Oracle® Retail Macro Space Management

Configuration Module User Guide
Release 13.2.4

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ORACLE

Oracle® Retail Macro Space Management Configuration Module User Guide, Release 13.2.4

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Preface

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

Audience

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

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Related Documents

For more information, see the following documents in the Oracle Retail Macro Space Management Release 13.2.4 documentation set:

- *Oracle Retail Macro Space Management Administration Module User Guide*
- *Oracle Retail Macro Space Management Administration Module Online Help*
- *Oracle Retail Macro Space Management Configuration Module User Guide*
- *Oracle Retail Macro Space Management Configuration Module Online Help*
- *Oracle Retail Macro Space Management Data Importer User Guide*
- *Oracle Retail Macro Space Management Data Importer Online Help*

- *Oracle Retail Macro Space Management Fixture Studio User Guide*
- *Oracle Retail Macro Space Management Fixture Studio Online Help*
- *Oracle Retail Macro Space Management Product Studio User Guide*
- *Oracle Retail Macro Space Management Product Studio Online Help*
- *Oracle Retail Macro Space Management Store Planning User Guide*
- *Oracle Retail Macro Space Management Store Planning Online Help*
- *Oracle Retail Macro Space Management Report Designer User Guide*
- *Oracle Retail Macro Space Management Report Designer Online Help*
- *Oracle Retail Macro Space Management Release Notes*
- *Oracle Retail Macro Space Planning Installation Guide*
- *Oracle Retail Macro Space Planning License Information*
- *Oracle Retail Macro Space Planning Data Model*

For more information on Macro Space Management see the following documents in the Oracle Retail In-Store Space Collaboration Release 13.2.4 documentation set:

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

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

https://support.oracle.com

When contacting Customer Support, please provide the following:

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

Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 13.2) or a later patch release (for example, 13.2.4). If you are installing the base release and additional patch and bundled hot fix releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch and bundled hot fix releases can contain critical information related to the base release, as well as information about code changes since the base release.

Oracle Retail Documentation on the Oracle Technology Network

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

http://www.oracle.com/technology/documentation/oracle_retail.html

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

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

Conventions

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."

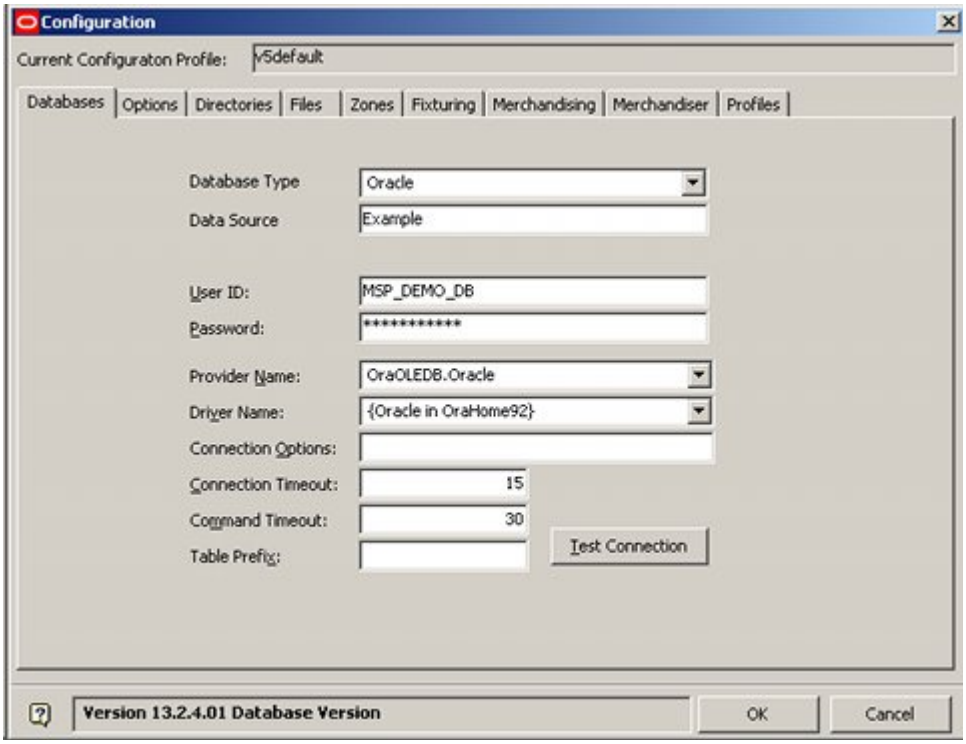
```
This is a code sample
    It is used to display examples of code.
```

1

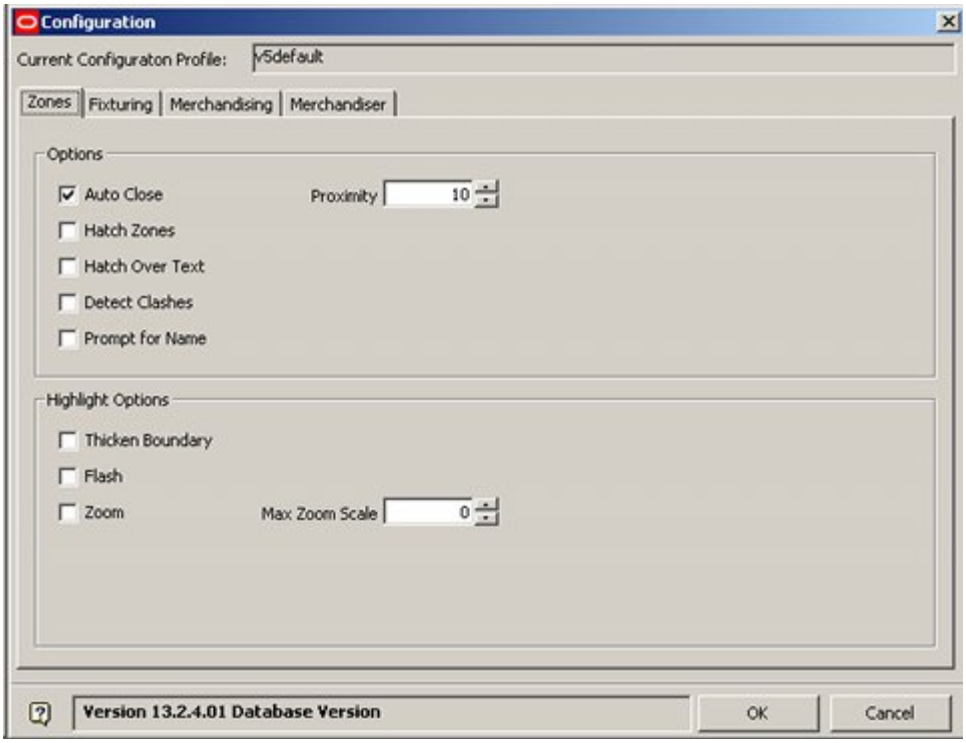
About the Configuration Module

About the Configuration Module

The **Configuration Module** allows numerous aspects of the operation of Macro Space Management to be customized to suit individual users. It also allows directory paths and file paths to be specified. Depending on where the Configuration Module is opened from, it will display differing numbers of tabs. If opened from the Administration module, it will show the full range of tabs.



If opened from the Fixture Studio, Product Studio, Planner or Merchandiser modules, a more restricted set of tabs will be available.



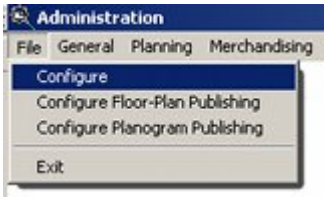
The majority of the tabs available only from the Administration Module control global operation of Macro Space Planning - for example the directories tab specifies where data files are to be stored. The tabs accessible from all modules are concerned with user specific settings - for example the Zones tab can be used specify how zones will highlight in the floor plan when selected in the zone hierarchy in the Object Browser.

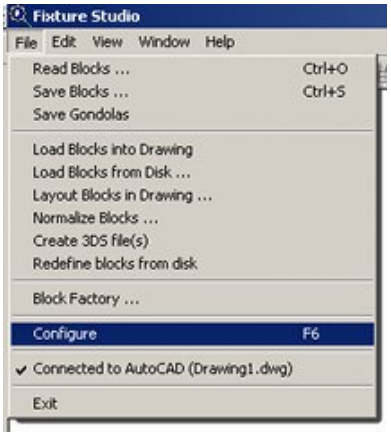
Methods of Accessing the Configuration Module

There are two methods of accessing the Configuration Module - from the menu bar and from the toolbars on the Object Browser in the Planner and Merchandiser Modules.

From the Menu Bars

Opening multiple tabs of the Configuration Module can be accomplished from the File menu of the Administration, Fixture Studio, Product Studio, Planner or Merchandiser modules.

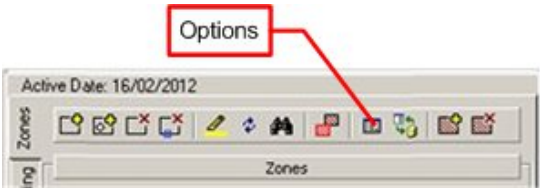




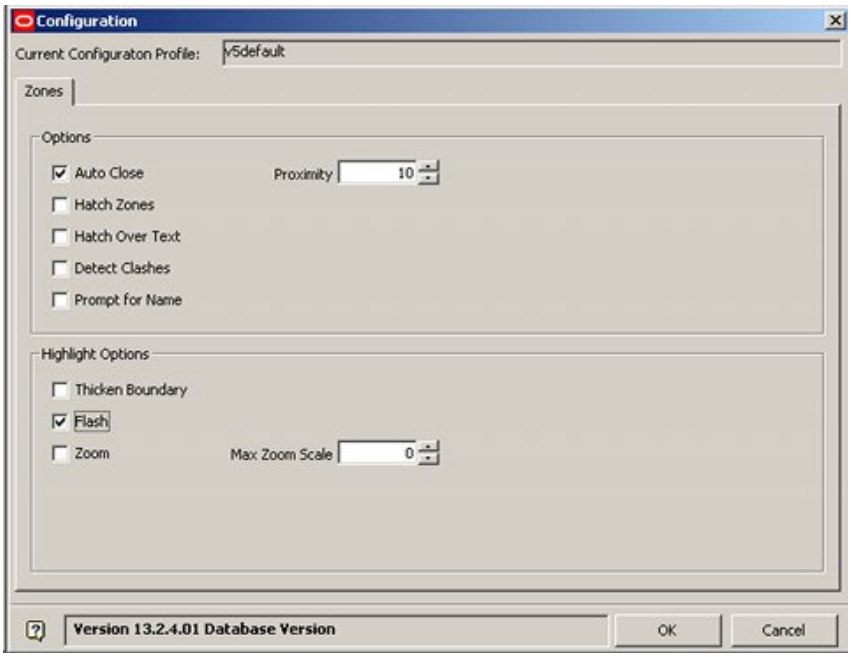
Note: The full range of tabs in the Configuration Module will only be available if opened from the Administration module.

From the Object Browser Toolbar

An alternative way of opening the Configuration module is from the Options button on the toolbar of the Object Browser.



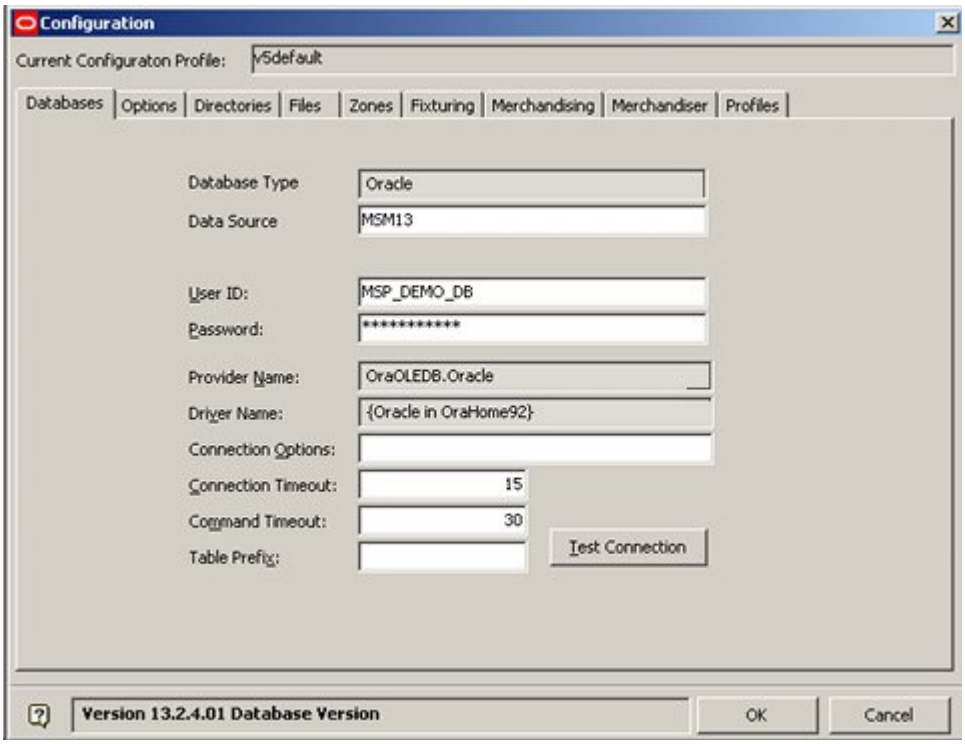
This will bring up the pertinent tab of the Configuration module.



The Tabs that can be brought up in this way are the Zones Tab, the Fixturing tab and the Merchandising Tab.

Configuration Module Components

The **Configuration Module** contains a series of tabs. Each tab allows changes to be made to a specific aspect of Macro Space Management operation.



The **Databases Tab** allows details of the connections to the central database to be set up.

The **Options Tab** allows some details of the interface with the software to be configured.

The **Directories Tab** allows directories where Macro Space Management stores data and files to be specified.

The **Files Tab** enables the user to specify where files required for the configuration of Macro Space Management are stored.

The **Zones Tab** allows the way Zones are displayed to be specified.

The **Fixturing Tab** enables the way fixtures are inserted into the store plan to be configured.

The **Merchandising Tab** enables the way Products and Planograms are selected and displayed to be adjusted.

The **Merchandiser Tab** allows the way Merchandiser displays a virtual store to be customized.

The **Profiles Tab** allows the adding, editing, renaming and deleting of profiles.

The Database, Options, Directories, Files and Profiles tabs are only available if the Configuration module is opened from the Administration module.

Making Changes in the Configuration Module

Some **Configuration Module Changes** will significantly affect the way Macro Space Management operates.

> **Note:** If making major changes in the Configuration Module, it is recommended that all modules are closed with the exception of the Administration Module. The Configuration module can then be called from the Administration module

Global Effects

If you are a member of the Administrators User Group, changing the directory paths (Directories tab) will change those paths for all Macro Space Management users.

Changes affecting all users of a Specific Computer

Some of the settings in the Configuration Module are stored in the HKEY_LOCAL_MACHINE section of the Registry. These settings affect all users of Macro Space Management using that particular computer.

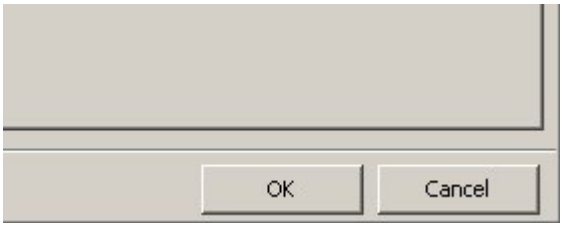
Changes Affecting Individual Users of MSM

Some of the settings in the Configuration Module are stored in the HKEY_CURRENT_USER section of the Registry. These settings only affect that specific MSM user.

> **Note:** For more information on how specific values in the Registry are used by MSM contact Oracle's Technical Support Department.

When Changes take Effect

Changes made in the Configuration Module will only be written to the database when the OK button in the lower right of the dialogue box is clicked. (Clicking the Cancel button will exit without saving changes).



If the user makes changes in the Configuration Module, then exits without saving, they will be warned about outstanding changes.

Changes made to settings within the Configuration Module will take effect at different times.

Some settings will have an immediate local effect. Other changes will take effect when a new store plan is opened. Other changes will only take effect when Macro Space Management is restarted.

Relationship between Configuration and Admin Modules

The **Administration Module** is a part of Macro Space Management only accessible to users with Administrative privileges. It contains a series of settings that affect the global operation of Macro Space Management.

Some data is passed between the Configuration Module and the Admin Module – changes on one module being reflected in the other. An example would be the Options Frame in the Merchandising Tab in the Configuration module. This contains allows settings for the % Over Tolerance and % Under Tolerance options controlling the permissible variations between Fixture and Planogram sizes.

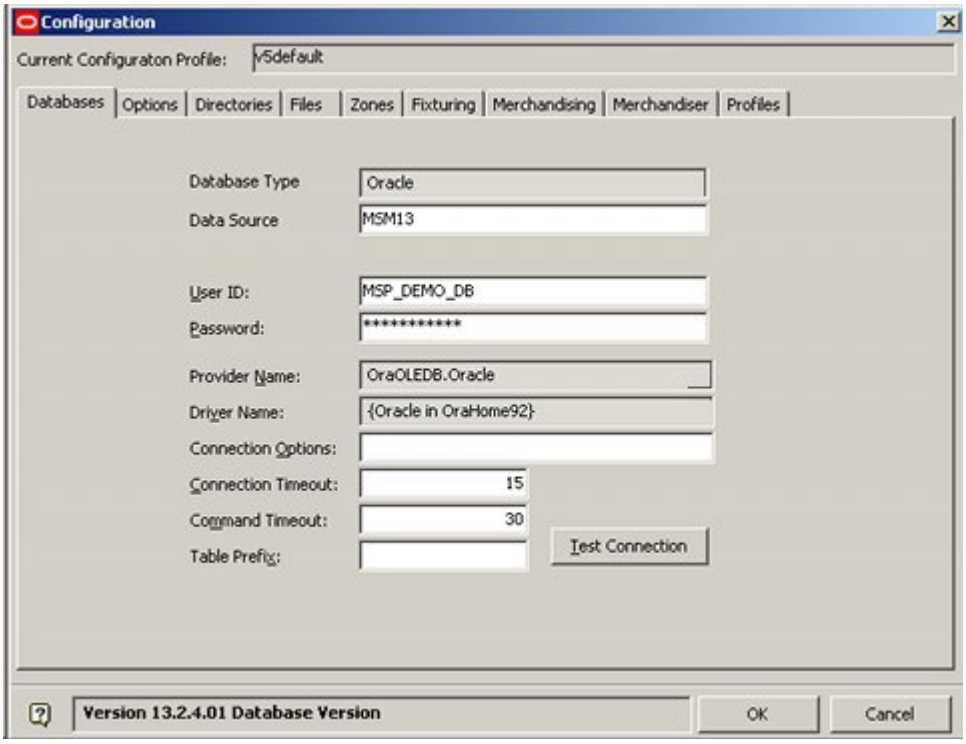
These tolerances are also reflected in the System Variable table in the Admin Module – changes in one module should result in the change being visible in the other.

2

The Database Tab

The Database Tab

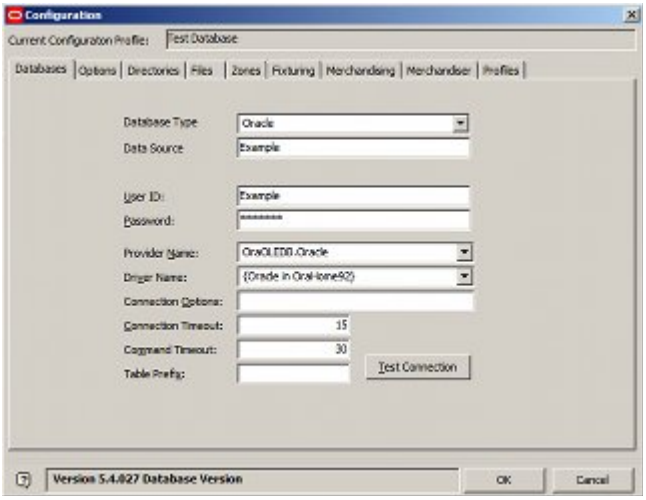
The **Database Tab** contains the settings for the database in current use. It is only available to users who have accessed the Configuration Module via the Administration module.



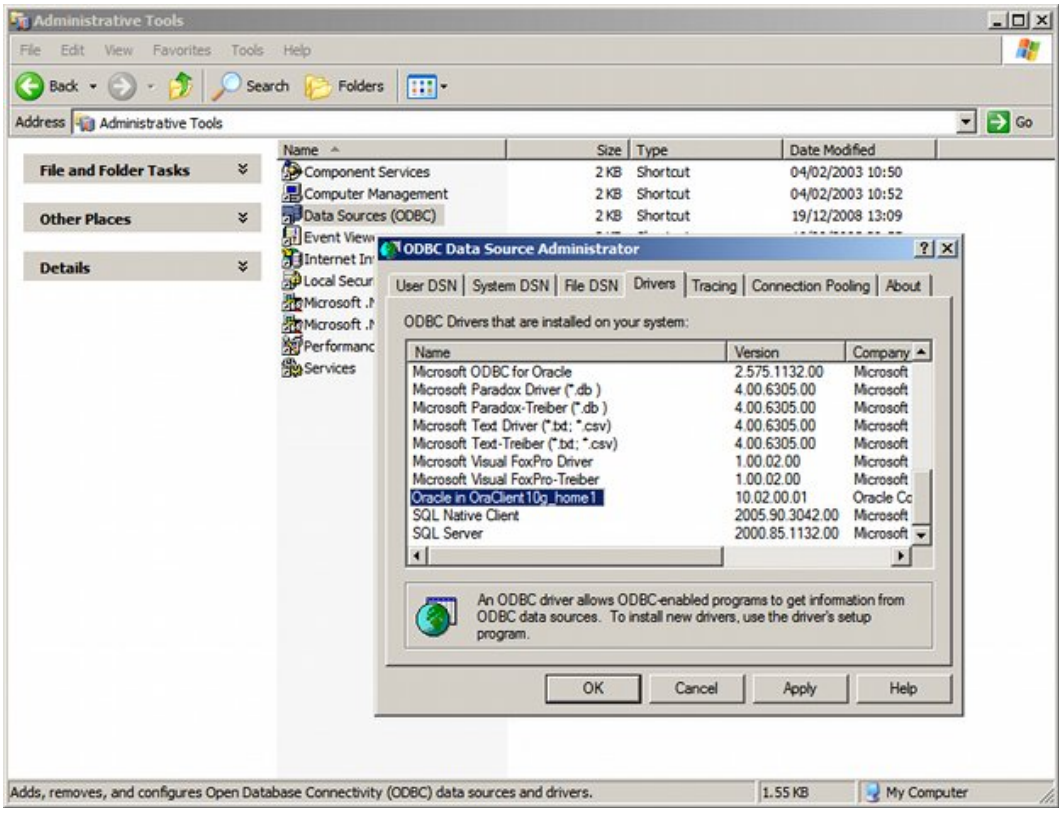
Database connection settings are stored in a Profile (see info on the Profiles Tab). Switching Profiles is a quick and easy way of changing the database a user is connected to.

Overview of Connections via the Database Tab

The **Database Tab** provides an interface to connect to the database types supported by Macro Space Management.



The options available in the drop down lists are read from the drivers tab of the ODBC Data Source Administrator dialogue box from the Administrators Tools in the Windows Control Panel.



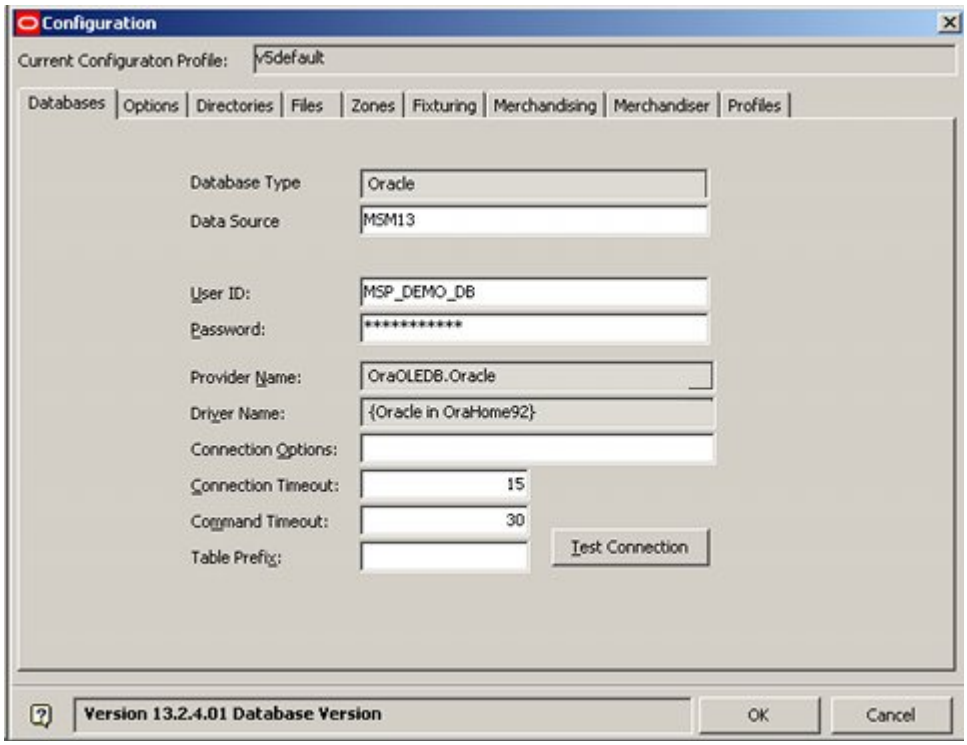
As many of these drivers are installed by default when Windows is installed, the drop down list in the Configuration Module contains options that are not in use by Macro Space Planning.

Note: When a database type is selected from the Database Type drop down list in the Configuration Module, the software sets the Provider Name and Default Name to the recommended default.

Database Connection settings are stored in the Registry, so the settings are specific to that computer.

Setting Connection Options for Oracle Databases

Oracle Database connections are set as follows:



Note: These setting are saved in the registry of the local computer and will thus be valid for all users of that computer.

Database Type

The Database Type displays grayed out and read only.

Data Source

The data source is the alias for the server that the required database resides on.

User ID and User Password

The User ID and User Passwords are the passwords for the Database (not Macro Space Planning).

Provider Name

This should default to OraOLEDB.Oracle for all databases. It will be grayed out and read only.

Driver Name

The Driver Name will vary depending on which version of the Oracle database is installed. {Oracle in OraHome92} is the driver for an Oracle database. It will be grayed out and read only.

Connection Options

These are not in use.

Connection Timeout

This sets the maximum time before the software determines connection with the database has been lost. If the connection time is longer than the default, a warning message will appear.

Command Timeout

This sets the maximum time before the software determines that there are problems with the database and the command will not be executed.

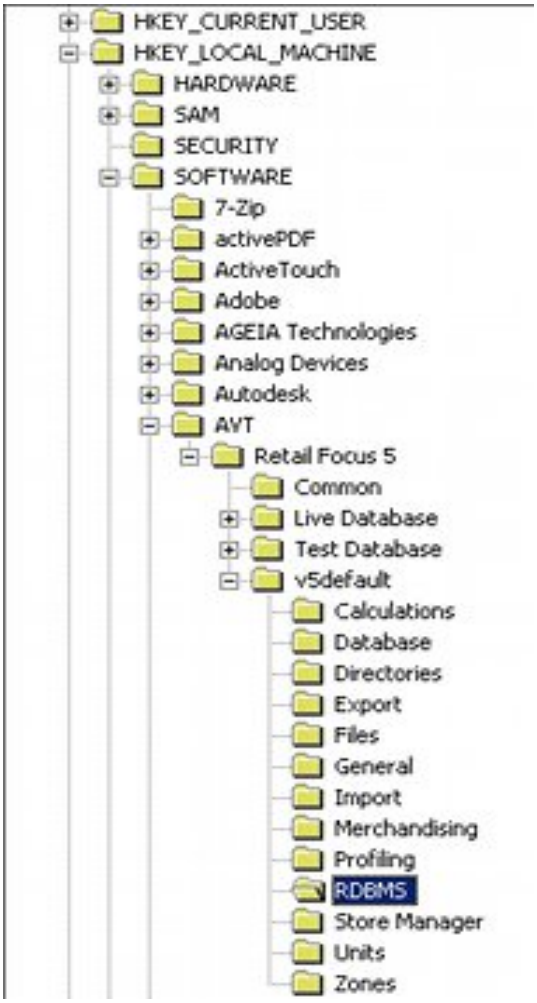
Table Prefix

This functionality is currently not enabled.

The **Test Connection button** checks that the connection to the central database is functioning correctly. Clicking on it will bring up a message indicating whether the connection is correctly functioning or not.

The Database Tab and the Registry

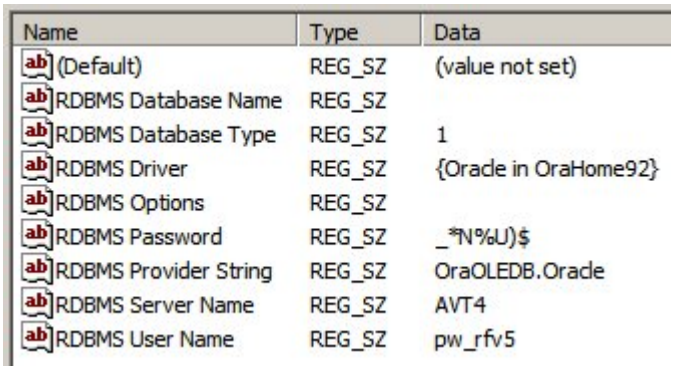
Settings from the Configuration Module are stored in the Registries of individual computers. The information is found using the following path: HKEY_LOCAL_MACHINE\SOFTWARE\AVT\Retail Focus 5. The most important information is for the database connection.



Each Profile in the Configuration Module (Profiles Tab) has its own entry in the Registry. In the above example, data is held for three profiles:

- Live Database
- Test Database
- v5 Default

Within each profile, there is a RDBMS folder. This holds information on the database connection settings.



Name	Type	Data
(Default)	REG_SZ	(value not set)
RDBMS Database Name	REG_SZ	
RDBMS Database Type	REG_SZ	1
RDBMS Driver	REG_SZ	{Oracle in OraHome92}
RDBMS Options	REG_SZ	
RDBMS Password	REG_SZ	_*N%U)$
RDBMS Provider String	REG_SZ	OraOLEDB.Oracle
RDBMS Server Name	REG_SZ	AVT4
RDBMS User Name	REG_SZ	pw_rfv5

Note: Because information is stored in the HKEY_LOCAL_MACHINE section of the Registry, changes to the database setting will affect all users of that computer, not just that specific user in Macro Space Management.

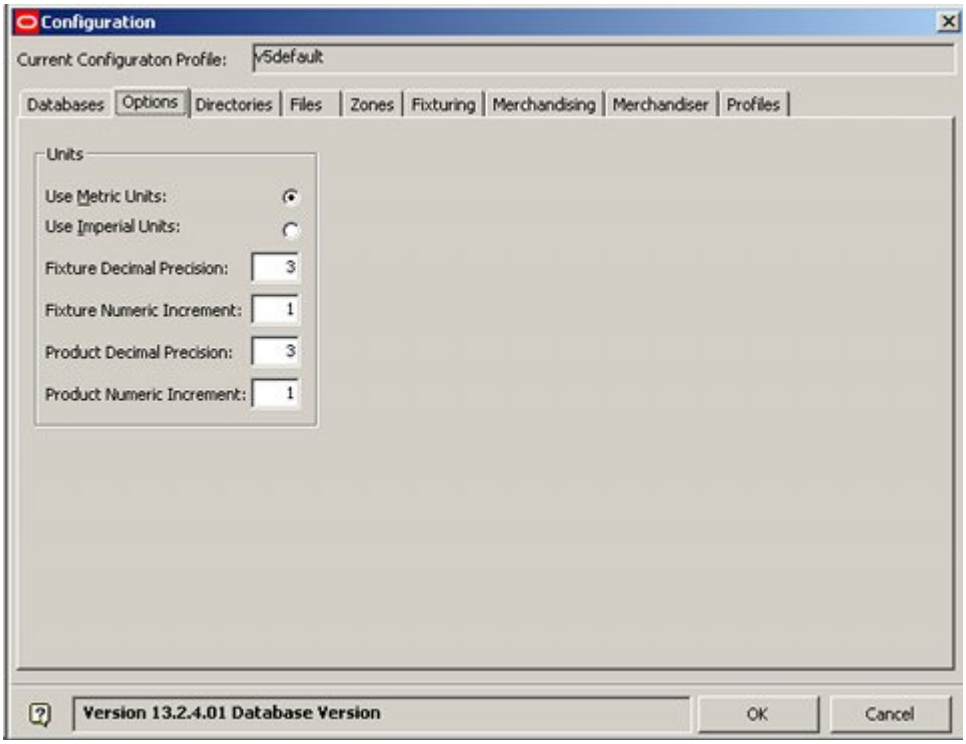
Users must be 'Power Users' for the Registry to allow information to be written to the Registry every time changes are made in the Configuration Module.

3

The Options Tab

The Options Tab

The **Options Tab** enables a number of broad options to be set up. It is only available to users who have accessed the Configuration Module via the Administration module.



The Units frame allows the user to specify which units Macro Space Management will use as its default.

Units can be set to either Metric or Imperial and should be appropriate for the database in use.

Fixture Decimal Precision is the precision that will be used for dimensions in Fixture Studio.

Fixture Numeric Increment is the amount a spin control in Fixture Studio will be incremented each time the user clicks on an increase or decrease arrow.

Product Decimal Precision is the precision that will be used for dimensions in Product Studio.

Product Numeric Increment is the amount a spin control in Product Studio will be incremented each time the user clicks on an increase or decrease arrow.

> **Note:** Fixture Decimal Precision, Fixture Numeric Increment, Product Decimal Precision and Product Numeric Increment are currently not functional.

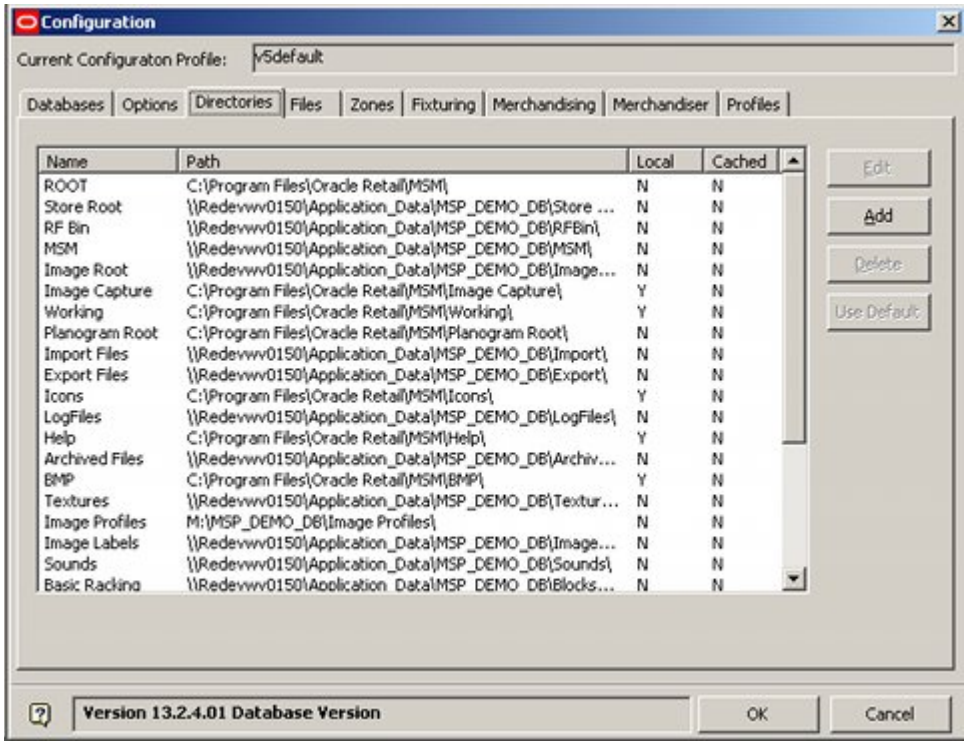
Although Macro Space Management can work in a variety of units, specifying the default unit affects some aspects of configuration including the units used for the default tolerances and for annotation. The default unit is also the measure used to store measurements in the database.

4

The Directories Tab

The Directories Tab

The **Directories Tab** contains the list of Directories where Macro Space Management stores its information. It is only available to users who have accessed the Configuration Module via the Administration module.



Directory Types

These directories may be:

- **Default:** mandatory directories required by the software and configured by Oracle. These cannot be renamed or deleted.
- **User Defined:** non-mandatory directories defined by the user and used to hold information on (for example) fixtures. These can be added to meet customer requirements.

Directory Locations

These directories may be located as follows:

- **Central:** in a single specific location on a network so that the data in them is available for all users
- **Local:** in a location specific to the user (often on their hard drive) and normally only accessible to that user

Directory Paths

The path to the directory may be specified as either a:

- **Mapped drive:** the path name is relative to a folder that has been 'mapped' using Windows tools
- **UNC (Uniform Naming Convention) path:** the full path to the directory
- **Local Drive:** the user's local hard drive

> **Note:** The directories referenced by In-Store Space Collaboration must always be UNC paths - the ISSC service does not recognize mapped drives.

Information on directory paths may be stored as:

- **Default**: the standard path to the directory used as the default for all users.
- **User Specific:** a path to the directory specific to that user. User specific paths can only be set for user defined directories and not for system directories.

> **Note:** UNC paths are better for Central paths. This is because not everyone will have mapped to the same directory, whereas a UNC path is common to all users.

The Directories Tab enables Administrators to configure this information.

Overview of Directories

The **default directories** for Macro Space Management are specified below. They are configured by Oracle and cannot be deleted or renamed.

- **Network Directories** use a single specific location on a network so that the data in them is available for all users.
- **Local Directories** use a location specific to the user (usually on their hard drive) and normally only accessible to that user.

Directories should only be designated as Local if there is no possibility of the specific data stored there being used by other users.

Directory Name	Directory Type	Comment
Archived Files	Network	Directory files will be moved to after they have been imported.
BMP	Preferably local	This directory is used for the AutoCAD toolbar button bitmaps that appear in the toolbars in the Planner environment. It is normally local as the icons are part of the software installation. The local files are found at C:\Program Files\Oracle Retail\MSM\BMP.
Export files	Network or local	Location that files are exported to, for example Profiles
Icons	Network or local	Directory for additional icons used by Oracle Retail Macro Space Management. This directory will be discontinued shortly.

Directory Name	Directory Type	Comment
Image Capture	Network	Default directory for holding images captured by a scanner, digital camera, etc. These images can subsequently be imported into the software.
Image Label	Network	Directory for images that can be added to the labels associated with fixtures in the Merchandiser environment.
Image Profile	Network	Location for 2D planogram profile images. The images are used when a planogram is placed as a 2D placeholder in the Merchandiser environment.
Image Root	Network	This is the root directory for the images that will be used for photo-realistic indications of products. As product images are added, edited or deleted, the hierarchy below the image root will be modified. **Note:** Image Root must be a UNC path if referenced by In-Store Space Collaboration.
Import Files	Network	Location to which files will be imported. Data Importer looks for the files it reads in this location.
Help	Must be local	The location of the help files used by Macro Space Management. The locally installed files are found at C:\Program Files\Oracle Retail\MSM\Help. **Note:** the directory must be local as chm type help files cannot be read across a network for security reasons.
Log Files	Network or local	Log files created by the application to record events and issues
MSM	Network	Directory that holds standard blocks used by Oracle Retail Macro Space Management. It has two sub directories for imperial and for metric blocks.
RFBin	Network	This holds files that have been marked for deletion in Store Manager and moved from their location relative to the Store Root. If purged (Store Manager), they will be permanently deleted. If un-deleted, the files will be moved back to their location relative to the Store Root.
Planogram Root	Network or local	Root directory for planograms imported from third party software. This directory is not used in the standard implementation. Planograms can only be imported via the Data Importer
Root	Must be local	Root directory for the application. For files such as the AutoCAD line style or hatch style files

Directory Name	Directory Type	Comment
Store Root	Network	This is the root directory for the directories and files that make up the hierarchy specified in Store Manager. As stores, floors, revisions, and files are added, edited or deleted, the hierarchy below the store root will be modified. **Note:** Store Root must be a UNC path if referenced by In-Store Space Collaboration.
Textures	Network	Directory for Textures. Used for specifying the textures for walls, ceilings, etc in Merchandiser
Working	Normally local	Directory for temporary files, including temporary graphics images created in Merchandiser. The pre-installed local directory can be found at C:\Program Files\Oracle Retail\MSM\Working

More information on specific directories can be found in the chapter on directories.

Overview of Directory Paths

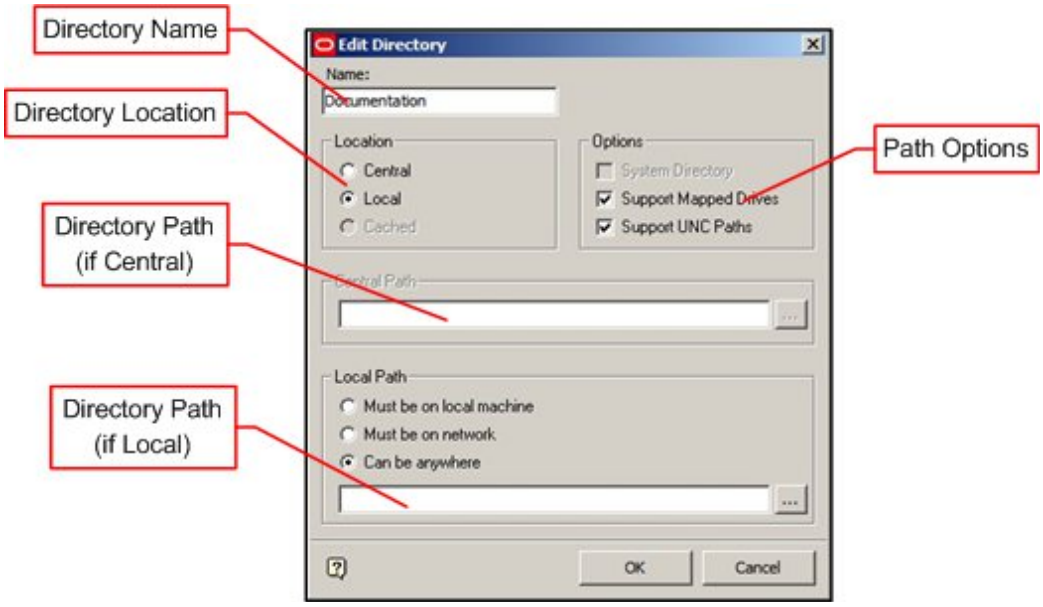
General

Directories may be either System or User Defined.

- System directories cannot be deleted and can only have their paths changed.
- User Defined directories are additional to the system directories. They can be added, edited and deleted.

Both are set using the Add Directory or Edit Directory dialogue box from the Directories tab of the Configuration module.

> **Note:** Changing a User Specified directory path will only change the path for that user. Changing a Default directory path will change that path for ALL users. Accordingly, changing the Default directory path should be done with caution.



Directory Name

- If the directory is a system directory, the directory name will be grayed out and non-editable.
- If the directory is a user defined directory, the directory name can be edited.

Path Options

The paths to the directories can take three forms:

- Mapped drives
- UNC (Uniform Naming Convention) Paths
- Local Drives

Mapped drives and UNC paths are only supported it the appropriate option is checked.

Location

Directories can be:

- Central - on a server, so they are available for all users
- Local - on a user's hard drive, so they are normally only available to that user

> **Note:** Take care when specifying directories as local - the majority of system directories need to be available to all users.

Central Path

A central path is to a directory on a server

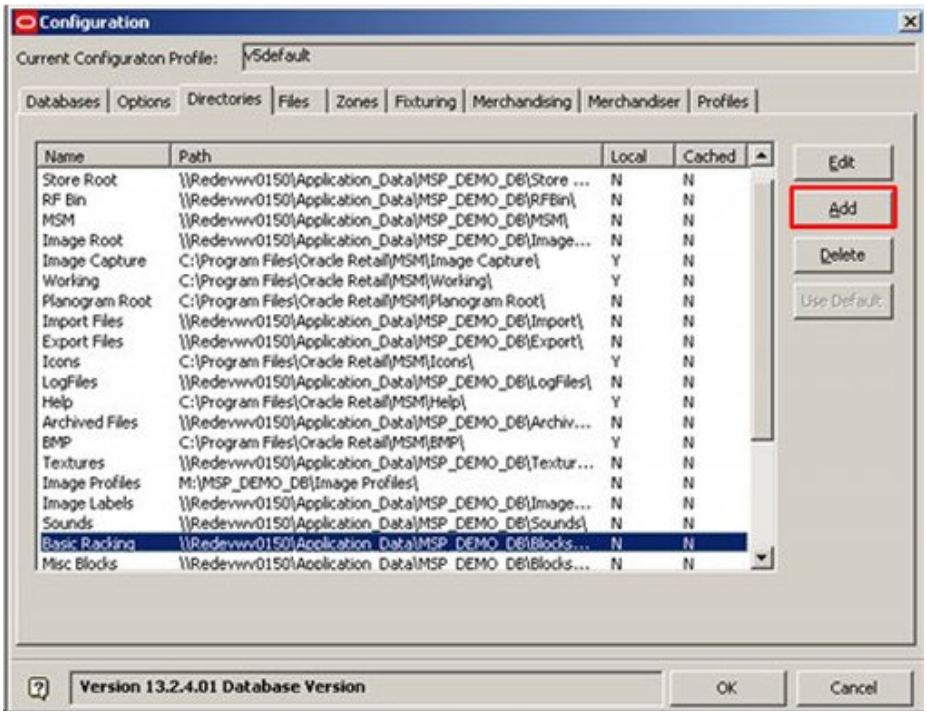
Local Path

A Local Path defines a generic path to a directory on all local drives, for example the help file directory that is installed at C:\Program Files\Oracle Retail\MSM\Help.

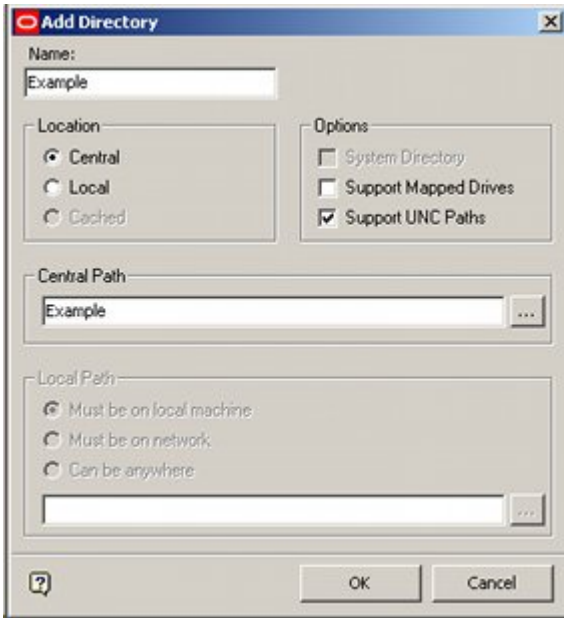
Adding, Editing and Deleting Directories

Adding Directories

Only User Defined directories can be added. This is done by clicking the Add button on the Directories tab.



This will bring up the Add Directory dialogue box.



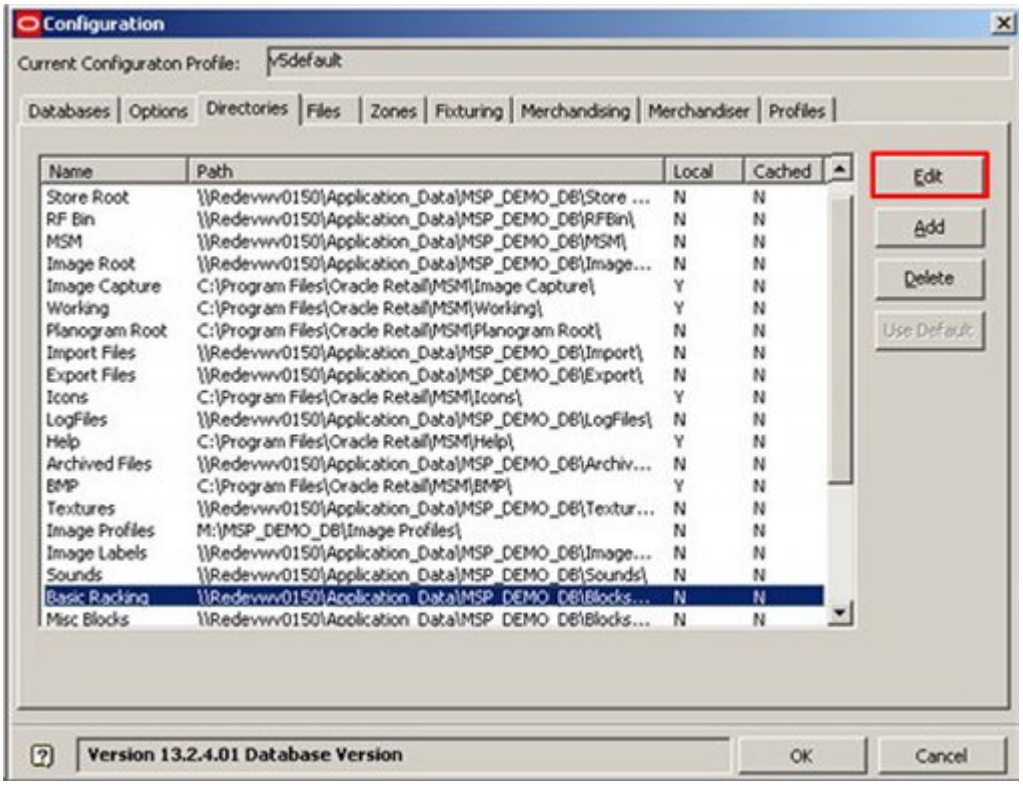
This will allow users to configure details for User Defined directories including:

- Directory Name
- Where local or central
- Path to directory

> **Note:** The specified path for the directory must reference a directory in the Windows directory structure.

Editing Directories

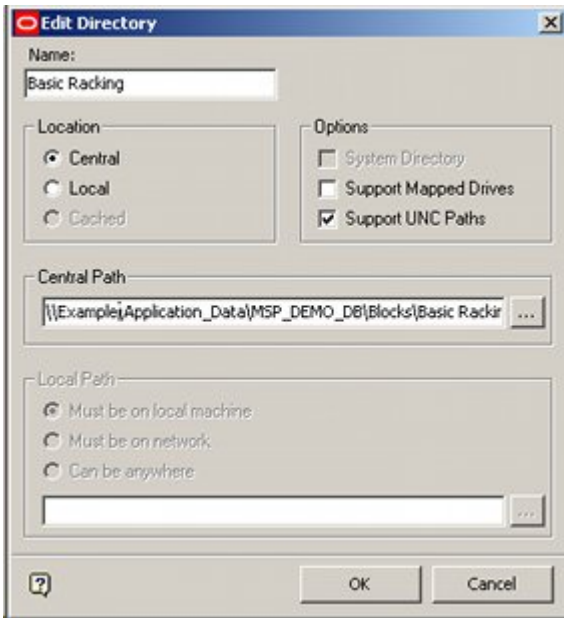
Editing directories is carried out by highlighting the required directory in the list of directories and clicking the Edit button.



What can be edited depends on whether the directory is a System or User Defined directory.

- If a System directory, only the path to the Windows directory can be edited
- If a User Defined directory, the name the directory is identified by and the path to the directory can be edited.

> **Note:** System Directory names will be grayed out and non-editable.



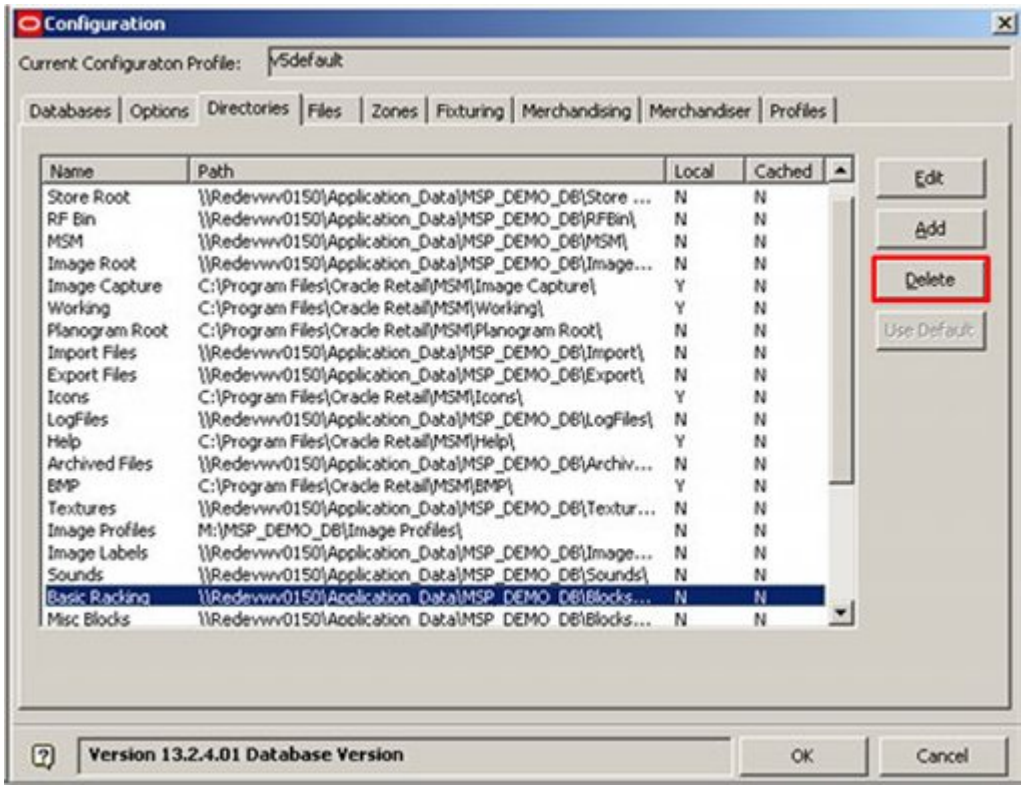
If the directory is User Defined, the name used to identify it can be edited.

For both System and User Defined directories, the path can be set to be either central or local.

Note: Care should be taken if editing system directory paths - changing the path may significantly affect functionality within Macro Space Management. Paths to directories are referenced by other modules – for example Fixture Studio. Changing a path may affect the operation of these modules.

Deleting Directories

To delete a User Defined directory, highlight the directory Name then click on the Delete button. (System directories cannot be deleted).



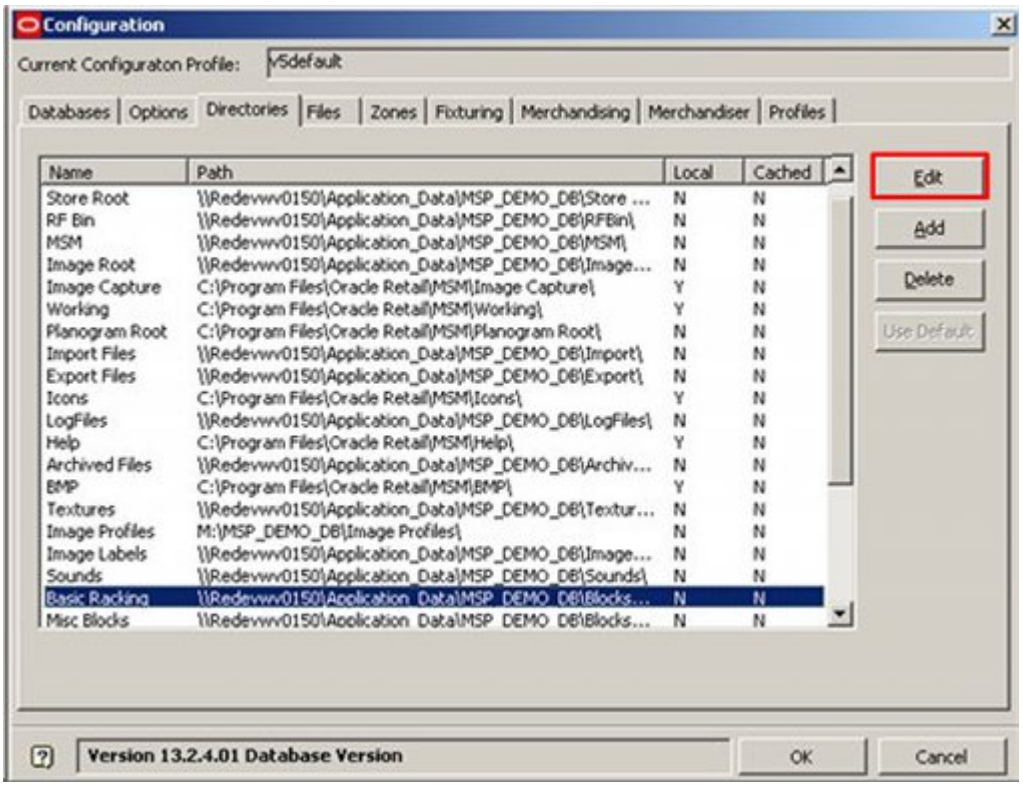
A small dialogue box will come up asking for confirmation the directory is to be deleted.

Click on Yes to delete the directory.

Admin Users and Directory Paths

Directory paths can only be set when the configuration module is opened via the Administration module.

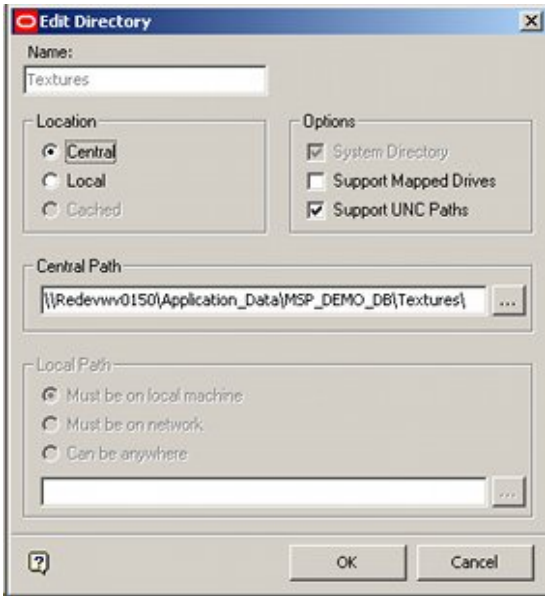
To set a directory path, highlight a directory and click the Edit button.



This will bring up the Edit Directory dialogue box.

Central Paths

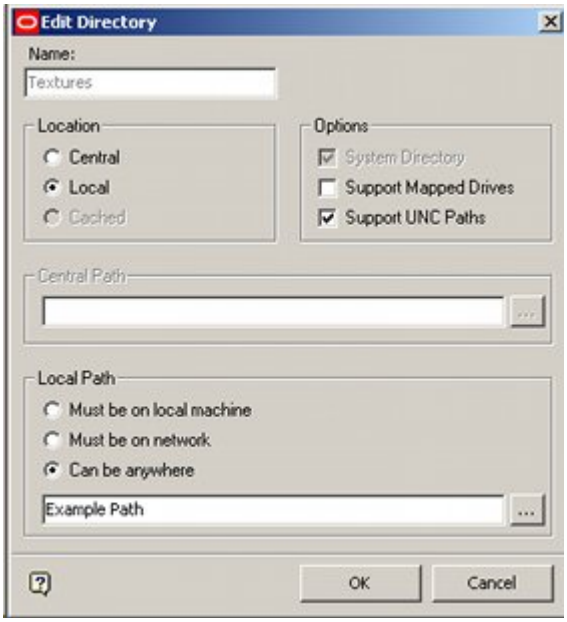
Central paths (which must use mapped drives or UNC paths) are used to point to directories that are on a server or other centralized resource. They are used for folders that are common to all users - for example directories holding images for use in Merchandiser.



Note: It is generally easier to use UNC paths. If mapped drives are used, all computers using the database must have their drives mapped to the same point on the server. In addition, certain In-Store Space Collaboration files require a UNC path to be accessed.

Local Paths

Local paths are used to point to directories that are in a common location on hard drives across the system. An example would be the help files, which are always located at C:\Program Files\Oracle Retail\MSM\Help in each installation.



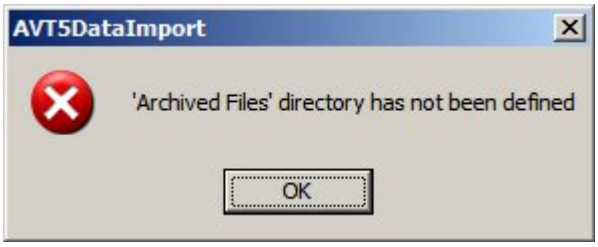
If the default path is set to C:\Program Files\Oracle Retail\MSM\Help, then all Macro Space Management users will have their software set to look for the help files in that location on their local hard drive.

5

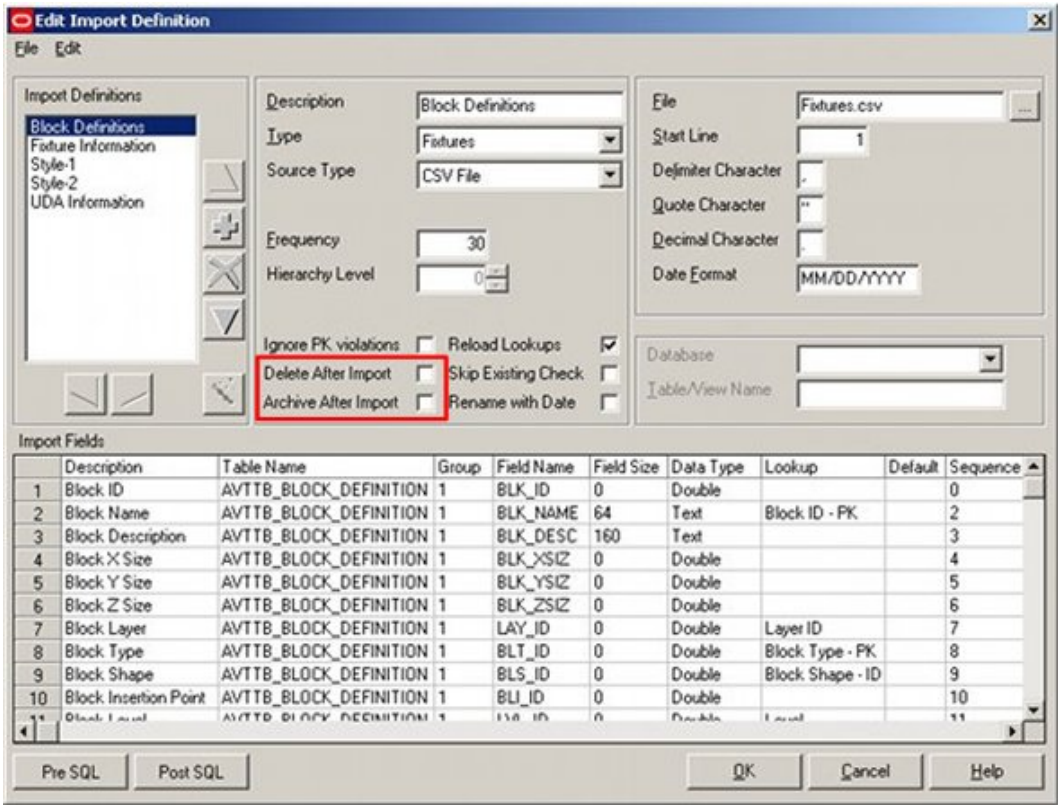
Directories

The Archive Directory

The **Archive Directory** is used to hold files that have been processed by Data Importer. If the Archive Directory is absent, users will warned on starting up Data Importer.



Files for Data Importer are initially placed in the Import Directory. When using Data Importer, the user can set two options in the Import Definitions dialogue box.



- If the user checks 'Archive After Import' a copy of the processed file will be placed in the Archive directory.
- If the user checks 'Delete After Import' and 'Archive After Import', a copy of the processed file will be placed in the Archive directory and the original will be deleted from the Import Directory.

The BMP (Bit Map) Directory

The **Bit Map Directory** is used to hold the bitmaps used for the toolbars in the Planner module. The directory should be local on every user's computer. The local files are found at C:\Program Files\Oracle Retail\MSM\BMP.

If bit maps are missing from this directory, the toolbars will have a question mark signifying the missing bit maps.

The Export Directory

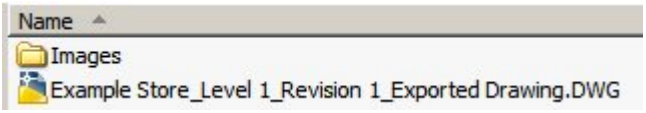
The **Export Directory** is the specified location to export files to. Objects that can be exported include:

Profiles

Profiles can be exported by clicking the Export button of the Profiles tab in the Configuration module.

Store Plans

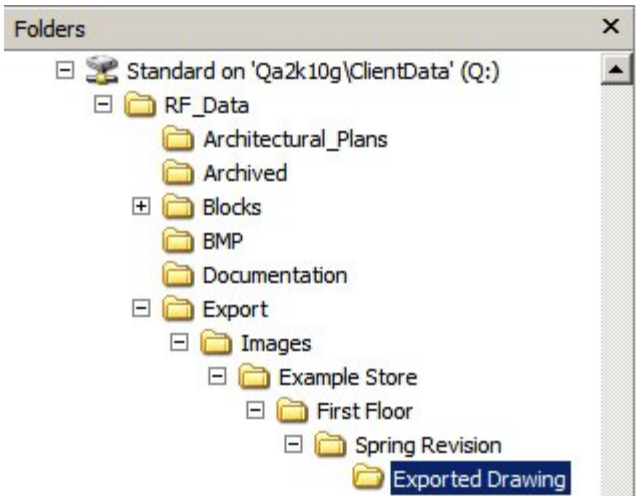
Store plans can be exported from Store Manager by selecting the store plan and then using the Export option in the right click menu. This



The file name will be of the form Store Name_Floor Name_Revision Name_Drawing_Name.dwg, enabling the file to be identified.

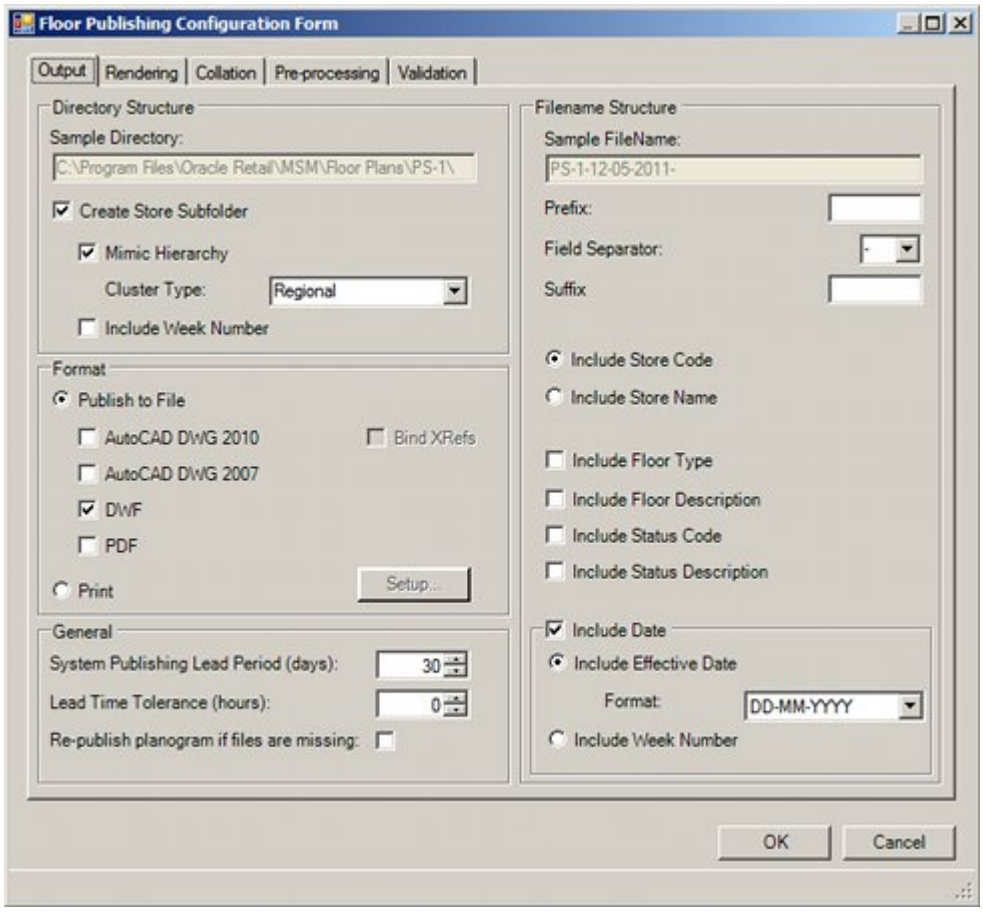
Snapshots

Snapshots are images of the current Merchandiser drawing they are taken using the Snapshot option on the view menu. Snapshots are stored in a hierarchy that starts in the image directory that is a sub directory of the export directory. A hierarchy will be created below the images directory that mirrors that of the store hierarchy.



The Floor Plan Publish Directory

The Floor Plan Publish directory is used as the starting point for the sub-directories used to hold published floor plans. The precise structure of those sub-directories will depend on setting in the Output Tab on the Floor Plan Publishing Configuration dialog box in the Admin Module.

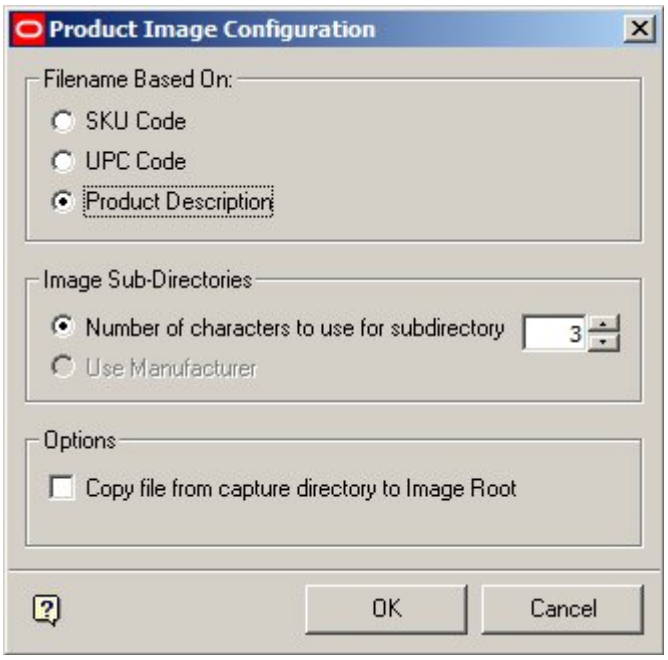


The Image Capture Directory

The **Image Capture** directory holds the images to be imported into Product Studio and subsequently used in Merchandiser (if required) as photographic representations of the products on the shelves.

The Image Capture directory can either be set to be on a server (network) or on the user's hard drive (local). If on a local drive, the images will only be available to that user and not generally available for importing.

When the image is used, whether it is moved or copied to the Image Root directory will depend on the settings in the Product Image Configuration dialogue box (called from the View menu).



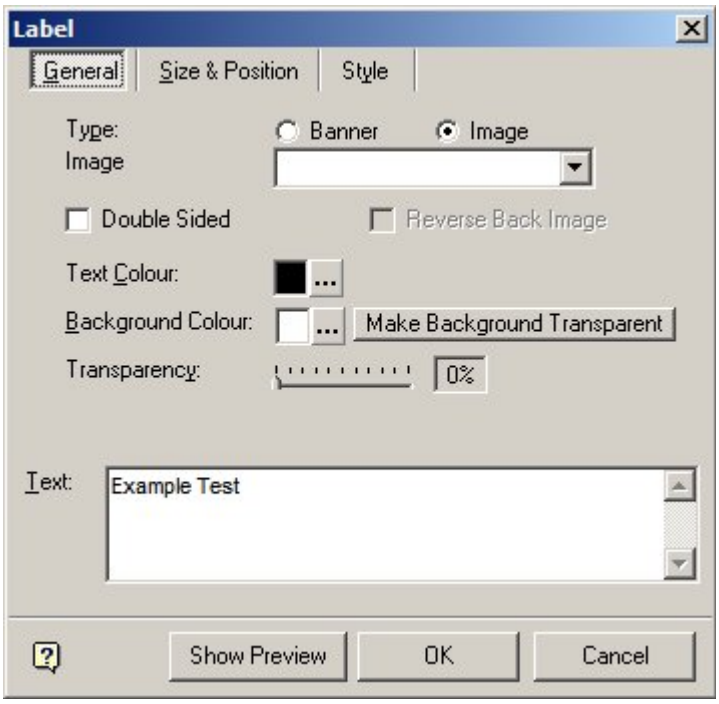
- If the 'Copy file from capture directory to Image Root' option is checked, the image will be copied from the Image Capture directory to the appropriate sub-directory in the Image Root directory.
- If the 'Copy file from capture directory to Image Root' option is not checked, the image will be moved from the Image Capture directory to the appropriate sub-directory in the Image Root directory.

The Image Label Directory

The **Image Label Directory** is used to store images that will be added as labels to fixtures in the Merchandiser module. The images can be of .bmp, .jpg or .png

The images are inserted in Merchandiser by using the Add (or Edit) options on the Formatting Toolbar

This will bring up the Labeling dialogue box.



Images that are in the Image Label directory can then be selected from the Image dropdown list and added to the highlighted fixture.

Note: This functionality is not working correctly at present.

The Image Profile Directory

The **Image Profile Directory** is used to hold 2D images of planograms. These are generated during the planogram design process in the Merchandiser module (example below).

These images will be displayed in the Merchandiser module if:

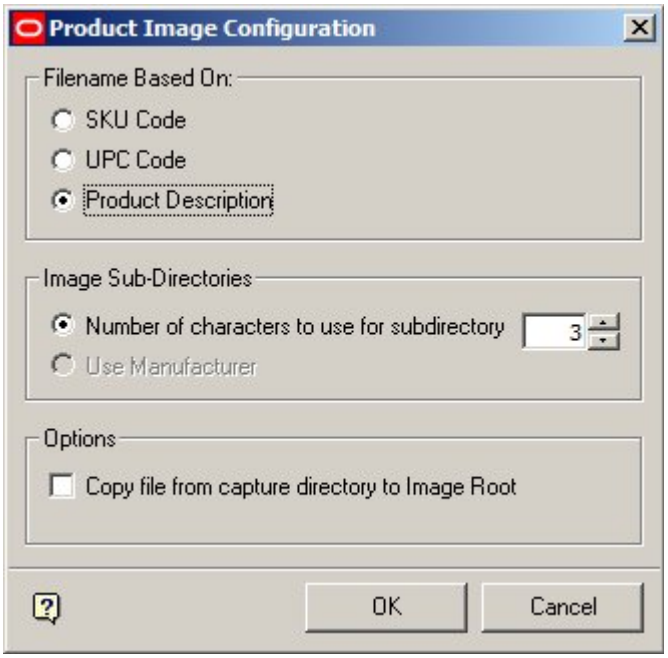
- The default mode of placing a planogram has been set to '2D' in the Merchandising tab of the Configuration module.
- Planograms have been toggled to '2D' mode using the 'Implode' option on the Directions and Product Text toolbar in the Merchandiser module.

The Image Root Directory

The **Image Root** directory holds sub-directories containing the images assigned to products in the Product Studio module and subsequently displayed (when the appropriate settings are selected) in Merchandiser.

> **Note:** In-Store Space Collaboration references the information in the Image Root for Front Graphical View. It needs the path to be specified in UNC format.

The names of the sub-directories (and associated images) are dependent on settings in the Product Image Configuration dialogue box (called from the View menu in Product Studio).



Note: Information on directories and filenames is not stored in the MSM database. It is implied from the settings in the Product Image Configuration dialogue box. Accordingly, changing settings in this dialogue box may cause problems in locating images imported into Product Studio using earlier settings.

Sub Directory Name

SKU Code

If the SKU code is selected, any value between 0 and 3 can be selected. If 0 is selected, all images will be put into the image root without using sub-directories. If a value between 1 and 3 is selected, the sub directory will be named after the requisite number of characters from the start of the SKU string.

Note: There is an error in the software. At present the SKU code is reading data from the client code field in the database, not the SKU field.

UPC Code

If the UPC code is selected, there are two options for determining the name of the sub-directories. These are selected via the radio button.

- If 'Number of Characters' is selected, any value between 0 and 3 can be selected. If 0 is selected, all images will be put into the image root without using sub-directories. If a value between 1 and 3 is selected, the sub directory will be named after the requisite number of characters from the start of the UPC string.
- If 'Manufacturer' is selected, the sub-directory will be named after the first five characters of the UPC code as these denote the manufacturer. (Any leading zeros will be suppressed).

Product Description

If Product Description is used, the directory name can be anywhere between 0 - 3 characters long. If 0 is selected, all images will be put into the image root without using sub-directories. If a value between 1 and 3 is selected, the sub directory will be named after the requisite number of characters from the start of the Product Description.

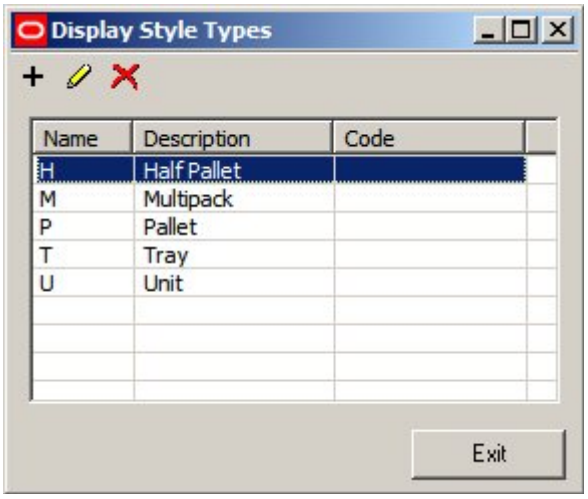
Image Name

SKU codes or UPC codes

The image file name for items using either SKU codes or UPC codes will be of the same format: Display Style Type/Code/Facing Direction. It is assigned automatically when the images are added to the Display Styles dialogue box in Product Studio.

An example of an image file name would be U50781276_1.jpg

The list of Display Style Types is set in the Display style types dialogue box (accessed from the View menu in Product Studio).



Note: Display Style Types are assigned to specific products in the Display Styles dialogue box in the Product Studio module.

The Product Code or SKU code will have been assigned to the product, either when it was imported, or when it was added in Product Studio (Display Styles dialogue box).

The view direction can be one of 6 options:

Direction	Value
Front	_1
Left	_2
Top	_3
Back	_4
Right	_5
Bottom	_6

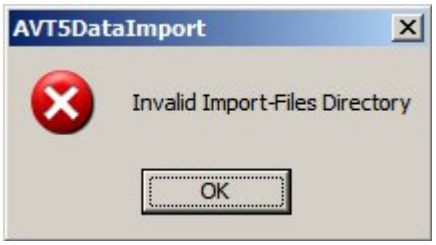
There can be up to six images stored for each product display style if UPC or SKU codes are in use - only the suffix differing in each file name.

Product Description

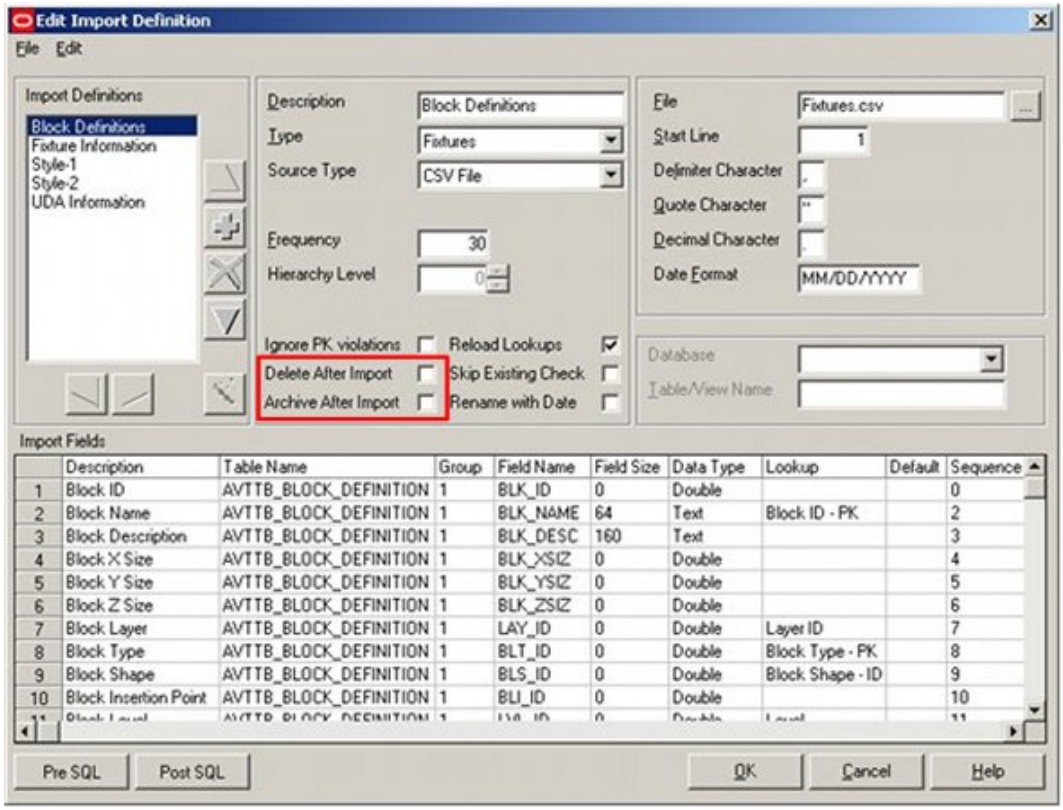
If images are being named after the Product description, there can only be one image stored per display style. It will be named after the display style description; for example Tinned Peas - 50g.jpg.

The Import Directory

The **Import Directory** is used to store files for use by Data Importer. The Data Importer module can only read files from this specific directory and cannot be modified to import from files in any other location. If the Import Directory is absent, users will warned on starting up Data Importer.



When using Data Importer, the user can set two options in the Import Definitions dialogue box.

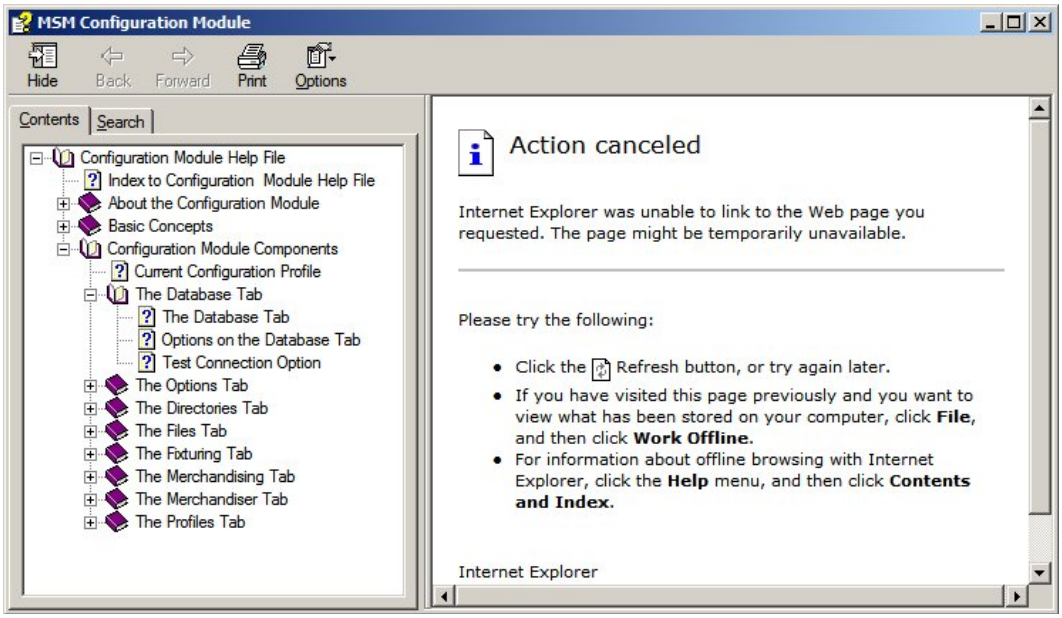


- If the user checks 'Archive After Import' a copy of the processed file will be placed in the Archive directory.
- If the user checks 'Delete After Import' and 'Archive After Import', a copy of the processed file will be placed in the Archive directory and the original will be deleted from the Import Directory.

The Help File Directory

The **Help File Directory** contains the .chm (Compiled HTML) files used for the on-line help for Macro Space Management. The directory must be local on every user's computer as .chm type help files cannot be read across a Microsoft Windows network. The local files are found at C:\Program Files\Oracle Retail\MSM\Help.

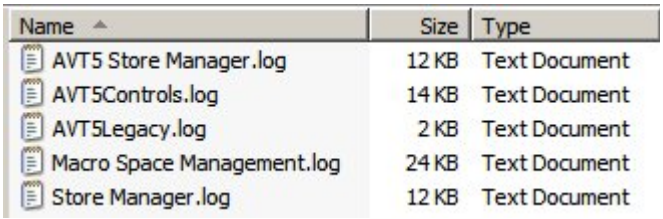
A typical error from using non-local help files is below.



Note: To avoid security vulnerabilities, it is recommended to not use .chm type help files across a network.

The Log Directory

The **Log Directory** holds text versions of some of the logs maintained by Macro Space Manager.



This directory may be either local or network.

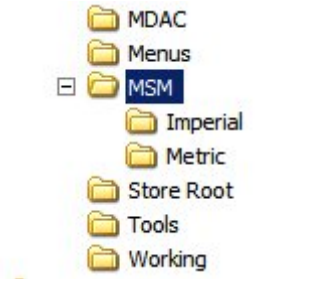
- If local, each user will have information written to a user specific help file.
- If network, all users will write information to a common help file.

These log files can be used by Support personnel to diagnose problems with the software.

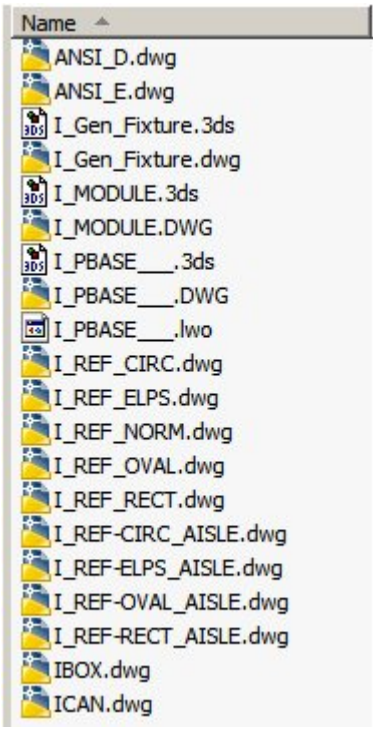
> **Note:** Other logs are written to tables in the database.

The MSM Directory

The **MSM Directory** is used to hold standard blocks used by the application. There are Imperial and Metric directories and the default directory below



These standard blocks include:



- Blocks used for annotating aisles and for bay numbering (i.e. REF-CIRC, REF_ELPS, etc)
- Blocks used to represent modules [2 dimensional blocks used for placing merchandise directly on the floor] (I_MODULE)
- Product Bocks used to represent products on fixtures (i.e. I_PBASE__, IBOX, etc)
- Title Blocks used for drawing borders (i.e. ANSI_D, ANSI_E, etc)

> **Note:** Imperial Blocks have a prefix of I_, metric blocks do not have a prefix.

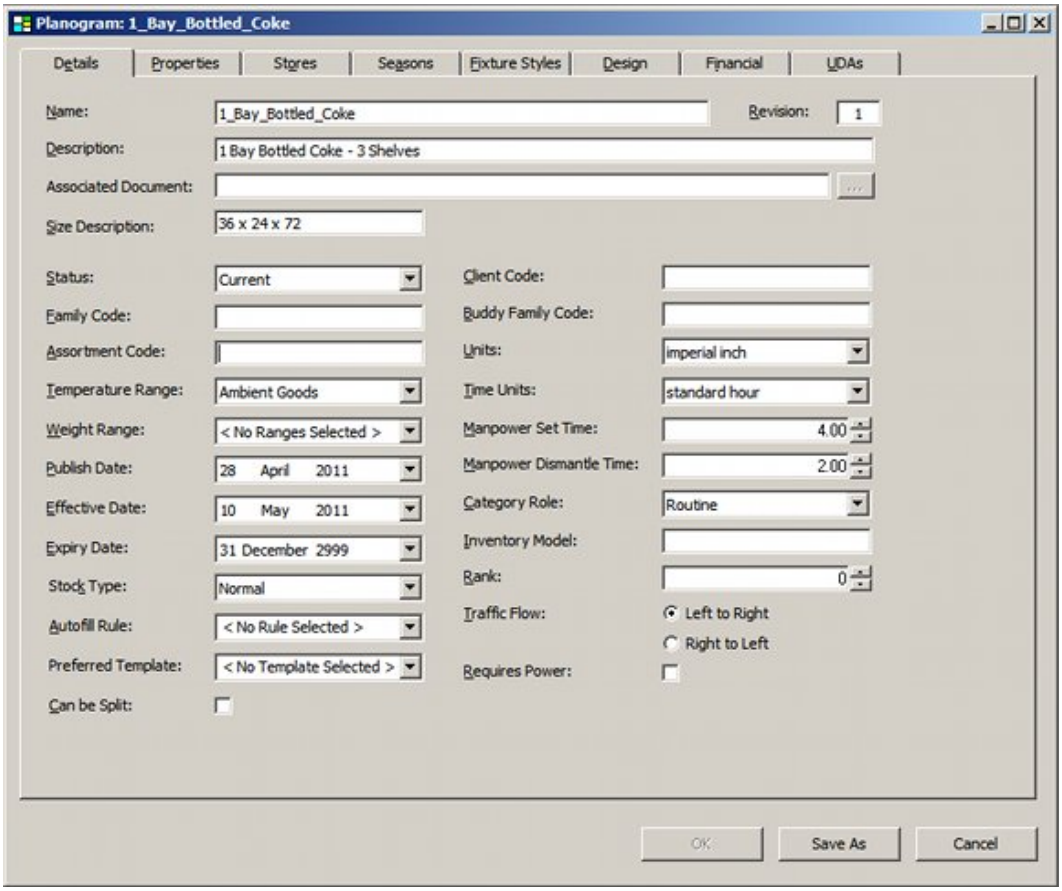
These blocks can be different file types:

File Type	Description
DWG	File used in the Planner (AutoCAD environment)
3DS	Basic graphics file used in the Merchandiser environment
LWO	More advanced graphics file used in the Merchandiser environment

The Planogram Documents Directory

The Planogram Documents Directory is used to hold reports imported from third party planograming software. These reports can be in multiple forms including BMP, JPG and PDF files.

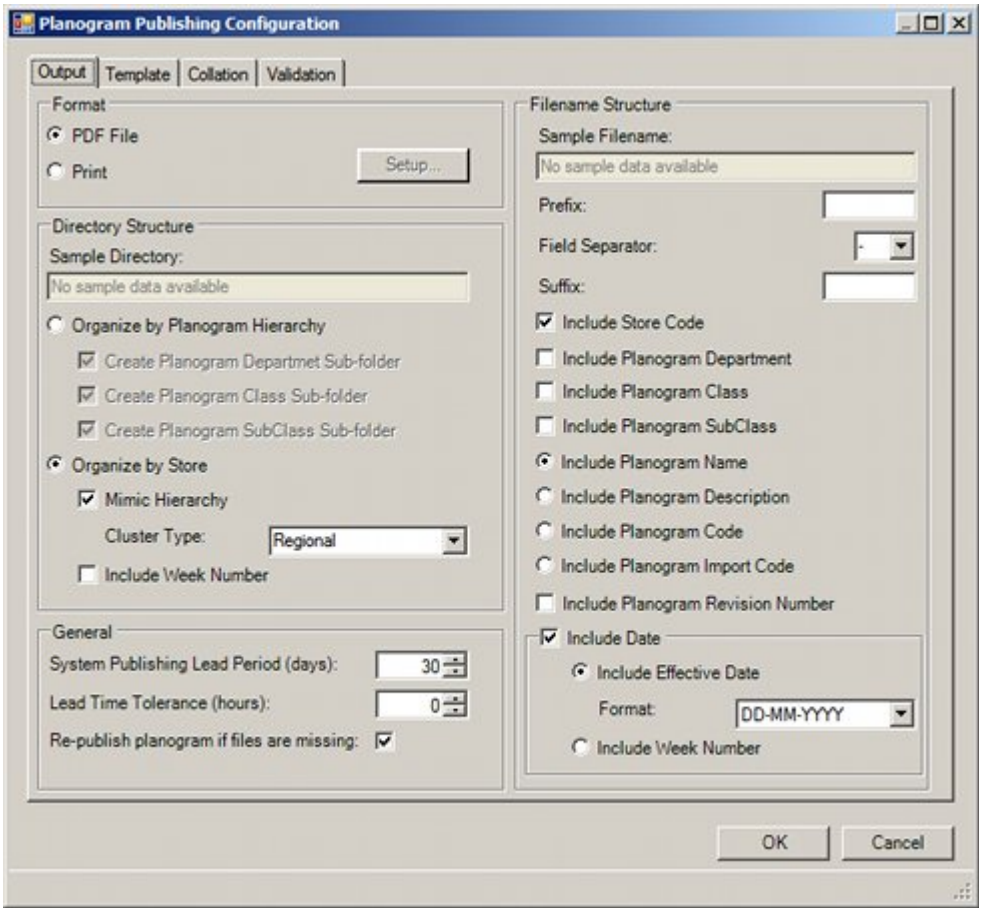
The name of the imported report is displayed in the Associated Documents field of the Planogram Design dialog box in the Merchandiser module.



Note: The name of the report is changed during the import process. It is renamed to reflect the ID assigned to the Planogram in the database (POG_ID). The name of the document displayed in the Associated Documents field of the Planogram Design dialog box hold the original path and filename from the third party software used to generate the report. This path and file name will not match that in the Planogram Documents Directory - although Macro Space Planning will still be able to retrieve it.

The Planogram Publish Directory

The Planogram Publish directory is used as the starting point for the sub-directories used to hold published planograms. The precise structure of those sub-directories will depend on setting in the Output Tab on the Planogram Publishing Configuration dialog box in the Admin Module.



The Planogram Root Directory

The **Planogram Root** directory is the Root directory for planograms imported from third party software. This directory is not used in the standard implementation. Planograms can only be imported via the Planogram Import module.

> **Note:** The Planogram Import Module is found in the APPS directory of a standard install.

The Root Directory

The **Root Directory** holds files that are essential to the operation of the software. Most are directly referenced by the software and do not need the path specified by the Root directory.

> **Note:** The DLL's are dependency DLL's referenced by the software. Acad.err, DLINE.LSP, and ACAD.fas are referenced by AutoCAD.

The RFBin Directory

The **RFBin Directory** holds files from Store Manager that have been marked for deletion, but not yet purged from the database.

When files are marked for deletion in Store Manager the physical files and directories are moved from under the Store Root to the RFBin. At the same time, the files are renamed from Filename.dwg to <FIL_ID>.dwg. (The FIL_ID is the primary key in the database).

If the files are un-deleted, they will be moved back to the Store Root and the FIL_ID changed back to the file name.

If files are deleted, all entries will be removed from the database and all physical files and directories removed from the Windows file structure.

> **Note:** At present files are not being moved to the RFBin when marked for deletion. When purged, the physical directories and files are not being removed from the Windows file structure.

The Sound Directory

The **Sound Directory** is used to hold .wav sound files that can be used to give audible warnings for problems within Macro Space Management.

The sounds are not user configurable but must be set up by Oracle using the AVTTB_EVENT_SOUND table in the database.

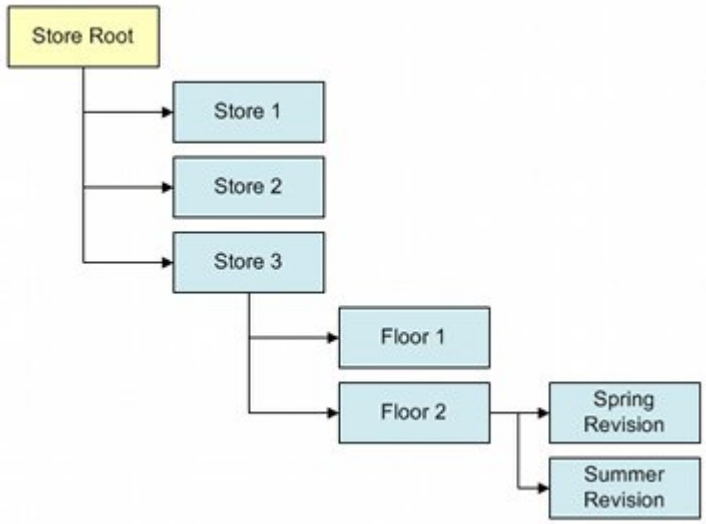
> **Note:** WAV files are a standard format file used for playing Audio only sounds.

The Store Root and its Child Directories

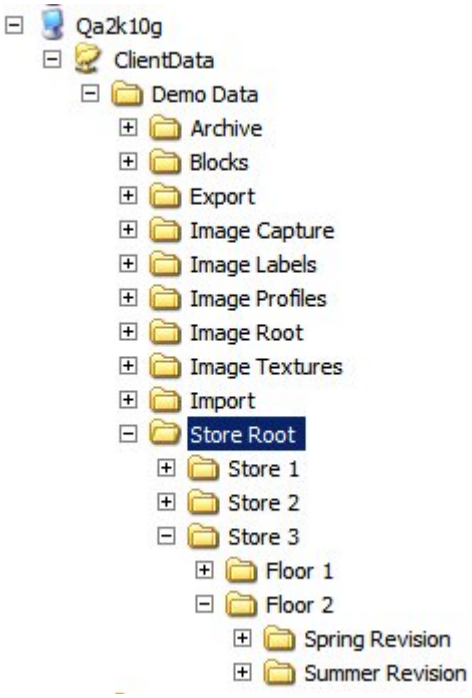
The **Store Root** serves as the starting point for a hierarchy of folders containing information on the stores within Retail Group. It must be located in a location accessible to all users of Macro Space Management and In-Store Space Collaboration.

Note: In-Store Space Collaboration uses DWF files (a special form of an AutoCAD drawing) to show the architectural plan for a store. This allows ISSC users to see where the fixtures and fittings are located relative to the structure of the store.

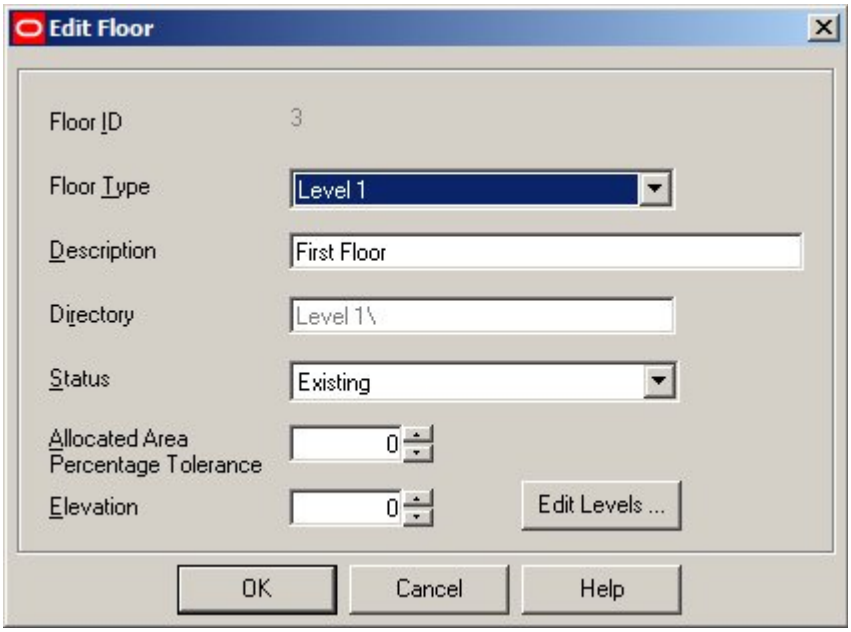
Stores, floor and revisions are created relative to the store root. Stores are direct children of the store root. Floors are children of their parent stores, and revisions are children of their parent floor.



As stores, floor and revisions are created, physical directories are created relative to the store root.



When the physical directory is being created, it will be named according to the information in the description field of the Add Floor dialogue box. If the store, floor or revision is subsequently renamed, it will be renamed in the database only. In the example below, when the floor was created it was called Level 1 and the directory named accordingly. The floor has subsequently been renamed 'First Floor' and the information changed accordingly in the database.

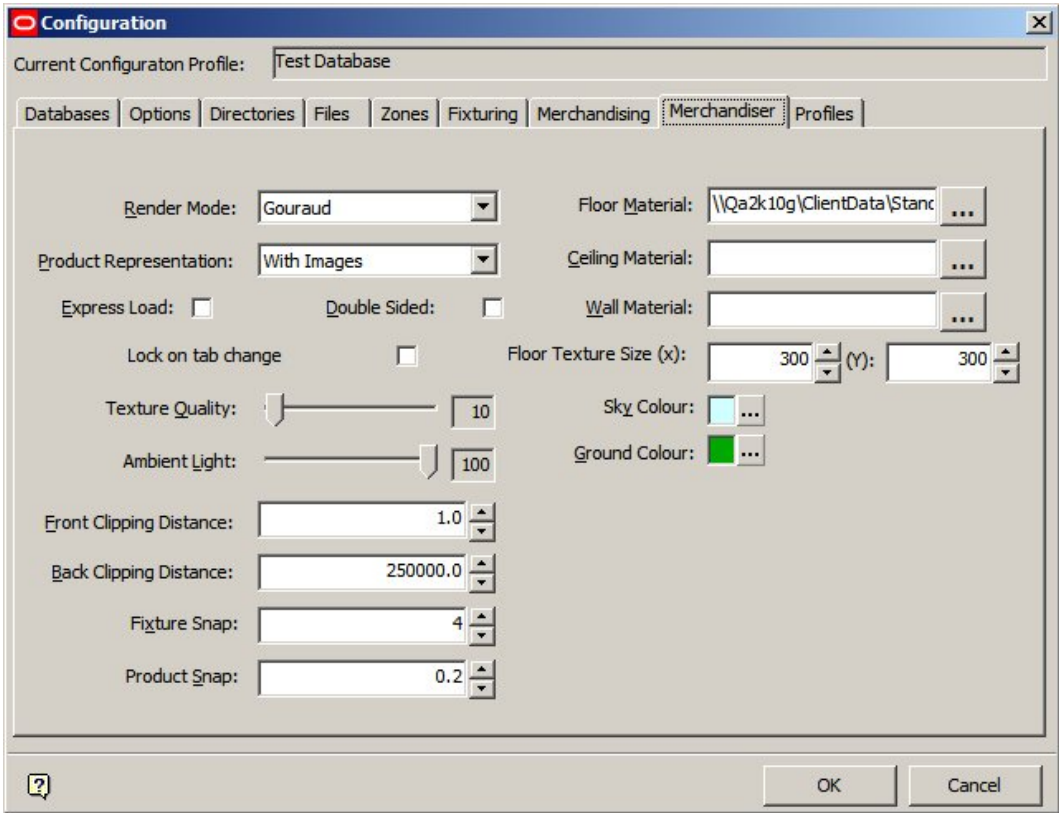


The database retains a link between the original directory name and the new name assigned in the description, so if the floor (or store or revision) is deleted from the database, the physical directory will be deleted as well.

The Textures Directory

The **Textures Directory** has two purposes:

- It holds jpg files used to specify the materials for the floor and ceiling of the store in Merchandiser. These materials can be selected for use in the Merchandiser tab of the Configuration Module (Floor Material and Ceiling Material options).



> **Note:** At present the Configuration module attempts to select materials from the Image Root directory.

- It holds jpg files used as the basis for creating lightwave objects (lwo files) for fixtures. In the example below a 'wood grain' effect has been used to make a pallet more realistic.

Note: A LWO file is a graphics file that gives a more detailed image than a 3DS file. The option to set up the LWO file is invoked in Merchandiser by right clicking on a Fixture and selecting 'Edit Materials'.

The Working Directory

The **Working Directory** should always be local. It stores temporary files used by the software.

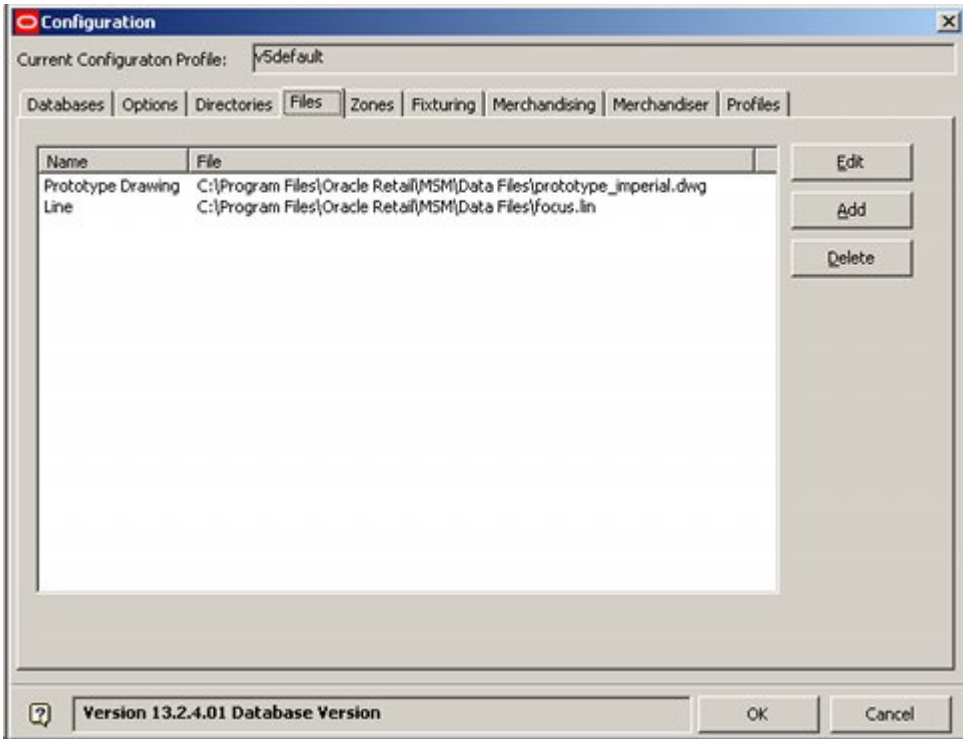
An example would be when products are added in Merchandiser - the temporary graphics used to show products as 3D boxes are held in the Working directory.

6

The Files Tab

The Files Tab

The **Files Tab** contains information on two files essential to the operation of Macro Space Planning. It is only available to users who have accessed the Configuration Module via the Administration module.



These files are shown in the File List.

Prototype Drawing File

The Prototype Drawing file is the AutoCAD drawing that will be copied each time Store Manager is used to create a new drawing. It can be used to specify the default settings in the drawing, for example Snap and Grid spacings.

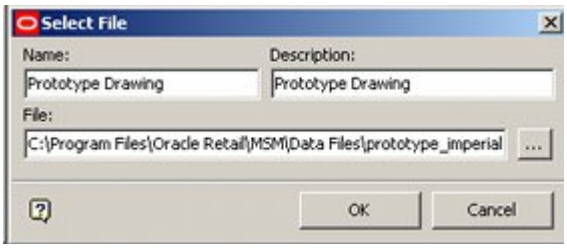
There are two Prototype Drawings supplied with the software - one for metric and one for imperial drawings. The file selected should be appropriate for the units used in the database.

Lin (LineType) File

The **LIN** file contains information on line weights (thicknesses) used for AutoCAD drawings.

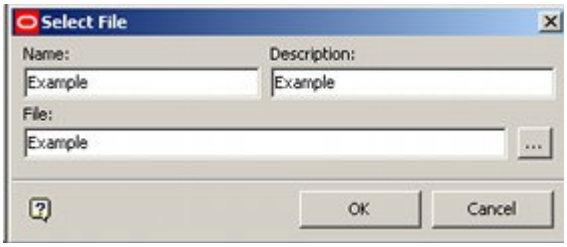
> **Note:** See the AutoCAD Help file for further information on modifying the information in the 'Lin' File.

To **edit a file** path, highlight the directory Name then click on the Edit button. This will bring up the Select File dialogue box.



Browse to the new directory and click OK.

To **add a file**, click on the Add button.

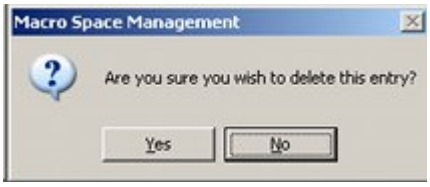


Type in a name and description for the new file. Browse to the new file and click OK.

> **Note:** There is generally no purpose in adding new files to the Files tab - they are not referenced by the software.

To **delete a file**, highlight the file Name then click on the Delete button

A small dialogue box will come up asking for confirmation the directory is to be deleted.



Click on Yes to delete the file

> **Note**: Mandatory files cannot be deleted.

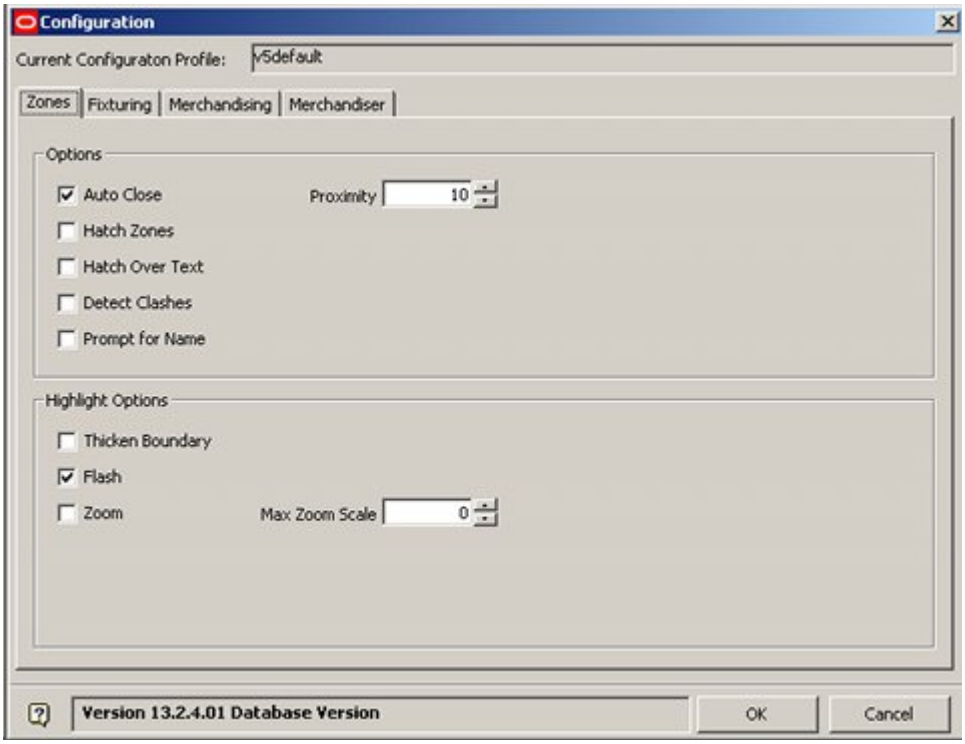
> **Note:** The Prototype drawing and LIN files will be found in the 'Data Files' directory in the standard installation: C:\Program Files\Oracle Retail\MSM\Data Files.

7

The Zones Tab

The Zones Tab

The Zones Tab contains basic options for Zones. It is available from the Admin, Fixture Studio, Product Studio, Planner, or Merchandiser modules. If opened from the Fixture Studio, Product Studio, Planner or Merchandiser modules only a restricted set of tabs will be available (shown below).



Auto Close will automatically close a zone when drawing it if the user clicks within the Proximity of the point where drawing the zone commenced.

Hatch Zones determines whether different zone types are drawn with a colored or transparent background.

Hatch Over Text determines whether the Hatch Pattern will go over the top of any annotation.

Detect Clashes determines whether clashes between overlapping zones are highlighted during Zone placement.

Prompt for Name causes a dialogue to come up allowing zone to be renamed locally when inserted into drawing. </p>

> **Note:** Only Zones on the same aliased layer can be shown as clashing.

Thicken Boundary increases the thickness of the boundary of the zone as visible on the drawing.

Flash causes the selected Zone to flash briefly when selected from the hierarchical tree.

Zoom determines whether a Zone increases in apparent size when selected. The physical size of the Zone does not change, only the scale it is displayed on the screen. Zoom only affects drawings opened in the AutoCAD environment, not in Merchandiser.

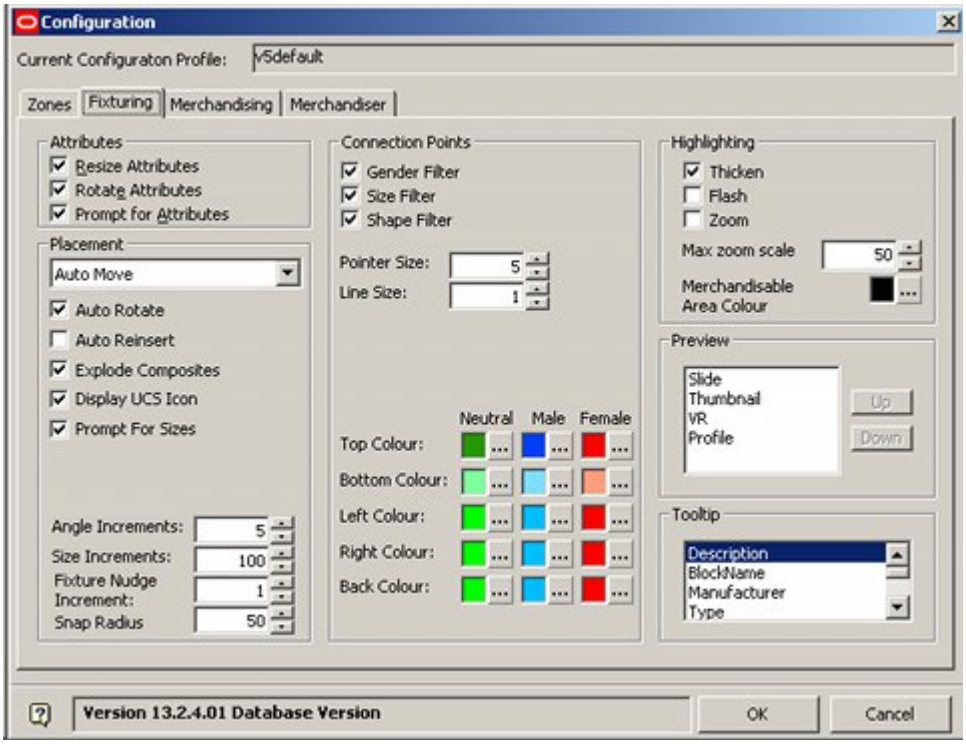
Max Zoom Scale is only active when the Zoom check box is ticked. It sets the amount a zone zooms when selected.

8

The Fixturing Tab

The Fixturing Tab

The **Fixturing Tab** contains a series of options primarily concerned with fixture placement. These options can affect how fixturing behaves in Planner, Merchandiser or both. It is available from the Admin, Fixture Studio, Product Studio, Planner, or Merchandiser modules. If opened from the Fixture Studio, Product Studio, Planner or Merchandiser modules only a restricted set of tabs will be available (shown below).



The **Attributes frame** specifies which features (attributes) of the fixture or fitting are active when it is placed into the drawing.

The **Placement frame** specifies which options are available when a fixture or fitting is placed into a drawing. For example, if the Clash Detection check box is ticked, then a warning will be given if one fixture is placed overlapping another

The **Connection Points** frame specifies a series of options that determine how two fixtures/fittings with connection points join together. For example if the Layer Filter option check box is ticked, then fixtures or fittings on different aliased layers cannot be connected.

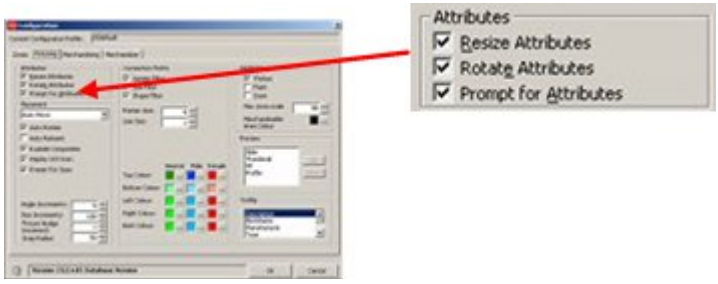
The **Highlighting frame** determines how fixtures or fittings selected via the Fixtures tool bar display when selected.

The **Preview frame** determines how Fixtures and Fittings will show in the Preview window on the Object Browser.

The **Tooltip frame** determines the information that will show when the mouse pointer is held over the fixture/fitting name, for example in Merchandiser.

The Attributes Frame

The **Attributes Frame** is used to set the options available for AutoCAD attributes assigned to an AutoCAD Block. These settings will take effect when blocks are inserted in the Planner module.



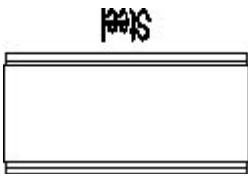
Note: Attributes are customizable annotations specific to particular types of object, for example fixtures. They are typically assigned to an AutoCAD object using the ATTDEF command - generally before the block is registered in Fixture Studio. For more information on Attributes and Blocks see the AutoCAD help files.

In the example below, the attribute is used to specify the material for the fixture.

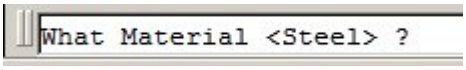
Resize Attributes results in the attribute being resized if the size of the object to which the attribute is attached changes. This applies to stretchable (re-sizable) blocks where the user can specify dimensions when the block is placed in the drawing. If this option is not checked then the attribute will stay the same size when the size of the object is changed.

Rotate Attributes results in the attribute being rotated to stay in a readable orientation when the object to which the attribute is assigned is changed to another orientation. If this option is checked, the attribute will be 'flipped' so that it can be read when the block is rotated 180°. If the option is not checked, the attribute will appear upside down when rotated 180°.

In the example below the Rotate Attributes checkbox has not been checked. When the block is placed in the Planner module and rotated 180°, the attribute text is upside down.



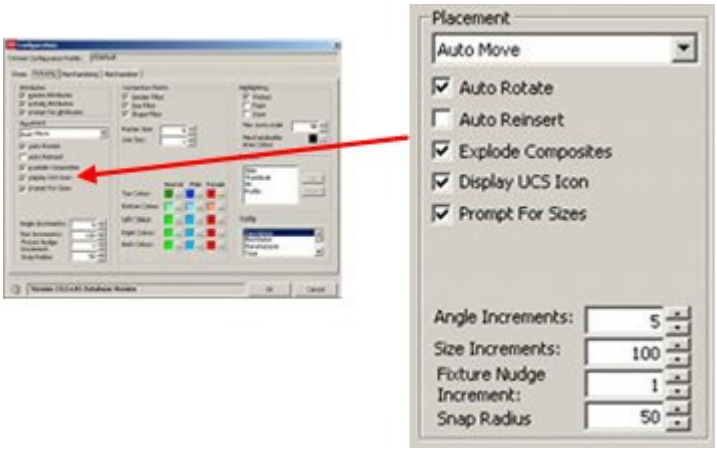
Prompt for Attributes results in the user being prompted to edit the attribute when the object is inserted. The prompt will appear in the AutoCAD command line in the Planner module.



Note: If the Prompt for Attributes option is checked, the user will have to specify an attribute before the Add Fixtures dialogue box appears.

The Placement Frame

The **Placement Frame** is used to specify how fixtures place in the drawing. Some options apply to the Planner module, some to both the Planner and Merchandiser modules.



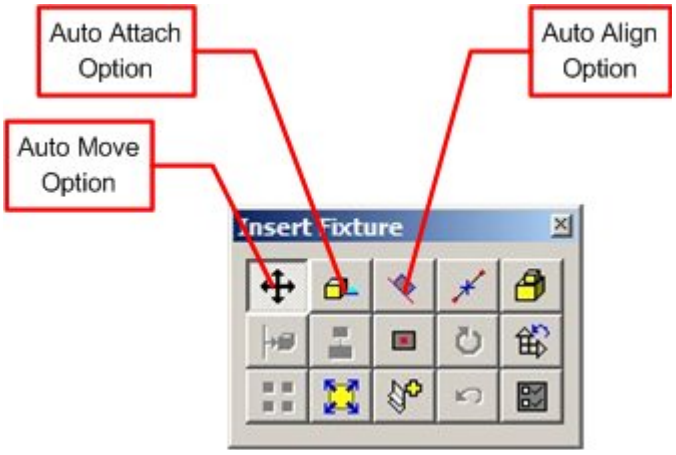
The options are either selected from the drop down list, ticking or un-ticking the check boxes, or by using the spin controls.

The drop down lists at the top of the frame givers the user the option to set the default for the Add Fixture dialogue box in the Planner module.

Auto Attach enables the fixture being inserted to be snapped to an existing fixture (providing suitable connection points exist).

Auto Move enables the fixture to be moved to a different position than the original insertion point.

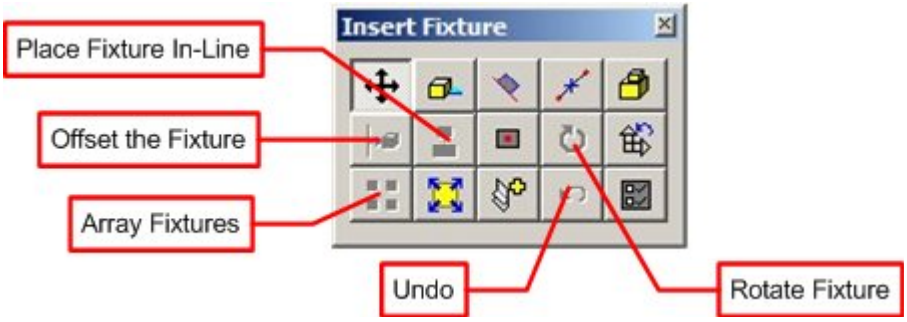
Auto Align automatically aligns the fixture being inserted with the nearest existing fixture.



Auto Rotate automatically requires the user to specify the rotation angle of the block when inserting into the drawing.

Auto Reinsert enables the user to insert further examples of the fixture without re-selecting it from the hierarchy by pressing <Return>.

If either Auto Rotate or Auto Reinsert is selected, this will render some of the options in the Add Fixture dialogue box temporarily unavailable.



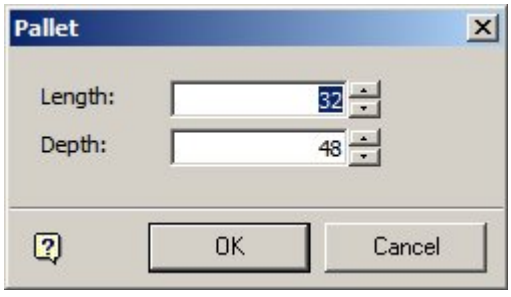
The unavailable options are Place Fixture In-Line, Offset the Fixture, Array Fixtures, and Rotate Fixture. Undo is also temporarily unavailable because there are no actions to undo until the fixture has been placed.

Explode Composites results in composite blocks separating into their constituent parts when inserted into the drawing.

> **Note:** This option is an MSM command and differs from the AutoCAD Explode command. The AutoCAD Explode command will explode the composite into its constituent parts, but will not write the individual blocks into the MSM database. (This requires Synchronization). The MSM Explode both explodes the composite into its constituent blocks and writes the individual blocks into the MSM database - synchronization is not needed.

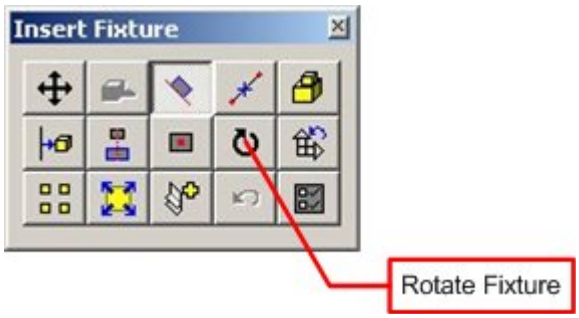
Display UCS Icon determines whether the Planner UCS (Universal Co-ordinate System) icon is displayed when fixtures are inserted. If the box is not checked, the UCS icon will be temporarily suppressed while a fixture is being placed.

Prompt for Sizes activates a dialogue box that prompts the user to specify the dimensions for sizable fixtures. If checked, when the fixture is stretchable, it will cause a prompt dialogue box to appear when the fixture is placed.

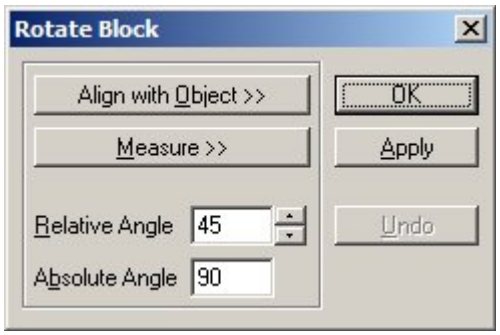


> **Note:** If the Prompt for Sizes checkbox is not enabled, it will not be possible to specify the size of stretchable fixtures when inserting them in the drawing.

Angle increments sets the increments by which a fixture can be rotated during insertion into Planner.



Clicking on the Rotate Fixture option in the Add Fixture dialogue box will bring up the Rotate Block dialogue box.



The Angle Increments option in the Fixturing tab of the Configuration Module determines the increments the Relative angle will increase or decrease when the spin controls for Relative Angle are used.

Size Increments sets the increments by which a fixture can be nudged during insertion.

> **Note:** This functionality is not working at present.

Fixture Nudge Increment sets the amount a selected fixture is nudged in the Merchandiser module each time a cursor key is pressed.

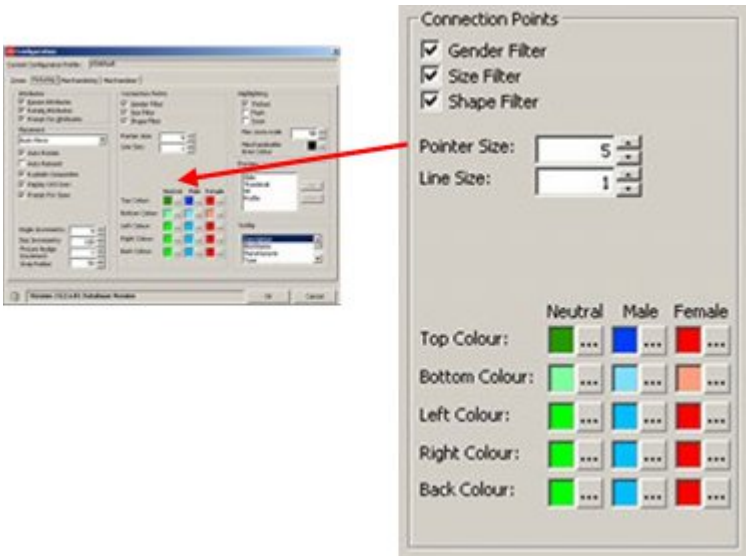
If set to 1 in an imperial database, then the fixture will be moved the equivalent of one inch every time a cursor key is pressed. (The equivalent would be one centimeter in a metric database).

Snap Radius determines how close a fixture has to be to another in the Planner Module before the connection points snap together. The larger the value, the greater the distance one fixture will snap to another from.

> **Note:** For fixtures to connect together, their connection points must have compatible settings. See Fixture Studio help file for more detailed information.

The Connection Points Frame

The **Connection Points frame** is used to specify details of connection points that join one fixture to another.



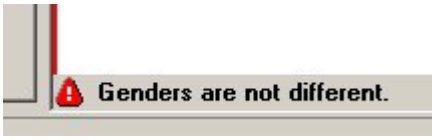
The options are either selected by ticking or un-ticking the check boxes, or by using the spin controls.

Gender Filter sets whether male connections can only connect to female connections, or whether one connection can connect to another irrespective of gender. If off, any gender will connect to any gender.

Size Filter sets whether connections have to be of compatible sizes to mate, or whether one connection can join to another irrespective of size. If off, any size of connection will connect to any other size.

Shape Filter sets whether connections have to be the same shape to mate. If off, any shape will connect to any other shape.

Which filters set will determine which connection points can connect to which - and which warnings display.



Pointer Size is used to set the size the connection points visually appear in the Planner, Merchandiser and Fixture Studio environments.

In Planner, the connection points will appear when the 'Attach' option is selected in the Add Fixture dialogue Box.

In Merchandiser, the connection points will appear when Connections are toggled On in the status bar.

In Fixture Studio, the connection points can be seen in the Preview Tab of the Block Details dialogue box - tick the 'Connection Points' check box to display them.

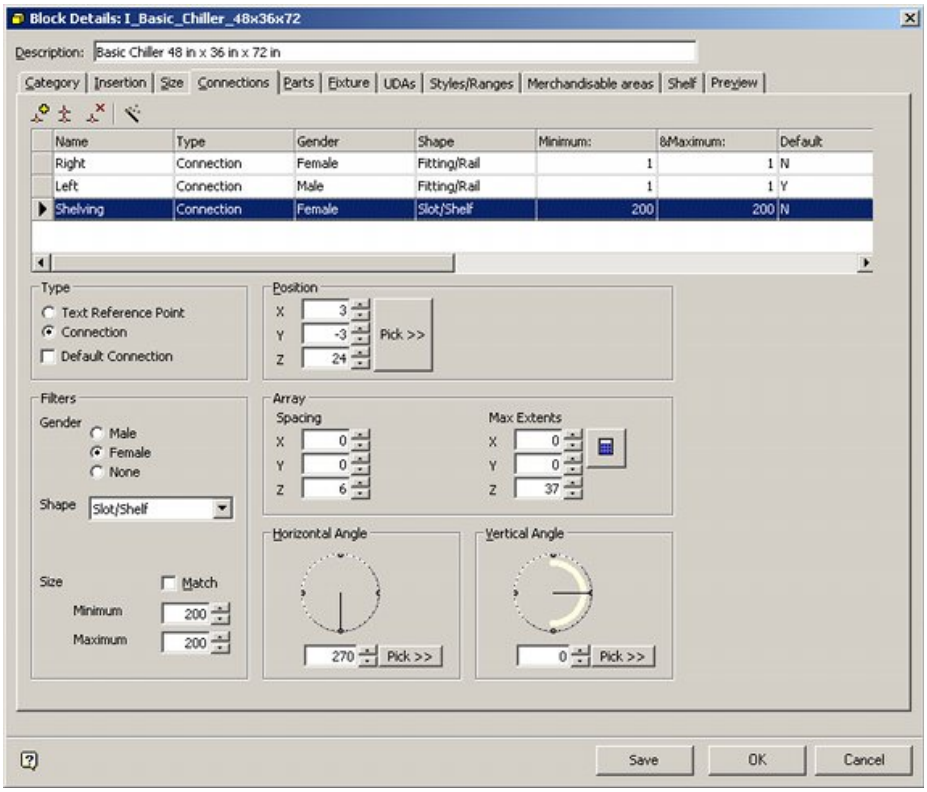
Line Size is used to set the thickness of lines associated with connection lines in the Merchandiser module and in the Preview Tab of the Block Details dialogue box - tick the 'Connection Points' check box to display them.

Colors are used to set the color for the connection points used in the Planner and Merchandiser environment.

> **Note:** It is recommended Neutral, Male and Female connection points are given different colors.

The Connection Points Frame and Fixture Studio

Connection points are specified within the Block Details dialogue box in Fixture Studio.



The Connections tab allows users to specify the Connection Name, Type, Gender, Shape, Size and whether it is a default connection.

Filters set in the Connection Points frame of the Fixturing tab in the Configuration Module then determine which connection points can connect with which.

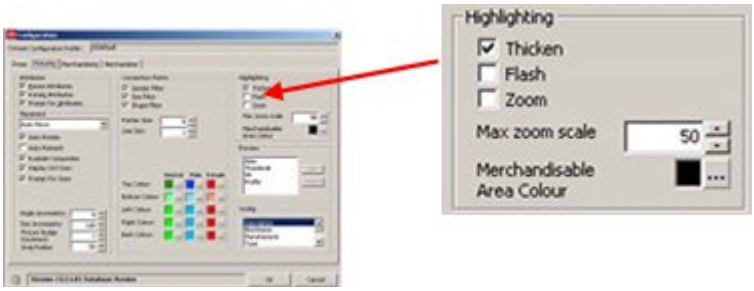
For example, if the Gender filter is On, male connections cannot connect with other male connections; if the Gender filter is Off, they can.

(See the Fixture Studio Help file for more information).

The Highlighting Frame

The **Highlighting frame** has two functions:

- It is used to specify how fixtures appear when highlighted in the drawings in the Planner module.
- It is used to specify the color of the merchandisable area in Merchandiser and Fixture Studio.



The option is activated in Planner by clicking the Highlight in Drawing option in the fixturing toolbar - when a fixture present in the drawing is highlighted in the fixture hierarchy it will be highlighted in the drawing according to the selected options.

Flash causes the selected Fixture to flash three times when selected from the hierarchical tree.

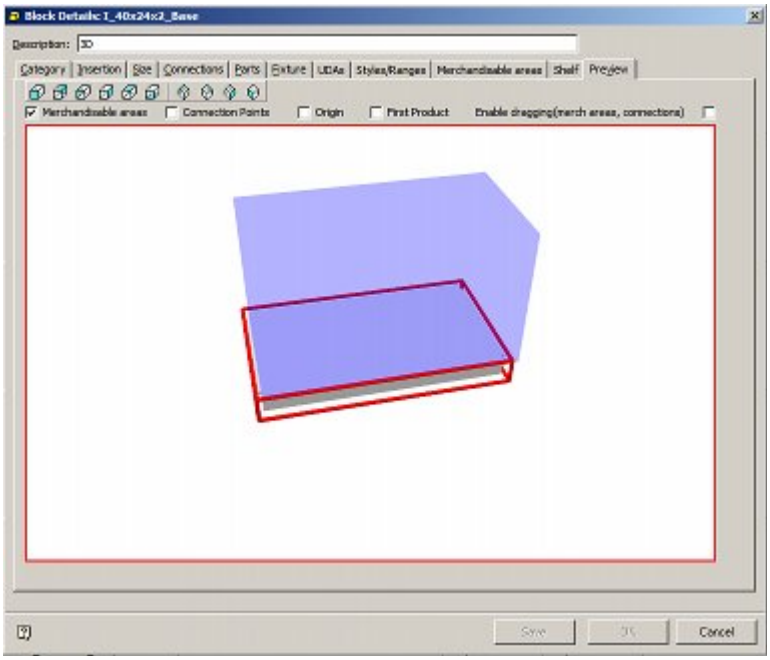
Thicken increases the thickness of the lines denoting the fixture as visible on the drawing.

Zoom determines how much a Fixture changes in apparent size when selected. The physical size of the Fixture does not change, only the scale it is displayed on the screen. If there are multiple fixtures in the drawing, the drawing will zoom until all fixtures of that type are visible.

Max Zoom Scale is only active when the Zoom check box is ticked. It sets the amount a fixture zooms when selected.

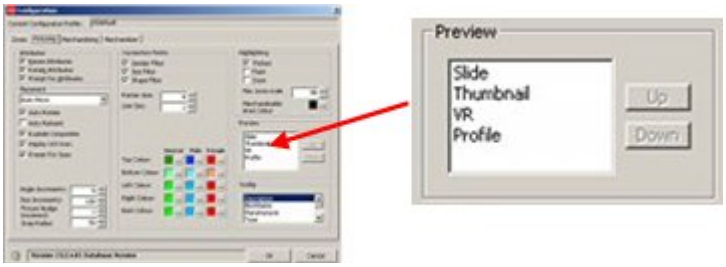
Merchandisable Area Colour indicates the color merchandisable areas appear in the Preview Tab of Fixture Studio and if displayed in the Merchandiser module.

In the example below from Fixture Studio, the Merchandisable area color has been set to blue.



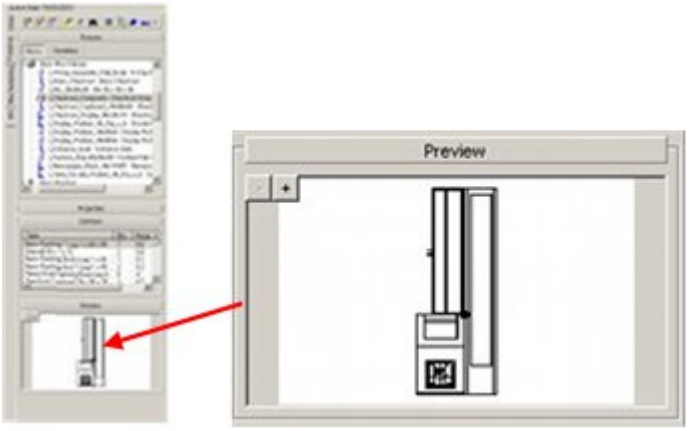
The Preview Frame

The Preview frame is used to set the order of priority that previews will display in the preview window in the Object Browser.



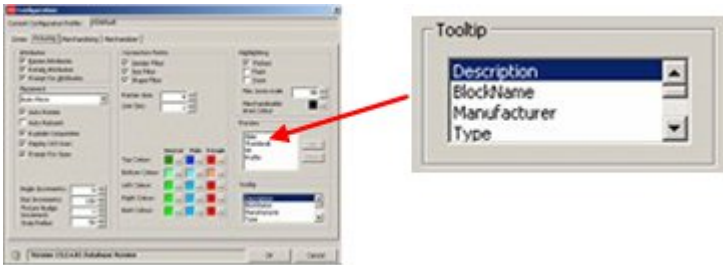
Each option in the list of those available can be moved up and down in the window by clicking on the Up or Down buttons.

If a direction is not available then the appropriate movement button will be grayed out. The screen shot below shows the thumbnail option in use on the Object Browser.



The Tooltip Frame

The **Tooltip Frame** is used to select the tooltip that is displayed when the mouse pointer is held over a fixture.



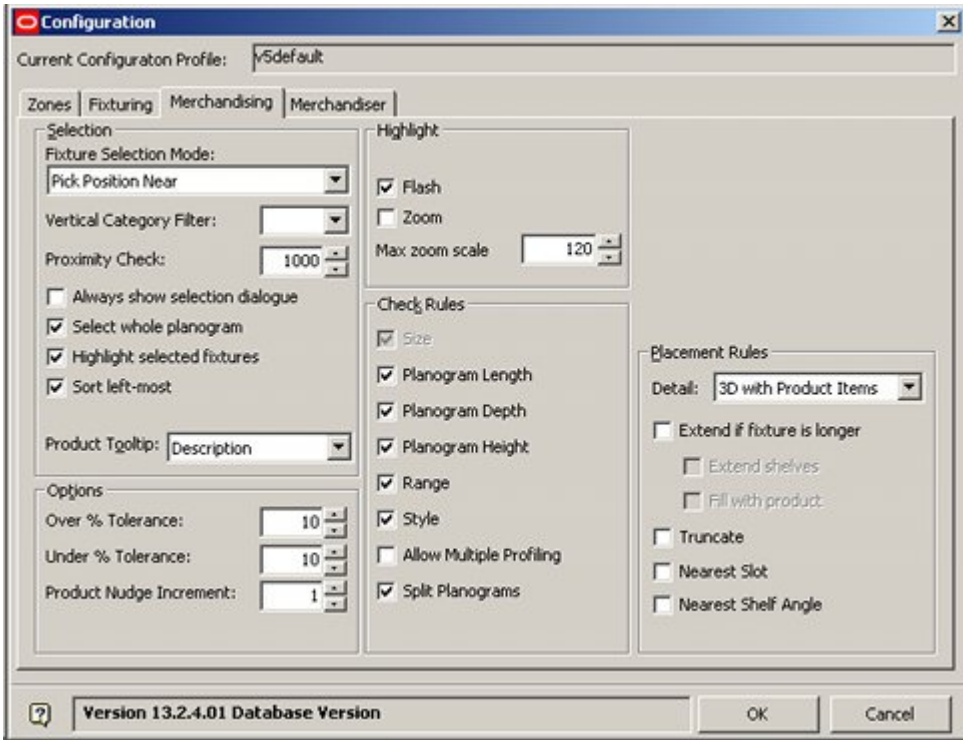
The required tooltip can be selected by using the scroll bar to find the required tooltip in the list of those available, then clicking on it to highlight it.

9

The Merchandising Tab

The Merchandising Tab

The **Merchandising Tab** contains setting that affect how Products and Planograms are placed on fixtures. It is available from the Admin, Fixture Studio, Product Studio, Planner, or Merchandiser modules. If opened from the Fixture Studio, Product Studio, Planner or Merchandiser modules only a restricted set of tabs will be available (shown below).



The **Selection frame** specifies a series of options determining how fixtures are selected for placement of Products or Planograms.

The **Options frame** determines what tolerances will be allowed for over or undersize planograms when placing them – planograms outside these tolerances will trigger an error message.

The **Highlight frame** specifies how selected fixtures will display in the Planner module when the Highlight in Store option is used.

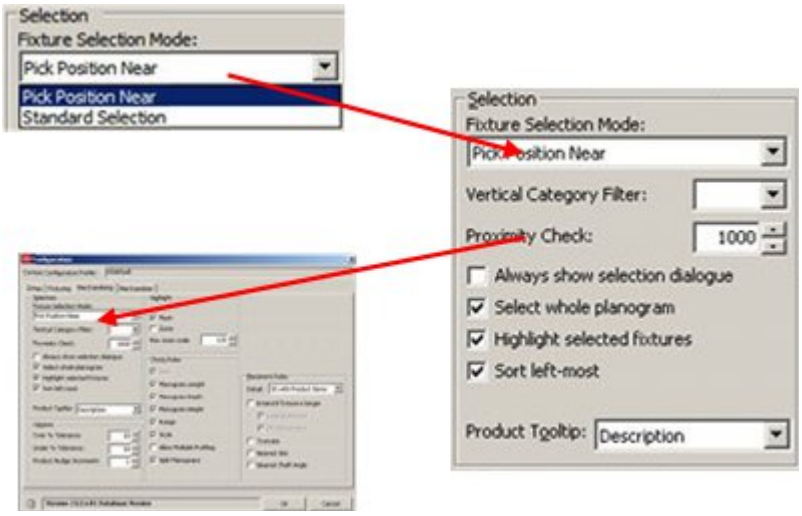
The **Check Rules frame** sets criteria by which Planograms will be filtered for display.

The **Placement Rules** frame determines how the planogram will be placed on the selected fixture.

The Selection Frame

The **Selection frame** specifies a series of options determining how fixtures are selected for placement of Products or Planograms.

Note: Changes in these settings will have a considerable effect on how fixtures are selected. Users may wish to experiment to find settings that suit their requirements.



Fixture Selection Mode is selected from a drop down list. It only affects the Planner module.

- **Standard Selection** allows users to use all the usual AutoCAD selection methods, for example windows selection boxes and fences.
- **Pick Near Position** gives an additional method selection method. Providing no fixtures are currently selected, when the Add Product or Add Planogram buttons are clicked on the Object Browser, users may select fixtures to merchandise by clicking adjacent to them. A sequence of fixtures may be selected, the selection sequence being completed by right clicking.

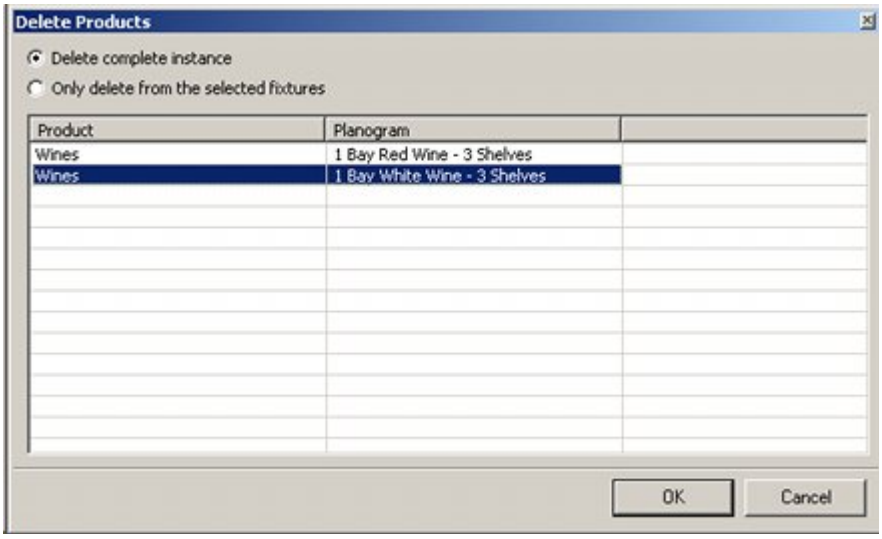
Vertical Category Filter enables the user to select Planograms that have previously been assigned to a vertical category. This allows users to select planograms that have been designated for placement in fixtures above floor level.

Note: This functionality is not fully implemented

Proximity Check sets the tolerance for the Planner cursor when Standard selection is in use. The larger the value; the further the user may click from a fixture and still select it.

Always show selection dialogue controls display of the Delete Products dialogue box when products or planograms are deleted in the Planner module.

- If this option is not enabled, then the dialogue box will only appear if multiple products or planograms are selected. Single instances of a product or planogram will be deleted without further confirmation.
- If this option is enabled, then the dialogue will appear even if a single product or planogram is deleted.



Select whole planogram allows users to select a single fixture associated with a multi-bay planogram and delete the whole planogram when the Delete Planogram command is used.

> **Note:** This functionality is not yet working.

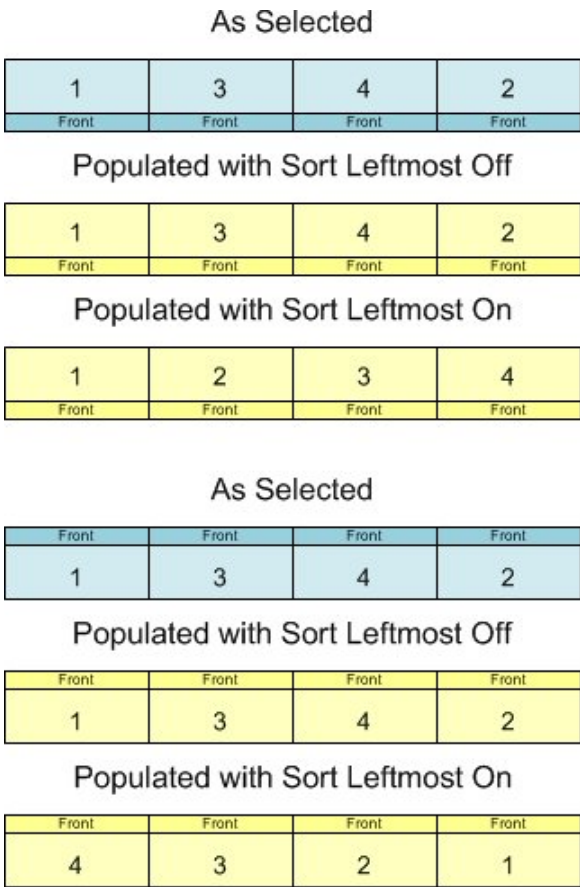
Highlight selected fixtures highlights fixtures in the drawing suitable for the currently selected planogram in the Object Browser.

> **Note:** This functionality is not yet working.

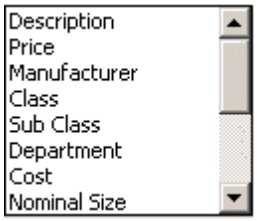
Sort Left-most controls whether fixtures are populated in the sequence they are selected or whether they are sorted into a sequence starting with the leftmost fixture.

- If Soft Leftmost is Off, then the fixtures will be populated in the sequence they are selected.
- If Sort Leftmost is On, then the fixtures will be populated leftmost first relative to the front of the fixtures.

In the diagram below, the effects can be seen of having Sort Leftmost Off and On. The effect of front direction can also be seen.

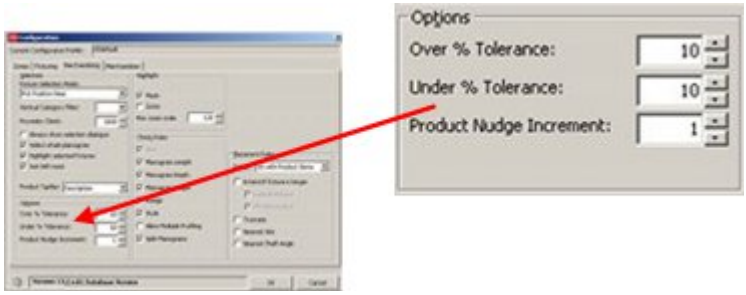


Product Tooltip specifies the type of tooltip to be displayed when a mouse cursor is hovered over a product in a Planner or Merchandiser Store Plan.



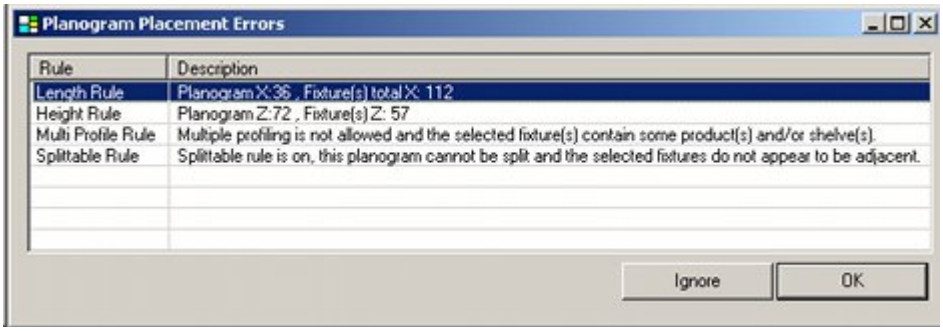
The Options Frame

The **Options frame** determines what tolerances will be allowed for planogram length when placing them onto fixtures before a warning is generated. It functions for both Planner and Merchandiser.



The tolerances can be set to 0 - 50% for fixtures that are both Over and Undersize for length relative to the selected planogram. For example, selecting -25% for undersize fixtures and +10% for oversize fixtures would allow a 48" planogram to be placed on fixtures that varied between 36" to 52.8" in length.

Any fixtures outside this range of lengths would still trigger the Planogram Placement Errors dialogue box, providing the Planogram Length warning is checked in the Check Rules frame of the Merchandising Tab.

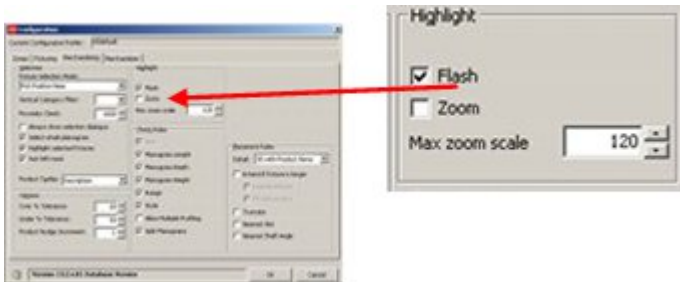


Product Nudge Increment sets the amount a product is nudged in Merchandiser each time a cursor key is pressed. If set to 1 in an imperial database, then the product will be moved the equivalent of one inch every time a cursor key is pressed. (The equivalent would be one centimeter in a metric database).

(There is no effect in the Planner environment).

The Highlight Frame

The **Highlight frame** specifies how selected merchandise will display in the Planner Module.



The option is activated in Planner by clicking the Highlight in Drawing option in the Merchandising toolbar in the Object Browser - when a product or planogram present in the drawing is highlighted in the fixture hierarchy it will be highlighted in the drawing according to the selected options.

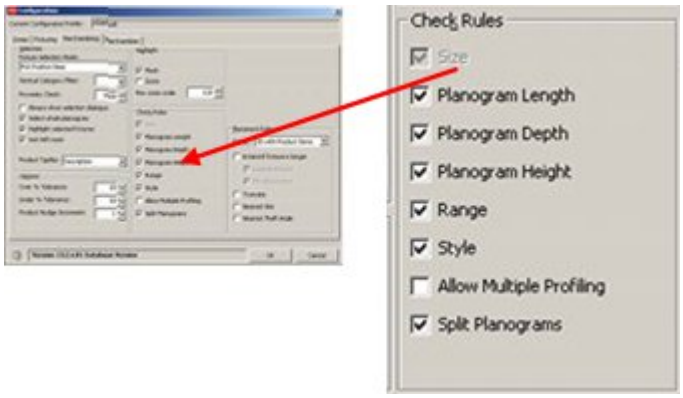
Flash causes the selected merchandise to flash three times when selected from the hierarchical tree.

Zoom causes the merchandise to change in apparent size when selected. The physical size of the Fixture does not change, only the scale it is displayed on the screen. If there are multiple fixtures in the drawing, the drawing will zoom until all fixtures of that type are visible.

Max Zoom Scale is only active when the Zoom check box is ticked. It sets the amount an item of merchandise zooms when selected.

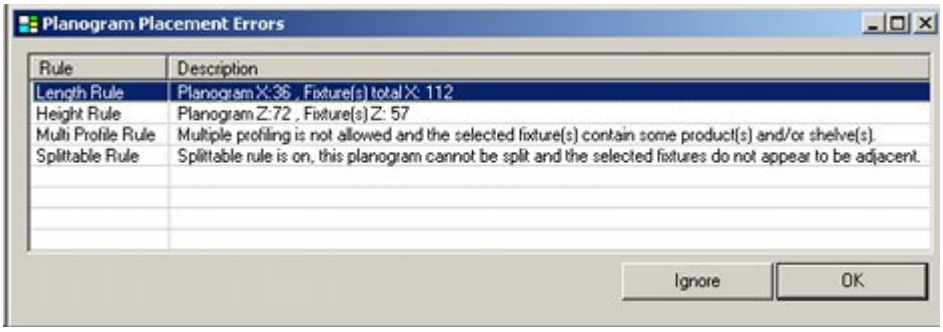
The Check Rules Frame

The **Check Rules Frame** sets criteria by which warnings will be given for Planograms being placed in both the Planner and Merchandiser modules.



When a planogram is designed in Merchandiser or imported into the MSM database, the planogram definition contains information about the fixtures it is designed to be placed on. The check rules compare information on the fixtures selected in the drawing with the information on fixtures held in the planogram definition.

If there is a difference between the selected fixtures and the defined fixtures for the currently active rules, a Planogram Placement Errors dialogue box will appear in both Merchandiser and Planner environment.



The check boxes generate the following warnings if selected:

- **Size** is current grayed out. When it was active it turned the Size Rule On or Off in the Merchandiser module.

  > **Note:** The Size Rule can be turned On or Off using the controls in the Merchandiser module.

- **Planogram Length**, **Planogram Depth** and **Planogram Height** trigger warnings if the selected fixtures do not match the sizes specified in the planogram definition
- **Range** triggers a warning if the Planogram to be added has properties that do not fall within specified temperature or weight ranges.

  > **Note:** The Range option is currently not active in Merchandiser.

- **Style** triggers a warning if the Planogram to be added has a specified style that does not match the styles for the specified fixtures.

- **Allow Multiple Profiling** allows the user to add a planogram to a fixture already containing merchandise if the checkbox is ticked.

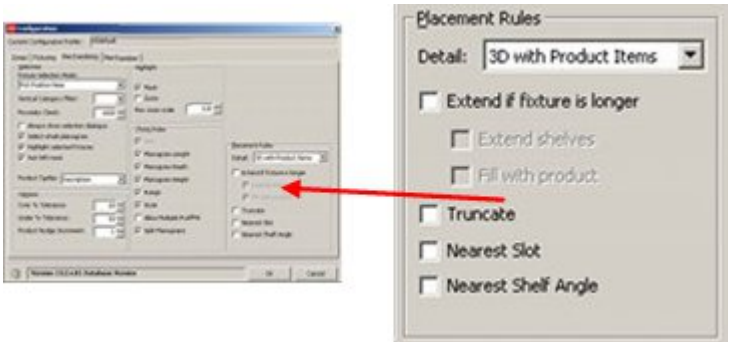
  Note: To be warned about multiple profiling, ensure this checkbox is NOT checked.

- **Split Planograms** triggers a warning if a planogram has been placed on fixtures that are not adjacent - i.e. fixtures with a distinct gap between them and the planogram has not been designated as splitable.

  Note: This warning does not currently operate in Merchandiser - although it does in the Planner module.

The Placement Rules Frame

The **Placement Rules frame** determines how the planogram will be placed on the selected fixtures. Some options cater for if the parameters in the planogram definition differ from those of the selected fixtures.



Detail brings up a pull down list specifying the default level of detail the planogram will be drawn in.

- 2D places a simple placeholder to represent the planogram. No shelves or products will be drawn.
- 3D draws the shelves in the planograms but represents the products by placeholders on the individual shelves.
- 3D with Product Items shows the shelves with individual products drawn.

  Note: This option has a considerable impact on the amount of data storage capacity required. Choosing the 2D option will result in a significantly smaller quantity of data being stored than if the 3D with Product Items option is selected.

  Note: The Detail drop down list sets the amount of default level of detail planograms will be placed in. It is possible to change the level of detail in an individual store plan in the Merchandiser module by clicking on the Implode or Explode icons in the Directions and Product Text Toolbar.

The remaining options determine what happens if the fixtures selected to place the planogram on differ from those specified in the planogram definition held in the database.

The **Extend if fixture is longer** option comes into effect when planograms are shorter than the fixture. The two subsidiary options will be grayed out until the 'Extend if fixture is longer' option is selected.

- **Extend Shelves** increases the shelf length (and depth) on the planogram until it matches that of the fixture.
- **Fill with product** puts additional product onto the shelf (or fixture) for the additional length (and depth) of the fixture.

Truncate will shorten the Planogram length to that of the fixture if it is longer. This means that both the shelves and their associated products will be reduced for both length and depth as required.

Nearest Slot will change the slot heights in the Planogram to match that of the fixture if the fixture does not permit the slot heights specified in the Planogram.

Nearest Shelf Angle will change the shelf angles in the Planogram to match those of the fixture if the fixture does not permit the shelf angle specified in the Planogram.

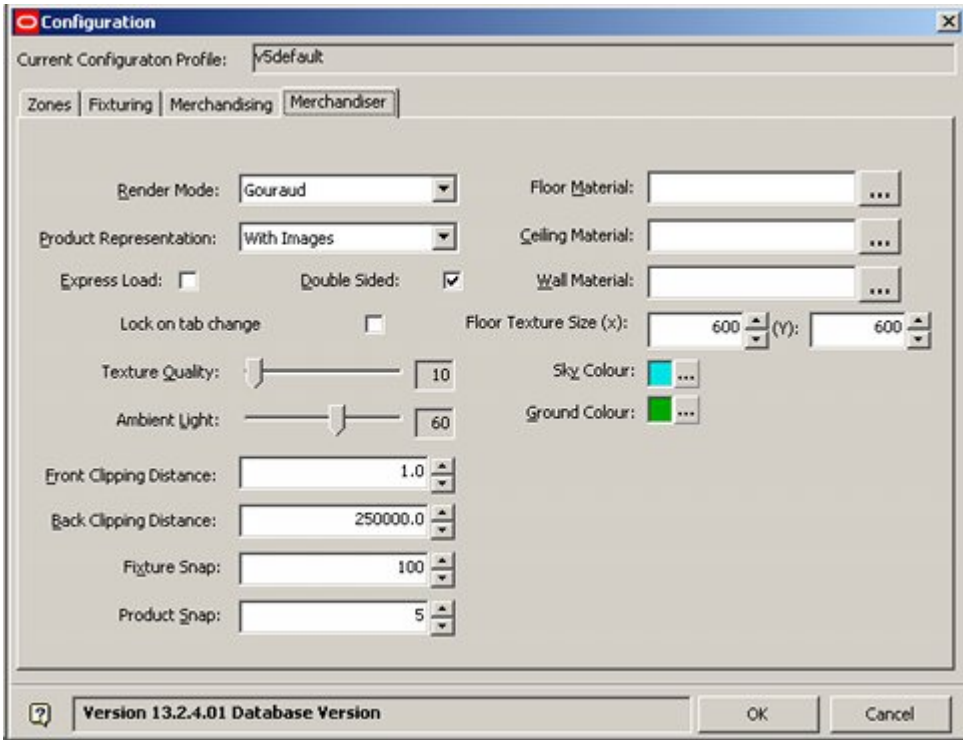
> **Note:** The functionality for extending and truncating planograms is not yet fully implemented.

10

The Merchandiser Tab

The Merchandiser Tab

The **Merchandiser Tab** contains a series of options determining how things are displayed in the Merchandiser module. It is available from the Admin, Fixture Studio, Product Studio, Planner, or Merchandiser modules. If opened from the Fixture Studio, Product Studio, Planner or Merchandiser modules only a restricted set of tabs will be available (shown below).



Render Mode

This functionality is currently not enabled.

Product Representation

This functionality is currently not enabled.

Express Load

This option allows users to only load part of a Store Plan, thus maximizing operation speed while working in the Store Plan. More Info

Double Sided

This option allows for objects drawn in Planner (AutoCAD) that might have only had one face assigned to a side. Checking Double Sided ensures that both faces of such objects are drawn - although at a penalty in performance. More Info

Lock on Tab Change

Lock on Tab Change links current setting of the Object Browser in the Merchandiser Module to actions that can be carried out in the current store plan. If set to 'On' then

fixtures and gondolas are locked against change except when the Fixturing Tab is selected. Similarly, products and planograms are locked against change except when the Merchandising Tab is selected.

Texture Quality

Texture Quality sets the default Texture Quality for when a drawing is opened. The texture quality for a specific store plan can be adjusted using the toolbar options in Merchandiser.

Ambient Light

The Ambient Light sets the default light level when the store plan is opened. The exact result will depend on the number, location and type of lights positioned in a specific store plan. The light level for a specific store plan can be adjusted using the toolbar options in Merchandiser.

Front Clipping Distance and **Back Clipping Distance**

The Front Clipping Distance and Back Clipping Distance set the maximum and minimum distances the drawing will be visible within. These values can be reset for a specific store plan can be adjusted using the toolbar options in Merchandiser. More Info

Fixture Snap

This functionality is not enabled at present.

Product Snap

This functionality is not enabled at present.

Floor Material

This enables the user to select a jpg graphics file that will appear at repeated intervals to represent the floor in each store. More Info

Ceiling Material

This enables the user to select a jpg graphics file that will appear at repeated intervals to represent the ceiling in each store. More Info

Wall Material

This functionality is not enabled at present.

Floor Texture Size

This is the size that the image for the floor (and ceiling) will be drawn. The image will tile repetitively at that size.

Sky Colour

This is the color that the sky will draw in the Merchandiser environment. It can be selected by clicking the button and selecting the color from the pallet.

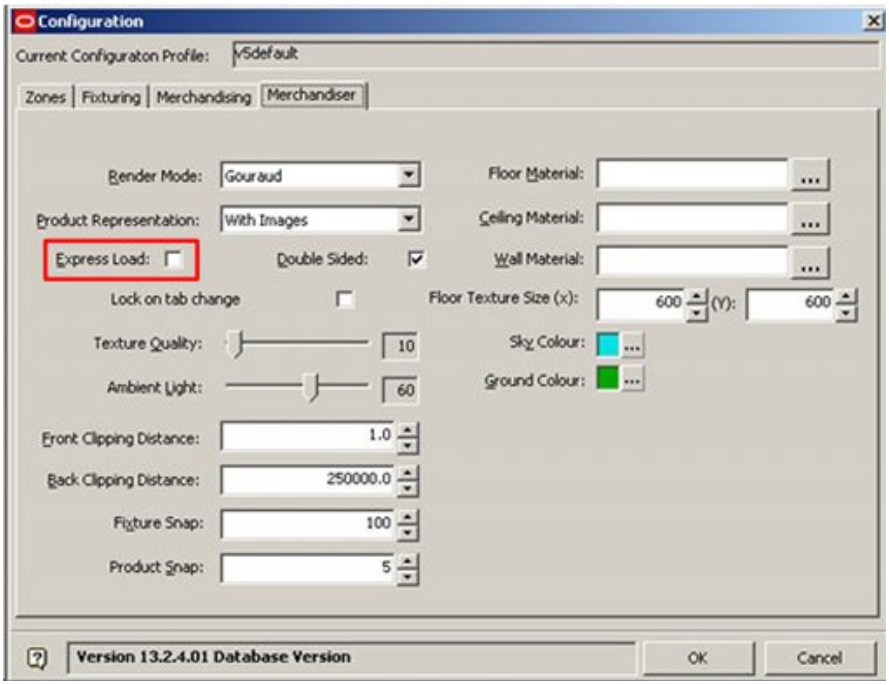
Ground Colour

This is the color that the ground will draw in the Merchandiser environment. It can be selected by clicking the button and selecting the color from the pallet.

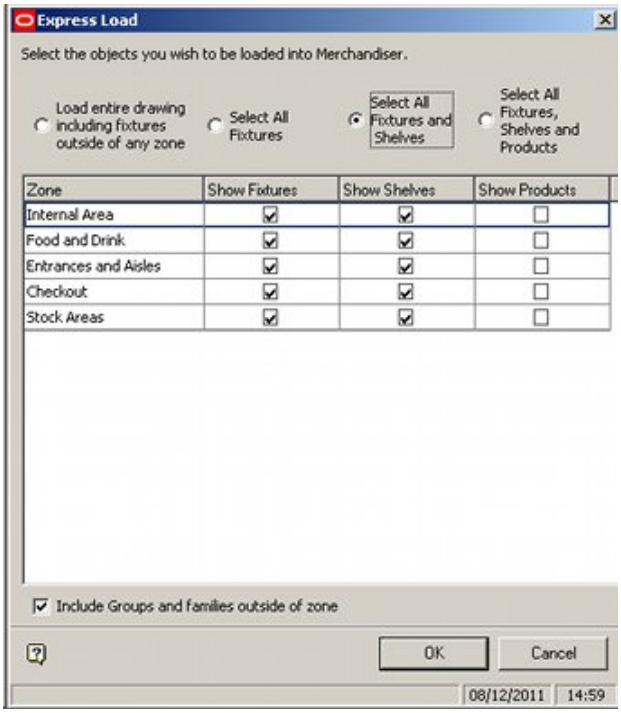
Note: This functionality is not enabled at present.

The Express Load Option

The **Express Load option** on the Merchandiser tab allows selection of specified parts of the store plan to be displayed. This speeds up movement and operations within the drawing as a smaller quantity of data is being manipulated. It is selected by ticking the check box on the Merchandiser tab.



When a store plan is selected in Merchandiser, the Express Load dialog box will appear.



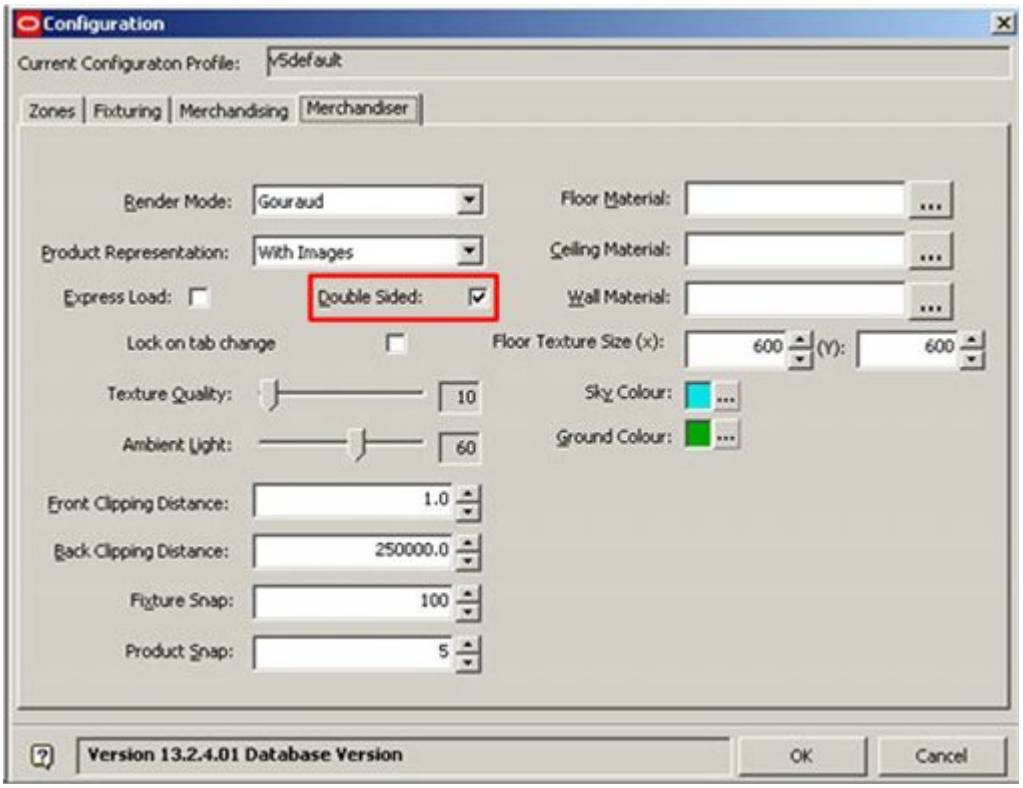
For any selected zone, this gives control what is displayed. The user can display:

- Fixtures
- Fixtures and Shelves
- Fixtures, Shelves and Products

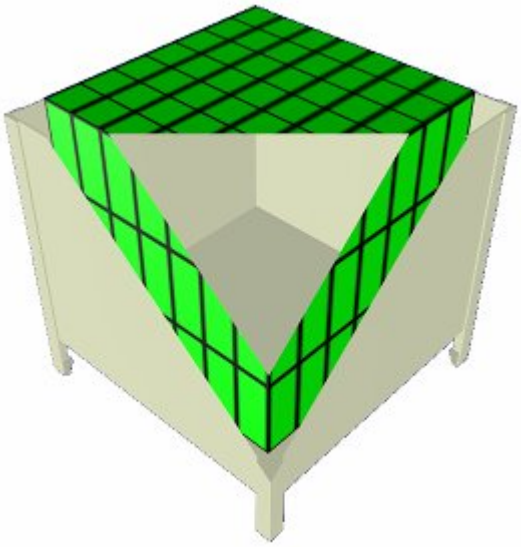
On clicking OK, the store plan will open with only the selected zones displayed.

The Double Sided Option

The **Double Sided option** allows for objects drawn in Planner (AutoCAD) that might have only had one face assigned to a side. Checking Double Sided ensures that both faces of such objects are drawn.

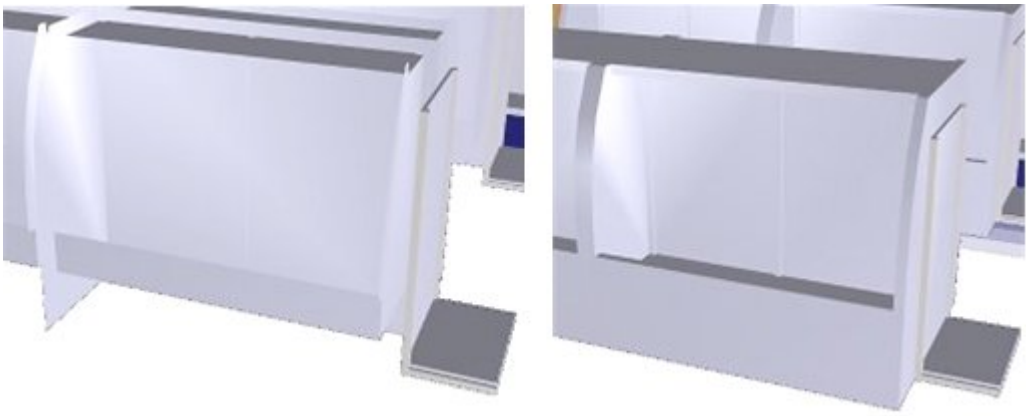


To understand this, consider this example of products placed inside a bin. The Front Clipping Plane has been advanced until it cuts into the image. The products are drawn in the form of a cube but only the outside faces of the cube are normally drawn. Here, use of the Front Clipping Plane has revealed the inside faces of the cube - which have been drawn without any detail.



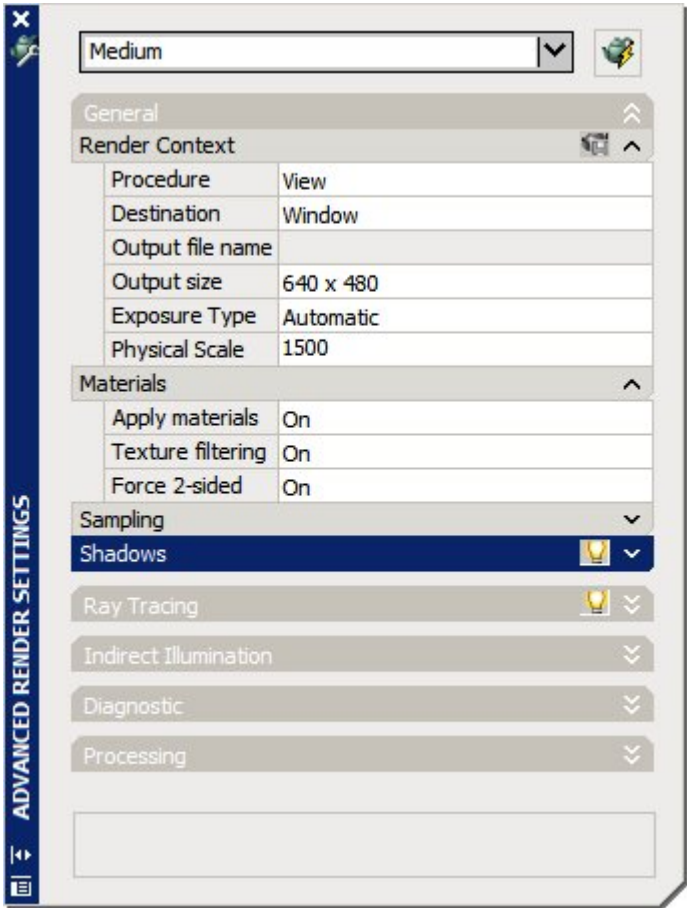
The software usually correctly determines which the outside and inside faces of an object are. Sometimes it can result in an error. For example, the outside [normally visible] faces could be drawn without detail and be invisible to users.

In the example below, the left hand image shows the 'double sided' option set to Off, with some faces of the fixture not being rendered correctly. The right hand image shows the 'double sided' option set to On, with all faces of the fixture drawn double sided, thus avoiding the error. However, because more faces are being rendered, this requires more processing capacity from the computer.



The setting for the 'Double Sided' option is saved to the Registry and is thus specific to individual computers. It is recommended that users set 'Double Sided' to Off unless there are problems rendering objects in a specific store plan. 'Double Sided' can then be set to On - once Merchandiser has been restarted objects will draw fully in that store plan.

Note: The AutoCAD Rendering Preferences Option dialog box provides a similar option called 'Force 2-sided' for the Planner Module. This can be accessed by using the 'RPREF' command in the command line.

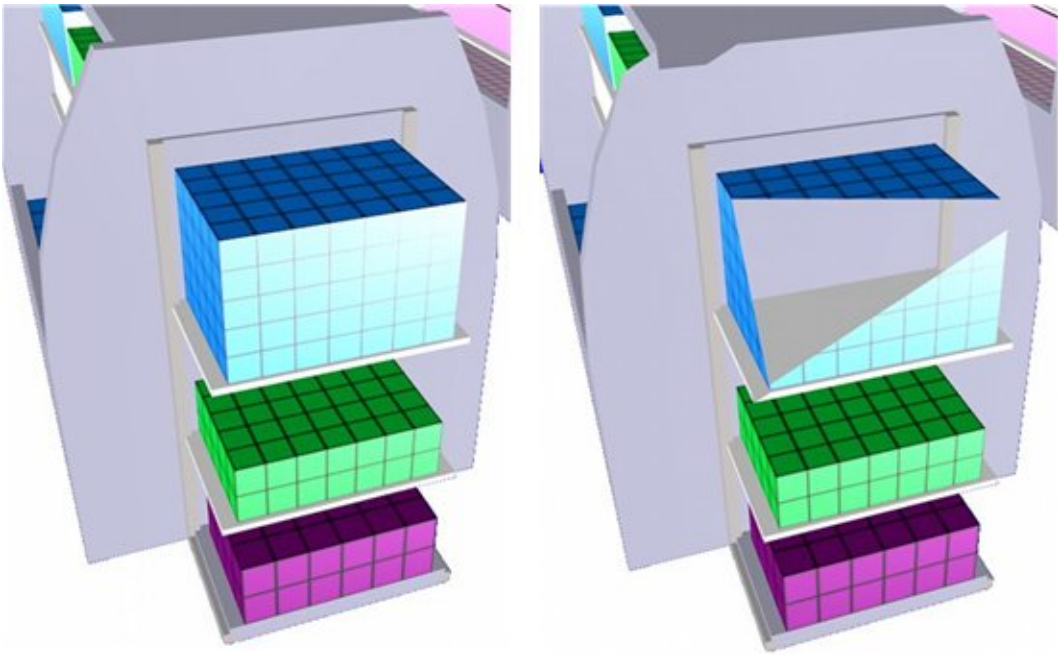


Front and Back Clipping Distance

The **Front Clipping Plane** and **Back Clipping Plane** are used to set the front and back distances beyond which detail is not visible. Reducing the area that is drawn in the store plan improve the performance in rendering the drawing.

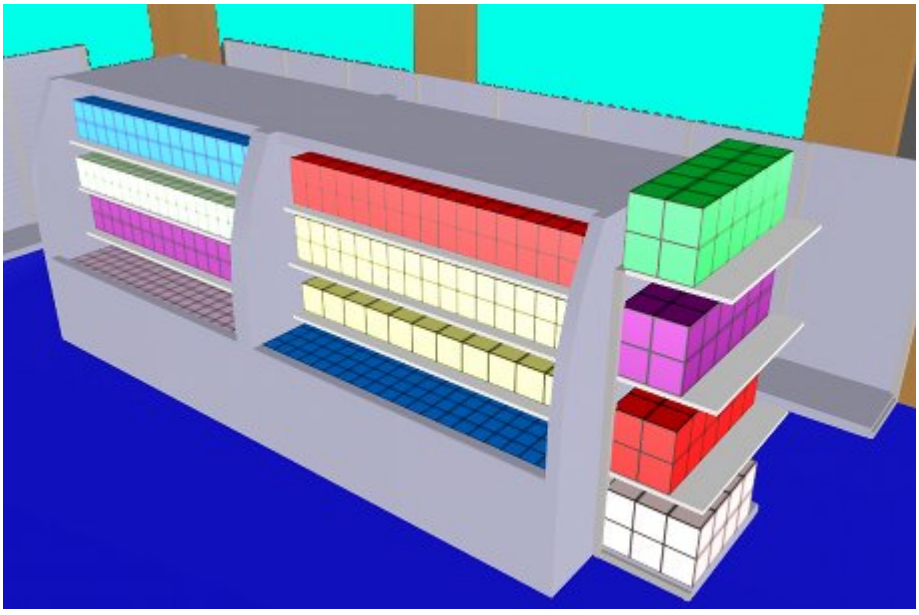
Front Clipping Plane

The Front Clipping Plane determines the distance in front of the user's view point detail will start being drawn from. In the left hand image the Front Clipping Plane is in front of the fixtures being viewed. In the right hand image, the Front Clipping Plane distance has been increased. It has now reached the products on the top shelf of the end cap. Part of those products is inside the Front Clipping Plane and is not being drawn.

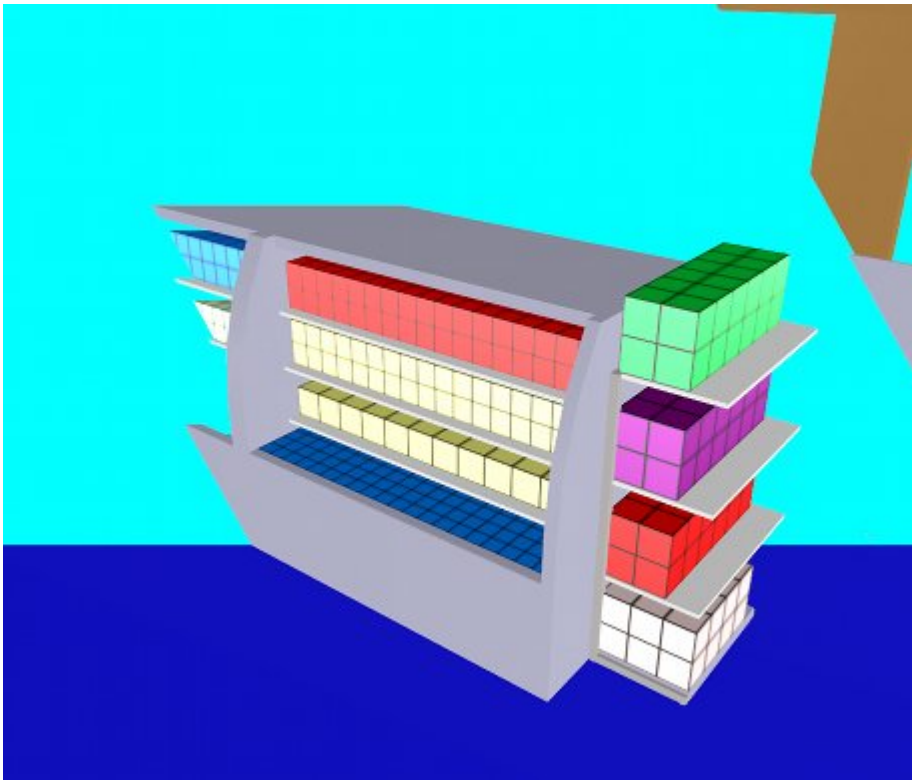


Back Clipping Plane

The Back Clipping Plane determines the maximum distance from the user's view point detail will start being drawn from. In the example below, the Back Clipping Plane is behind the fixtures and all of the fixtures are visible.



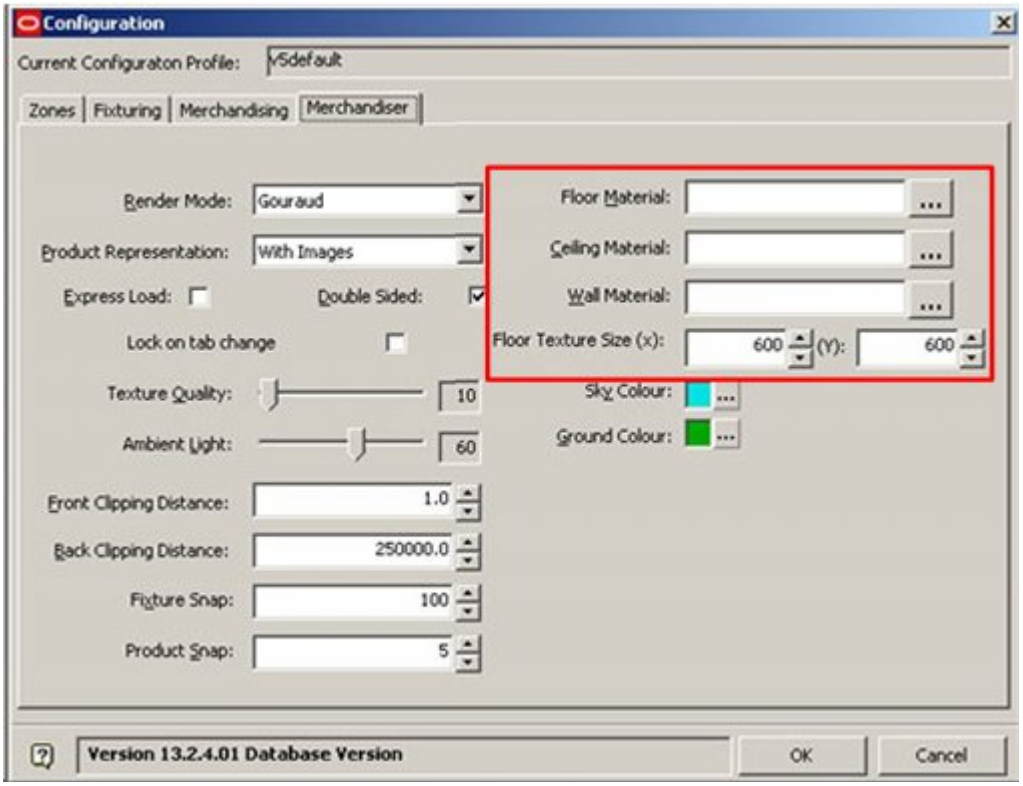
In the example below, the Back Clipping Plane has been brought closer and fixtures further to the rear are no longer included in the view being drawn.



Floor and Ceiling Materials

Floor and Ceiling Materials can be assigned, allowing the store to look more realistic. In the example below, a tile material has been assigned to the floor.

Floor and Ceiling materials are assigned by clicking on the appropriate button in the Merchandiser tab and navigating to the required image.



Note: Valid image types are .jpg and .bmp

The size the image will appear is governed by the Floor Texture size. If set to 8" x 4" the image will tile repetitively at this size.

Ceiling Height

The ceiling will draw at the height specified in the AVTTB_LEVELTYPE table in the database. In the example below, the ceiling is set to draw at a height of 168" (14ft).

	LVL_ID	LVL_DESC	LVL_RELATIVE_TO_LEVEL	LVL_DEFAULT_ELEVATION
1	16	Ceiling Datum	3	240
2	0	Undefined	3	0
3	1	Top of Slab	3	0
4	3	Floor Level	(null)	0
5	5	Under Slab	3	0
6	6	Low Level	3	3
7	8	Freezer Top Level	3	36
8	9	Chest Level	3	60
9	10	High Level	4	-4
10	12	Ceiling Void	4	8
11	13	Pelmet Level	3	70
12	14	Banner Level	4	-120
13	99	User Defined	0	0
14	4	Sky	3	1440
15	15	Poster Level	3	42

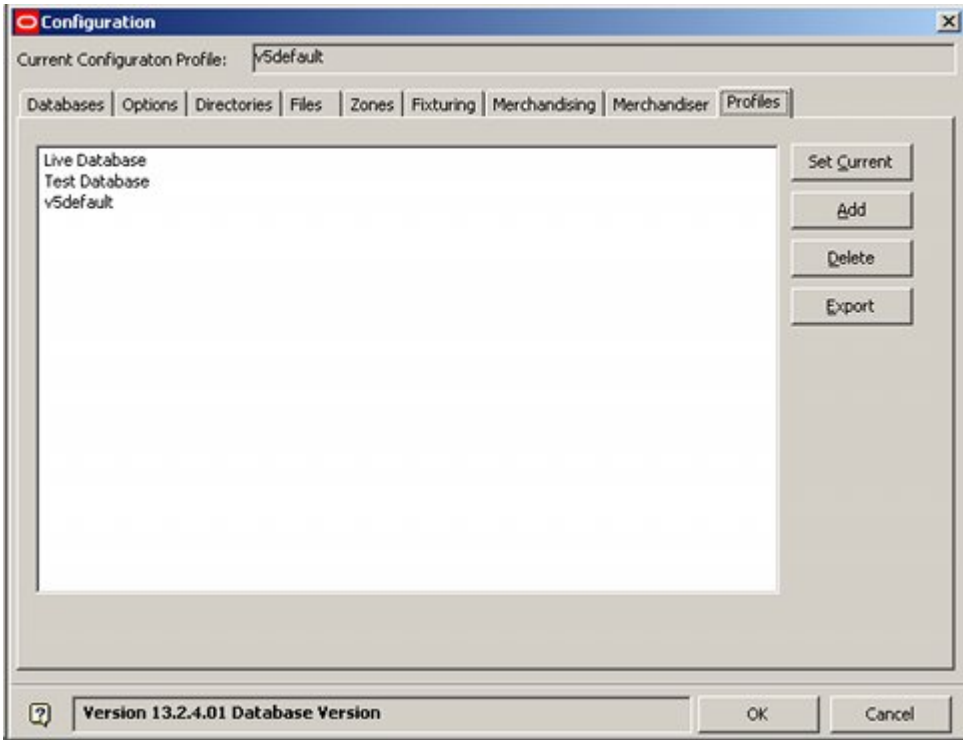
The ceiling is visible when viewed from below, but not when viewed from above.

11

The Profiles Tab

Overview of Profiles

The **Configuration Module** allows users to specify a large number of local settings to suit their preferences as to how their local copy of the software should operate. These settings are stored in Profiles. The user can define multiple profiles and readily switch between them - thus changing from one configuration of the software to another. This is done via the Profiles Tab.

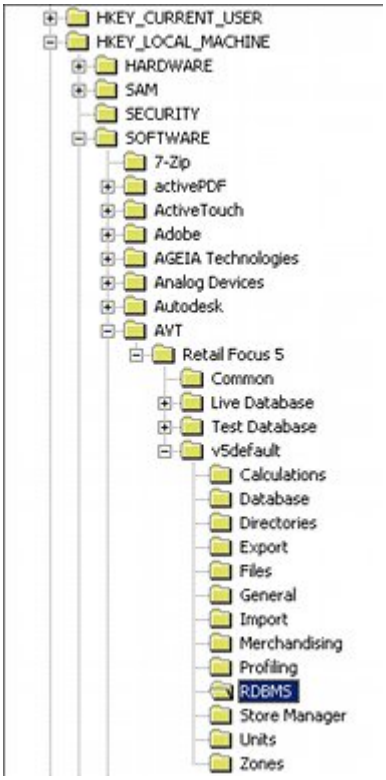


The individual settings for each Profile are stored in the Registry on each computer. Information is stored in two places within the Registry:

- HKEY_LOCAL_MACHINE\SOFTWARE\AVT\Retail Focus 5
- HKEY_CURRENT_USER\Software\AVT\Retail Focus 5

Within these locations, data is stored in named profiles. In the example below, data is held for three profiles:

- Live Database
- Test Database
- v5 Default



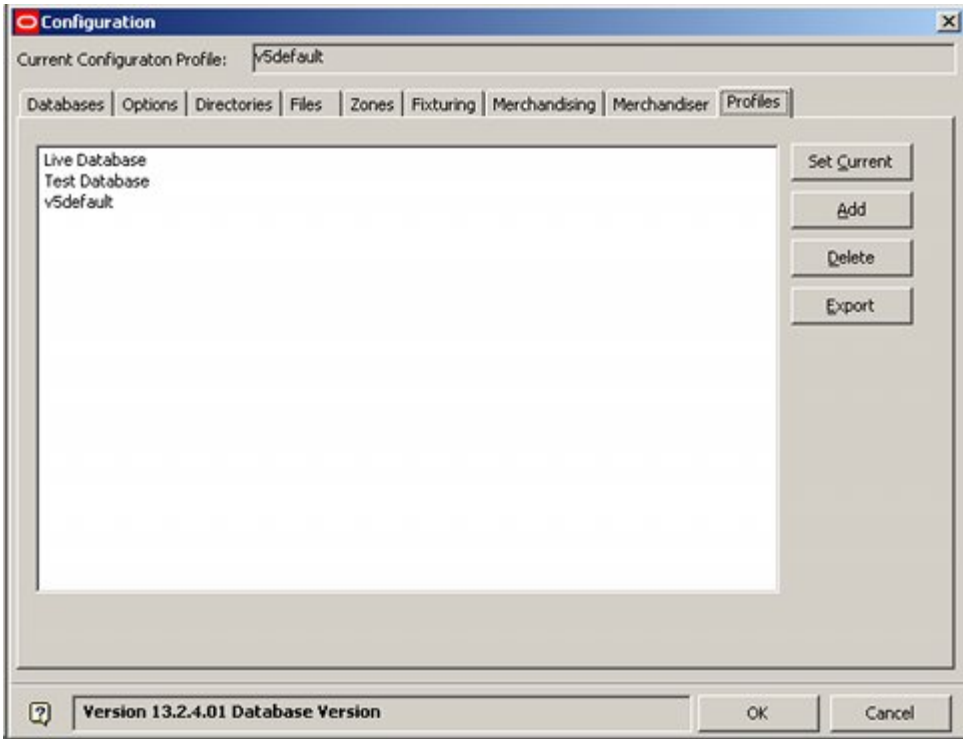
Each folder then contains individual settings for one aspect of MSM. For example, the RDBMS folder holds the settings for the database connection set in the database tab of the Configuration Module.

Name	Type	Data
(Default)	REG_SZ	(value not set)
RDBMS Database Name	REG_SZ	
RDBMS Database Type	REG_SZ	1
RDBMS Driver	REG_SZ	{Oracle in OraHome92}
RDBMS Options	REG_SZ	
RDBMS Password	REG_SZ	<d?p3V<`NU1
RDBMS Provider String	REG_SZ	OraOLEDB.Oracle
RDBMS Server Name	REG_SZ	Example
RDBMS User Name	REG_SZ	MSP_DEMO_DB

Note: Some of these values are stored as bit wise variables - these should be set through the Configuration module and not directly in the registry.

The Profiles Tab

Each **Profile** contains a defined set of preferences that have been set using the Configuration Module. The Profile in use is known as the Current profile. As changes are made to the Configuration Module, the modifications are stored in the current profile. Oracle Retail Macro Space Management allows users to store multiple profiles, allowing them to switch from one set of standard settings to another.



All currently available profiles will be listed in the text pane.

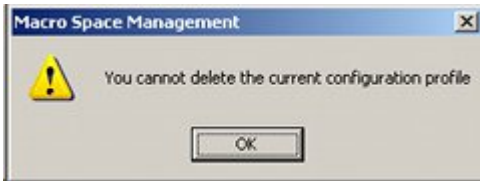
Set Current makes a highlighted profile current.

> **Note:** The new profile will not take effect until the software has been closed and restarted.

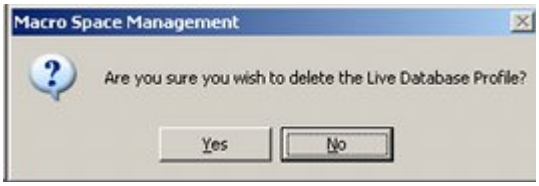
Add takes a copy of the current profile and stores it under a different name. It also makes the new profile current. (To rename the profile, highlight it and use the Rename option on the right click menu).

Delete deletes the highlighted profile.

> **Note**: If the profile to be deleted is current, it cannot be deleted – another profile has to be set to current first.



Before the profile can be deleted, it has to be conformed via a small dialogue box.

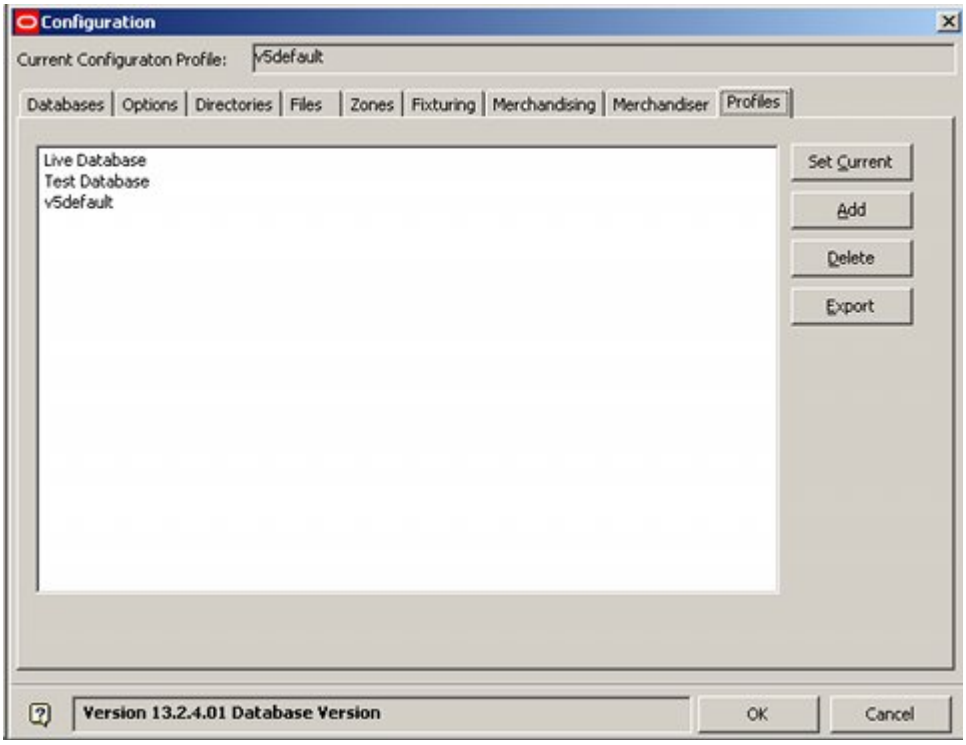


Export Profile exports the highlighted profile to the Export directory, putting up a confirmatory message at the same time.

Note: The Export directory is specified in the directories tab.

Switching Profiles

Each **Profile** holds a complete user specific list of settings for Macro Space Planning. This allows users to swap from one list of settings to another at the click of a button. An example would be switching from a test environment to a live environment.



In order to do this, highlight the profile it is wished to change to and click the Set Current button. The new profile will not take effect until the software has been closed and restarted. Accordingly it is best to switch profiles with just the Administration module open. The Administration module can then be closed. When restarted, the user will be connected to the new database.