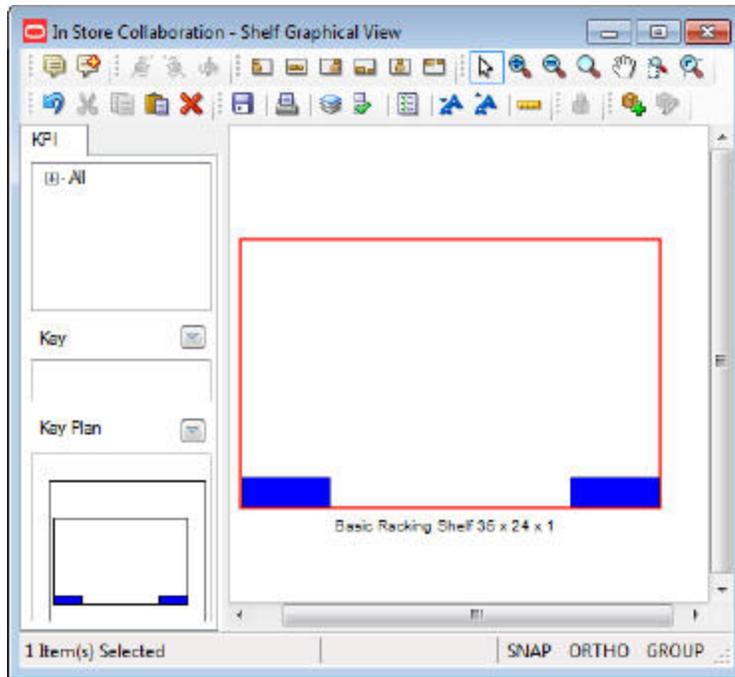


This distance the selected product moves with each click of a cursor key is set using the **Product Nudge Increment** in the **Options dialog box** accessed from the toolbar.

If the product is 'dragged and dropped', it can be aligned to a grid. The dimensions of this grid are set using the **Product Snap Grid** in the **Options dialog box** accessed from the toolbar. This grid will only be active if the Snap option is toggled on in the status bar.

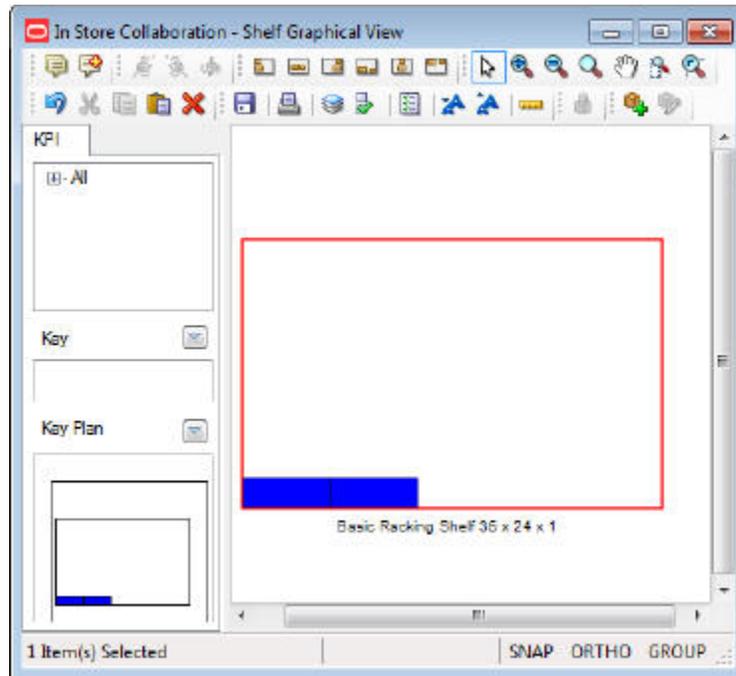
Aligning All Products

All products on a shelf can be aligned by selecting the parent shelf. The products on it can then be aligned by clicking on the appropriate icons in the toolbar. Multiple options can be used to get the alignment required.



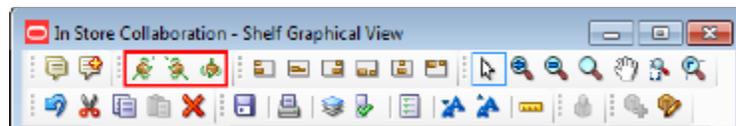
Icon	Description
	Align to Left
	Align to Center
	Align to Right
	Align to Front
	Align to Middle
	Align to Back

In the example below, the products have been moved to Left, Front.



Rotating Products

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



The rotation increment is set in the **Product Rotation Increment** field in Options dialog. It is suggested the value is set to 90°. Each click on a rotation button will then turn the product onto another side.

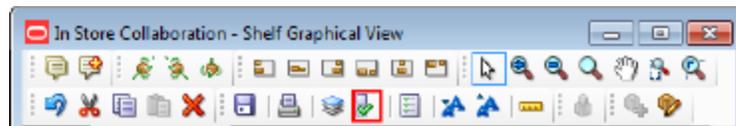
Note: When using the rotation options, it is suggested that care is taken that the product be left with the front or top of the packaging is left facing the direction customers will look from.

Other Shelf Graphical View Functionality

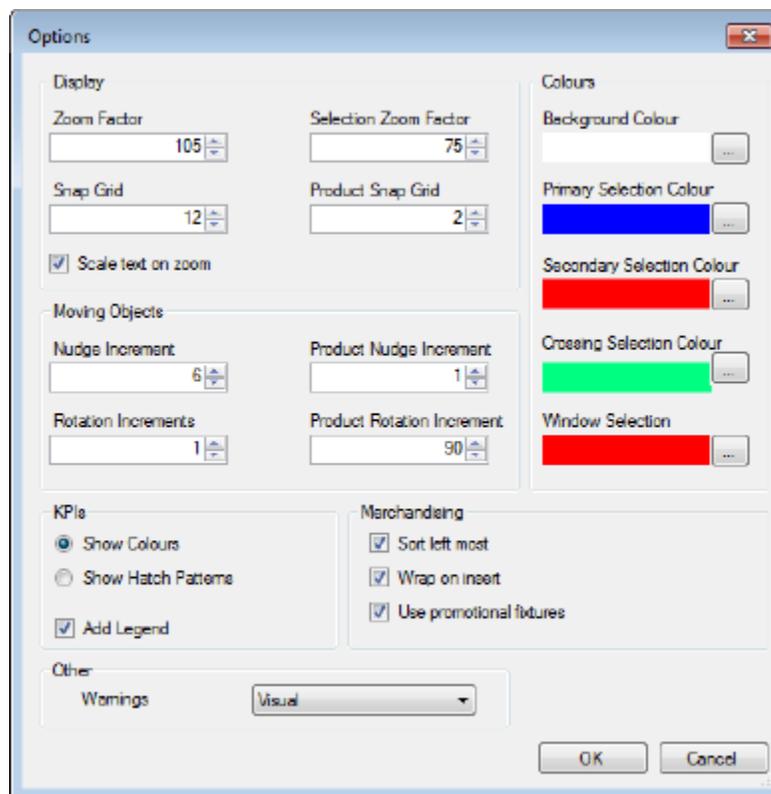
Some functionality within Shelf Graphical View is common to ISSC. This is described in more detail in the General Options section of this guide, but some of the more common functionality is described below.

Options Dialog Box

The Options dialog box enables individual users to customize some aspects of how ISSC works for them. This is accessed from the toolbar.



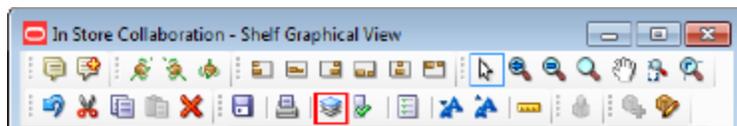
This will bring up the options dialog box.



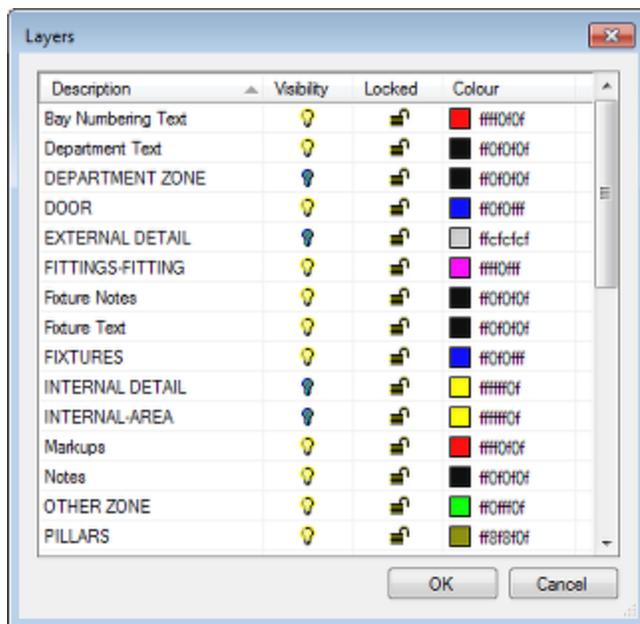
This can be used to customize a series of parameters.

Layers Dialog box

The Layers dialog box enables users to control the visibility of objects and to lock them against change. This is accessed from the toolbar.

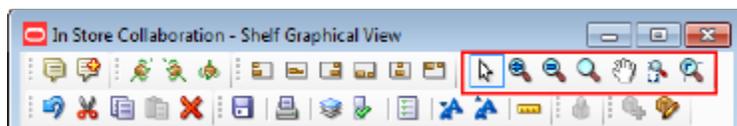


This will bring up the Layers dialog box.



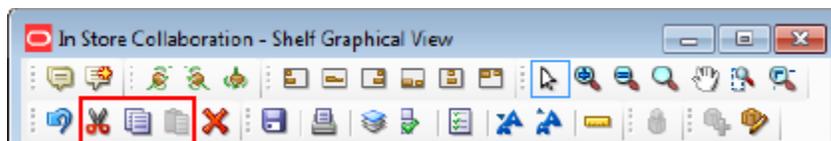
Operating within the Selected View

ISSC provides a number of ways of moving about within a particular view. These options are available from the toolbar.



Cut, Copy, Paste and Clipboard

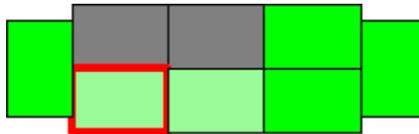
ISSC provides a clipboard which information can be cut and copied to. It also allows the information to be pasted back into the current view. These options are available from the toolbar.



Planogram Preview

Planogram Preview

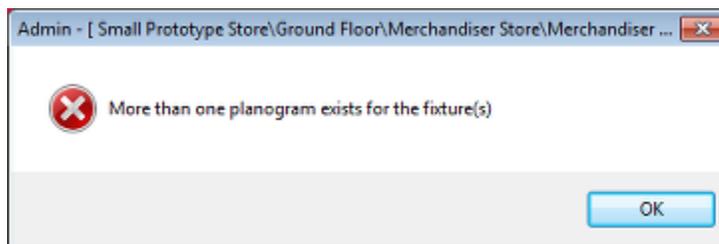
The Planogram Preview Window is used to display the planogram bays present on the selected fixture or fixtures. If the selected fixtures only contain part of a planogram, the full planogram will not be displayed. The information displayed is the original planogram design and does not take into account any changes made to products or shelves after the original planogram design was placed. To access the Planogram Preview for a planogram, first highlight one or more fixtures containing that planogram in Top Graphical View. If the planogram has been placed in multiple locations in the floor plan - for example a chocolate planogram on the checkouts - only one instance of that planogram can be selected for viewing at any one time.



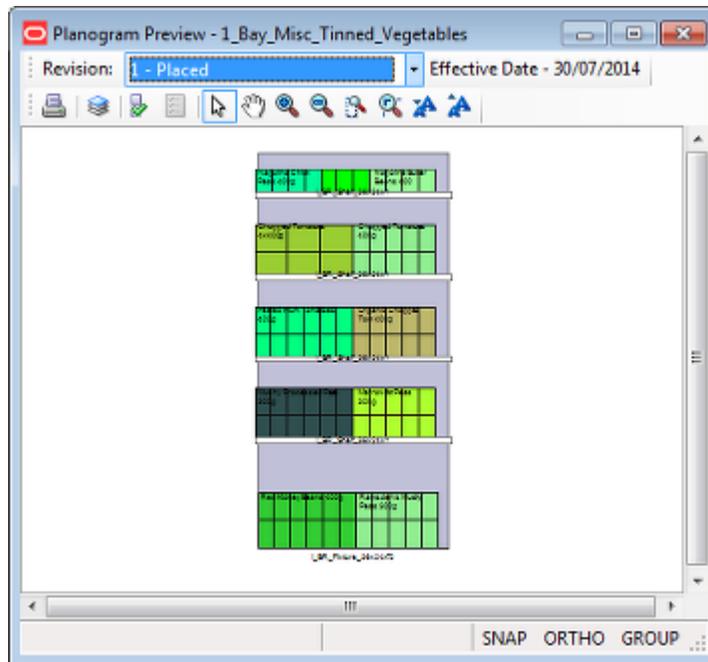
Next, click Planogram Preview on the toolbar.



If the fixtures selected contain multiple planograms, an error message will result. The fixture selection will then have to be modified.



If the fixtures selected only contain a single planogram, the Planogram Preview window will open.



- If there is no individual planogram mapped to a master planogram, the master planogram will be displayed.
- If there is an individual planogram mapped to a master planogram, the individual planogram will be displayed.

Toolbar

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



Icon	Description
	Print
	Shelf view (Disabled in Planogram Preview.)
	Layers
	Options
	Find
	Properties
	Decrease Text Size

- If the floor plan is at Authorised status, the initial revision displayed will be the first planogram after the effective date of the floor plan. The user can then move the date forward to see other planograms set to become effective in the future.
- If the floor plan is at Current status, the initial planogram that will be displayed is the one that is effective at today's date. Changing the date allows the user to see any past or future planograms that might be associated with the floor plan.
- If the floor plan is at Historical status the initial planogram that will be displayed is the one that was active at the date the floor plan was made historical. changing the date to an earlier one allows the user to see prior revisions of the planogram.

Master Planograms

If master planograms are present in the floor plan and a mapping exists between that master planogram and an individual planogram, the Planogram Preview will show the associated individual planogram. If a master planogram is displayed in the Planogram Preview dialog box, no such mapping exists. It would be good practice to investigate why. This is because master planograms are not suitable for implementation in the store. Neither will they generate the correct information for the replenishment system.

Keyboard and Mouse Options

The following **keyboard shortcuts** can be used.

Short Cut	Description
<Ctrl + S>	Save
<Ctrl + P>	Print
<Ctrl + F>	Display the Find dialog
<Ctrl + L>	Display the Layers dialog
<Ctrl + O>	Display the Options dialog
<the Esc key>	Clear the current selection
Cursor Keys	Pan Left, Right, Up and Down

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

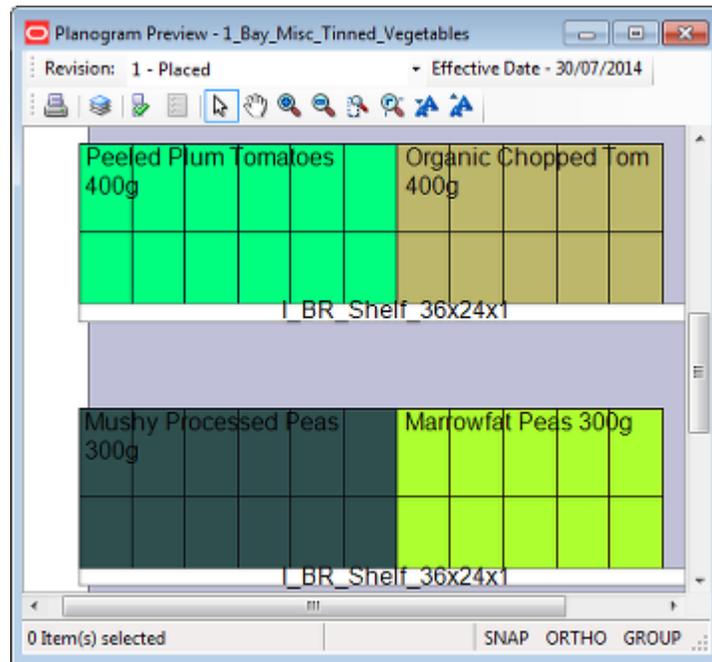
Short Cut	Description
Mouse Click	Select /De-select Fixtures
Mouse Wheel Up	Zoom In (relative to mouse pointer position)
Mouse Wheel Down	Zoom Out (relative to mouse pointer position)
Mouse Wheel Drag	Pan

Planogram Preview Operations

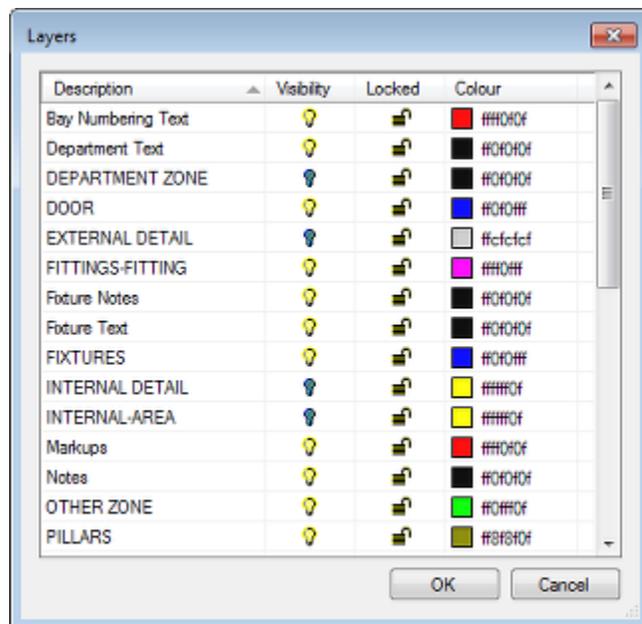
The Planogram Preview Window provides a number of ways of gaining information on the planogram.

Annotation

Fixtures, shelves and products show customizable annotation. In the example below, product facings are represented by the grid lines, while the products themselves are annotated to show their identity. How the annotation behaves when the scale is zoomed depends on how it is configured in the Product SKU Text for Planogram Preview text style in the Text Styles dialog box (Planning menu) in the Administration module in Macro Space Management.



Display of the varying forms of annotation can be turned on or off by means of the Layers dialog box accessed from the toolbar.



Tooltips

Holding the mouse pointer over a fixture, shelf or product will bring up a tooltip giving information on that object.

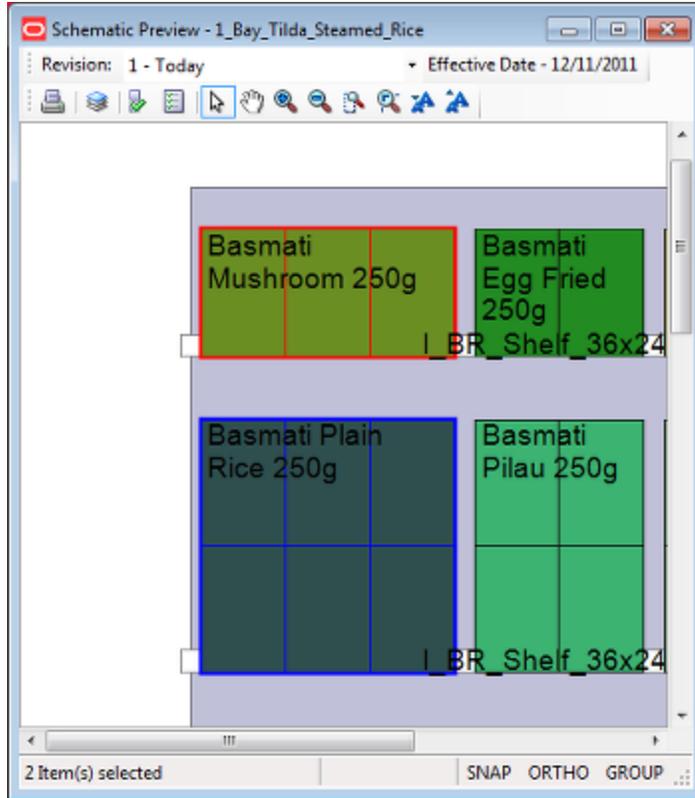


The information displayed in the tooltip can be customized by modifying the Custom SQL in the database. See the *Oracle Retail Macro Space Planning Data Model* for details.

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:

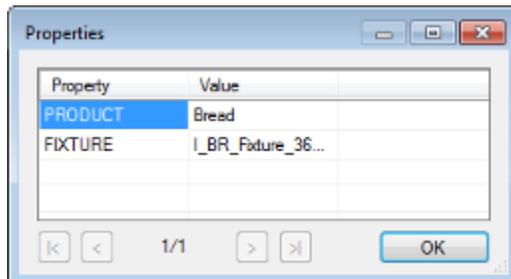
- **Window Selection:** Window Selection only selects objects that the window completely encloses. To use Window Selection, select a start point then move the cursor right.
- **Crossing Selection:** Crossing Selection selects every object that the window encloses or crosses. To use Crossing Selection select a start point then moves the cursor left.



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: If Grouping 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 the user to move through the records.

Field	Description
	Go to first record
	Go to previous record
	Go to next record
	Go to last record