

Oracle® Retail Macro Space Management Merchandiser Module

User Guide

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Related Documents

For more information, see the following documents in the Oracle Retail Macro Space Management Merchandiser Module Release 13.3.2 documentation set:

- *Oracle Retail Macro Space Management Administration User Guide*
- *Oracle Retail Macro Space Management Administration Module Online Help*
- *Oracle Retail Macro Space Management Configuration 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*
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- *Oracle Retail In-Store Space Collaboration Release Notes*
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- Screen shots of each step you take

Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 13.3) or a later patch release (for example, 13.3.2). If you are installing the base release or additional patch releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch releases can contain critical information related to the base release, as well as information about code changes since the base release.

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

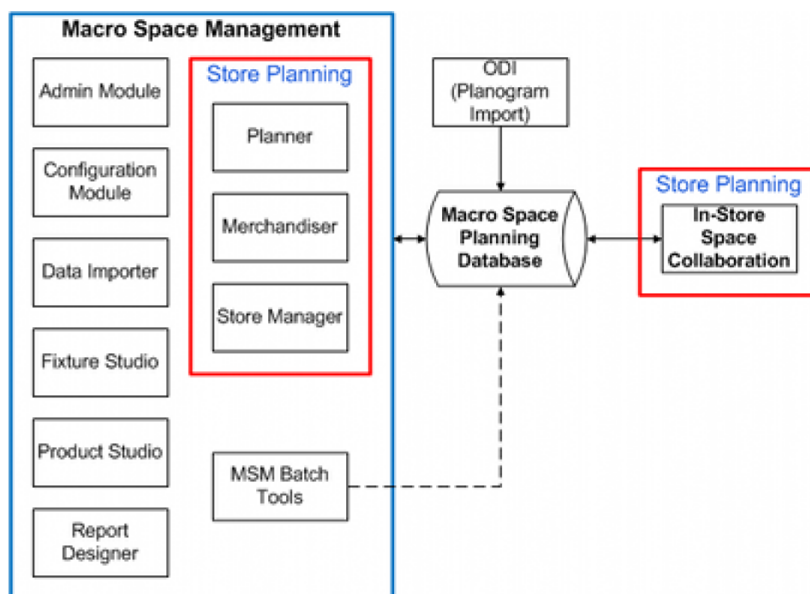
Navigate: This is a navigate statement. It tells you how to get to the start of the procedure and ends with a screen shot of the starting point and the statement “the Window Name window opens.”

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

Overview of Macro Space Planning

Overview of Macro Space Planning

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



Macro Space Planning

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

Macro Space Management

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

1. Store Planning Modules

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

2. Support Modules

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

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

In-Store Space Collaboration

In-Store Space Collaboration uses a common database with Macro Space Management. ISSC is more portable than MSM and is often deployed to stores to allow store managers to become involved in the store planning process. It can also be used to ensure compliance with store plans.

Differences between Planner and Merchandiser Modules

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

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

Range and Resource Planning

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

Category and Assortment Planning

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

Store Planning Criteria

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

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

Planogram Design

Planogram design will also have been carried out, often based on information from category management combined with guidelines on visual merchandising.

Store Planning

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

Store Plan Validation

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

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

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

Store and Planogram Publishing

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

Supply Chain Execution

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

Store Plan Execution

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

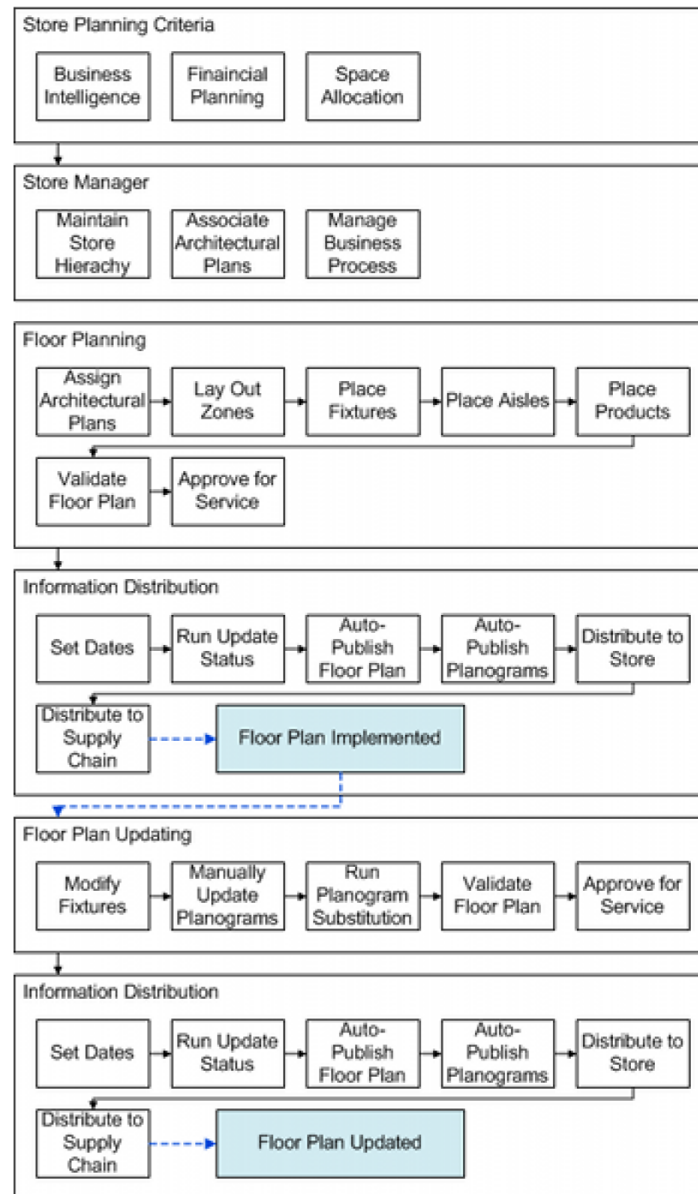
Performance Measurement

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

Overview of Store Planning

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

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



Store Planning Criteria

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

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

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

Store Manager

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

- Maintaining the Store Hierarchy

Maintaining the store hierarchy includes adding, editing and deleting stores, floors, revision and floor plans as required.

- Associating Architectural Plans

Architectural plans are used as underlays for floor plans in order to show the position of walls, doors, windows, lighting and services. Associating architectural plans is a two-part process, with the second step required when a floor plan is open.

- Managing Business Processes

Stores, Floors, Revision and floor plans all go through different stages in their business life cycle. For example a store may be at the design stage, in service, closed for refurbishment or sold and out of service.

Floor Planning

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

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

- Assign Architectural Plan

An architectural plan should already have been associated with the parent floor for the floor plan in Store Manager. This can now be assigned to this specific floor plan.

- Lay Out Zones

The next stage is to lay out the zones within the floor plan. These can be used to indicate the positions and areas of departments, sub-departments, aisles, etc. This can only be done in the Planner module. Zones come in several broad types:

- Internal Area: There is only one zone of this type in a floor plan. It is used to indicate the maximum extents and area used for retail purposes.
- Department: This type is used to indicate the departments within a retail outlet. Any floor plan that is to be viewed in In-Store Space Collaboration must have zones of this type for it to open.
- Other: This type is often used to indicate sub-departments within a main department, aisles, etc.

- Place Fixtures

The fixturing can then be laid out. Fixtures can either be placed individually or a gondola runs. Fixture placement is generally done in the Planner module because of the ability to place the fixtures with great accuracy. After the fixturing has been placed, it is often Bay Numbered - this makes it easier for users to identify a specific fixture within a floor plan.

- Place Aisles

The next stage is to draw the aisles. These can only be placed in the Planner model and allow the aisle to be identified. The direction the aisle is drawn also serves to identify the predominant traffic direction. This can be used when placing multibay planograms that have been designed to be viewed in a specific sequence.

- Place Products

After the fixtures and aisles are in place, products can be placed. 'Big ticket' items can be placed as individual products, but the majority of merchandise is placed in the form of planograms.

- **Validate Floor Plan**

After the floor plan has been created, it is next validated to see the layout is optimum. Validation can be done using reports and KPIs. Because of the visual nature of KPIs these often allow validation to be completed in the least possible time. Validation can include:

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

If necessary amendments can be made to the floor plan and the new arrangement revalidated.

- **Approve for Service**

The final stage is to approve the floor plan for service. This is done in Store Manager by setting the status to Authorized. This enables the Publish and Effective (Current) dates to be set. Macro Space Management batch tools can then be used to automatically change the floor plan status and publish the floor plan and its associated planograms.

Information Distribution

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

- **Set Dates**

When the floor plan has been approved and set to Authorized status, the Publish and Effective Dates are set.

- The Publish Date is when information is distributed in preparation for putting the floor plan into service. This date is set far enough in advance of the implementation date that all preparations for putting the floor plan into service (including ordering equipment and merchandise) can be put in hand.
- The Effective Date is when the floor plan will be put into service (made current). This date will usually be integrated with the retailers strategic planning so that the change is made in coordination with promotional and advertising campaigns, etc.

- **Run Update Status**

UpdateStatus.exe is a small Macro Space Management utility that can automatically change the status of floor plan. It is generally set to run as a batch process on a nightly schedule. When the Publish Date has been met or exceeded, Update Status will change the status of the floor plan from Authorized to Published. In most implementations this also sets the floor plan to read only status. This prevents further changes to the floor plan unless an administrator deliberately overrides this.

- **Auto-Publish Floor Plan**

Another Macro Space Management application can be scheduled to publish the floor plan on the Publish Date. This results in a copy of the floor plan (typically in DWF or PDF format) being placed in a specified location. From there the retail chain can make arrangements to distribute the information to the store - typically by e-mail.

- **Auto-Publish Planograms**

A further Macro Space Management application can be scheduled to publish the planograms on the Publish Date. This results in a copy (typically in Word document or PDF format) being placed in a specified location. From there the retail chain can make arrangements to distribute the information to the store - typically by e-mail.

- **Distribute to Supply Chain**

In parallel with publishing the information, information needs to be sent to the supply chain for the equipment, merchandise, signage and promotional material needed. This is generally achieved by running reports on the floor plan to identify the types and quantities required, then creating the appropriate purchase orders.

- **Run Update Status**

UpdateStatus.exe executes as a batch process on a nightly schedule. When the Effective Date has been met or exceeded, Update Status will change the status of the floor plan from Published to Current. In most implementations this also maintains the floor plan at read only status. This prevents further changes to the floor plan unless an administrator deliberately overrides this.

Simultaneously with update status changing the status of this floor plan to Current, any pre-existing Current floor plan for this specific floor will have its status changed to Historical. This indicates it has been superseded by a more recent version.

- **Implementing the Floor Plan**

On the Effective Date, the store will know to put the changes into effect. This means setting out the fixturing, populating it with merchandise and setting up the signage and promotional material. This will require careful planning and allocation of labor.

Floor Plan Updating

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

- **Modify Fixtures**

The fixtures are modified as required. Typical examples include adding or removing display bins from an aisle or changing the widths of several aisles.

- **Manually Update Planograms**

If the fixturing has been changed, it may be necessary to manually populate the modified fixtures with the appropriate planograms.

- **Run Planogram Substitutions**

Planogram substitutions are an automated way of changing the specified planograms in one or more stores. This can be done in several forms including:

- One to One Substitutions: A planogram is swapped out for one of identical size.
- One to Many Substitutions: A large planogram is swapped out for several smaller ones.
- Many to One Substitutions: Several smaller planograms are swapped out and replaced by a single large one.

There are a number of reasons for planogram substitutions. The more common ones include:

- Space Trading: Reducing the space assigned to a poorly performing category and increasing the space available to a better performing one.

- Seasonal Changes: Swapping out seasonal goods; for example changing Halloween products for Christmas ones.
- Special Offers: Swapping out standard planograms for planograms containing products in modified packaging for the special offer.
- Validate Floor Plan

After the floor plan has been created, it is next validated to see the layout is optimum. Validation can be done using reports and KPIs and would be similar to the exercise carried out when the floor plan was first created.

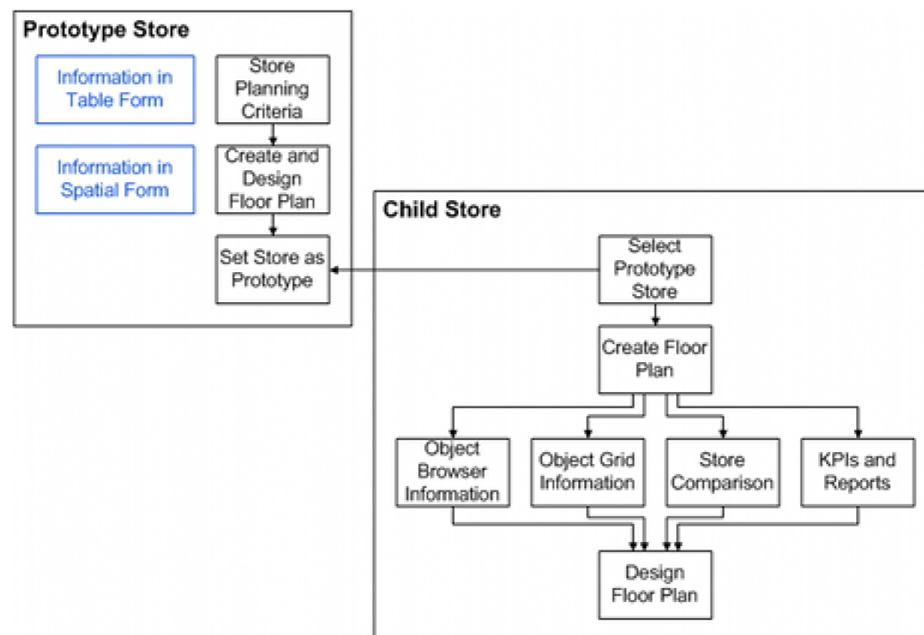
Information Distribution

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

Using Prototype Stores

Overview of Prototype Stores

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



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

2. Store Planning Criteria

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

3. Create and Design Prototype Store

The planning criteria are then used to design the prototype store. This results in the tabular information in the planning criteria being transformed into a series of spatial

relationships where departments, equipment and merchandise are placed relative to each other. After the store plan has been optimized by means of reports and KPIs, it is ready for use as a reference.

4. Set Store as a Prototype

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

5. Select Prototype Store and Create Floor Plan

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

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

6. Design Floor Plan

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

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

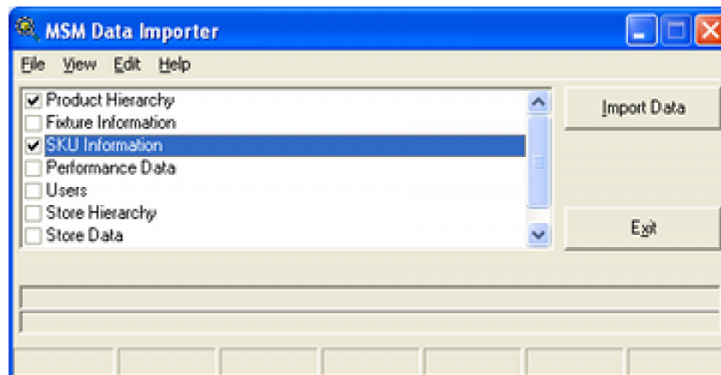
MSM Batch Processes

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

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

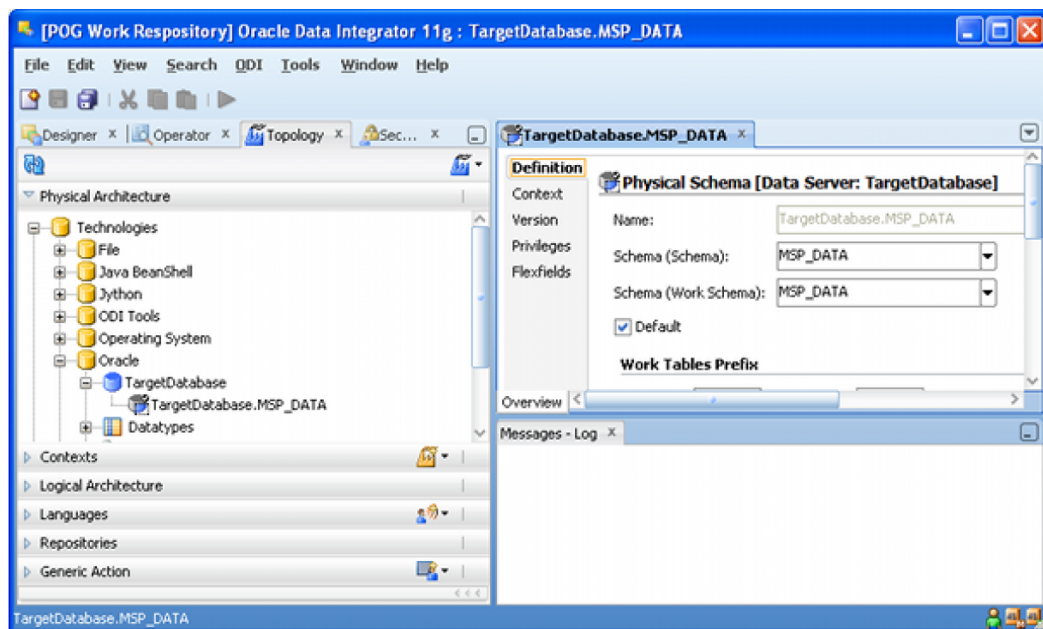
Batch Processes

Data Importer



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

ODI Planogram Importer



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

Automated Calculations

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

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

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

Update Status

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

Floor Plan Publishing

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

Planogram Publishing

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

Custom SQL

Note: this information is for DBAs and Administrators only. Standard users cannot access the database and modify the requisite tables.

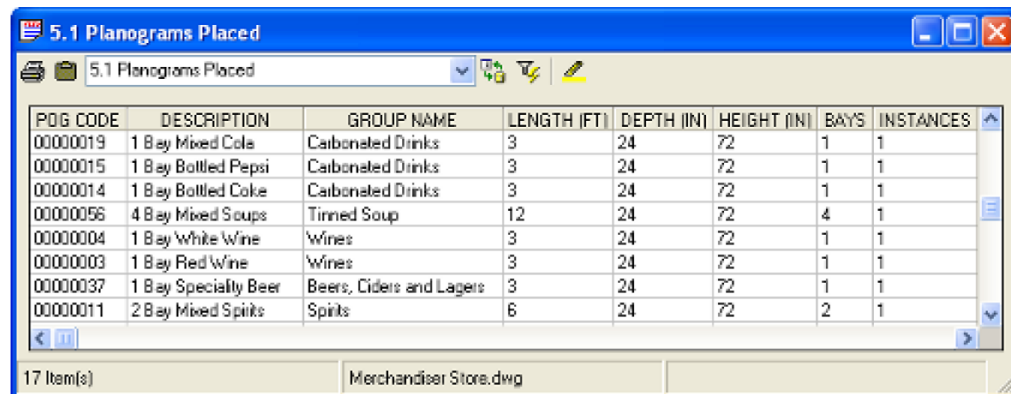
Definition of Custom SQL

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

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

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

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



The screenshot shows a software window titled "5.1 Planograms Placed". Inside, there is a table with the following data:

| POG CODE | DESCRIPTION | GROUP NAME | LENGTH (FT) | DEPTH (IN) | HEIGHT (IN) | BAYS | INSTANCES |
|----------|----------------------|--------------------------|-------------|------------|-------------|------|-----------|
| 00000019 | 1 Bay Mixed Cola | Carbonated Drinks | 3 | 24 | 72 | 1 | 1 |
| 00000015 | 1 Bay Bottled Pepsi | Carbonated Drinks | 3 | 24 | 72 | 1 | 1 |
| 00000014 | 1 Bay Bottled Coke | Carbonated Drinks | 3 | 24 | 72 | 1 | 1 |
| 00000056 | 4 Bay Mixed Soups | Tinned Soup | 12 | 24 | 72 | 4 | 1 |
| 00000004 | 1 Bay White Wine | Wines | 3 | 24 | 72 | 1 | 1 |
| 00000003 | 1 Bay Red Wine | Wines | 3 | 24 | 72 | 1 | 1 |
| 00000037 | 1 Bay Specialty Beer | Beers, Ciders and Lagers | 3 | 24 | 72 | 1 | 1 |
| 00000011 | 2 Bay Mixed Spirits | Spirits | 6 | 24 | 72 | 2 | 1 |

At the bottom of the window, it says "17 Item(s)" and "Merchandise Store.dwg".

Where Custom SQL Can Be Used

Custom SQL can be used in the following ways:

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

Where Custom SQL is Stored

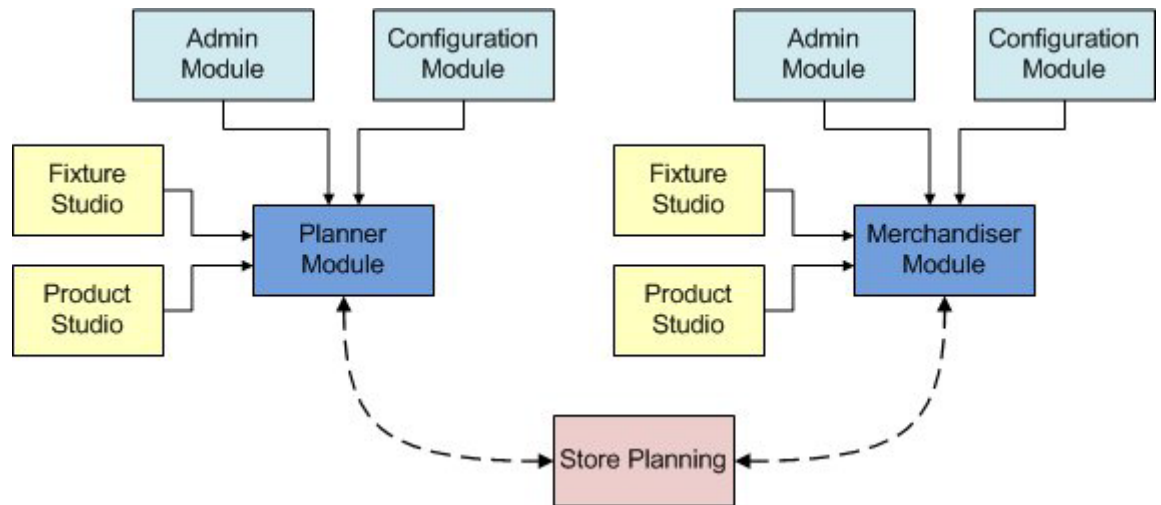
The primary repository for Custom SQL is in the AVTTB_CUSTOM_SQL in the database; although other tables come into use. The Custom SQL itself is stored in the CSQ_SQL field. This can be edited to change the table referenced and fields displayed.

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

Overview of Other MSM Modules

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

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



Administration Module

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

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

Configuration Module

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

| Option | Description | Planner | Merch |
|-------------------|---|---------|-------|
| Zones Tab | • How zones are drawn when being added to the floor plan. | X | |
| | • How zones are highlighted in the floor plan. | X | |
| Fixturing tab | • How the Add Fixture dialog box functions | X | |
| | • How Connection Points function | X | X |
| | • Highlighting of Fixtures | X | |
| Merchandising Tab | • Selection Method for Fixtures | X | |
| | • Highlighting of Products | X | |
| | • Checking Planogram Placement Validity | X | X |
| Merchandiser tab | • Appearance of buildings, equipment and merchandise | | X |

Fixture Studio

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

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

Product Studio

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

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

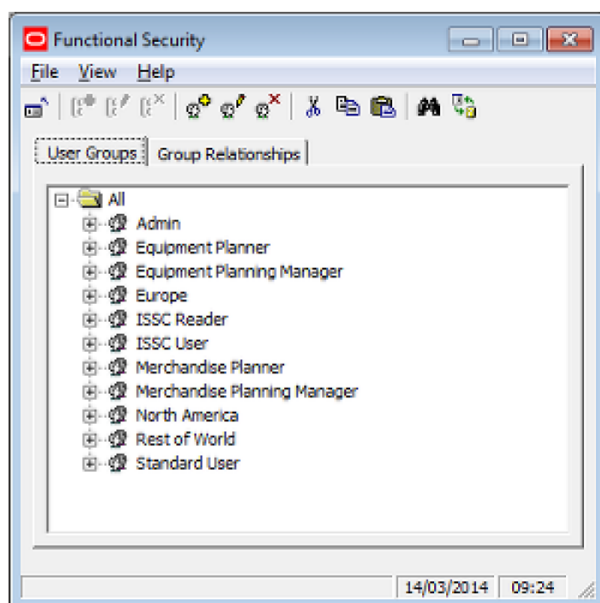
Logging In

How Passwords and Privileges are Configured

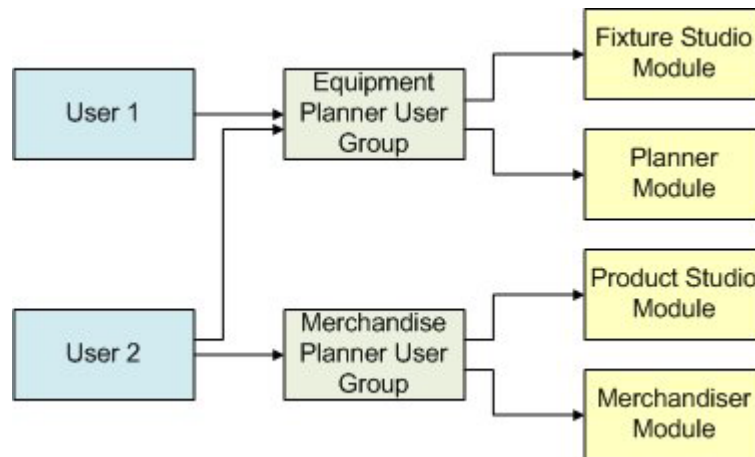
Passwords and privileges are configured in Macro Space Management's Administration module.

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

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



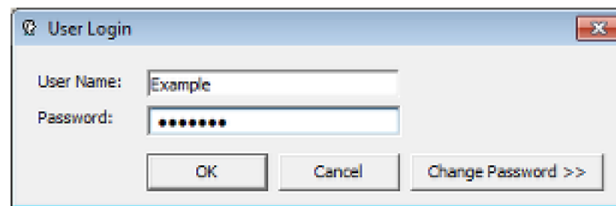
Users are assigned to User Groups in the User Groups Tab. Which modules a User Group can access is specified in the Group Relationships tab. A user's privileges thus depend on what user groups they are assigned to.



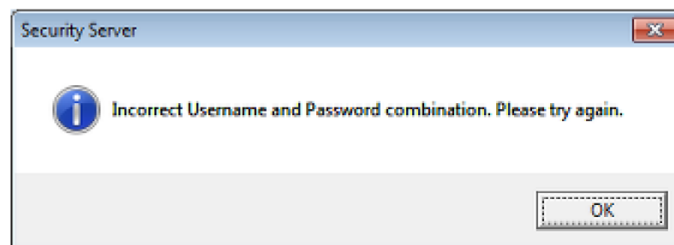
In the above example, User 1 is only a member of the Equipment Planner user group. Accordingly, their access is restricted to the Fixture Studio and Planner modules. User 2 is a member of the Equipment Planner and Merchandiser Planner user groups. They have wider access and can use the Fixture Studio,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

Logging in to Macro Space Management Modules

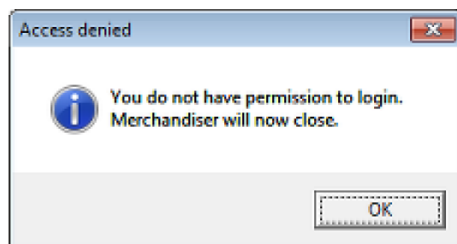
When a user first attempts to access a Macro Space Management module, the **Log In dialog box** will appear.



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



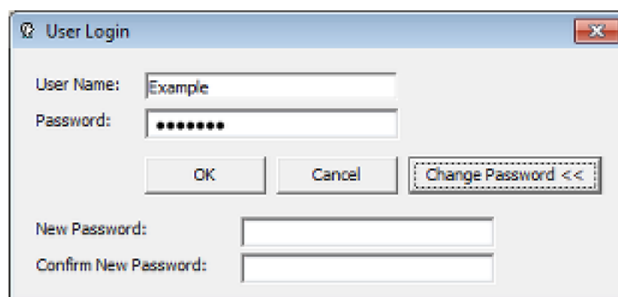
If the user attempts to log into a module for which they do not have permissions for, a warning will appear and the log in attempt will be terminated.



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

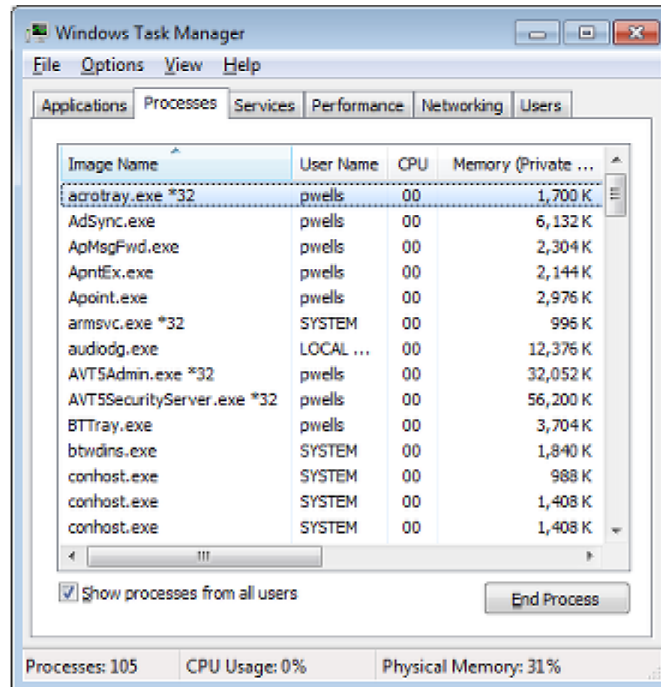
Password Changes

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

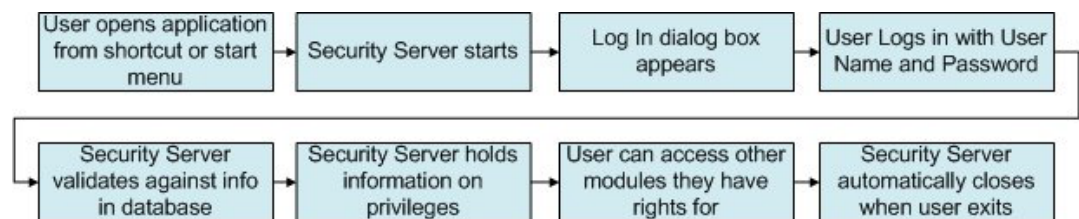


Security Server

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



How Security Server operates is shown in the following flowchart.



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

Security Server and Application Errors

On occasion a Macro Space Management module might encounter a significant error and automatically close. Because the closure was not user initiated, Security Server does not close but remains open in the background. If the module that unexpectedly closed is

reopened, Security Server will contain information incompatible with the restart and further application errors will result.

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

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

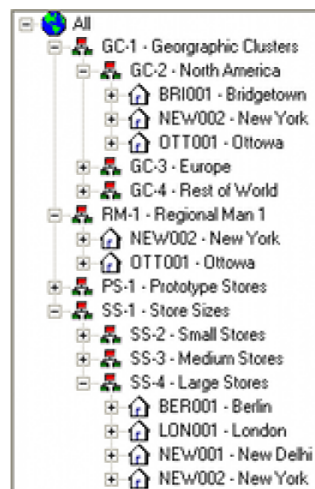
Store Manager Business Processes

Store Manager Business Processes

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

Grouping Together Stores of Common Purpose in the Hierarchy

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

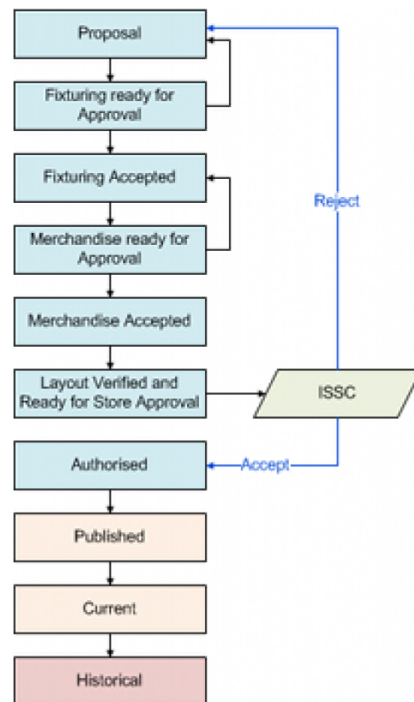


It also allows stores sharing (for example) similar demographic characteristics to be grouped together. For example clusters could be created according to the ethnic mix of the store catchment area. If a 'Hispanic' cluster was created, that would enable all stores with a predominantly Hispanic shopper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

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

Controlling Business Life Cycle

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



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

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

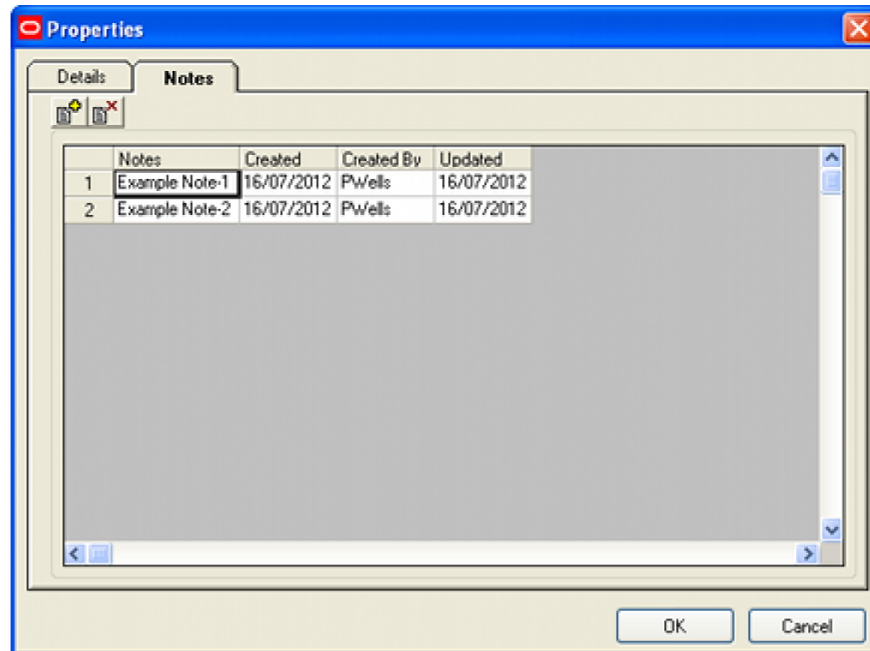
Batch processes can be used when the floor plan reaches Publish status to auto-generate the pertinent floor plan and planograms.

Communicating Information

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

- File Notes

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



- Publishing a Floor Plan

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

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

- Making a floor Plan Effective (Current)

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

Reports and the Macro Space Planning Database

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

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

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

Integrating Store Manager into Retail Processes

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

Identify Need for Floor Plan Change

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

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

Floor Plan Created in Store Manager

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

Floor Plan Ready for Approval

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

Floor Plan Set to Authorized Status

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

1. The Publish Date

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

2. The Effective Date

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

Update Status Changes Floor Plan Status to Published

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

Publishing Planogram Designs and Floor Plan

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

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

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

Update Status Changes Floor Plan Status to Current

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

Financial KPIs and Reports

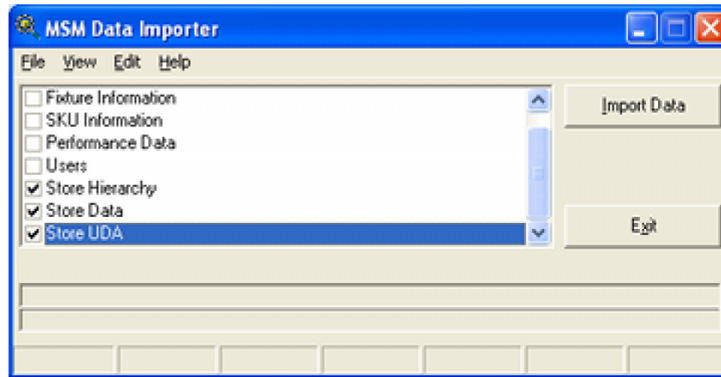
Macro Space Management allows retailers to understand how efficiently they are using space within their bricks and mortar outlets. Running KPIs and reports enables retailers to optimize future floor plans. It also allows information to be fed back into Category Management to optimize future categories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

Importing Data and Setting up Store Manager

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

Importing Data

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



This allows the classes of data to be imported to be selected. Data Importer is fully configurable

Oracle's consultants can configure the exact nature of the data import so that specified data is selected from the designated databases and imported into the required fields within Macro Space Management's central database.

Configuring the Store Manager Hierarchy

General

Before Macro Space Management can be used, it is necessary to set up a Hierarchical Tree within Store Manager. This structure enables the stores to be arranged in logical groupings by means of Clusters and Sub-clusters.

The performance of individual Stores can be compared against selected Prototype Stores, while the performance of one cluster of stores can be compared against another cluster.

The structure of this hierarchical tree should be carefully considered as it will affect the quality of information that can be produced using Macro Space Management, and hence determine the effectiveness of Macro Space Management as a tool for improving the profitability of a business.

Planning the Structure

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

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

Criteria can then be developed as to cluster types, and hence whether individual stores should be assigned to single or multiple clusters.

For example, a store could be associated with three separate and distinctive clusters. One cluster would enable the store to be compared against those in other regions, one against stores of similar turnover, and the third against stores of similar size.

Consideration should also be given to which stores can be designated as Prototypes for comparison purposes. Correctly assigned prototype stores will also allow swift and effective comparison of individual store performance against an exemplar.

A correctly planned structure can significantly improve the performance of a retail organization – a poorly planned structure could prevent the full power of Macro Space Management being used.

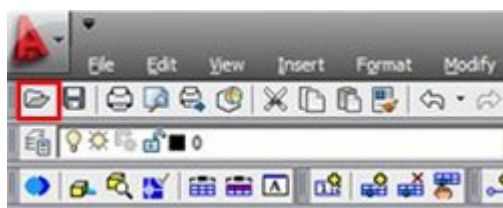
Overview of Store Manager

Overview of Store Manager Module

Accessing the Store Manager Module

Store Manager can be accessed from either the Planner or Merchandiser modules.

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



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

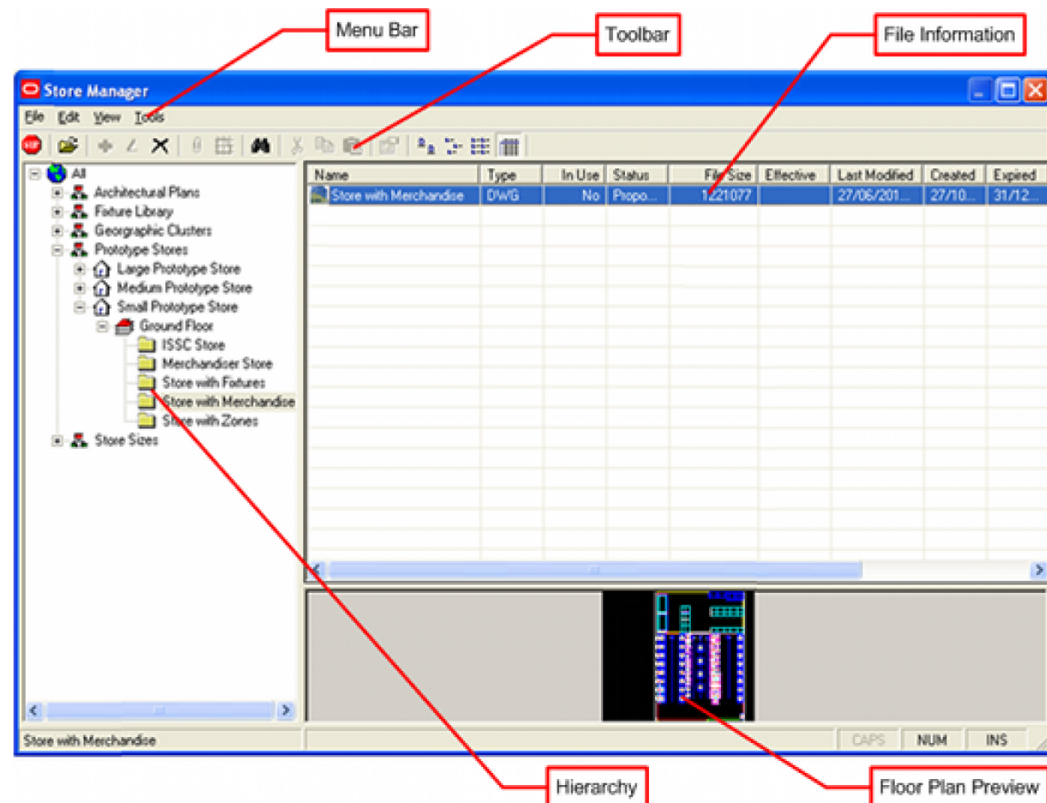


Overview of Module

Oracle's Macro Space Management software combines the traditional merchandising approach with store planning, construction, operation and inventory management. It is designed to maximize profitability and returns by enabling the optimum layout and mix of products to be efficiently planned right across an organization's range of retail outlets.

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

Store Manager operates in a similar way to Windows Explorer. It has been designed to be easy to use and allows information to be grouped in a way that reflects the structure of the organizations.



The menu and tool bars can be seen to the top left of the window.

A frame showing the hierarchical tree of Clusters, Stores, Floors and Revisions can be seen to the left of the window.

The files associated with a particular Revision can be seen in the frame to the upper right.

A preview of the drawing to be selected can be seen towards the lower right.

Using Store Manager you can:

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

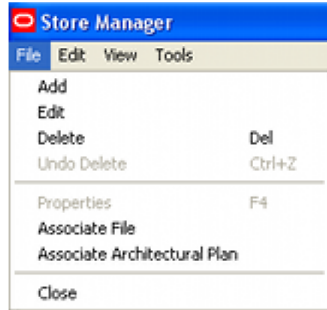
Note: Macro Space Management's sister program, In-Store Space Collaboration, can be used to access and edit drawings held in the central Macro Space Planning database.

The Store Manager Menu Bar

The **Store Manager Menu bar** contains several options:



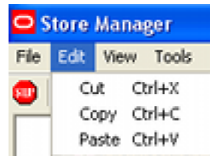
File activates a pull down menu with options primarily concerned with operations on files.



Some of these may be grayed out depending on what Store Manager function is being used.

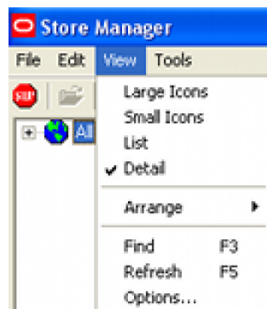
This menu can be used to add, edit and delete files and to associate files and architectural plans.

Edit activates a pull down menu with options to cut, copy and paste files.



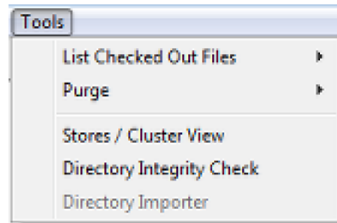
Some of these may be grayed out depending on what Store Manager function is being used.

View activates a pull down menu with various options controlling the way Store Manager appears.



These can be used to change the way Store Manager displays information.

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

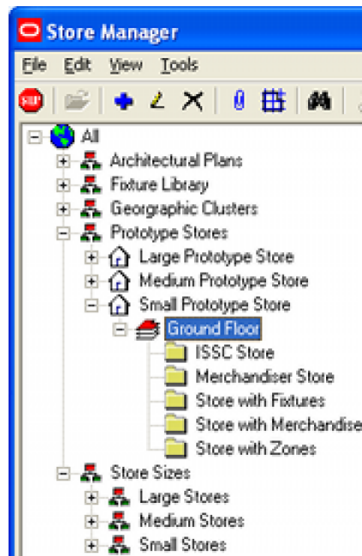


Basic Concepts

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

Hierarchical Structures

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



Hierarchical structures are used to allow objects to be set out in a logical relationship to each other.

The Prototype stores cluster contains prototype stores of different sizes. These stores each have floors associated with them - and the floors have revisions associated with them.

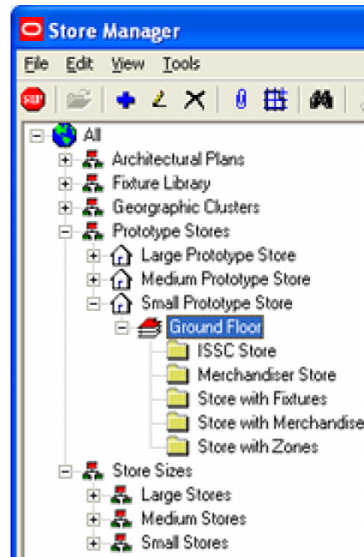
Parent-Child Relationships

Some objects within Store Manager are linked together in such a manner that changes to one object may result in changes to other objects linked to it. Such objects are described as being in a parent-child relationship. The object that has dependent objects associated with it is known as the parent, while the objects that are associated with the parent object are known as the children.

In a hierarchical structure, children of one parent can be parents of their own children in turn.

When the status of a parent object is changed; it can often result in changes to the status of child objects. Similarly, the status of parent objects can sometimes only be changed when the status of the appropriate child object is correct.

When a parent object is deleted, it affects all the associated child objects. Conversely, a child object can often be deleted without affecting the parent.

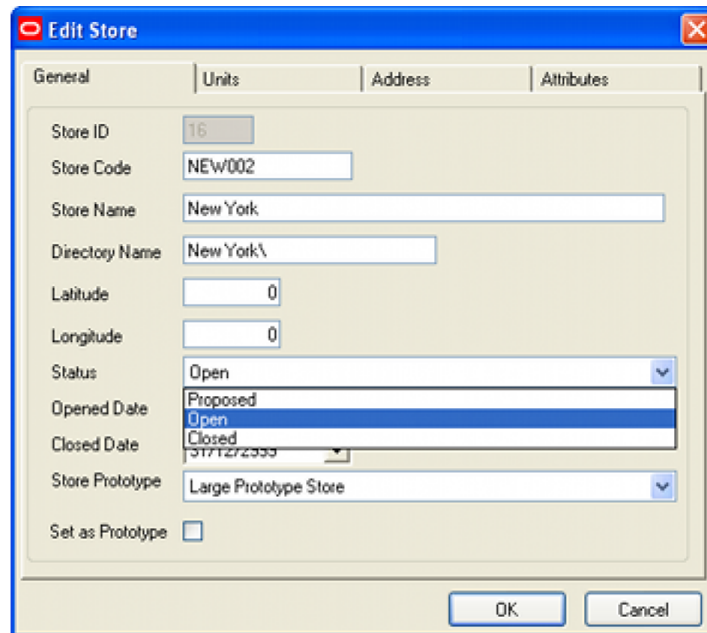


In the above example, the Ground Floor is a child of the Small Prototype store, but is a parent several Revisions - including 'Store with Fixtures'.

Status

Status defines the current standing of an object within the business life cycle.

For example, Stores generally have three statuses.



At the beginning of the process, the Store has a **Proposed** status as it is only at the design stage. When the store has been built, its status will change to **Open**. Finally, if the store has reached the end of its useful life, it will be assigned **Closed** status.

The status of an object thus changes as Macro Space Management users move through the business cycle.

Publish and Effective Dates

Publish and **Effective** dates are associated with the status of a floor plan. The Publish date is the date at which the floor plan is issued to the stores. Floor plans are typically published a number of days or weeks in advance of the time the changes are required. The Effective date is the date at which the published drawing becomes current.

Publish and Effective dates can be turned on or off by making changes to the ENABLE_FILE_TRIGGER_DATES system variable in the Administration Module.

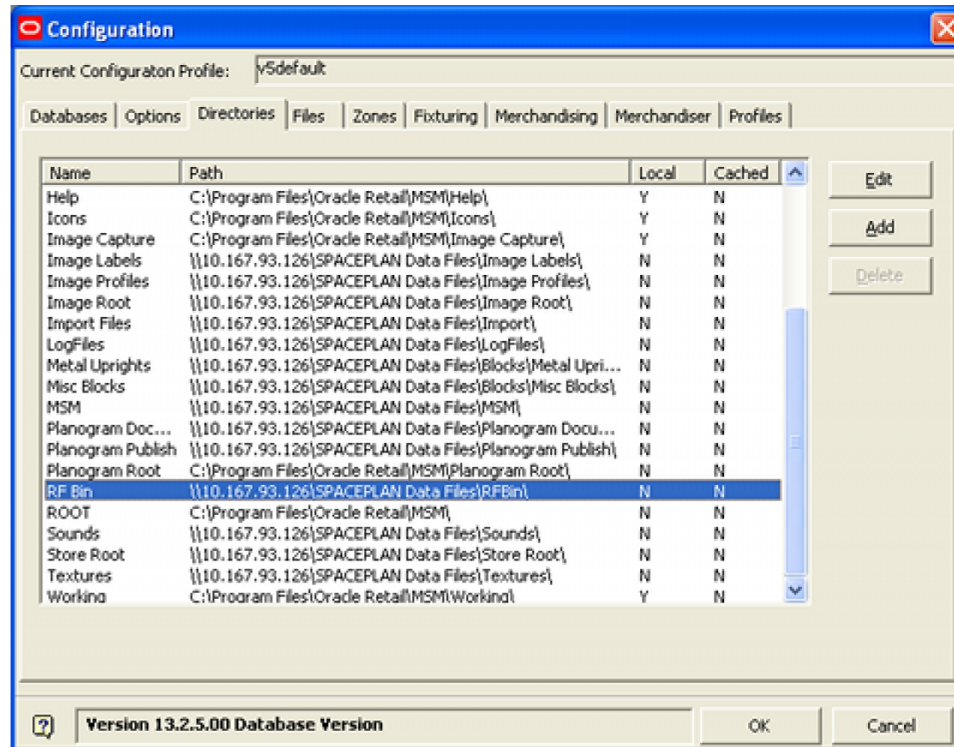
Note: It is STRONGLY recommended that users discuss this with Oracle's Technical Support team before making the changes.

Once enabled, Publish and Effective dates can be used to automatically change the status of revisions and drawings by making use of the UpdateStatus.exe file in the Macro Space Management/Tools sub-directory.

Note: UpdateStatus.exe can be set to run on a daily or weekly basis by the Windows task manager, allowing some degree of automation of common tasks. However, for full automation of common tasks, it is recommended that Macro Space Management users use the Enterprise version of Macro Space Management.

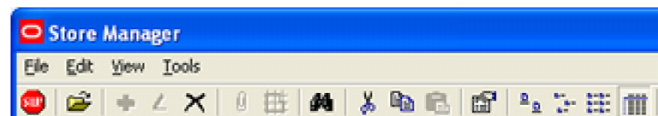
RFBin

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



















The path to this directory can only be changed by users with rights to the Administration module.

The Store Manager Toolbar



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

| Icon | Description |
|---|---------------------|
|  | Close Store Manager |
|  | Open a Drawing |
|  | Add an Item |
|  | Edit an Item |
|  | Delete an Item |

| Icon | Description |
|---|------------------------------|
|  | Associate File |
|  | Associate Architectural Plan |
|  | Search |
|  | Cut |
|  | Copy |
|  | Paste |
|  | Properties |
|  | Large icons for files |
|  | Small Icons for files |
|  | List of files |
|  | Details of files |

Overview of Objects

This section of help describes the objects found in the Store Manager hierarchy.

Objects

Store Root



The **Store Root** is the origin of the hierarchical tree. All other data emanates from the root.

Normally, stores are grouped in clusters and sub-clusters. However, it is possible to add stores directly at the root level without them being associated with a cluster or sub-cluster.

Clusters



A **Cluster** is a logical grouping of stores that meet specified criteria. Examples of possible groupings for Clusters include stores that are:

- In the same country.
- In the same region.
- Of the same size.
- Of the same turnover.
- Of the same internal layout.

Clusters of a specific type can be further divided into sub-clusters.

Sub-Clusters



A **Sub-cluster** is a sub-division of a Cluster. Sub-clusters are used to allow a finer level of detail when analyzing the performance of groups of stores.

For example the cluster of stores labeled England might be further sub-divided into sub-clusters called north, central and south.

Stores



A **Store** is the unique description of a specific retail outlet. Stores are made up of one or more floors.

Stores are normally associated with one or more clusters; although they can, (less usually), be directly associated with the Store Root.

Floor



A **Floor** is a distinct physical level within a store.

A Floor can contain one or more revisions, (arrangements of fixtures and fittings), associated with it.

Revision



Revision is the name given to a version of the arrangement of fixtures and fittings on a floor. Floors can have many revisions. For example, a floor could have Spring, Summer, Autumn and Winter revisions, each representing a planning arrangement to be used at the appropriate time.

Revisions are often color coded to show their status. Floors can also have different revisions showing different marketing mixes, fixture arrangements, etc.

Files

A **File** is a general description for a category of records. Floor plans are files, as are Architectural Plans.

Maintaining Store Manager

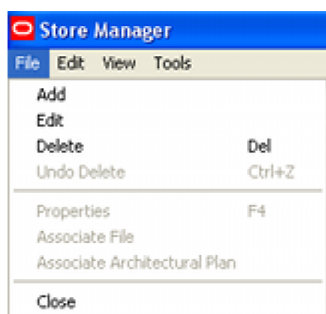
The Store Manager Hierarchy

General Note on Adding, Editing and Deleting Objects

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

File Menu

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



Toolbar

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





Right Click Menu

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



Deleted Objects

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

| Name | Type | In Use | Status | File Size |
|--|------|--------|----------|-----------|
|  Proposed Summer Plan-1 | DWG | No | Proposed | 1791459 |
|  Proposed Summer Plan-2 | DWG | No | Proposed | 74136 |

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

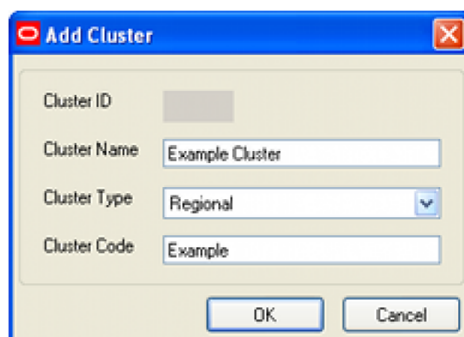
Adding, Editing and Deleting Clusters

Add and Edit Dialog Boxes

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

Adding (and Editing) Clusters

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



The 'Add Cluster' dialog box is a standard Windows-style window with a title bar containing a red 'X' icon and the text 'Add Cluster'. It contains four input fields: 'Cluster ID' (a greyed-out text box), 'Cluster Name' (a text box containing 'Example Cluster'), 'Cluster Type' (a dropdown menu showing 'Regional'), and 'Cluster Code' (a text box containing 'Example'). At the bottom right are 'OK' and 'Cancel' buttons.

Cluster ID: once the dialog box is saved, this field will populate with the ID that is the primary key in the database.

Cluster Name: This is the name assigned to the cluster.

Cluster Type: This is assigned from a drop down list. It is normally used as a filter for reporting purposes.

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

Deleting Clusters

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

Adding, Editing and Deleting Stores

Add and Edit Dialog Boxes

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

Adding (and Editing) Stores

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

1. General Tab

The screenshot shows the 'Add Store' dialog box with the 'General' tab selected. The fields are as follows:

| Field | Value |
|------------------|--------------------------|
| Store ID | |
| Store Code | Exm-1 |
| Store Name | Example |
| Directory Name | Example |
| Latitude | 0 |
| Longitude | 0 |
| Status | Open |
| Opened Date | 06/07/2012 |
| Closed Date | 31/12/2999 |
| Store Prototype | Large Prototype Store |
| Set as Prototype | <input type="checkbox"/> |

In the General Tab:

Store ID: Once the dialog box is saved, this field will populate with the ID that is the primary key in the database.

Store Code: This is the unique code used to identify the store.

Store Name: this is the name of the store.

Directory Name: This is the name of the directory that will be automatically created to hold the files associated with the store. It will be created below the **Store Root** specified in the **Directories Tab** of the **Configuration Module**.

Latitude: This can be entered to identify the position of the store.

Longitude: This can be entered to identify the position of the store.

Status: This is set from a drop down list. It specifies where the store is in its business life cycle.

Opened Date. This is the date the store is scheduled to open. If the store is not at Open status when this date is reached, Update Status will automatically change the status to Open.

Closed Date. This is the date the store is scheduled to close. If the store is not at Closed status when this date is reached, Update Status will automatically change the status to closed.

Store Prototype: This enables the user to specify another store to be used as a prototype for comparison purposes. Available prototypes are set by selecting the Set as Prototype check box.

Set as Prototype: This check box designates the store as a Prototype. If set as a prototype, it cannot have a prototype store assigned to it.

2. Units Tab

The screenshot shows a dialog box titled 'Add Store' with a blue header bar and a close button in the top right corner. Below the header is a tabbed interface with four tabs: 'General', 'Units', 'Address', and 'Attributes'. The 'Units' tab is currently selected. Inside the 'Units' tab, there are two sections: 'Input' and 'Display/Output'. The 'Input' section contains two dropdown menus: 'Length' set to 'imperial inch' and 'Area' set to 'square inch'. The 'Display/Output' section contains four dropdown menus: 'Length' set to 'imperial foot', 'Alternate Length' set to 'metric metre', 'Area' set to 'square feet', and 'Alternate Area' set to 'metric area'. At the bottom of the dialog box are 'OK' and 'Cancel' buttons.

- **Input Units**

Length: These are the default length units used for the floor plan.

Area: These are the default area units used for the floor plan.

- **Display/Output Units**

Length: These are the default length units used for displaying information the floor plan.

Alternative Length: These are the alternative length units used for displaying information for the floor plan.

Area: These are the default area units used for displaying information the floor plan.

Alternative Area: These are the alternative area units used for displaying information for the floor plan.

3. Address Tab

Address: There are 4 lines available to enter the address of the store.

Post Code: This field holds the post code of the store. This might be used in the UK.

Area Code: This field holds the area code of the store. This might be used in the US.

Telephone: This field holds the telephone number of the store.

4. Attributes Tab

| | Property | Value |
|---|----------------------|--------------|
| 1 | Manager | Joe Bloggs |
| 2 | Regional Manager | Jane doe |
| 3 | Demographic | Multi Racial |
| 4 | Normal or Mirrored | Normal |
| 5 | Next Stock Check Due | 31/12/12 |

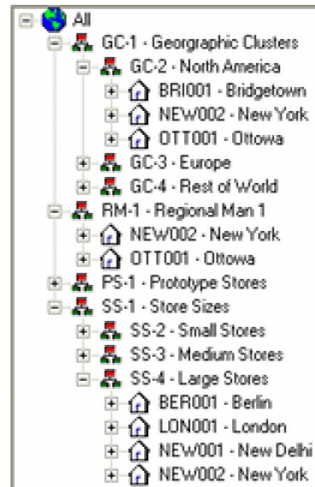
The attributes tab contains the name and value of the User Defined Attributes assigned to the store. These are configured in the Administration Module and will vary from retailer to retailer.

Deleting Stores

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

Adding Stores to Multiple Clusters

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



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

- North America
- Large Stores
- Regional Manager 1

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

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

Adding Stores to Multiple Clusters

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

Removing Stores from Multiple Clusters

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

Adding, Editing and Deleting Floors

Add and Edit Dialog Boxes

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

Adding (and Editing) Floors

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

Floor ID: Once the dialog box is saved, this field will populate with the ID that is the primary key in the database.

Floor Type: This is the type of floor. It is set from a drop down list which is pre-populated with names like Basement, ground floor, etc.

Description: This is the name given to the floor.

Directory: This is the name of the directory that will be automatically created to hold the files associated with the floor. It will be created below the directory for the parent store.

Status: This is set from a drop down list. It specifies where the floor is in its business life cycle.

Allocated Area Tolerance: This is a value that can be entered for reporting purposes. It allows the actual area allocated for retail purposes to be compared with some theoretical value.

Elevation: This field can be used to specify the height above ground level for reporting purposes.

Edit Levels: This button can be used to edit the default levels for items of equipment that are to be placed at levels other than floor level. Examples would be posters and banners. If not activated during the creation of the floor, these levels cannot be edited later.

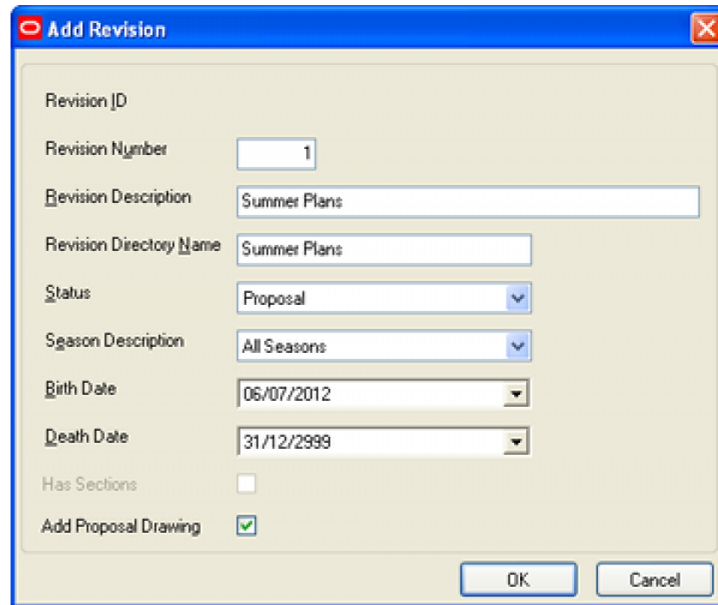
Adding, Editing and Deleting Revisions

Add and Edit Dialog Boxes

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

Adding (and Editing) Revisions

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

A screenshot of a Windows-style dialog box titled "Add Revision". The dialog box has a blue title bar with a red close button in the top right corner. The main area is light beige and contains several input fields and checkboxes. The fields are: "Revision ID" (empty), "Revision Number" (text box with "1"), "Revision Description" (text box with "Summer Plans"), "Revision Directory Name" (text box with "Summer Plans"), "Status" (dropdown menu showing "Proposal"), "Season Description" (dropdown menu showing "All Seasons"), "Birth Date" (dropdown menu showing "06/07/2012"), and "Death Date" (dropdown menu showing "31/12/2999"). There are two checkboxes at the bottom: "Has Sections" (unchecked) and "Add Proposal Drawing" (checked). At the bottom right are "OK" and "Cancel" buttons.

Revision ID: Once the dialog box is saved, this field will populate with the ID that is the primary key in the database.

Revision Number: This is a number that can be assigned to the revision.

Revision Description: This is the name of the revision.

Directory: This is the name of the directory that will be automatically created to hold the files associated with the floor. It will be created below the directory for the parent floor.

Status: This is set from a drop down list. It specifies where the revision is in its business life cycle.

Season Description: This drop down list allows the user to select a season from a list of predefined seasons. If set, this can be used (in conjunction with the **Custom SQL**) to filter data in the **Object Grid**.

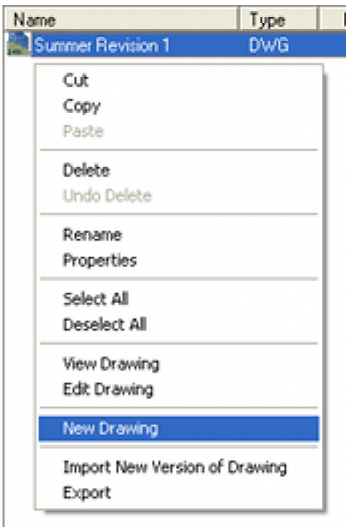
Birth Date: This is the date the revision was created.

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

Adding, Editing and Deleting Floor Plans

Adding Floor Plans

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



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

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

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

Editing Floor Plans

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

Details Tab

The Details tab contains information of the floor plan.

The screenshot shows a 'Properties' dialog box with two tabs: 'Details' and 'Notes'. The 'Details' tab is selected and contains the following sections:

- File Information:**
 - File Name: Spring 2013
 - Location: \\redevvvv0150\clientdata\DD_DEV\MSM_Data\Stores-Subset\Birmingham\Ground\Sp
 - File Predecessor:
- File Settings:**
 - Type: .dwg
 - Size: 104926 bytes
 - File Status: Authorised (dropdown)
 - Prototype Store: (dropdown)
 - Active Date: 08/01/2013 (dropdown)
 - Publish Date: 08/12/2012 (dropdown)
 - Effective Date: 08/01/2013 (dropdown)
- File Details:**
 - Created: 30-Aug-12
 - File Modified: 30-Aug-12
 - Last Modified: 28-Oct-12
 - Modified By Automation: 30-Oct-12
 - Last Modified By: Pwells
 - File Last Published:
 - File Made Current:
 - File Made Historical:
 - ID: 444373
 - ☐ Checked Out

At the bottom of the dialog are three buttons: 'UDA...', 'OK', and 'Cancel'.

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

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

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

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

Size is the physical size of the file.

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

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

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

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

Effective Date will be grayed out and unavailable until the floor plan is at Authorized status. Once set, the effective date is the date at which **Update Status** will automatically change the status of the floor plan to Current. This is the signal (via an appropriate

reporting system) for the store to put the floor plan into effect. When the Effective Date first appears, it will be set to a default value by the software.

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

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

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

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

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

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

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

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

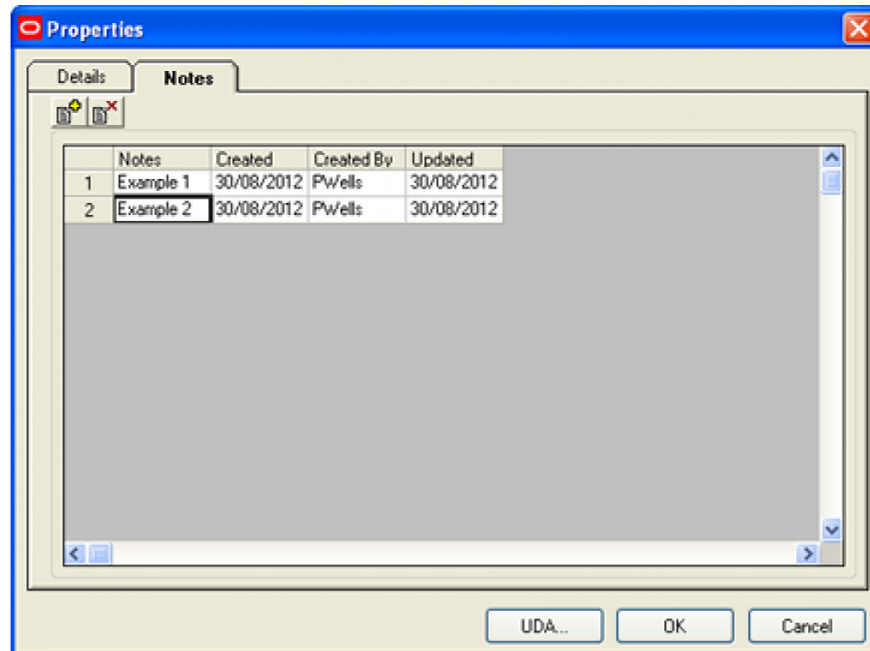
File Made Historical is the date the floor plan was superseded as a current file by another floor plan. This change is made automatically by the software and the date set accordingly.

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

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

Notes Tab

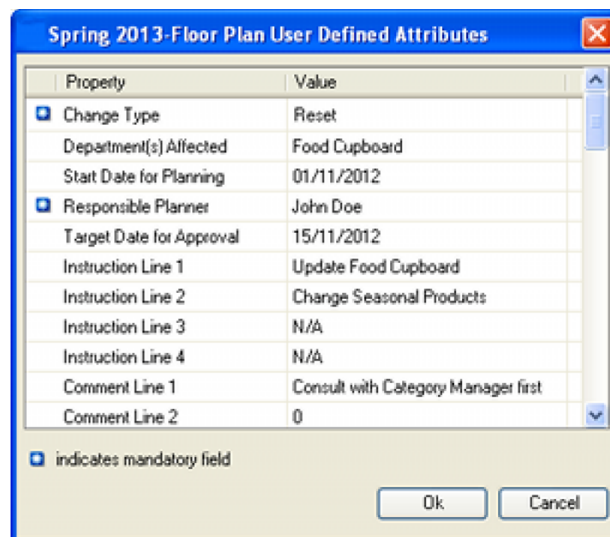
The Notes tab holds details of notes created in both Macro Space Management and In-Store Space Collaboration. These notes are visible in both applications and serve both to record and communicate data.



- **Macro Space Management**
Notes can be entered by typing them into any vacant line. Existing notes can be edited by selecting them then typing a revised entry. Notes in MSM only apply to the floor plan itself and cannot be applied to objects within that floor plan.
- **In-Store Space Collaboration**
ISSC users can add notes to the floor plan. They can also add notes to objects in the floor plan such as zones and fixtures. These notes can be read in MSM.

UDA Option

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



The list of available fields can be configured using the User Defined Attributes option from the General Menu in the Administration module. Users in Store Manager can then

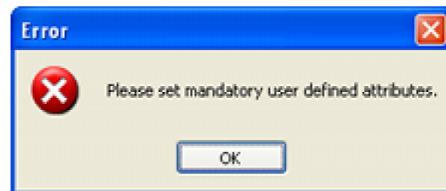
set the values for each floor plan. Depending on how each field has been configured in the Administration module, users can enter numeric, text or currency values, select from a drop down list, enter a date from a calendar or tick or untick a check box.

Some values can be defined as mandatory when they are configured in the Administration module. These are indicated by a blue asterisk. If a mandatory value is not filled in, this will be indicated by a red cross. This can be seen for the Responsible Planner field in the screen shot below.



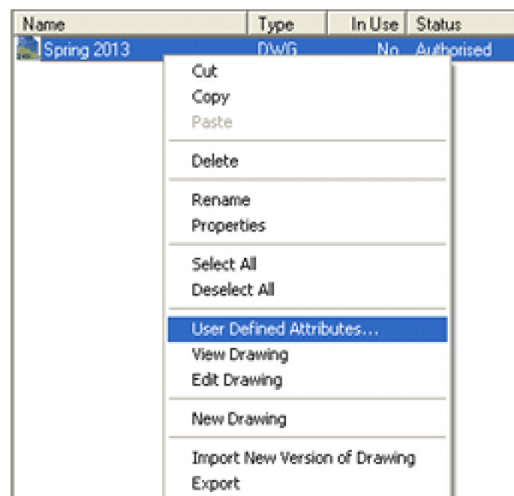
| Property | Value |
|---|---------------|
| <input checked="" type="checkbox"/> Change Type | Reset |
| Department(s) Affected | Food Cupboard |
| Start Date for Planning | 01/11/2012 |
| <input checked="" type="checkbox"/> Responsible Planner | |
| Target Date for Approval | 15/11/2012 |

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



- Accessing the File UDA dialog box directly

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



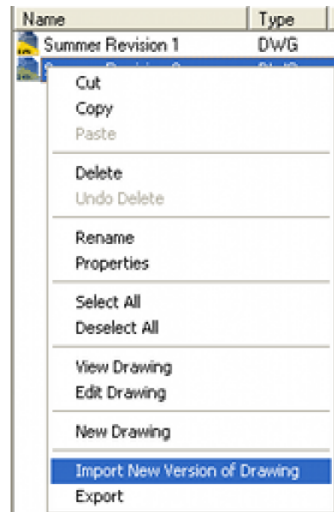
If multiple floor plans have been selected, the File UDA dialog box will display the attributes for the last floor plan selected.

Importing, Exporting and Copying Floor Plans

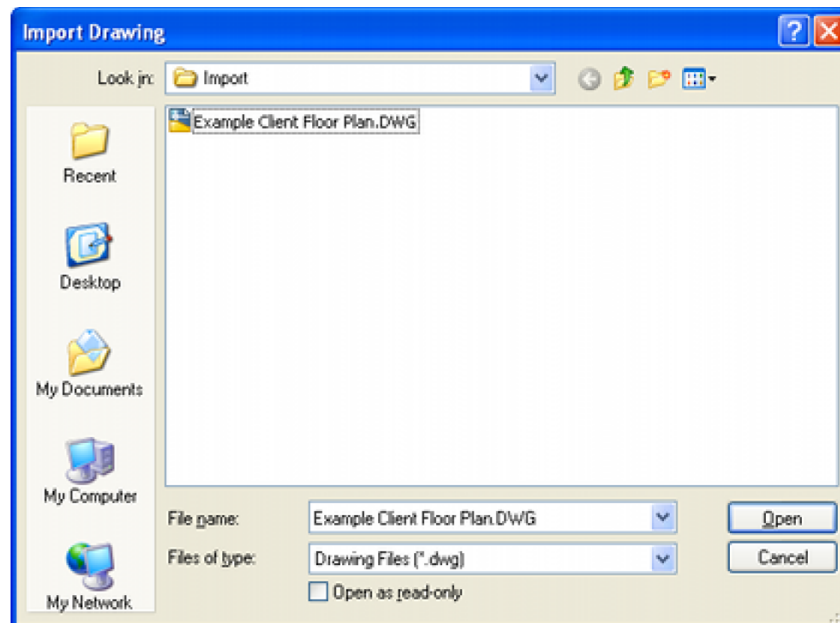
Floor plans can be either imported or copied.

Importing Floor Plans

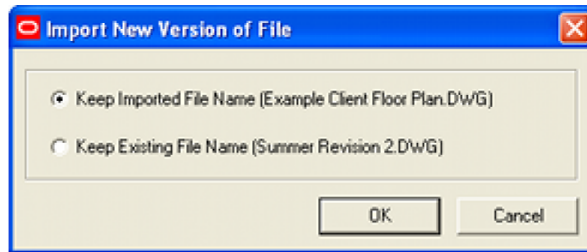
Floor plans can be imported into Store Manager. This is done by highlighting an existing floor plan (this can be a blank) and then selecting the Import New Version of Drawing option from the right click menu.



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



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

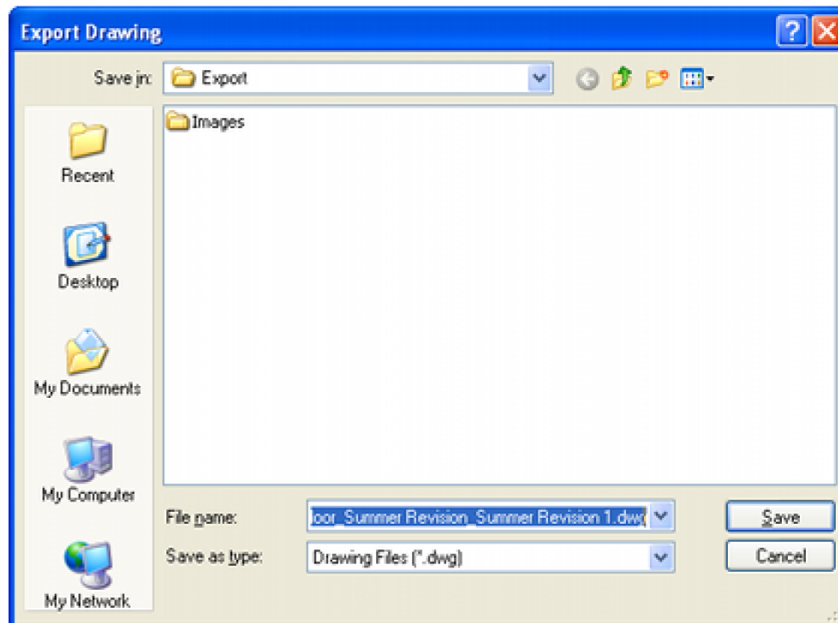


Users can select whether to keep the existing file name or use that of the file to be imported.

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

Exporting Floor Plans

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



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

Copying Floor Plans

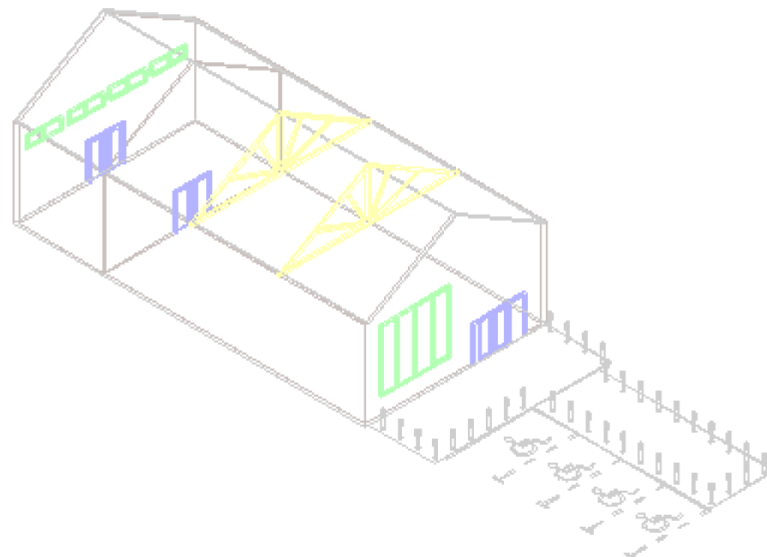
Floor plans can be copied within a revision or from one revision to another. Copying is done by highlighting the required floor plan then selecting the Copy option from the right click menu. After navigating to the required location, the Paste option can be used from the right click menu to place a copy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

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

Associating Architectural Plans

Overview of Architectural Plans

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



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

Architectural plans are used in two stages:

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

Types of Architectural Plans

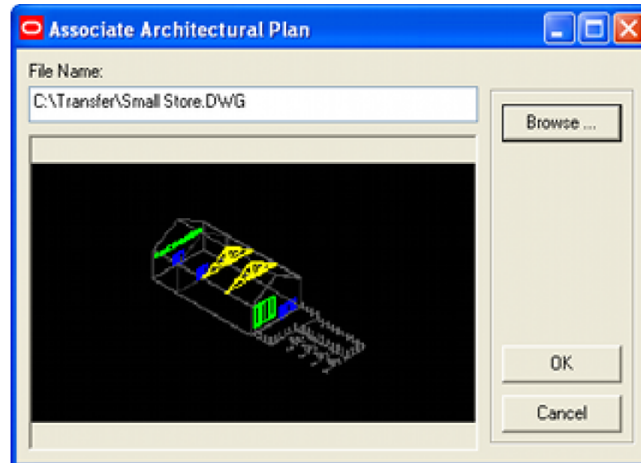
Macro Space Planning recognizes two forms of architectural plans:

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

Because of a current limitation of the software, if a DWF file is to be used for ISSC, it must be associated before any DWG files are associated for use in Planner. If this is not done, the DWF file will fail to appear in ISSC.

Associating an Architectural Plan

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



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

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

Associating Files

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

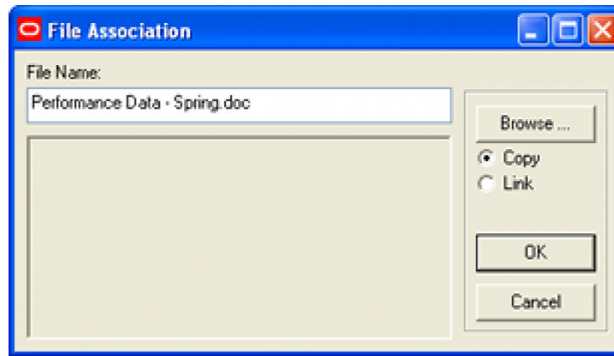
- Word documents
- Excel spreadsheets
- PDF Files

These files can be used for many purposes including:

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

How to Associate Files

Files can be associated by selecting the Associate File command from the **File menu**, the **Toolbar** or the **right click menu**. This will bring up the File Association dialog box.



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

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

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

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

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

Deleting Associated Files

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

Status

Overview of Statuses

Concept of Statuses

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

The 'Edit Store' dialog box is shown with the 'General' tab selected. The fields are as follows:

| Field | Value |
|------------------|--------------------------|
| Store ID | 16 |
| Store Code | NEW/002 |
| Store Name | New York |
| Directory Name | New York\ |
| Latitude | 0 |
| Longitude | 0 |
| Status | Open |
| Opened Date | Proposed |
| Closed Date | Closed |
| Store Prototype | Large Prototype Store |
| Set as Prototype | <input type="checkbox"/> |

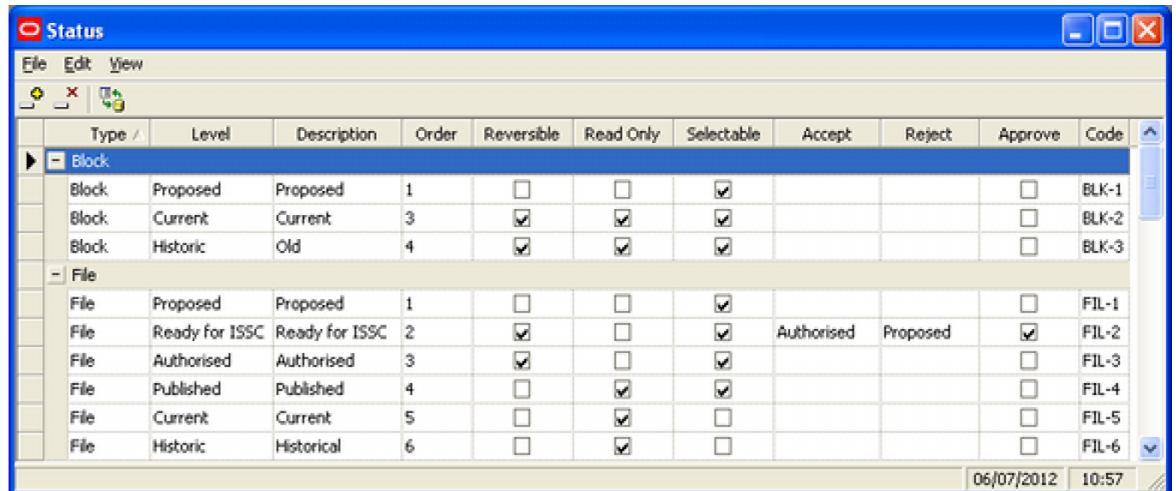
For example, a floor plan may go through a series of stages during the planning processes - these would include laying out the equipment, receiving approval for that layout, laying out the merchandise, receiving approval for that merchandise, authorizing that floor plan to go into service, publishing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

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

Configuring Statuses

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

Note: See the Administration Module User Guide for more information.



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

| Type | Level | Description | Order | Reversible | Read Only | Selectable | Accept | Reject | Approve | Code |
|--------------|----------------|----------------|-------|-------------------------------------|-------------------------------------|-------------------------------------|------------|----------|-------------------------------------|-------|
| Block | | | | | | | | | | |
| Block | Proposed | Proposed | 1 | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | | <input type="checkbox"/> | BLK-1 |
| Block | Current | Current | 3 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | | <input type="checkbox"/> | BLK-2 |
| Block | Historic | Old | 4 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | | <input type="checkbox"/> | BLK-3 |
| File | | | | | | | | | | |
| File | Proposed | Proposed | 1 | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | | <input type="checkbox"/> | FIL-1 |
| File | Ready for ISSC | Ready for ISSC | 2 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Authorised | Proposed | <input checked="" type="checkbox"/> | FIL-2 |
| File | Authorised | Authorised | 3 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | | <input type="checkbox"/> | FIL-3 |
| File | Published | Published | 4 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | | <input type="checkbox"/> | FIL-4 |
| File | Current | Current | 5 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | | <input type="checkbox"/> | FIL-5 |
| File | Historic | Historical | 6 | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | | <input type="checkbox"/> | FIL-6 |

The status bar at the bottom right shows the date 06/07/2012 and time 10:57.

Users and In-Store Space Collaboration

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

Non-Reversible Statuses

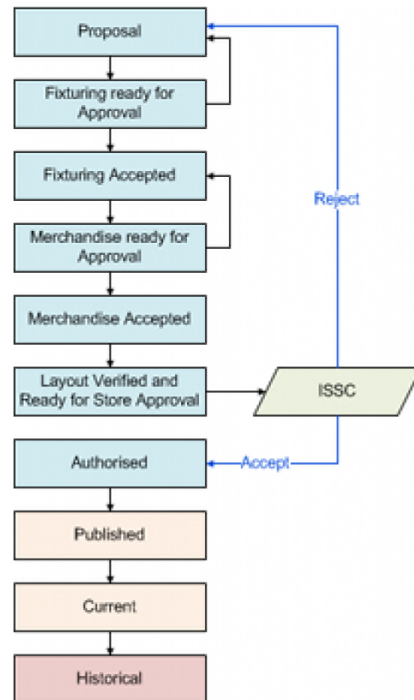
Some statuses are set to be non-reversible - users can select that status, but having selected it cannot then manually reset that status to an earlier one.

Non-Selectable Statuses

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

Example of Controlling Business Flows with Statuses

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



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

Changing the Status of Objects

Changing Statuses

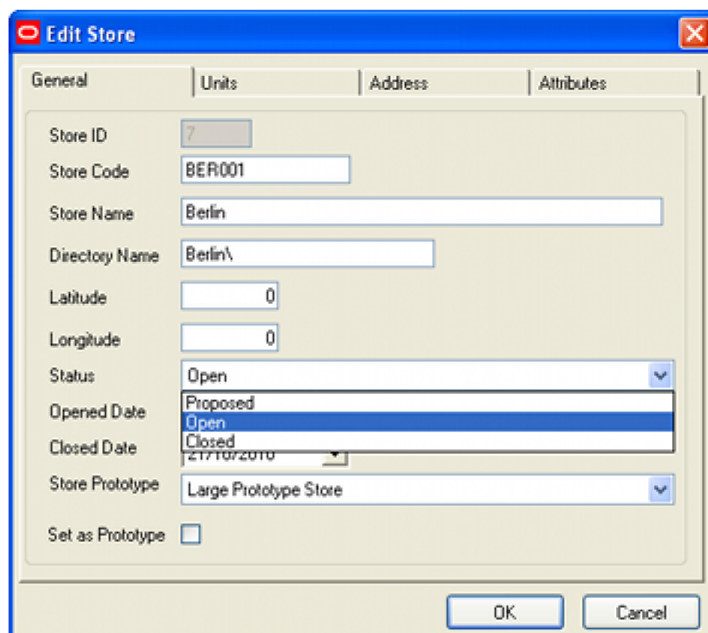
Statuses can be changed by selecting the required store, floor, revision or floor plan in the store hierarchy. It can then be opened for edit using the right click menu or the edit option from the Edit menu on the menu bar or the edit option from the toolbar.

Clusters

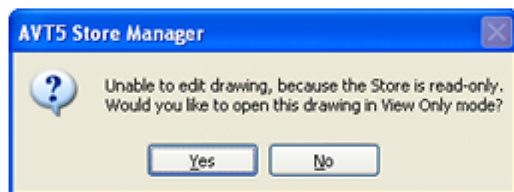
Clusters and sub-clusters are administrative devices for arranging stores in logical groupings. As such they do not have a status.

Stores

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

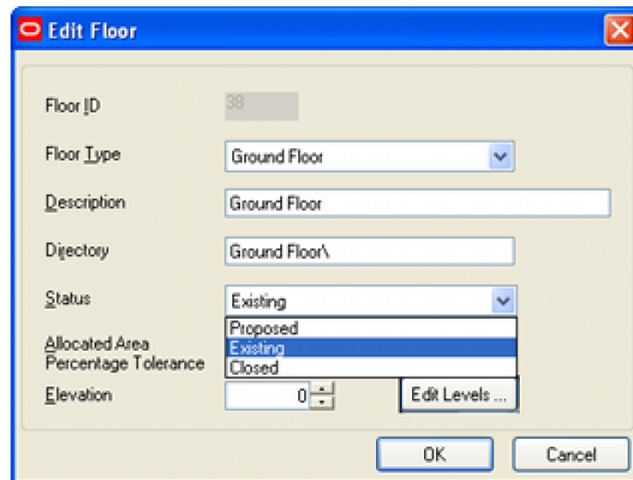


If a store is set to **Closed**, all associated floor plans will be set to **Read Only** status. Any attempt to open those files for editing will result in the appearance of a warning dialog box.



Floors

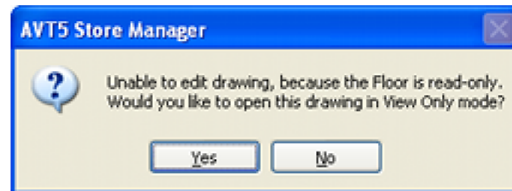
Statuses for floors are set using the **Status** drop down list in the Floor dialog box.



The **Edit Floor** dialog box contains the following fields and controls:

- Floor ID:** Text box containing '38'.
- Floor Type:** Drop-down menu set to 'Ground Floor'.
- Description:** Text box containing 'Ground Floor'.
- Directory:** Text box containing 'Ground Floor\'\'.'
- Status:** Drop-down menu with 'Existing' selected.
- Allocated Area:** Text box.
- Percentage Tolerance:** Text box.
- Elevation:** Spin box set to '0'.
- Buttons:** 'Edit Levels...', 'OK', and 'Cancel'.

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



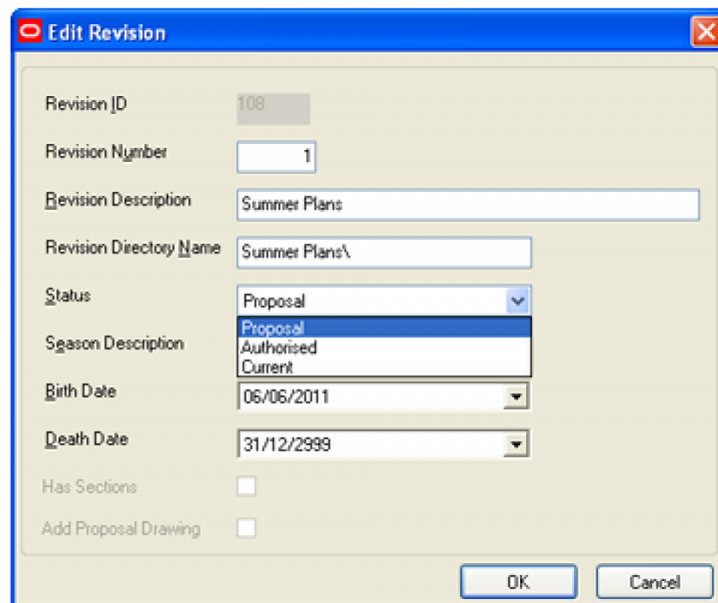
The **AVT5 Store Manager** warning dialog box displays the following message:

Unable to edit drawing, because the Floor is read-only.
Would you like to open this drawing in View Only mode?

Buttons: Yes, No

Revisions

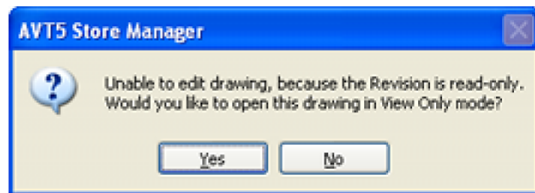
Statuses for revisions are set using the **Status** drop down list in the Revision dialog box.



The **Edit Revision** dialog box contains the following fields and controls:

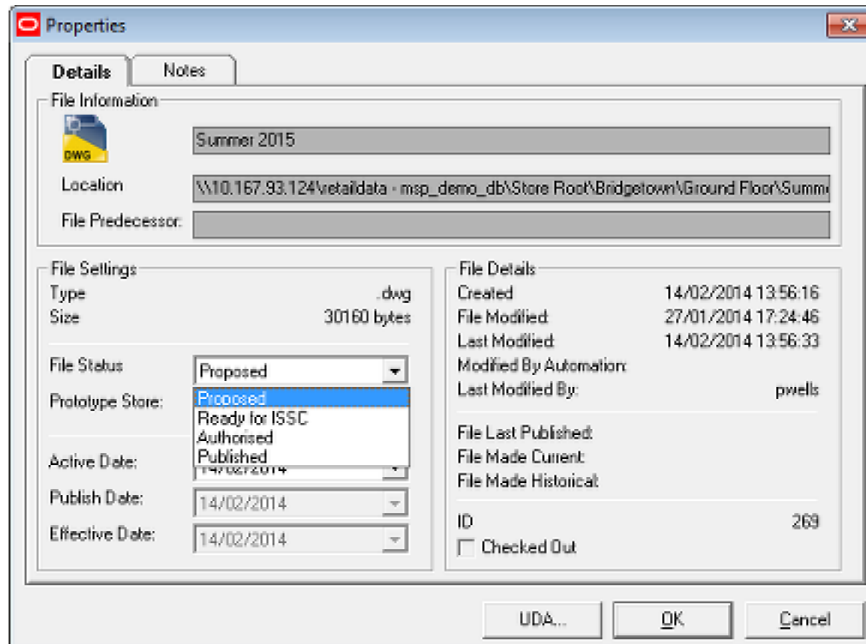
- Revision ID:** Text box containing '108'.
- Revision Number:** Text box containing '1'.
- Revision Description:** Text box containing 'Summer Plans'.
- Revision Directory Name:** Text box containing 'Summer Plans\'\'.'
- Status:** Drop-down menu with 'Proposal' selected.
- Season Description:** Drop-down menu with 'Proposal' selected.
- Birth Date:** Date picker set to '06/06/2011'.
- Death Date:** Date picker set to '31/12/2999'.
- Has Sections:** Check box (unchecked).
- Add Proposal Drawing:** Check box (unchecked).
- Buttons:** 'OK' and 'Cancel'.

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



Files

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



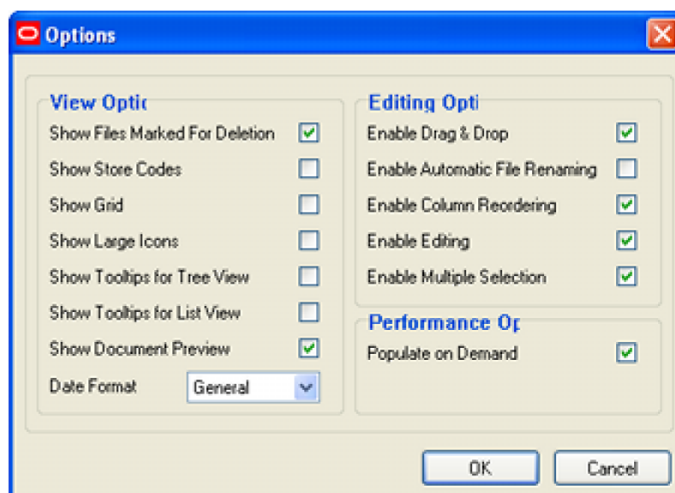
Some statuses for floor plans may not be **reversible** - for example, if the status is set manually to Published, it may not be possible to set it back to an earlier date. Other statuses are not **selectable** - for example it is not generally possible to set the status to Current manually as this is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

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

Advanced Administration

Customizing Display Options

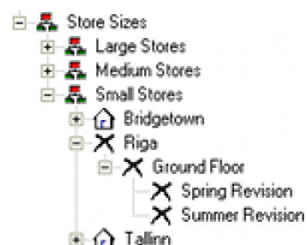
The appearance of some aspects of the Store Manager module can be customized via the Options option on the View pull down menu. This brings up the Options dialogue box.



Display Options

Show Files Marked for Deletion

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



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

Show Store Codes

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



Show Grid

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

Show Large Icons

This check box changes the icon size.

Show Tooltips for Tree View

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

Show Tooltips for List View

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

Show Document Preview

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

Date Format

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

Enable Drag and Drop

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

Enable Automatic File Renaming

This option is not currently active.

Enable Column Reordering

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

Enable Editing

This option is not currently active.

Enable Multiple File Selection

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

Populate on Demand

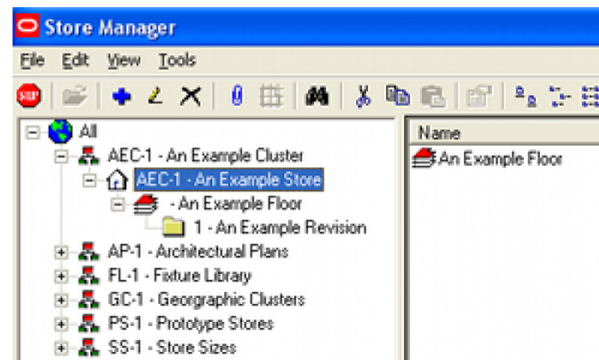
The Populate on Demand Option does not load full information for the store hierarchy until the users opens a specific branch. That branch is then populated with full data as the user opens it. If this option is not selected, all branches of the hierarchy populate as Store Manager is opened.

Windows Folders and the Store Hierarchy

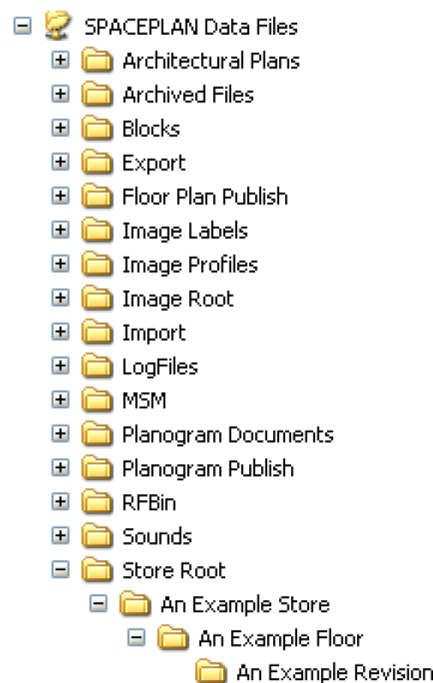
Store Manager has a specified structure:

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

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



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



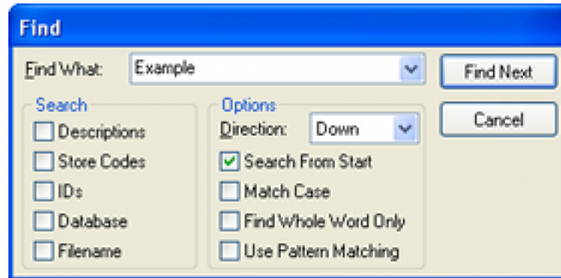
Any physical files associated with specific levels on the hierarchy will be in the appropriate folders. For example Architectural plans will be in folders associated with floors and floor plans in folders associated with revisions.

Searching the Store Hierarchy

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



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

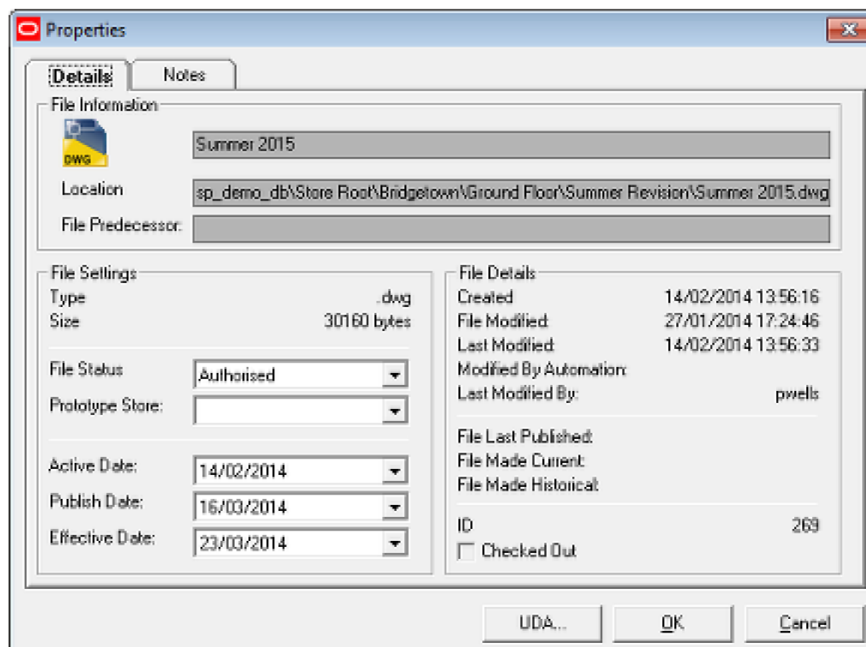


The search function in Store Manager performs an *in-string* search and does not support wild-cards. It will thus only return exact matches.

The search starts from any selected node, and can be set to search up or down from that node.

Significance of Dates in File Properties Dialog Box

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



These dates have the following significance:

- **Created:** This is the date the floor plan was originally created in Store Manager. Alternatively, if the floor plan was imported, this will be the date it was originally created in raw AutoCAD.
- **File Modified:** This is the date the floor plan was last modified in raw AutoCAD.

- Last Modified: This is the date the file was last saved by a user in the Planner or Merchandiser modules or in In-Store Space Collaboration.
- Modified by Automation: This is the date the file was last modified by a batch process such as planogram substitution.

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

Note: See the section on synchronization for more information.

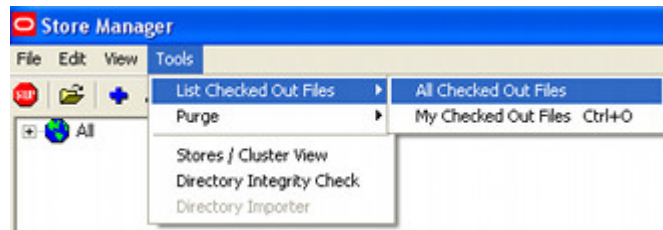
List Checked Out Files

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

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

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

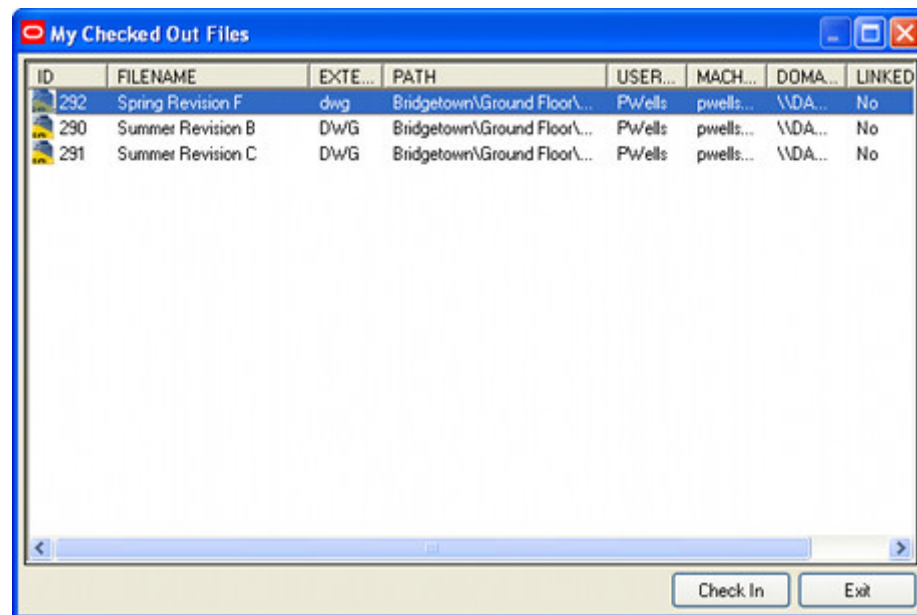
Note: If the file is manually checked back in, all changes since the previous save will be lost.



Selecting **All Checked Out Files** lists every file checked out from Store Manager.

Selecting **My Checked Out Files** lists the files checked out by that particular log in identity. (This can also be accessed by <Ctrl + O>).

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



Purging from Store Manager

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

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

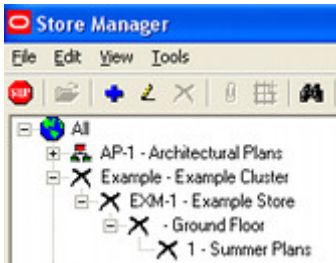
Removing Objects from the Store Manager Hierarchy

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

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

Deleting Objects

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

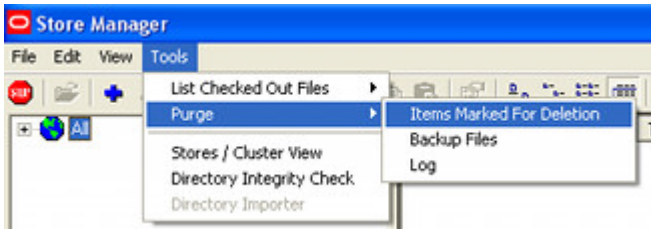


Purging Objects

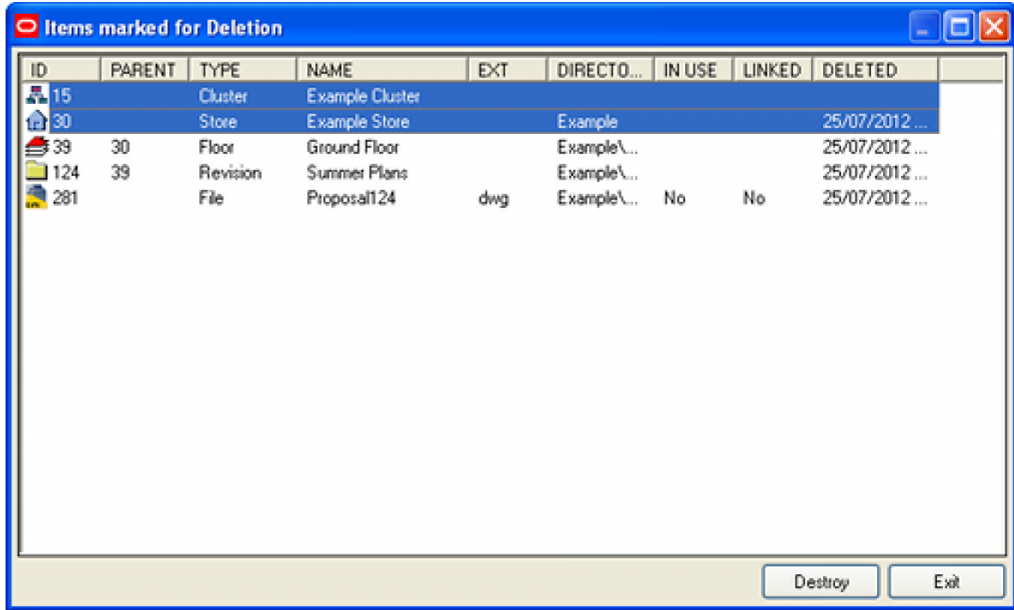
Purging objects results in their permanent removal from the Macro Space Planning database. In the case of the DWG files used for floor plans, these will also be physically deleted from the RFBin - where they were move to when marked for deletion.

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

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



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



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

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

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

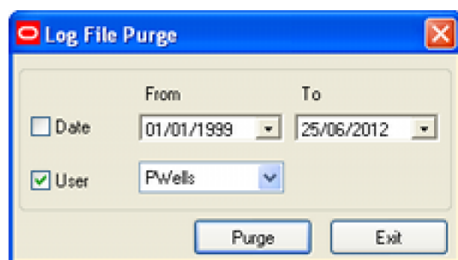
deleted. All floor plans associated with the architectural plan should be deleted before the architectural plan itself is deleted.

Purging .BAK files

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

Purging Log Files

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



Importing directories

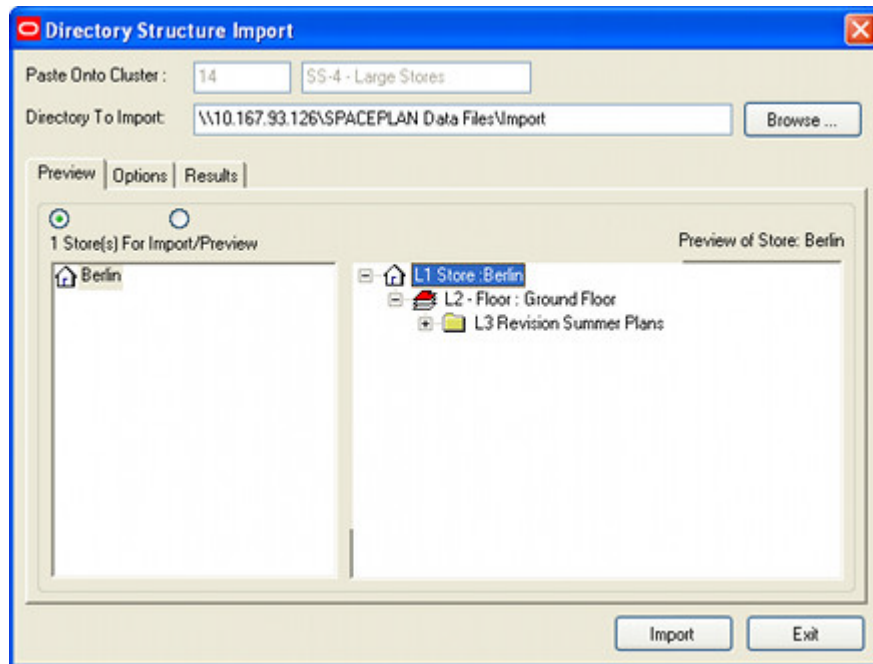
The **Import Directory** option allows files to be imported into the Store Manager file structure and corresponding entries to be made in the database. The import process is as follows:

Preparation

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

Importing

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



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

Store/Cluster view

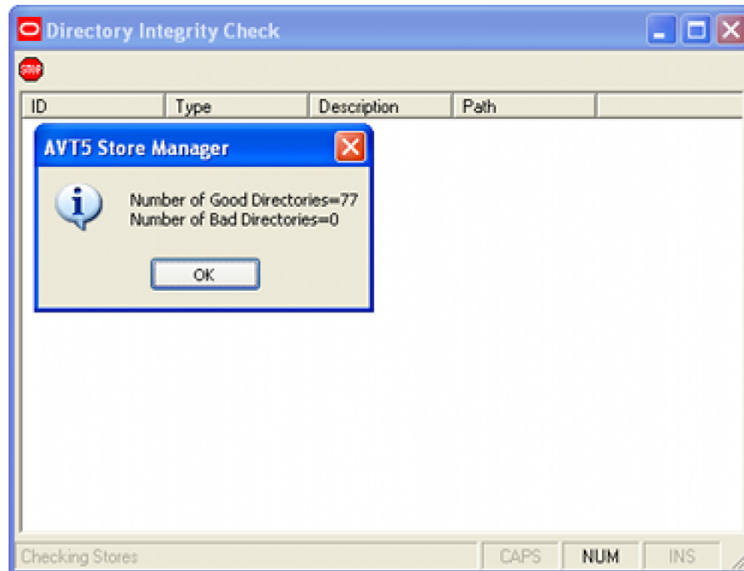
Selecting the **Store/Cluster view** option brings up a window allowing an alternative way of viewing the information held within the hierarchical data structure within Store Manager. Stores are listed in the sequence determined by their unique identification code. The cluster to which the store has been allocated is displayed immediately below the store.



Where stores are assigned to multiple clusters, this will be shown. For example the Berlin store belongs to both the Europe and Large Store clusters.

Integrity Check

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



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

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

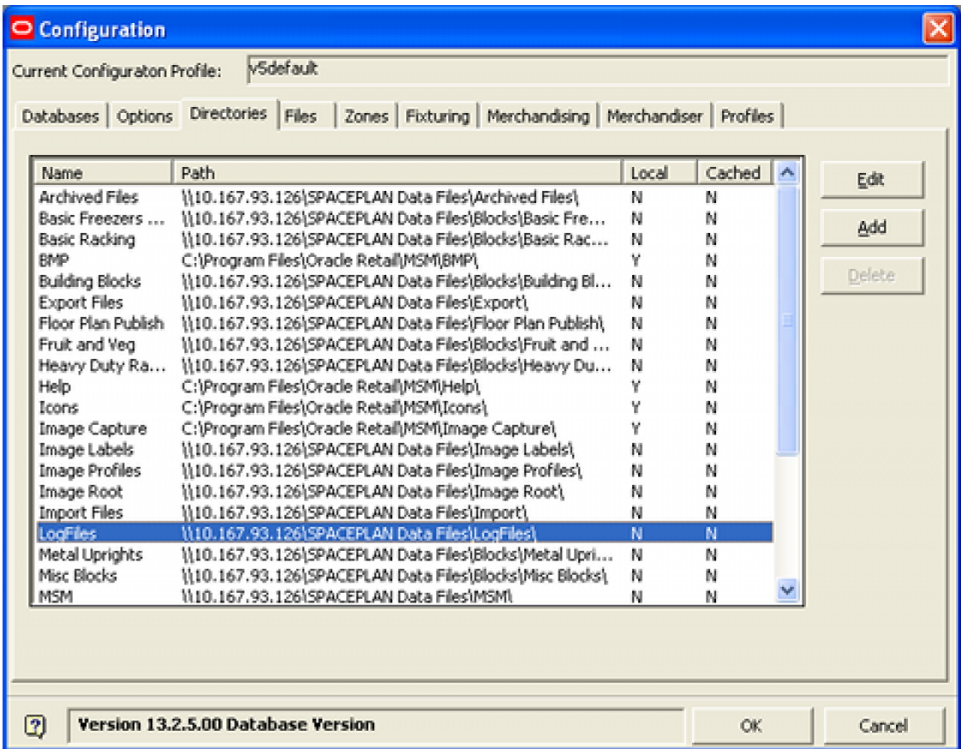
The **Description** is the name given to the object.

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

Log Files

Log files are files recording events and problems during operation of Macro Space Management. This enables problems to be investigated at a later date.

They can be found at the location specified in the Directories tab of the Configuration Module - this tab is only available if the configuration module is open via the Administration module.



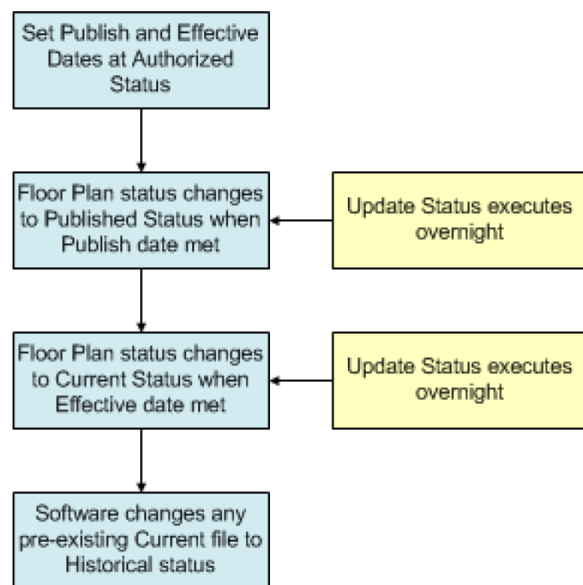
Double clicking on a specific file will bring up a log of that aspect of Macro Space Management's operations.

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

Update Status

Overview of UpdateStatus.exe

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



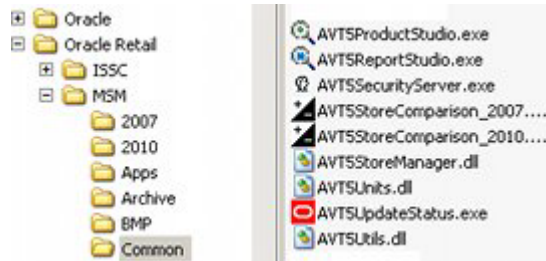
1. The initial stage is to set the Publish and Effective dates when a floor plan reaches Authorized status
2. Update status is set to execute every night by means of a scheduling tool.
3. When the Publish date is met or exceeded, the status of the floor plan is changed to Published.
4. When the Effective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

Running Update Status

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

1. Running Directly

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



Click on AVT5UpdateStatus.exe to run the file.

2. Through Windows Scheduler

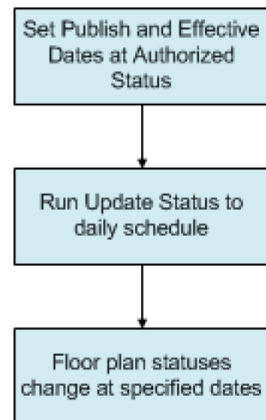
Windows Scheduler gives the option of running UpdateStatus.exe automatically at set intervals.

3. Through other Batch Scheduling Tools

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

Using UpdateStatus.exe

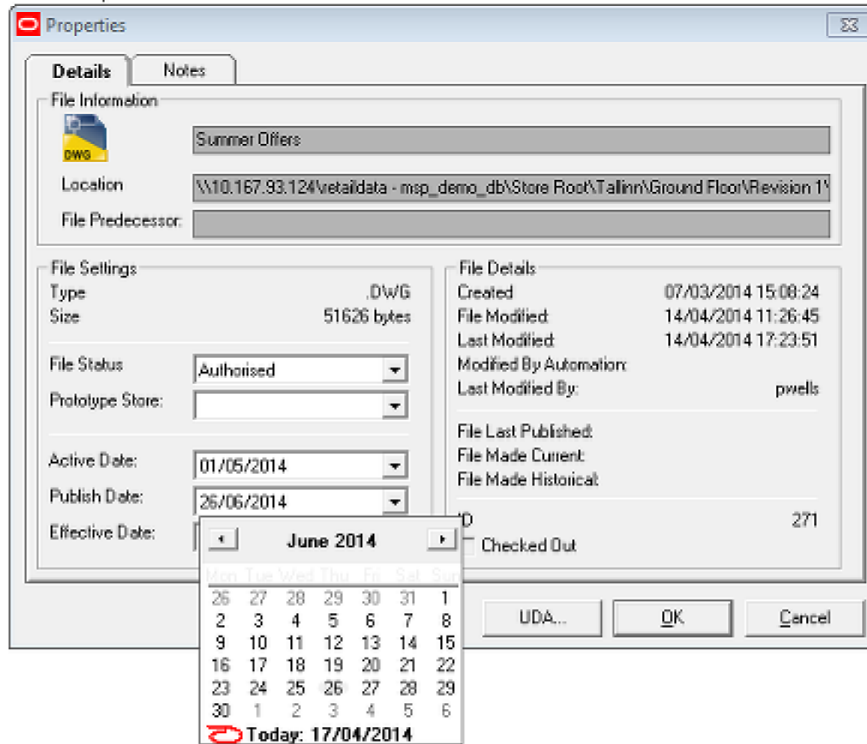
To use UpdateStatus.exe the following actions are required.



The process is carried out as follows:

1. Open the file Properties dialog box

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



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

2. Set File status to Authorized

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

3. Set the Publish Date

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

4. Set the Effective Date

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

5. Run UpdateStatus.exe

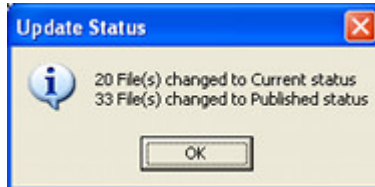
Update status can be run manually. However, it is more normal to run it using a scheduling tool.

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

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

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

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



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

Potential difficulties with UpdateStatus.exe

Multiple Authorized Files within a Floor

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

Note: Each Revision can only contain one Authorized file. Therefore, if a floor is to have multiple Authorized files, multiple Revisions must be created for that floor. If a floor only has a single Revision then this can only contain a single Current file and a single Authorized file. (It can contain multiple Proposed and Historical files. If a floor has multiple revisions, then care must be taken to keep track of which Revision contains the Current version of the drawing.

Files with an Effective Date greater than the date UpdateStatus.exe is run will not have their status changed.

All Effective Dates set to a date before the date UpdateStatus.exe is run will be changed to Current status in the sequence based on the date and time they were authorized. This will result in all but the last file set to Authorized being set first to current, and then to historical status.

This means that only the last file to be set to Authorized will retain Current status.

Status of Revisions

UpdateStatus.exe does not currently change the status of Revisions when floor plans within the Revision have their status changed.

It is therefore currently possible to have a Current file in a Revision that is not of Current status.

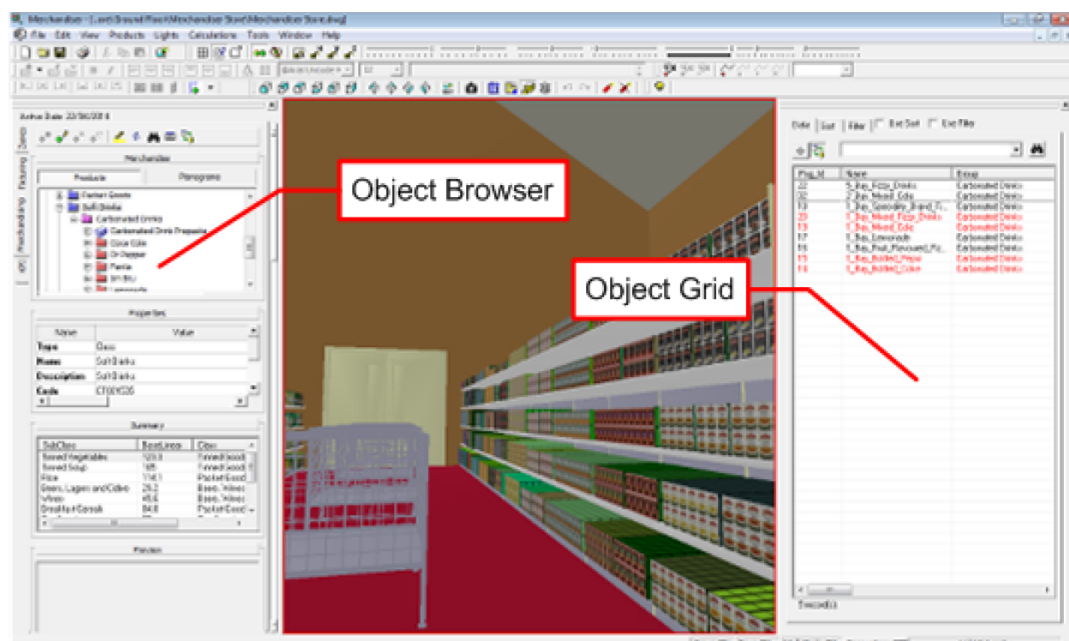
Dates

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

Object Browser

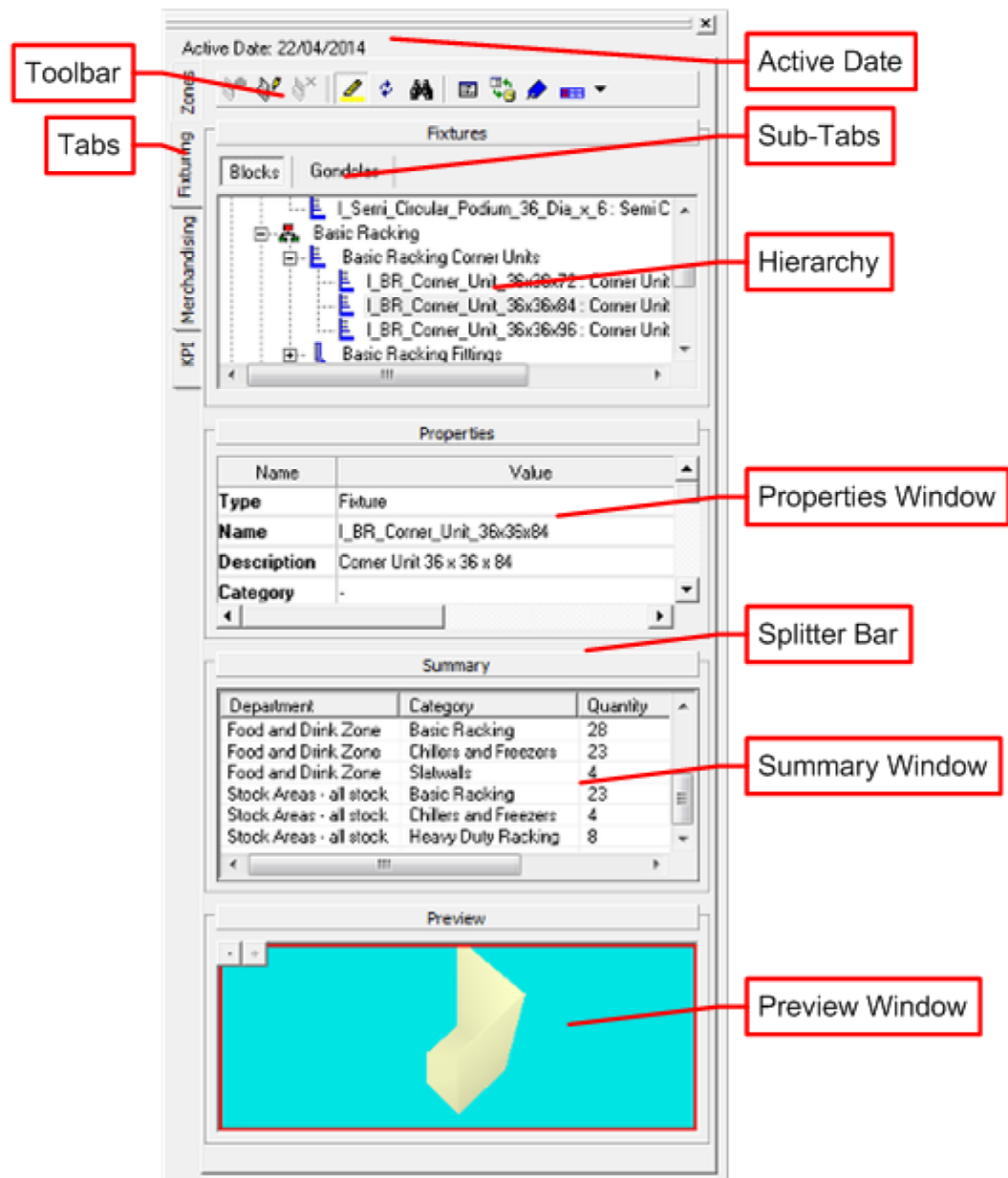
About the Object Browser

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



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

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



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

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

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

Each tab has the same general components.

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

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

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

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

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

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

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

The Refresh Option

All toolbars have a Refresh option.



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

The Active Date

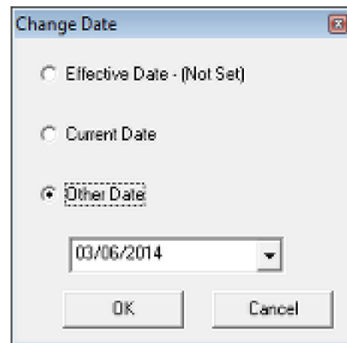
The Active Date can be seen at the top of the Object Browser. It can be used as a filter to ensure that equipment and merchandise being placed in the floor plan will be physically available at the time the floor plan is anticipated as going into service. This is done by comparing the Effective Dates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

Setting the Active Date

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

Setting from the Object Browser

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

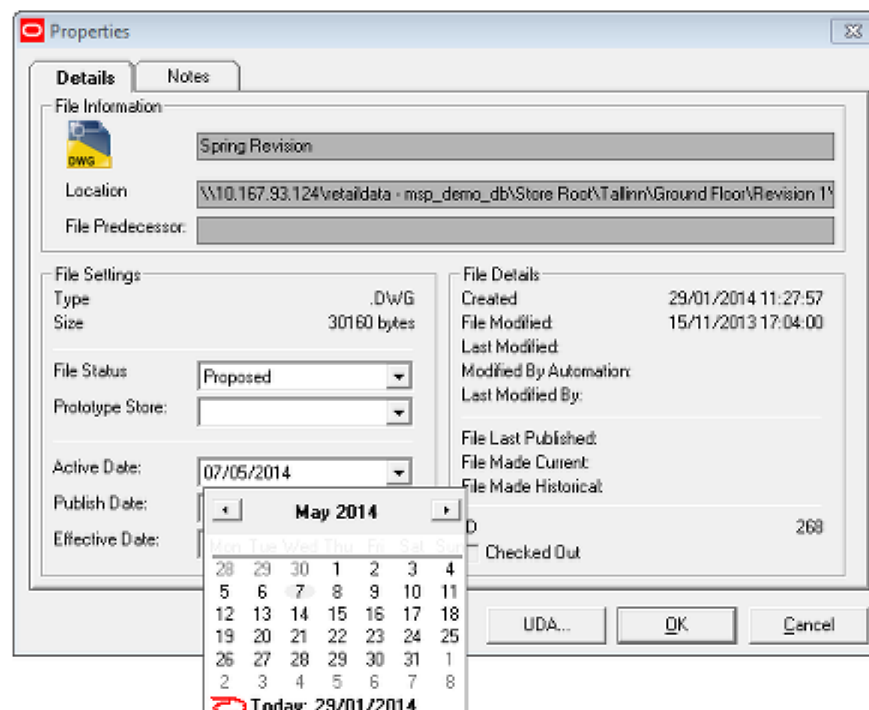


The Active Date can then be set by means of the radio button:

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

Setting in Store Manager

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



The Zones Tab

Overview of the Zones Tab

Macro Space Management uses Zones to assign space to different departments and non-sales areas. The zone types available to your business are customized within the



Administration Module. Zones can also be used to help user's select fixtures or merchandise.

The Zones tab is divided into four sections:

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

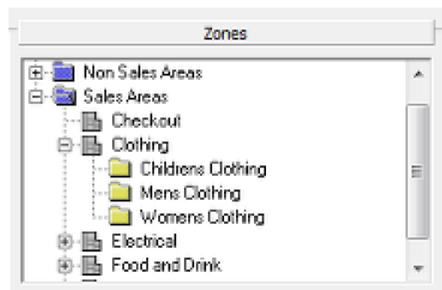
Note: Zones are 'read only' in the Merchandiser environment. Accordingly, the majority of the functionality that is present when the Object Browser is used in the Planner module is not operative.

Toolbar

| Icon | Option | Description |
|--|---------|--|
|  | Options | This option brings up the Zones Tab of the Configuration module, allowing users to customize their settings. |
|  | Refresh | This option refreshes the Object Browser with the latest information on zones in the database. |

The Hierarchy Window

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

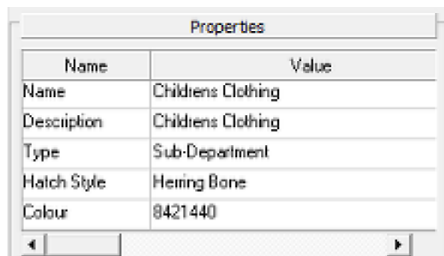


The hierarchy can be expanded using the plus control next to each item on the hierarchy. It can also be collapsed by using the minus control next to each item.

The Properties Window

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

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

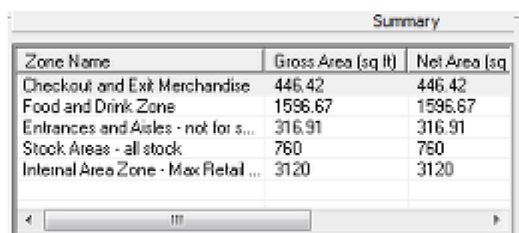


| Name | Value |
|-------------|--------------------|
| Name | Childrens Clothing |
| Description | Childrens Clothing |
| Type | Sub-Department |
| Hatch Style | Herring Bone |
| Colour | 8421440 |

The Summary Window

The Summary window displays information on the zones placed in the currently open floor plan. The content of this window is by modifying the Custom SQL in the database. This allows an implementer to specify the information that appears in the window. As an example, the window could include a comparison between the zones in the currently open floor plan and any designated prototype store.

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



| Zone Name | Gross Area (sq ft) | Net Area (sq ft) |
|-------------------------------------|--------------------|------------------|
| Checkout and Exit Merchandise | 446.42 | 446.42 |
| Food and Drink Zone | 1596.67 | 1596.67 |
| Entrances and Aisles - not for s... | 316.91 | 316.91 |
| Stock Areas - all stock | 760 | 760 |
| Internal Area Zone - Max Retail ... | 3120 | 3120 |

The Fixturing Tab

Overview of the Fixturing Tab

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











- The toolbar – provides controls that allow users to add, edit, and delete fixtures and gondolas.
- The Fixtures window – shows a hierarchy of available blocks and gondolas.
- The Properties window – after selecting a block from the hierarchy, this window shows the details for the selected block. The content of this window is customizable.
- The Summary window – shows details of equipment placed based on the active store plan. The content of this window is customizable.
- The Preview window – shows an image of the object selected in the fixture hierarchy.

Note: In Merchandiser, fixtures can only be added by dragging and dropping from the hierarchy. The Add icon is not active.

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



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









Fixturing Toolbar

| Icon | Option | Description |
|---|---------------------------------|---|
|  | Add Fixture | This option is grayed out and unavailable in Merchandiser. |
|  | Edit Fixture in Fixture Studio | This option will take the user to Fixture Studio to edit the fixture. They must have access rights to the module. |
|  | Delete Fixture | This option is grayed out and unavailable in Merchandiser. |
|  | Highlight Fixture in Floor Plan | This option does not operate in Merchandiser. |
|  | Highlight selected item in tree | If selected, selecting a fixture in the floor plan will cause the pertinent fixture to be highlighted in the Object Browser Fixture Hierarchy |
|  | Find | This option brings up the Find dialog box, allowing users to search for objects in the Fixture Hierarchy. |
|  | Options | This option brings up the Fixturing Tab of the Configuration module, allowing users to customize their settings. |
|  | Refresh | This option refreshes the Object Browser with the latest information on fixtures and gondolas in the database. |
|  | Show Attributes | This option shows the fixture attributes for any selected fixtures. Fixture attributes are customizable items of information assigned to specific fixtures. |
|  | Promotional Fixtures | This option allows the user to assign or remove the Promotional Attribute and to highlight fixtures with the promotional attribute. This option has no effect in the merchandiser module. |

Note: When Fixtures are added, the Add Fixture dialogue box (present in the Planner Environment) does not appear in Merchandiser.

Gondola Toolbar

| Icon | Option | Description |
|---|--------------------------------|--|
|  | Add Fixture | This option is grayed out and unavailable in Merchandiser. |
|  | Edit Fixture in Fixture Studio | This option is grayed out and unavailable in Merchandiser. |

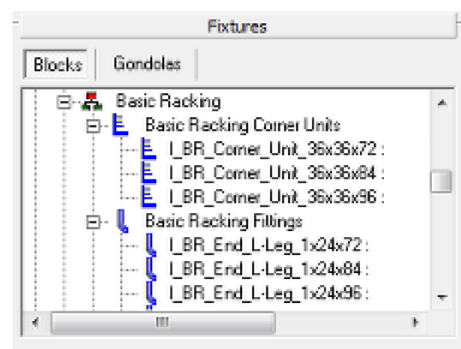
| Icon | Option | Description |
|---|---------------------------------|---|
|  | Delete Fixture | This option is grayed out and unavailable in Merchandiser. |
|  | Highlight Fixture in Floor Plan | This option is grayed out and unavailable in Merchandiser. |
|  | Highlight selected item in tree | This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

The Hierarchy Window

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

The hierarchy can be expanded using the plus control next to each item on the hierarchy. It can also be collapsed by using the minus control next to each item.

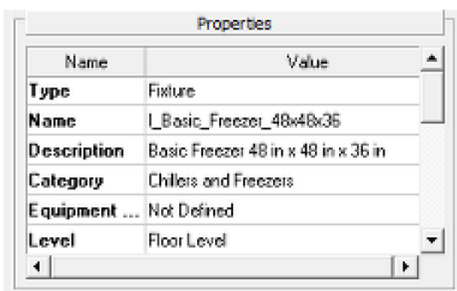
An item in the hierarchy can be highlighted by clicking on the name of the block or gondola.



The Properties Window

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

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

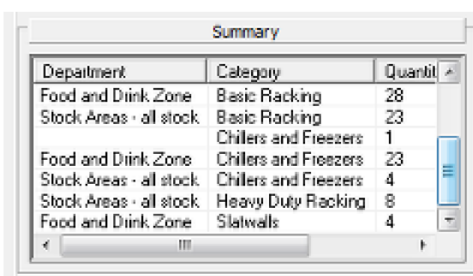


| Name | Value |
|---------------|-------------------------------------|
| Type | Fixture |
| Name | L_Basic_Freezer_48x48x36 |
| Description | Basic Freezer 48 in x 48 in x 36 in |
| Category | Chillers and Freezers |
| Equipment ... | Not Defined |
| Level | Floor Level |

The Summary Window

The Summary window displays information on the blocks placed in the open store plan. The content of this window is by modifying the Custom SQL in the database. This allows an implementer to specify the information that appears in the window.

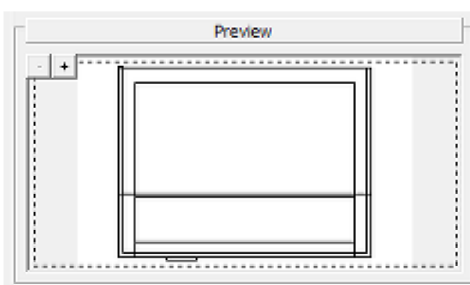
Note: See the *Oracle Retail Macro Space Planning Data Model* for information on Custom SQL.



| Department | Category | Quantity |
|-------------------------|-----------------------|----------|
| Food and Drink Zone | Basic Racking | 28 |
| Stock Areas - all stock | Basic Racking | 23 |
| | Chillers and Freezers | 1 |
| Food and Drink Zone | Chillers and Freezers | 23 |
| Stock Areas - all stock | Chillers and Freezers | 4 |
| Stock Areas - all stock | Heavy Duty Racking | 8 |
| Food and Drink Zone | Slatwalls | 4 |

The Preview Window

The Preview window shows a sample picture of the block selected in the block hierarchy. Clicking on the plus or minus signs will step through any alternative forms of preview available.



The preview is not updated when the Gondola hierarchy is displayed.

Placing Fixtures and Gondolas

Placing Fixtures

To add a block to the store plan, highlight the required block in the hierarchy then drag and drop the fixture to the store plan drawing.

(The Insert Fixture dialogue box will not appear in Merchandiser).

Placing Gondolas

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

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

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

The Merchandising Tab

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

The Merchandising tab is divided in to 5 parts:

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










- The Preview window – shows a sample picture of product display styles selected in the product hierarchy

Note: Product display styles (which show the physical form of the SKU) are only available in Merchandiser. In Merchandiser, products and planograms can only be added by dragging and dropping from the hierarchy. The Add icon is not active










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

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

Products Toolbar

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

Planogram Toolbar

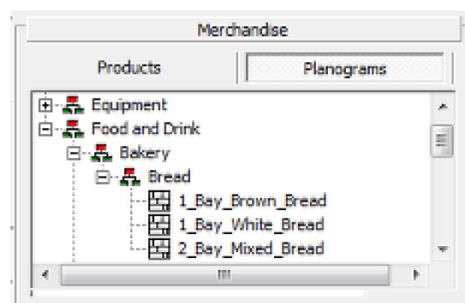
| Icon | Option | Description |
|---|---------------------------------------|--|
|  | Add Planogram | This option is grayed out. Planograms can be added by dragging and dropping. |
|  | Edit Definition | This option will open the Planogram design window so the planogram can be edited. |
|  | Delete Planogram | This option is grayed out and unavailable in Merchandiser. Planograms can be directly deleted in the floor plan. |
|  | Reverse Planogram Placement Direction | This option is current grayed out. . |
|  | Highlight in Store | This option does not operate in Merchandiser. |
|  | Highlight in Tree | If selected, selecting a planogram in the floor plan will cause the pertinent planogram be highlighted in the Object Browser Fixture Hierarchy |
|  | Find | This option brings up the Find dialog box, allowing users to search for objects in the Fixture Hierarchy. |
|  | Properties | This option brings up the Merchandising Tab of the Configuration module, allowing users to customize their settings. |
|  | Refresh | This option refreshes the Object Browser with the latest information on products and planograms in the database. |

The Hierarchy Window

The hierarchy window displays both the product and the planogram hierarchies. To toggle between the hierarchies use the Products or Planograms buttons respectively.

The Product hierarchy is defined in the Product Studio module and shows all the products that can be added to a store plan. The Planogram hierarchy can be configured in Merchandiser and shows all the planograms that can be added to a store plan.

The hierarchy can be expanded using the plus control next to each item on the hierarchy. It can also collapsed by using the minus control next to each item.



An item in the hierarchy can be highlighted by clicking on the name of the product or planogram.

The Properties Window

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

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

| Name | Value |
|-------------|-------------------|
| Pog Id | 69 |
| Name | 1_Bay_Brown_Bread |
| Description | 1 Bay Brown Bread |
| Code | 00000069 |
| Bags | 1 |
| Status | Authorized |

The Summary Window

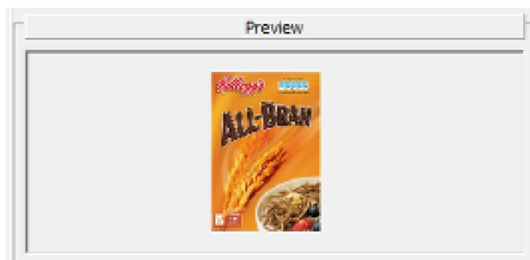
The Summary window displays information on the merchandise placed in the open store plan. The content of this window is by modifying the Custom SQL in the database. This allows an implementer to specify the information that appears in the window.

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

| SubClass | BaseLinear | Class |
|--------------------------|------------|-------------------|
| Tinned Vegetables | 123.3 | Tinned Goods |
| Tinned Soup | 105 | Tinned Goods |
| Rice | 114.1 | Packet Goods |
| Beers, Lagers and Ciders | 29.2 | Beers, Wines a... |
| Wines | 49.6 | Beers, Wines a... |
| Breakfast Cereals | 84.8 | Packet Goods |

The Preview Window

The Preview Window will be blank for products unless an image has been associated with that product in Product studio.



It will always be blank for Planograms.

The KPI Tab

The **KPI's tab** of the Object Browser allows users to see performance of a store plan at a glance. The available KPI's are customizable and more can be added either by an Oracle Retail consultant or a trained Macro Space Management super user.

The KPI tab is divided in to 4 parts:



- The toolbar – provides controls that allow KPI's to be run and modified
- The Indicators window – shows a hierarchy of available KPI's
- The Layers window – shows a list of KPI's that have been run against the store plan
- The Legend window – shows the color bands associated with a KPI that has been run

When the tab is first opened the Layers and Legend windows are blank. These windows are populated when a KPI is run.

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

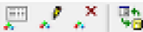



The **KPI Tab Toolbars** in the Object Browser are used to Add and Edit KPI's. They are also used to Edit and Delete the list of KPI's selected for display in the ViewPorts

Upper Toolbar

|  | |
|---|-------------|
| Icon | Description |
|  | Add KPI |

Note: The Edit Indicator functionality allows the user to specify the data returned for KPIs using SQL statements and stored procedures. The functionality has been disabled by default. Please refer to the Functional Security section in the Administration Module User Guide for information on how to give access to this functionality.

Lower Toolbar

|  | |
|---|--|
| Icon | Description |
|  | View Data |
|  | Edit KPI in list of those displaying |
|  | Delete KPI from list of those displaying |



Refresh All

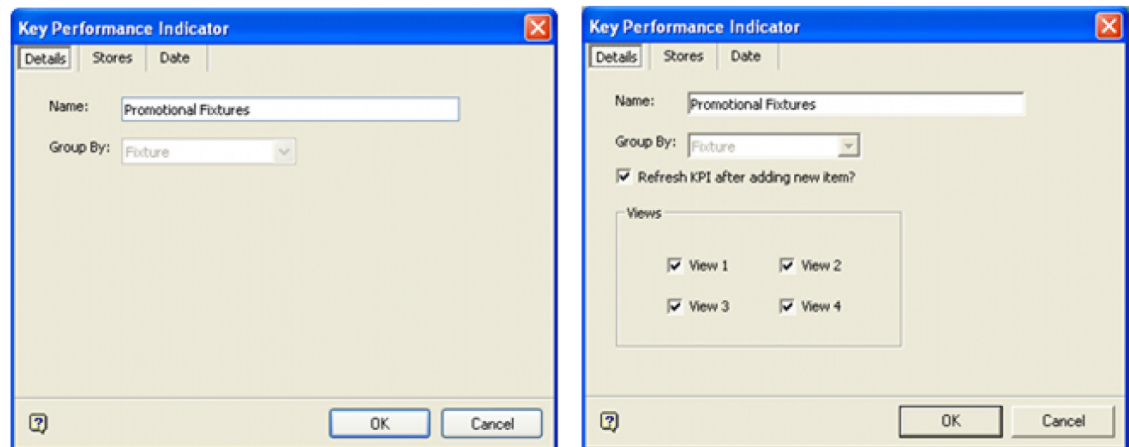
These commands are user to alter the list of those KPI's current displayed in the ViewPorts.

Running a KPI

In order to run a KPI the user must highlight the KPI that is to be run from the hierarchy of Indicators that are shown on the Object Browser.

Details Tab

Pressing the **Add KPI** button opens the Key Performance Indicator dialog for the highlighted KPI with the Details tab active. Slightly different versions of the Details tab will appear in Planner and Merchandiser. Merchandiser has more options because it can show up to four views of the floor plan simultaneously.

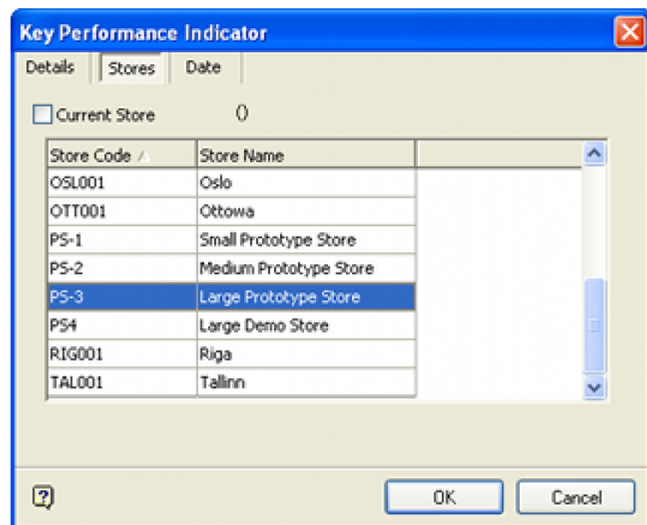


The Details tab shows the name of the selected KPI in the **Name** field. The user can edit this if they wish. This will only change the name that is shown in the Layers section of the KPI tab on the Object Browser and not the name of the KPI definition saved in the database.

The **Group By** field is automatically populated with the KPI Type that was saved in the KPI definition.

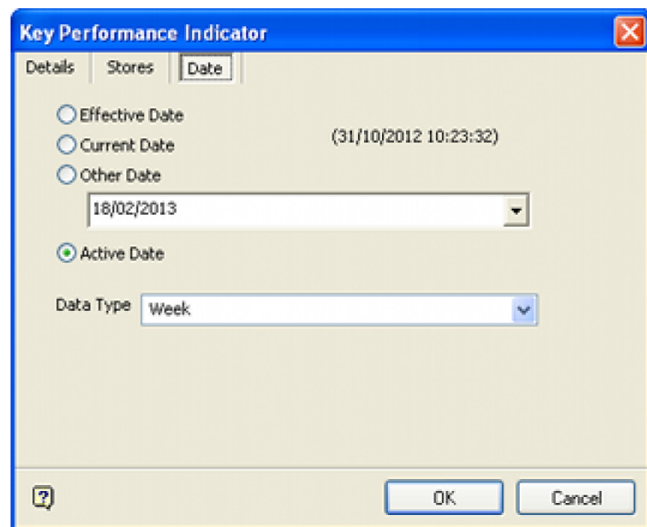
Stores Tab

The Stores tab enables users to specify whether the KPI should be run against the current floor plan or a floor plan in an equivalent store. The latter option is useful when a new store is being planned and there is no operational data available for it. However, the store data is being taken from must be an exact clone of the new store or data will not map across directly. Using a store specific KPI also requires a KPI to be developed for the purpose.



Date Tab

The Data tab has several options selectable by radio button. These can be used to specify the date range for the data where data is time sensitive. The initial action is to set the Data type. This can be set to any time period from a specific day to a year.



The next stage is to set the specified date for the date.

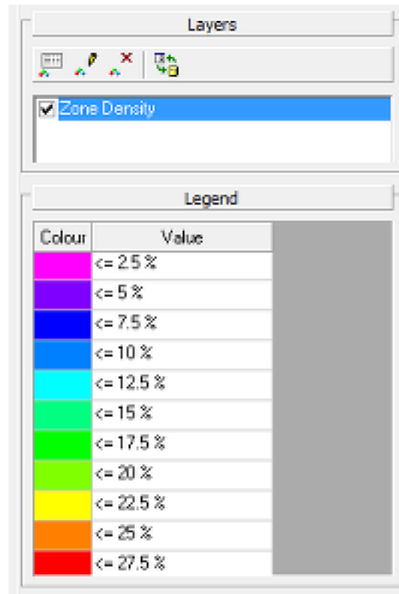
- Effective Date will use the Effective Date specified in the File Properties dialog box in Store Manager. This can only be used if the floor plan has not yet reached Current status and the Effective Date has been set.
- Current Date will use the Current Date specified in the File Properties dialog box in Store Manager. This can only be used if the floor plan is at Current status.
- Other Date can be manually set by the user using the Calendar control
- Active Date will use the Active Date specified at the top of the Object Browser.

When the OK button is clicked, the software will use the date and the data type to identify the correct calendar period. For example, if the date has been set to 21st June 2013 and the Data Type has been set to Month, the software will select the data associated with the calendar period June 2013.

Note: When selecting date specific data, that data must first exist in the database for the KPI to display correctly.

Running the KPI

Pressing the OK button will close the dialog and apply the KPI to the store plan drawing. The Layers frame will show the KPI that has just been run and the legend will be updated with the Color Theme for the KPI.



KPI's can be turned off in the store plan view by un-ticking the tick box next to the KPI name in the Layers pane on the Object Browser. If no KPI's are ticked the store plan view returns to the normal view mode.

Deleting the KPI

The **Delete KPI button** removes the highlighted KPI from the list in the Layers pane. If this is the KPI being displayed in the store plan view, then the results will be cleared and the view returns to normal, i.e. with no KPI applied.

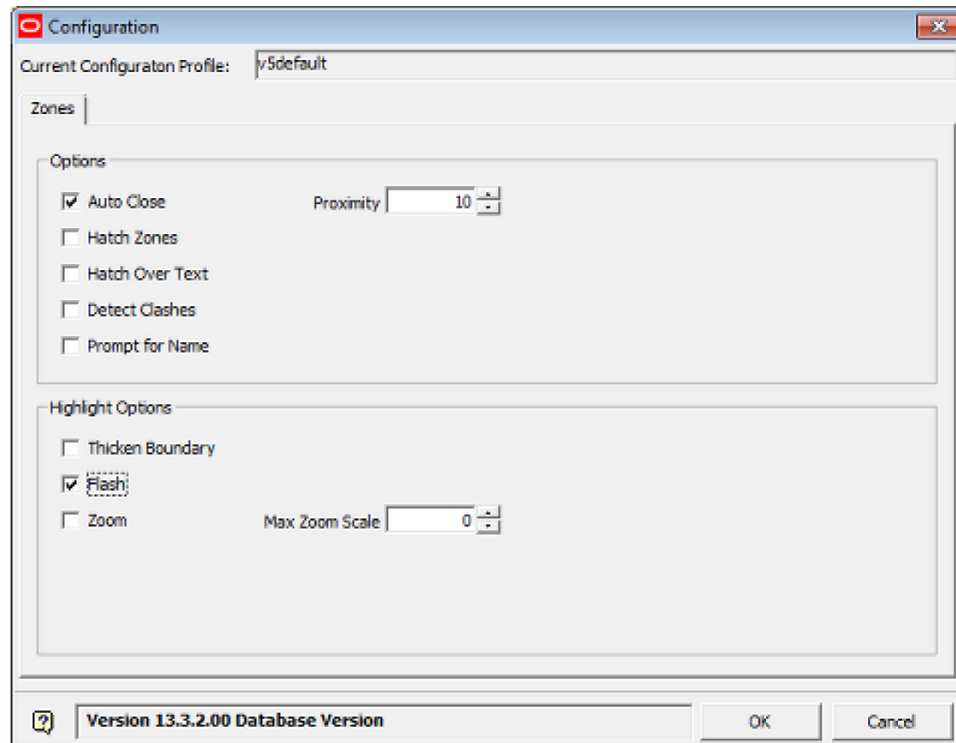
Note: The Delete KPI option only removes the KPI from the current floor plan. The KPI definition is still saved in the database. If the KPI needs to be run again, this can be done by selecting it within the KPI hierarchy again and clicking the Add KPI button.

Configuration Options on the Object Browser

Several toolbars on the Object Browser provide shortcuts to specific tabs of the Configuration Module. These allow individual users to customize the ways Macro space Planning operates to suit their individual needs. Full information can be found in the help for the Configuration Module (accessed from the File menu).

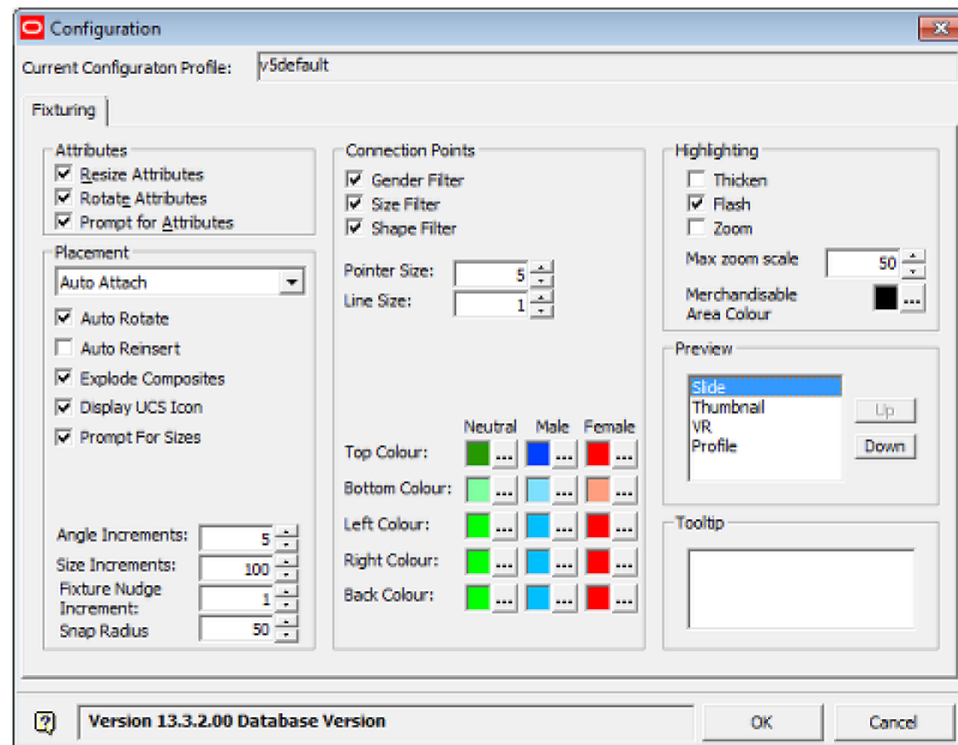


Zones Tab of Configuration Module



These options are intended for use in Planner and have no effect in the Merchandiser Module.

Fixturing Tab of the Configuration Module



Attributes Frame

These options are intended for use in Planner and have no effect in the Merchandiser Module.

Placement Frame

These options are intended for use in Planner and have no effect in the Merchandiser Module.

Connection Frame

The options in this frame can be used to control the behavior and appearance of connection points.

Note: For more information see the section on connection points

Highlighting Frame

The majority of these options is intended for use in Planner and have no effect in the Merchandiser Module. The Merchandisable Area Color sets the color used to display the merchandisable areas for a fixture. (Display is controlled by the right click menu when a fixture is selected in the floor plan).

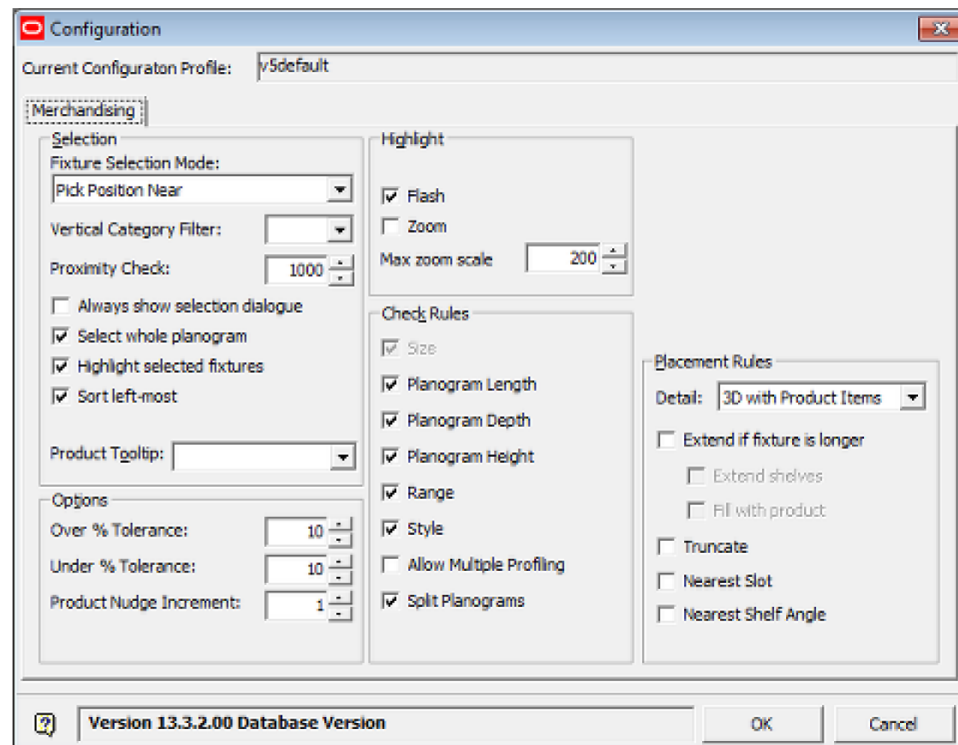
Preview Frame

This affects the sequence preview objects are shown in the Preview Window of the Object Browser.

Tooltip Frame

This option is intended for use in Planner and has no effect in the Merchandiser Module.

Merchandising Tab of the Configuration Module



Selection Frame

These options are intended for use in Planner and have no effect in the Merchandiser Module.

Options Frame

These options are intended for use in Planner and have no effect in the Merchandiser Module.

Highlight Frame

These options are intended for use in Planner and have no effect in the Merchandiser Module.

Check Rules Frame

The options control the warnings that will be displayed when a planogram is being placed.

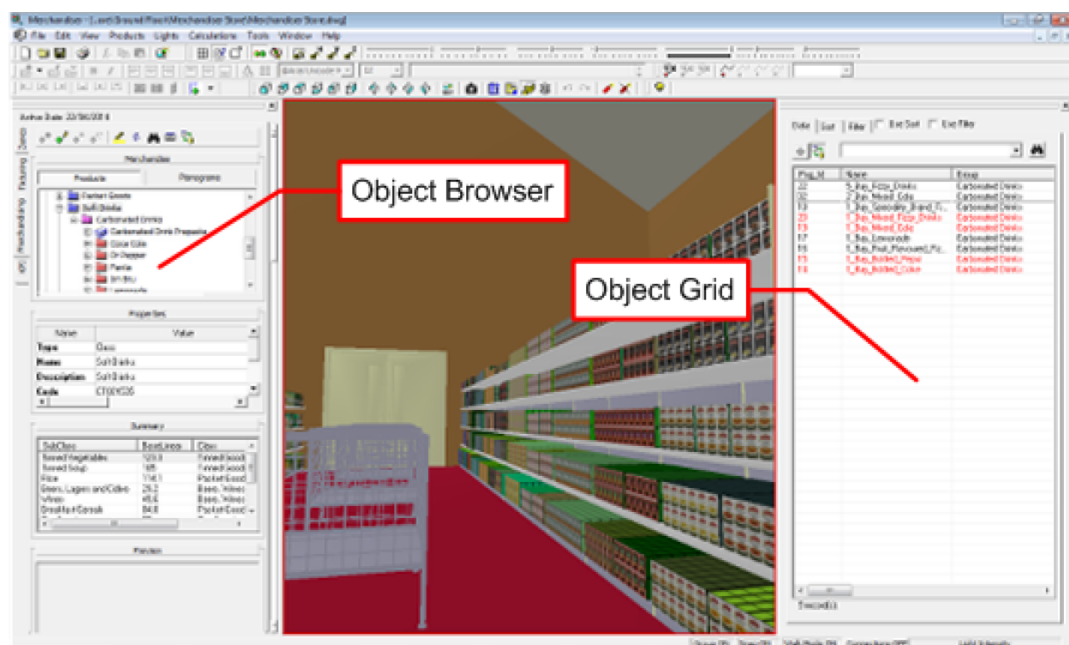
Placement Rules Frame

These options are intended for use in Planner and have no effect in the Merchandiser Module.

Object Grid

About the Object Grid

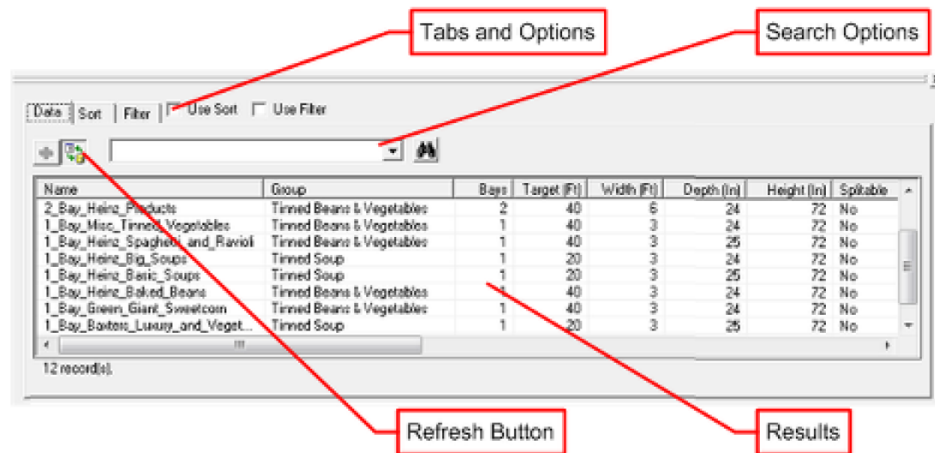
The **Object Grid** provides an alternative to selecting lower level objects in the Object Browser, including Zones, Fixtures, Products and Planograms.



It is used in conjunction with the Object Browser and is available in both the Planner and the Merchandiser environments. The Object Grid can be docked on any side of the screen or floated.

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

The Object Grid has the following major parts:



Tabs and Options

There are three tabs:

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

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

Search Options

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

Refresh and Add Buttons

For data to be added to the Object Grid, the refresh button must be toggled on (depressed). Clicking on a node in the appropriate hierarchy will return the results associated with that node. For Merchandiser, the Add button is not enabled. Objects must be 'dragged and dropped' in order to add them to a floor plan.

Columns

The columns can be hidden or displayed by right clicking in them. The order can be changed by 'dragging and dropping' them to a different order.

Determining the Data that Appears in the Object Grid

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

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

Turning Object Grid Display On or Off

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

Object Grid Position

The Object Grid can be moved to different positions by right clicking at the top and selecting, Left, Right, Top or Bottom. It cannot be floated in the Merchandiser module.

The Object Grid Sort and Filtering Tabs

The Sort Tab

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

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

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

The Filter Tab

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

| | Field | Operator | Value |
|---|-------|----------|------------------|
| 1 | Group | = | Kitchen Cupboard |
| 2 | Bays | <= | 4 |
| 3 | Name | LIKE | Tinned |
| 4 | | | |
| 5 | | | |

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

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

Using the Object Grid

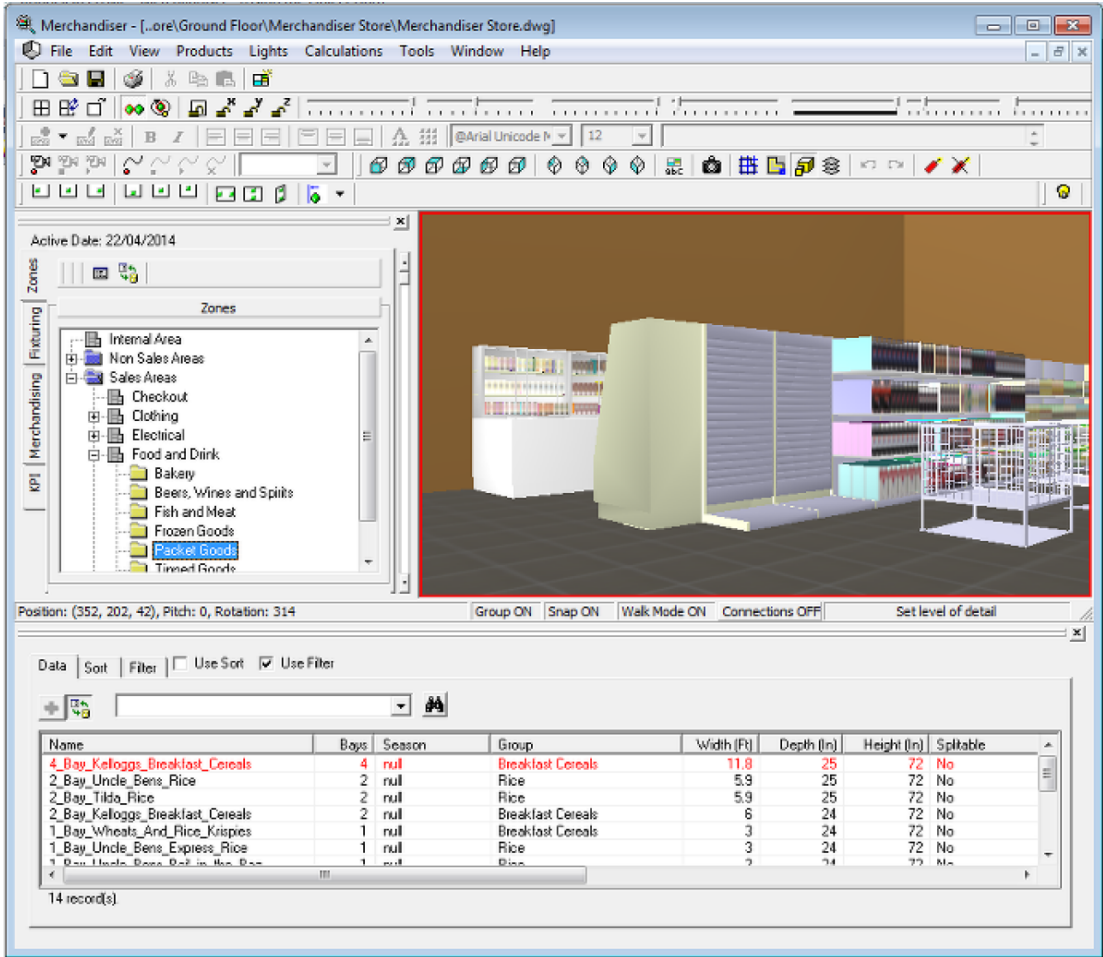
The Object Grid will behave in different ways depending on which tab of the Object Browser is selected. The results returned can be customized by modifying the information in the AVTTB_CUSTOM_SQL table. This table is only accessible by Administrators with access rights to the database, but those with such access have complete control over the results returned.

Note: In order to use the Object Grid, the Refresh button must be toggled to On. Unless this is done, information in the Object Grid will not update when nodes are clicked in the Object Browser hierarchy.

Zones Tab

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

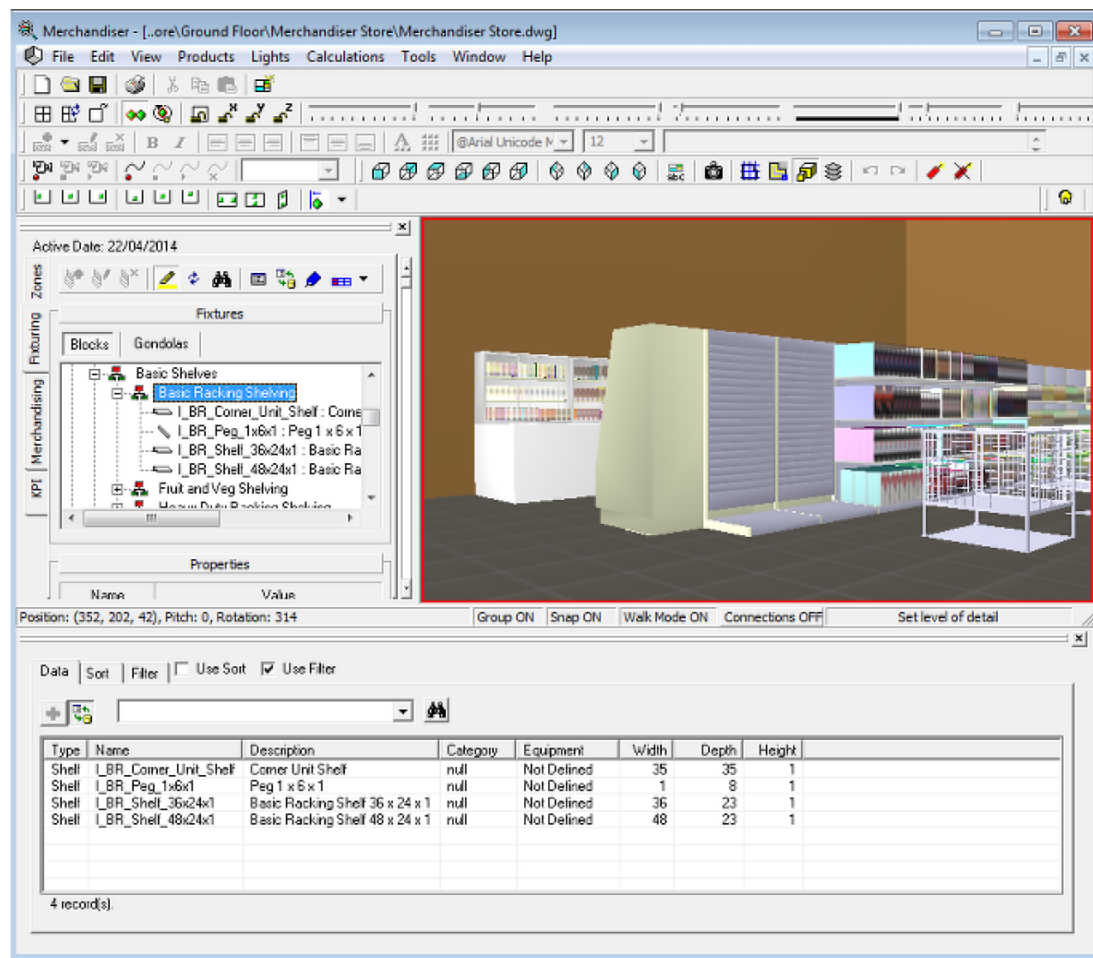
Note: This functionality is only applicable to floor plans - it does not operate in the planogram design window.



Fixturing Tab

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

Note: This functionality is only applicable to floor plans - it does not operate in the planogram design window.



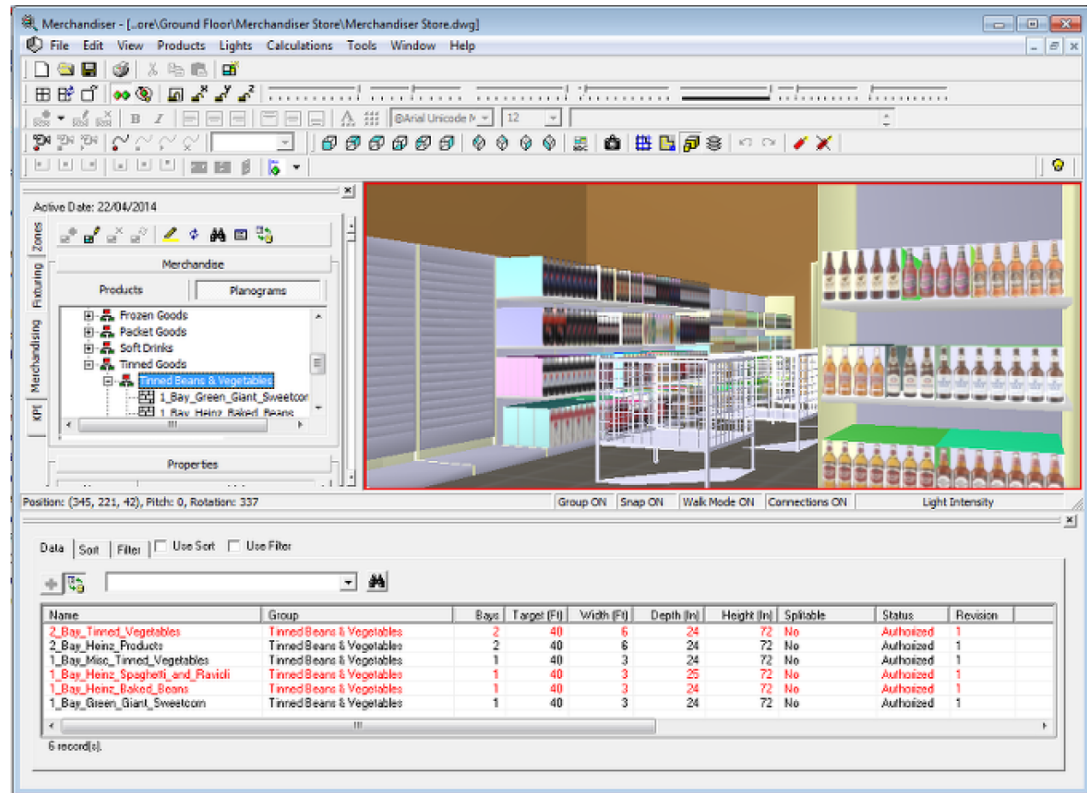
Note: Gondolas cannot be selected using the Object Grid.

Merchandising Tab

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

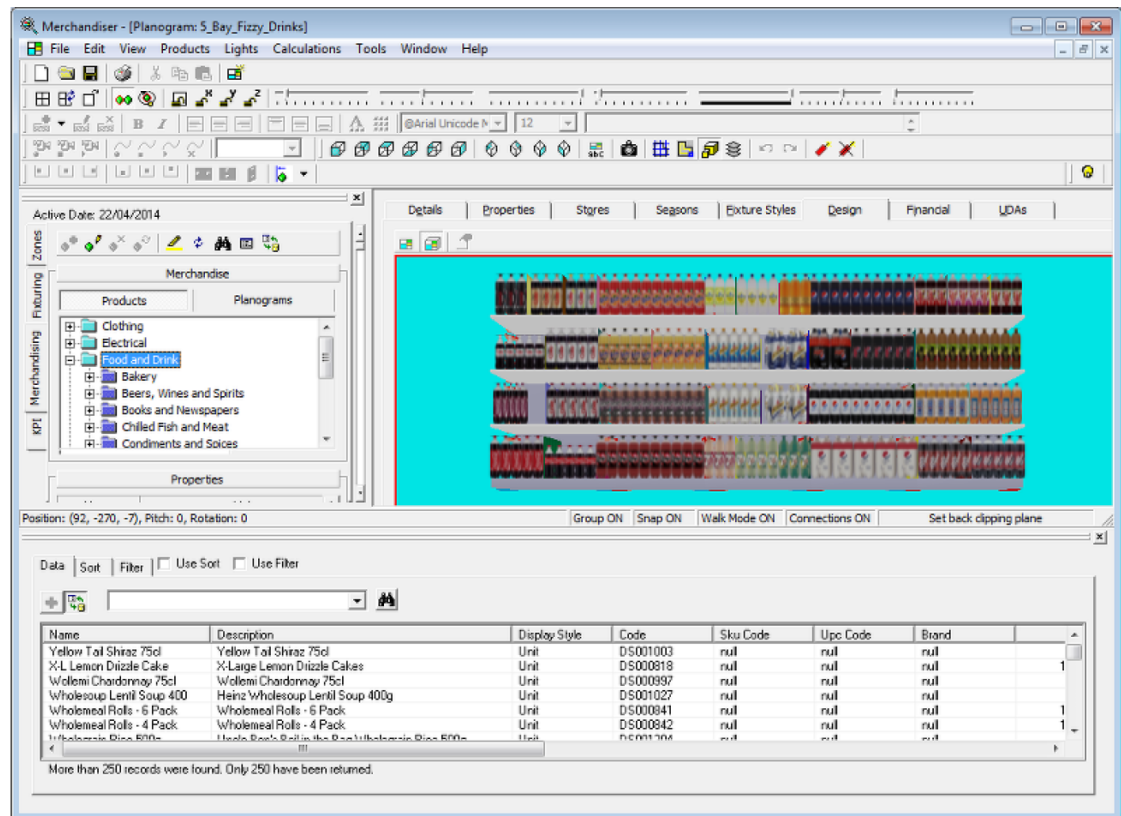
Returning Planograms for Floor Plans

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



Returning Products for Planogram Designs

The Custom SQL is set up to operate on the product hierarchy in the Object Grid. Selecting a Department, Class or Sub-class in the hierarchy will populate the Object Grid with a list of all products below that node. This is useful when selecting products for planogram design. Selecting a Planogram Group in the Planogram hierarchy will have no effect.



Note: In the above example, more results have been returned than permitted by the maximum limit. This limit is set using the OBJECT_GRID_DATALIMIT system variable accessed using the System Variable option from the General menu in the Administration module.

Key Performance Indicators

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

Overview of Merchandiser

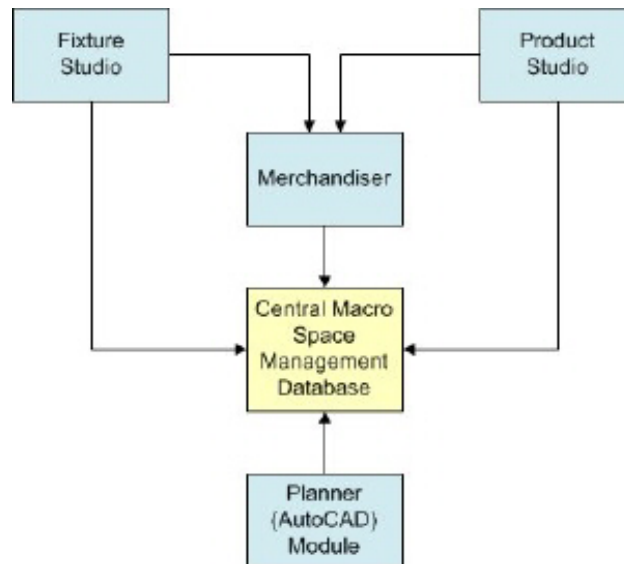
Merchandiser can be used to create, edit and review 3D Virtual Reality Stores.

Merchandiser integrates with other modules in Macro Space Management to enable the user to control all aspects of operating a retail organization.

- Fixtures and fittings can be created and edited in Fixture Studio.
- Similarly products can be created and edited in Product Studio.
- Planograms can be either imported or created in Merchandiser.

Merchandiser can then be used to add, edit or delete equipment in a 3D Virtual Reality store. Similarly, Merchandiser can be used to add edit or delete merchandise in a 3D Virtual Reality store.

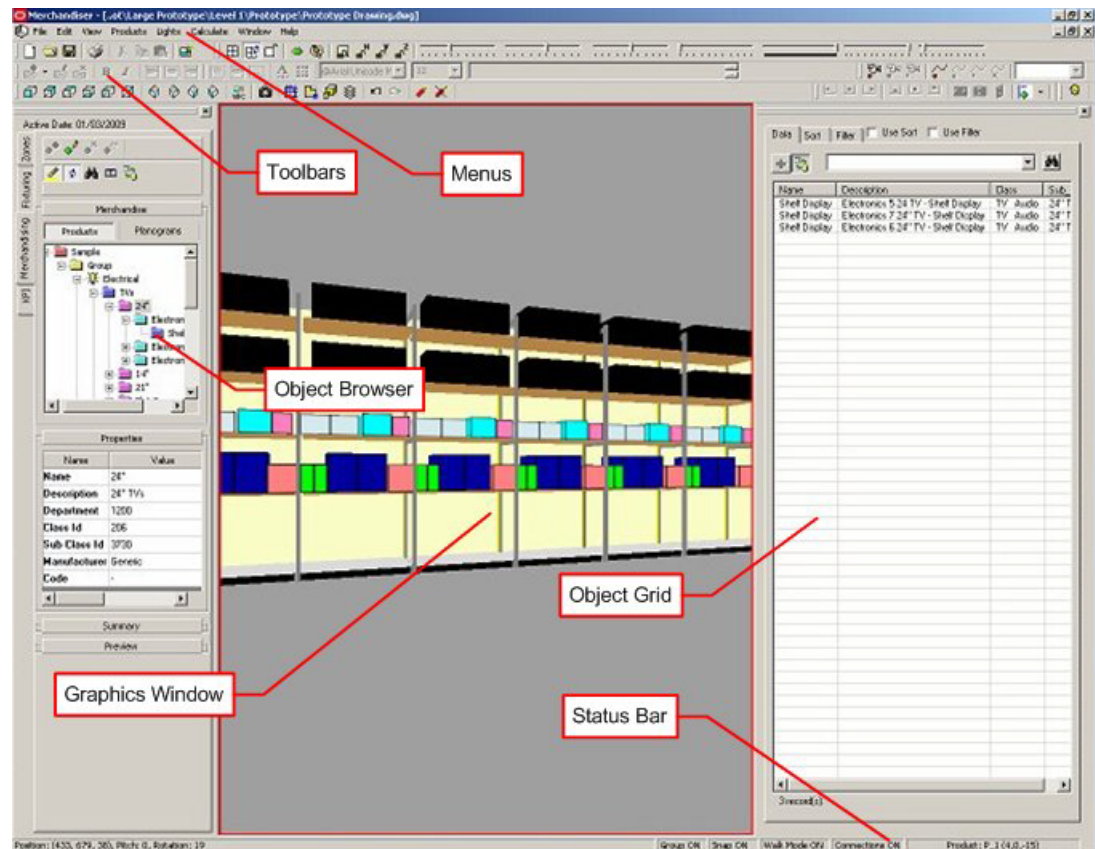
The results of these activities are stored in the Macro Space Planning database.



Note: The Macro Space Planning database is also used by the Planner (AutoCAD) module, which provides an alternative way to create and edit store layouts. Macro Space Management users may therefore work in which environment they find most convenient as the results of activities in either environment are stored in the central database and are available to the other environment.

The Merchandiser Window

The Merchandiser Window has six main parts.



The **Menu Bar** gives access to a series of drop down menus that control many of the operations in Merchandiser.

The **Toolbars** give access to a further series of commands.

The **Object Browser** controls fixturing and merchandising operations, together with the display of KPI's.

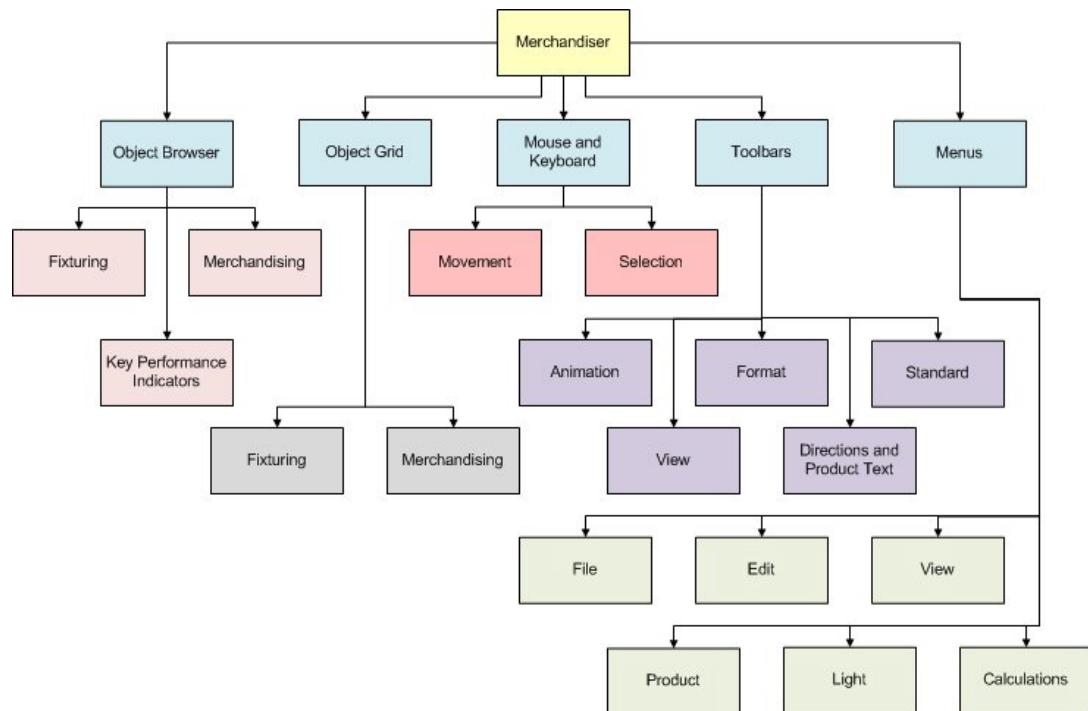
The **Object Grid** provides an alternative way to place equipment and merchandise.

The **Graphics Window** displays a 3D plan of the selected store.

The **Status Bar** gives information on current operations.

Merchandiser Components

The varying operations within Merchandiser are controlled in one of four ways: from the Object Browser and Object Grid, from the Menu Bar, from the toolbars, or using the mouse and keyboard.



The Configuration Module

The **Configuration Module** can be accessed from several modules within Macro Space Management. Full access is only granted to Administrators who access it via the Administration Module. This allows them to configure many aspects of the global operation of the application. Standard users get more restricted access and can configure their local settings.

Note: For full details of the Configuration Module see the Configuration Module help file.

Accessing the Configuration Module

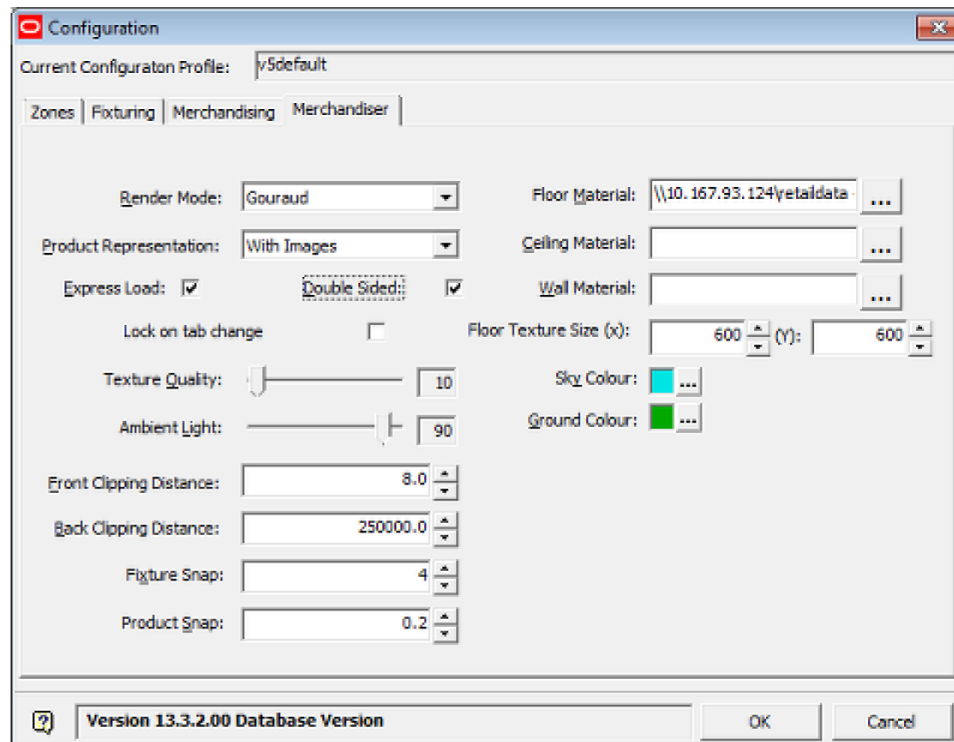
There are three ways the Configuration Module can be accessed from within the Merchandiser Module:

- By selecting the Configuration option from the File menu.
- By Pressing the F6 key.
- By selecting Options on one of the toolbars on the Object Browser.



The Configuration Module Tabs

Standard users can access four configuration Module tabs: Zones, Fixturing, Merchandising and Merchandiser. These tabs are explained in full detail in the Configuration Module help file. There are also discussed in more detail in any pertinent sections of this help file.



Zones Tab

This tab specifies the behavior of zones in the Planner Module and has no effect in Merchandiser.

Fixturing Tab

This tab has limited utility in the Merchandiser module. Its primary use is to allow the user to customize the color and behavior of connection points.

Merchandising Tab

Again, this tab has limited utility in the Merchandiser module. Its primary use is to allow the user to set the Check rules which are used to validate the fixtures a planogram is being placed on.

Merchandiser Tab

Several settings on this tab are of use in Merchandiser:

- Express Load enables express loading of zones. This allows users to specify what is loaded into the floor plan. It enables them to only load part of the floor plan and thus to make the plan of a large store more responsive.
- Double Sided: If some objects are not drawing correctly in the floor plan, selecting this option may correct it. The floor plan will require more processing capacity from the user's computer if this option is active.
- Lock Objects on Tab Change. If this option is selected, Fixtures can only be manipulated while in the Fixturing tab of the Object Browser and Merchandise in the Merchandising tab.

Controls in Merchandiser

Shortcut Keys

Shortcut keys are available. These provide alternatives to calling the required function from pull down menus of toolbars.

General Shortcuts

| Shortcut Keys | Also available from: | Function |
|----------------------|---|----------------------------------|
| <Ctrl> + O | File pull down Menu or Standard Toolbar | Open Drawing (Via Store Manager) |
| <Ctrl> + P | Standard Toolbar | Show Print Preview |
| <Ctrl> + <Shift> + C | File pull down menu | Show Configuration Module |
| <Ctrl> + S | File pull down menu | Save Drawing |
| <Ctrl> + Q | File pull down menu | Quit Application |
| <Ctrl> + N | File pull down menu | Create New Planogram |
| F8 | View Menu | Show/Hide Object Browser |
| Delete | N/A | Delete all selected objects |

Display Shortcuts

| Shortcut Keys | Also available from: | Function |
|---------------|-------------------------------------|--|
| <Ctrl> + F | Edit pull down menu | Display Find Dialogue |
| <Ctrl> + L | Directions and Product Text Toolbar | Display Layers Dialogue |
| F12 | View Menu | Take snapshot of Virtual Reality Store |

Editing Shortcuts

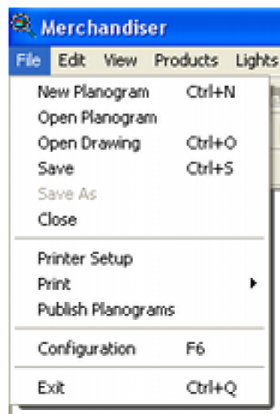
| Shortcut Keys | Also available from: | Function |
|---------------|----------------------|---|
| <Ctrl> + G | Edit pull down menu | Toggle Group On or Group Off |
| <Ctrl> + A | Edit pull down menu | Select All |
| <Ctrl> + E | Edit pull down menu | Empty selected fixture/shelf of products |
| <Ctrl> + C | Edit pull down menu | Copy the Selected Products to the Clipboard |

| Shortcut Keys | Also available from: | Function |
|----------------------------------|----------------------|---|
| <Ctrl> + X | Edit pull down menu | Cut the Selected Products and Paste on Clipboard |
| <Ctrl> + V | Edit pull down menu | Paste the Selected Products onto the selected fixture/shelf |
| <Ctrl> + Z | Edit pull down menu | Undo last action |
| <Ctrl> + D | Edit pull down menu | Deselect all selected objects |
| <Shift> + up or down cursor keys | N/A | Move selected shelf up or down on parent object |

Menu Options

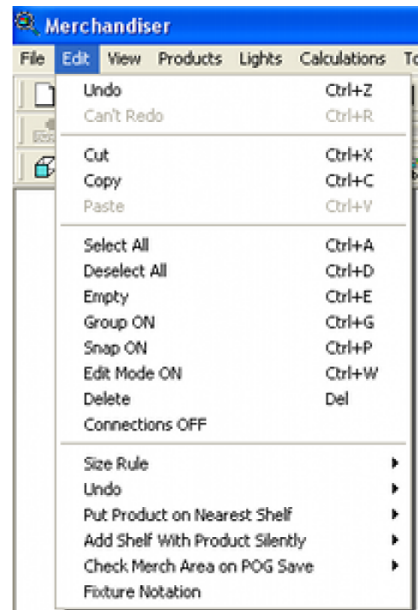
File Menu

The **File** menu gives access to several options. The most important of these are the creating and editing of planogram definitions, accessing Store Manager, Printing and accessing the Configuration Module.



Edit Menu

The **Edit** menu give access to a series of options mainly concerned with editing.



The **Undo** and **Redo** options allow the user to undo or redo recent actions.

Cut, **Copy** and **Paste** allow the user to carry out those operations on objects in the drawing.

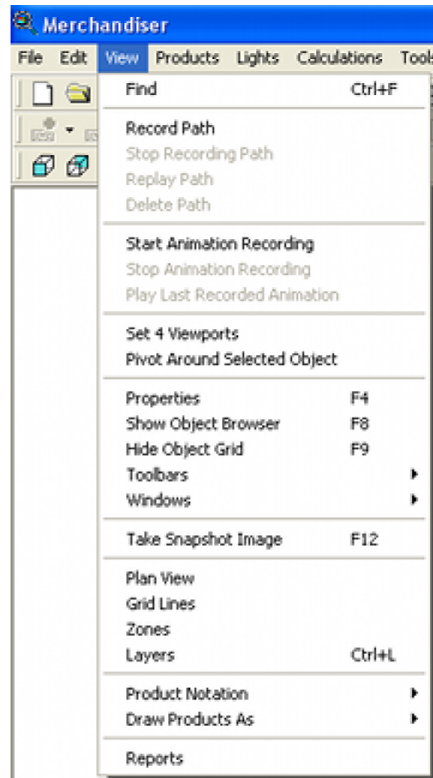
Select All, **De-select All**, **Empty** and **Delete** enable the user to carry out bulk operations on the drawing.

Group On or **Group Off** determines how Families and Groups are selected.

Size Rule allows the user to specify whether or not product size is to be taken into account when placing products on shelves.

View Menu

The **View** menu allows the user to specify a number of options affecting the view on screen.



Find enables the user to find an object in the drawing.

Record Path, **Stop Record Path**, **Replay Path** and **Delete Path** allow the user to configure a path specified through the drawing for the purpose of making a Virtual Reality movie of the store layout.

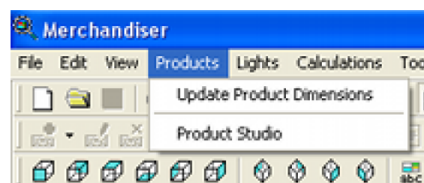
Start Animation Recording, Stop Animation Recording and Replay Last Recorded Animation are options concerned with Virtual Reality movies of the store layout.

Set 4 ViewPorts or **Set 1 ViewPort** determines how many views of the virtual store are available.

Pivot Around Selected Object enables the user to select an object in the drawing to rotate around.

Products Menu

The Product pull down menu enables Product Dimensions to be updated. It also allows access to Product Studio.

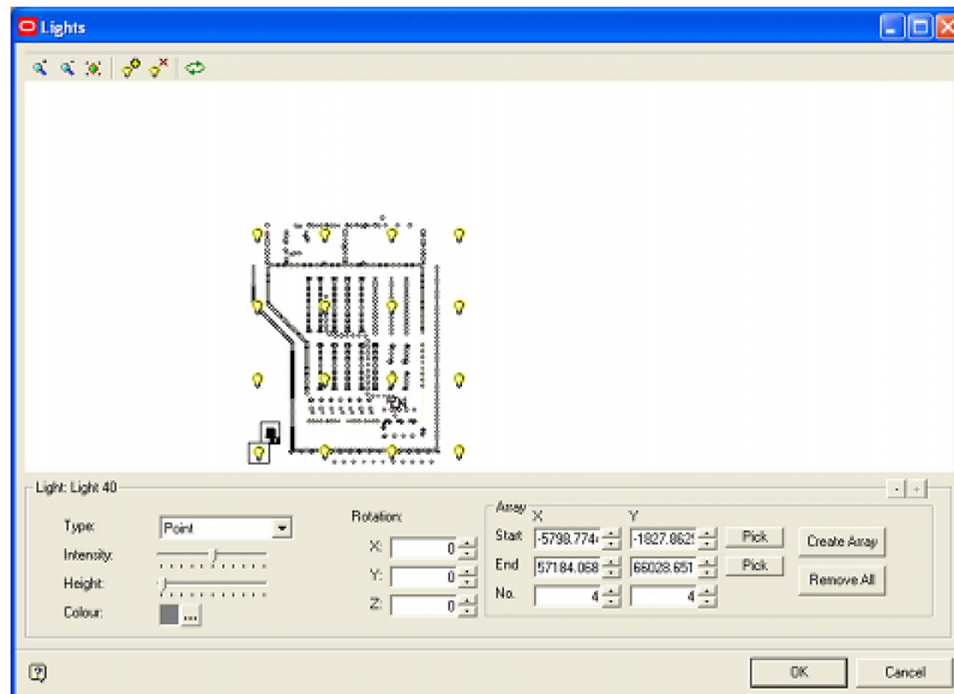


Lights Menu

The Lights pull down menu calls up the Lights dialogue box

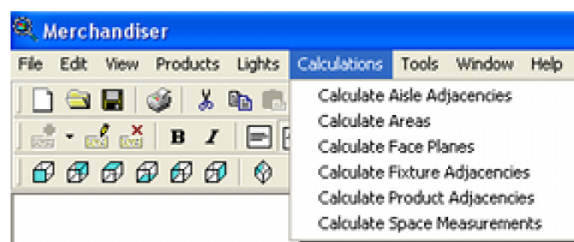


This allows the user to specify the lighting arrangements for the store.



Calculate Menu

The Calculate pull down menu gives access to calculations required for accurate reporting.



Calculate Aisle Adjacencies

This enables the user to determine which merchandise shares an aisle.

Calculate Areas

This gives determines how efficiently space in the store has been allocated.

Calculate Face Planes

Calculate Face Planes enables users to calculate the respective frontal area of products in planograms.

Calculate Fixture Adjacencies

This is used to determine which fixtures are next to which. The information is used for calculation and reporting purposes.

Calculate Product Adjacencies

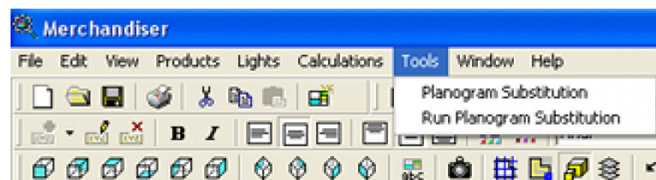
This is used to determine which fixtures are next to which. The information is used for calculation and reporting purposes.

Calculate Space Measurements

Calculate Space Measurements enables users to calculate the respective volumes of products in planograms.

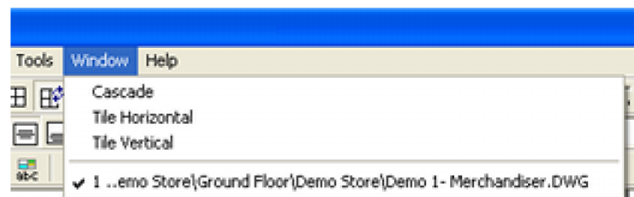
Tools Menu

The Tools menu gives access to Planogram Substitution functionality.



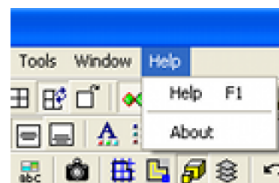
Window Menu

The Window menu allows users to arrange multiple store plans (if open) and to select the store plan they wish to be active.



Help Menu











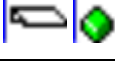
The **Help Options menu** gives access to this help file.



It also allows the version of the software to be checked.






The Align Products Toolbar





The **Align Products toolbar** allows shelves or products to be aligned.

|  | |
|---|---|
| Icon | Description |
|  | Align Left |
|  | Align Center |
|  | Align Right |
|  | Align Front |
|  | Align Middle |
|  | Align Back |
|  | Justify in X plane |
|  | Justify in Y plane |
|  | Justify in Z Plane |
|  | Select shelf or product to justify (Icon toggles) |

The Animation Toolbar

The **Animation Toolbar** enables the user to make define and store walk through paths for taking movies. It also allows users to record movies of the store layout in the Virtual Reality Environment.

|  | |
|---|----------------------|
| Icon | Description |
|  | Start Recording AVI |
|  | Stop Recording AVI |
|  | Play Recorded AVI |
|  | Start Recording Path |

| Icon | Description |
|---|--------------------------|
|  | Stop Recording Path |
|  | Replay Path |
|  | Delete Path |
|  | Available Recorded Paths |










The varying Path options allow the user to set, edit or delete a path along which a recording will take place.












The Recording options allow users to make movies of the Virtual Reality store, either by controlling the camera directly, or by setting it to follow a predefined path.

The Directions and Product Text Toolbar

The **Directions and Product Text** Toolbar is mainly concerned with views of selected objects.



| Icon | Description |
|---|--------------------------------------|
|  | Front view of selected object |
|  | Back view of selected object |
|  | Top view of selected object |
|  | Bottom view of selected object |
|  | Left view of selected object |
|  | Right view of selected object |
|  | NW isometric view of selected object |
|  | NE isometric view of selected object |
|  | SE isometric view of selected object |

| Icon | Description |
|---|--------------------------------------|
|  | SW isometric view of selected object |
|  | Show product text |
|  | Show product text |
|  | Show grid lines form |
|  | Show zones form |
|  | Size rule (Toggle On or Off) |
|  | Layers |
|  | Undo |
|  | Redo |
|  | Explode |
|  | Implode |




After an object (or objects) have been selected it may viewed from any of six axes or four isometric directions.














Other options specify whether zones, grid lines, etc., display.

The Formatting Toolbar

The **Formatting Toolbar** has a whole series of options concerning the appearance of annotation in the Virtual Reality store.





| Icon | Description |
|---|-----------------------|
|  | Add Label |
|  | Edit Selected |
|  | Delete Selected Label |







| Icon | Description |
|---|------------------------|
|  | Bold Text |
|  | Italic Text |
|  | Left Justify Text |
|  | Center Justify Text |
|  | Right Justify Text |
|  | Top Justify Text |
|  | Middle Justify Text |
|  | Bottom Justify Text |
|  | Text Color |
|  | Background Color |
|  | Font Type |
|  | Font Size |
|  | List of Current Labels |

The Standard Toolbar

The **Standard toolbar** enables the user to carry out a series of common actions.



| Icon | Description |
|---|--------------------|
|  | New Planogram |
|  | Open Store Manager |








| Icon | Description |
|---|---------------|
|  | Save Drawing |
|  | Print Options |
|  | Cut |
|  | Copy |
|  | Paste |
|  | AutoFill |




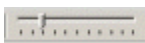
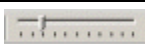


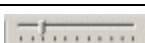

Options include creating a new planogram, opening Store Manager, Saving and Printing the drawing, etc.

The View Toolbar

The **View Toolbar** enables the user to set varying options for viewing the Virtual Reality environment.



| Icon | Description |
|---|----------------------------------|
|  | Toggle between 1 and 4 ViewPorts |
|  | Synchronize |
|  | Next view |
|  | Clash detection |
|  | Pivot around selected object |
|  | Lock view position |
|  | Lock X axis movement |

| Icon | Description |
|---|---------------------------|
|  | Lock Y axis movement |
|  | Lock Z axis movement |
|  | Set movement speed |
|  | Set texture quality |
|  | Set level of detail |
|  | Set front clipping plane |
|  | Set back clipping plane |
|  | Light Intensity |
|  | 2D Label Viewing Distance |

Options include setting the number of ViewPorts, pivoting around selected objects, locking movement in various directions and setting the level and type of detail visible in the drawing.

Note: There are no tooltips for the Movement Speed, Texture Quality, Level of Detail, Front Clipping Plane and Back Clipping Plane sliders. Instead, they show as prompts towards the right hand end of the status bar.

The Status Bar

The Status Bar contains a number of options and some useful information



Camera Position

This is on the left of the status bar. It gives the Cartesian coordinates of the current camera position, together with the angle the camera is pointing up or down and the horizontal direction it is pointing.

Floor Plan Options

These are in the middle position on the status bar.

- **Group On/Off**

Turning Grouping on or off determines the behavior when groups of fixtures (for example Gondola runs) are selected. If grouping is On, selecting a single fixture will select all associated fixtures - for example an entire gondola run. If Grouping is Off, fixtures can be selected one at a time without selecting the whole group.

- **Snap On/Off**

Turning Snap On or Off determines whether the currently selected fixtures will attach to the Snap Grid (Grid Lines option - View menu) or not.

- **Edit Mode/Walk Mode**

Toggleing between Edit Mode and Walk Mode determines whether the user can move in the floor plan. If Edit Mode is selected, the user will be fixed to one spot in the floor plan. This is convenient for editing shelves and merchandise. If Walk Mode is on, then the user can move in the floor plan via the mouse buttons and mouse wheel.

- **Connections On/Off**

If Connections are On, connection points will be displayed in the floor plan. If Connection Points are Off, then connection points are hidden.

Note: If Connection Point display is turned off (after being turned on), then the connection points can be hidden by pressing the Escape key.

Selected Item of Equipment

This is on the right of the status bar. It shows the position of the selected fixture, shelf or product.

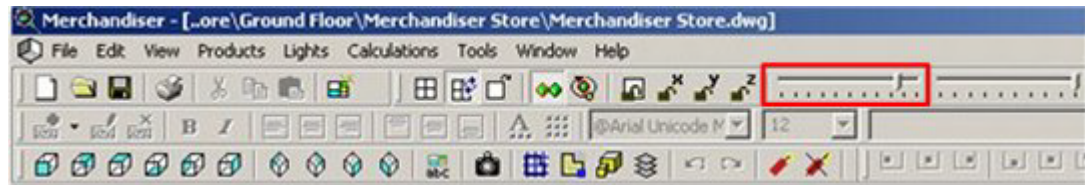
- If a fixture is selected, it will give the Fixture ID, together with the coordinates relative to the origin of the floor plan.
- If a shelf is selected, it will give the Shelf ID, together with the coordinates relative to the origin of the parent fixture.
- If a product is selected, it will give the Product ID, together with the coordinates relative to the origin of the parent shelf or fixture.

Movement with the Mouse

Note: to enable movement in the floor plan, Walk Mode in the status bar must be toggled on. If Edit Mode is selected, no movement will be possible.

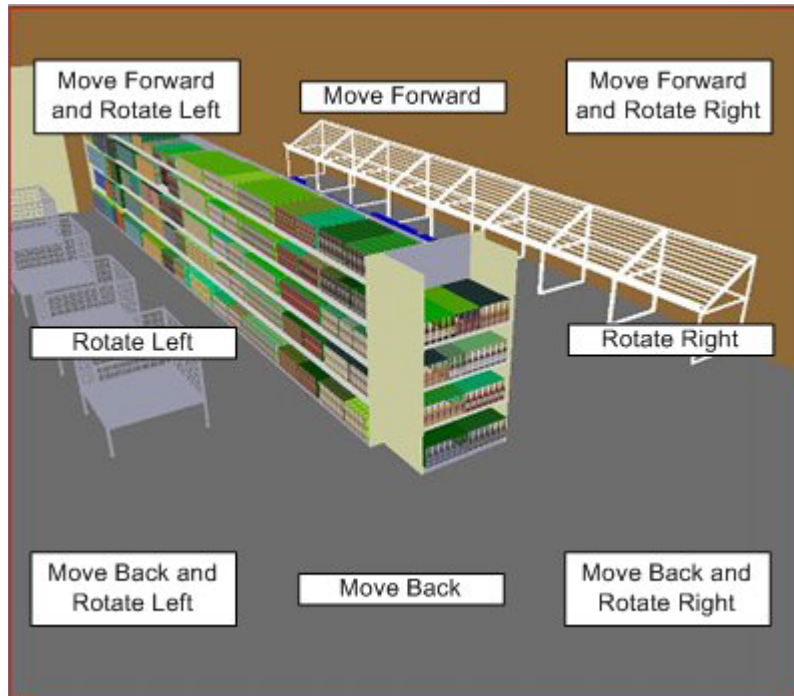
Movement Speed

Movement speed in the floor plan is determined by the setting in the Movement speed slider control.



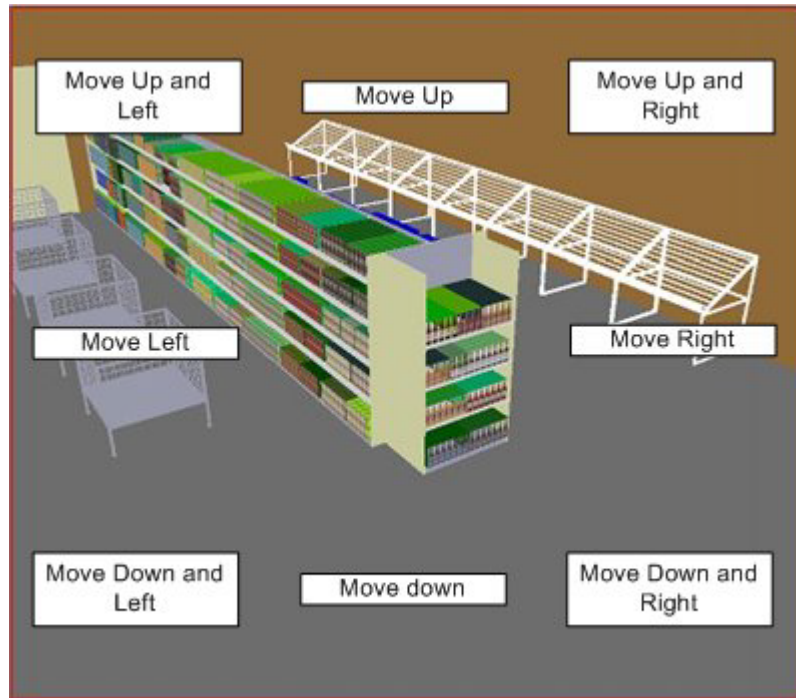
Left Mouse Button

The left mouse button enables users to move forward and back or rotate left and right in the floor plan. To do this position the mouse pointer at the appropriate position in the floor plan, then hold down the left mouse button.



Right Mouse Button

The right mouse button enables users to move up, down, left or right in the floor plan. To do this position the mouse pointer at the appropriate position in the floor plan, then hold down the right mouse button.



Mouse Wheel

How the mouse wheel operates depends on whether Walk or Edit mode has been selected in the status bar.

- In Walk mode, rotating the mouse wheel forward or back rotates the viewpoint up or down.
- In Edit mode, rolling the mouse wheel forward or back enables the user to move forward or back on the drawing along the currently selected axis of view.

Other Movement Options in the Floor Plan

Pivoting about a Selected Object

The Pivot About Selected Object option in the View toolbar enables the user to rotate about a specific point in the drawing. It is toggled On and Off by clicking on it.



Pivot about Selected Object will only work if one or more objects have been selected in the floor plan. Once selected, the user can pivot about the selected objects by holding down the left mouse button. They can move forward or back from the selected objects by rolling the mouse wheel backwards or forwards.

Viewing Objects from Specified Directions

Objects can be viewed from specified directions by clicking on the appropriate icons on the Directions and Product Text toolbar.







First, select the objects to be shown by left clicking on them. Next, click on an icon to show the specified viewpoint.

Depending on the icon selected, the selected objects can be shown from the front or back, above or below, or left and right. They can also be shown from one of four isometric views.

Locking Movement in Specified Planes

The View Toolbar contains several controls for restricting the available movement in the drawing.



| Icon | Meaning |
|---|----------------------|
|  | Lock View Position |
|  | Lock X Axis Movement |
|  | Lock Y Axis Movement |
|  | Lock Z Axis Movement |

The options can be toggled on and off by clicking on them.

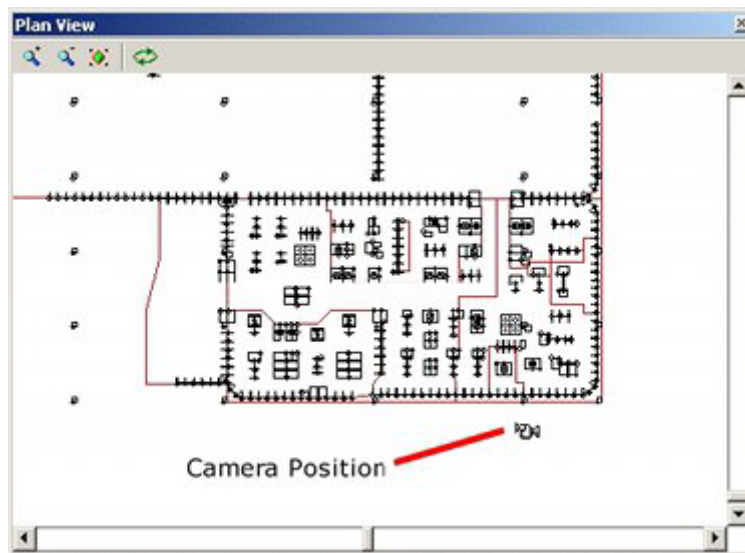
- Lock View Position will freeze the drawing with no movement possible
- Lock X Axis Movement will freeze the drawing with respect to left and right movement.
- Lock Y Axis Movement will freeze the drawing with respect to forward and back movement.
- Lock Z Axis Movement will freeze the drawing with respect to vertical movement.

Plan View

The Plan View Option can be activated from the Plan View option on the View pull down menu.



This brings up the Plan View window.



This shows a plan view of the store and the current position of the camera within the store.

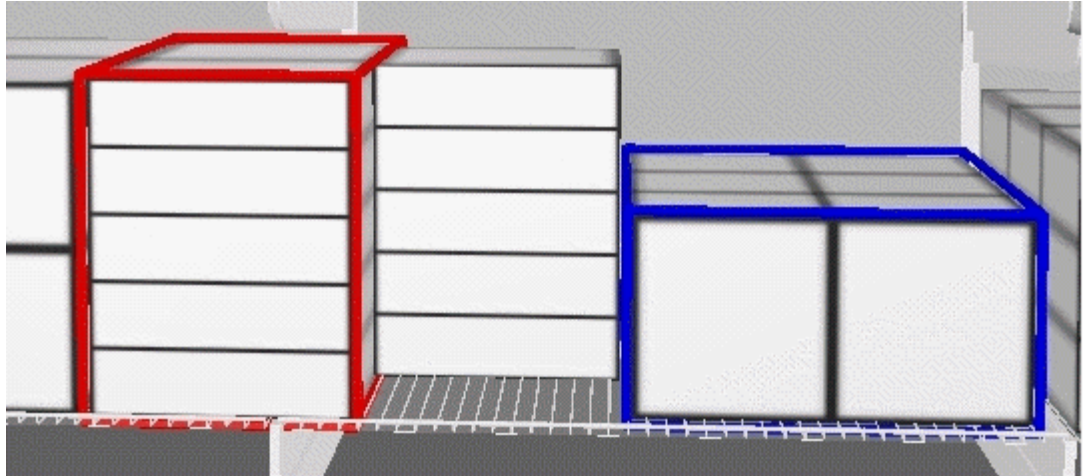
The camera position can be repositioned by holding down the left mouse key and dragging it to its new position.

Selecting and De-selecting Objects

Objects are best selected when in Edit Mode (status bar). With the user 'fixed' at one specific point in the floor plan, objects can be selected by left clicking them.

Standard Selection Set

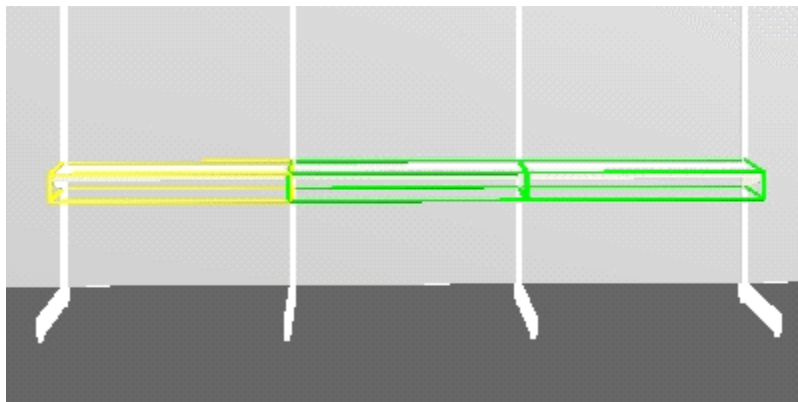
Standard Selection Sets occur when the objects are not in a Group or Family. The first object selected for a Standard Selection Set will be enclosed in a red frame. Subsequent objects selected for a set of objects will be enclosed in blue frames.



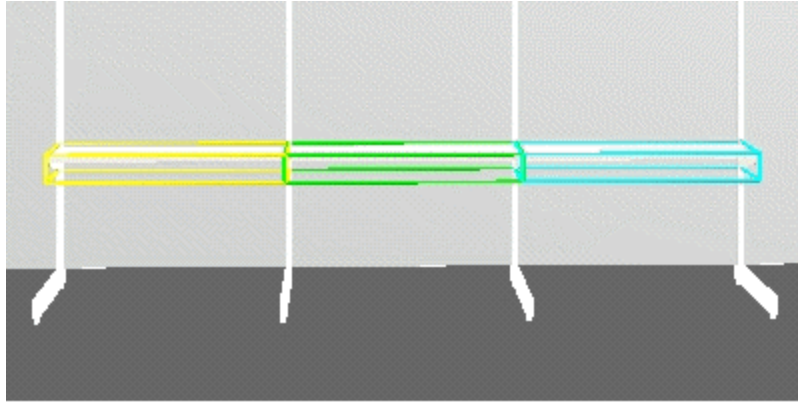
Individual objects can be de-selected by left clicking on them with the mouse for a second time. All objects in the Standard Selection Set can be de-selected by clicking on the first selected object (red frame) for a second time.

Family and Group Selection Sets

Objects that have been put into Families or Groups will be enclosed by yellow and green frames.



If Grouping is Off it is also possible that cyan frames will be visible.



If Grouping is On, then all objects in the set can be selected or de-selected by clicking on any member of the set. If Grouping is Off, individual objects can be de-selected by left clicking on them with the mouse for a second time. All objects in the set can be de-selected by clicking on the first selected object (yellow frame) for a second time.

General De-Selection

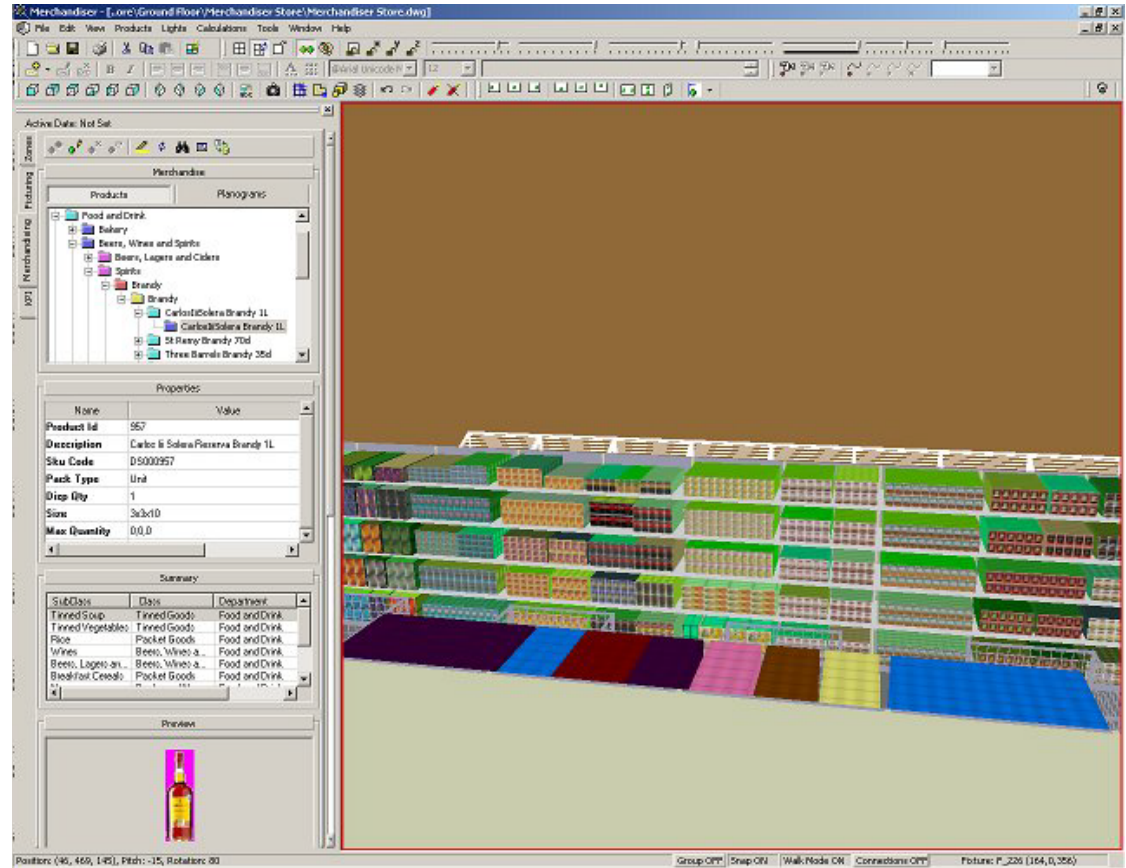
All currently selected objects can be de-selected by <Ctrl + D>.

Floor Plan Display Options

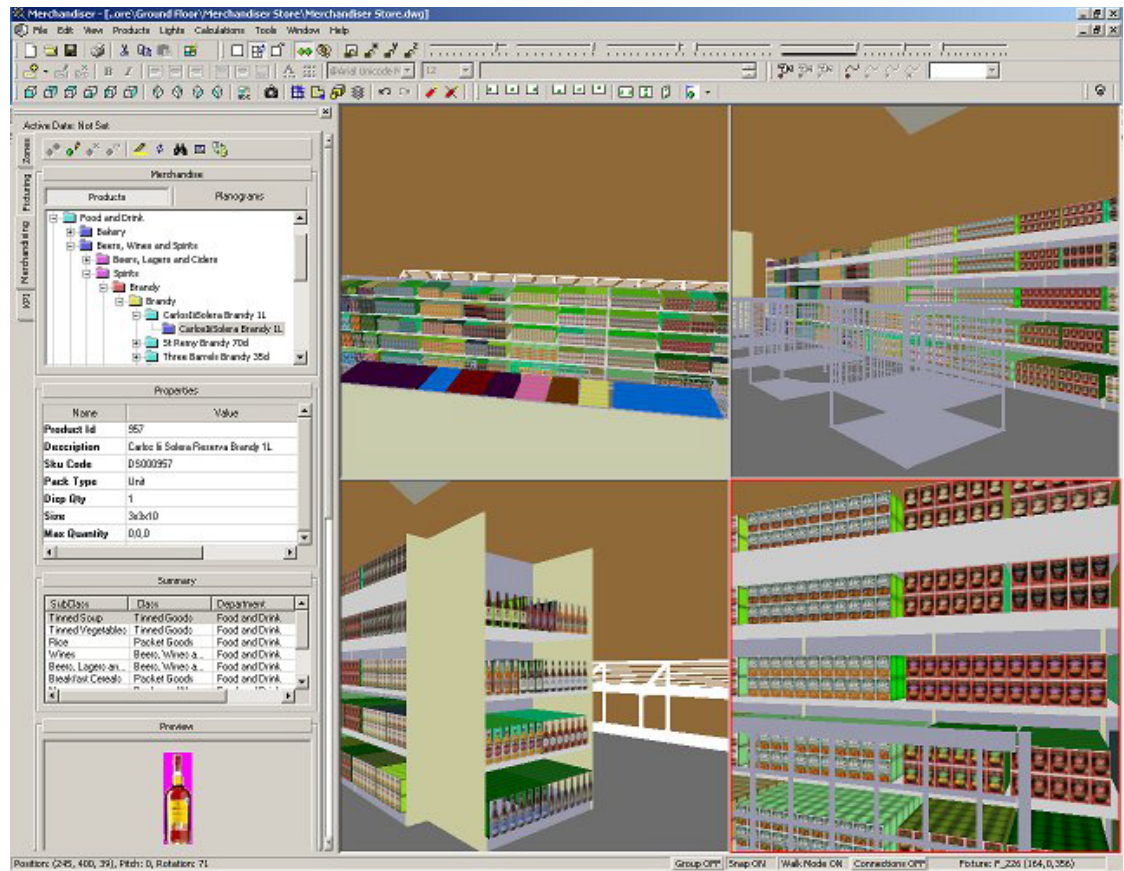
Overview of Single and Four ViewPorts

Merchandise can be viewed using single or multiple ViewPorts.

A single ViewPort will just show one image of the floor plan.



Changing to 4 ViewPorts will show four images of the floor plan.



These 4 ViewPorts can either be treated as separate entities or they can be synchronized.

If used as separate entities, they can be used, for example, to move merchandise from one set of shelves to another.

If used while synchronized they can be used, for example to show three different KPI's (Key Performance Indicators), for the same part of the store.

Setting Up and Switching Between ViewPorts

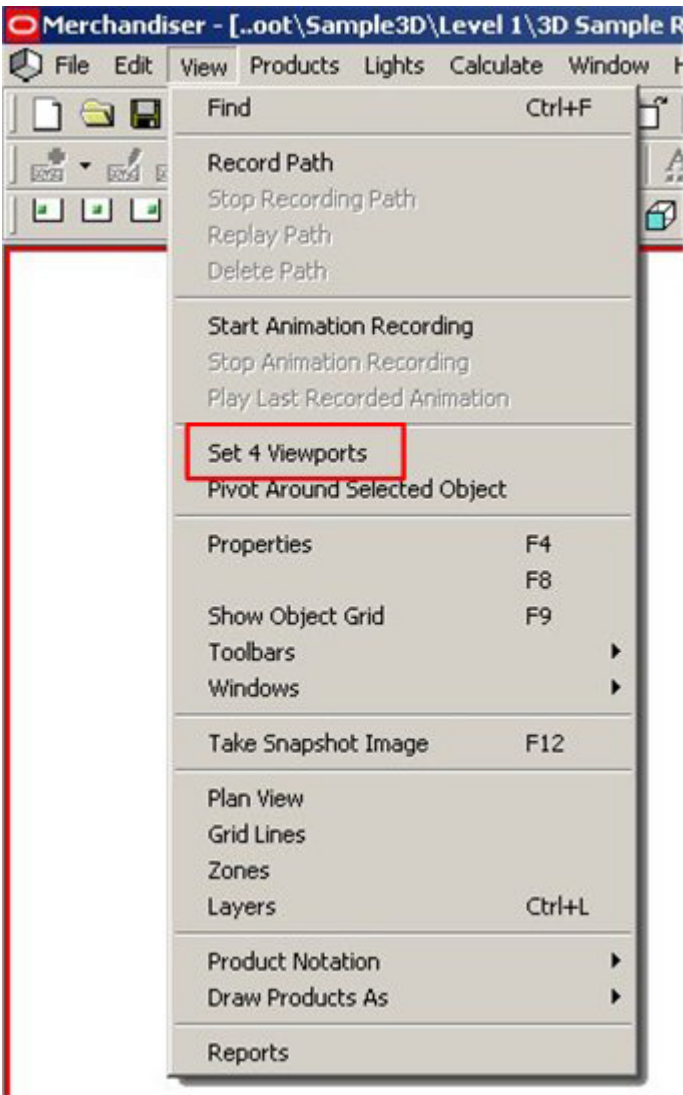
When the drawing opens, it will show a single view of the store plan.

(If 4 ViewPorts were enabled when the drawing was last saved and closed, the top left ViewPort will be displayed when the drawing is re-opened).

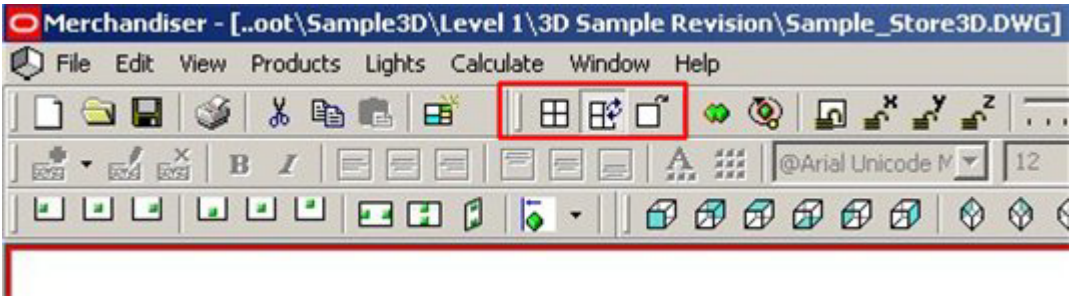
Starting/returning to the 4 ViewPorts option can be achieved using the menus or toolbars.


If using the View pull down menu, clicking on Set 4 ViewPorts will change the display from one to four viewpoints.

If the user is already using four viewpoints, then the pull down menu will read Set 1 view point, enabling the user to toggle back to a single view point.



Alternatively, the user can click on the appropriate icon in the toolbar. These will toggle between Show 4 ViewPorts and Show 1 viewport.
The Next View icon toggles between the available views.



| Icon | Option |
|---|-----------------------|
|  | Switch to 4 ViewPorts |



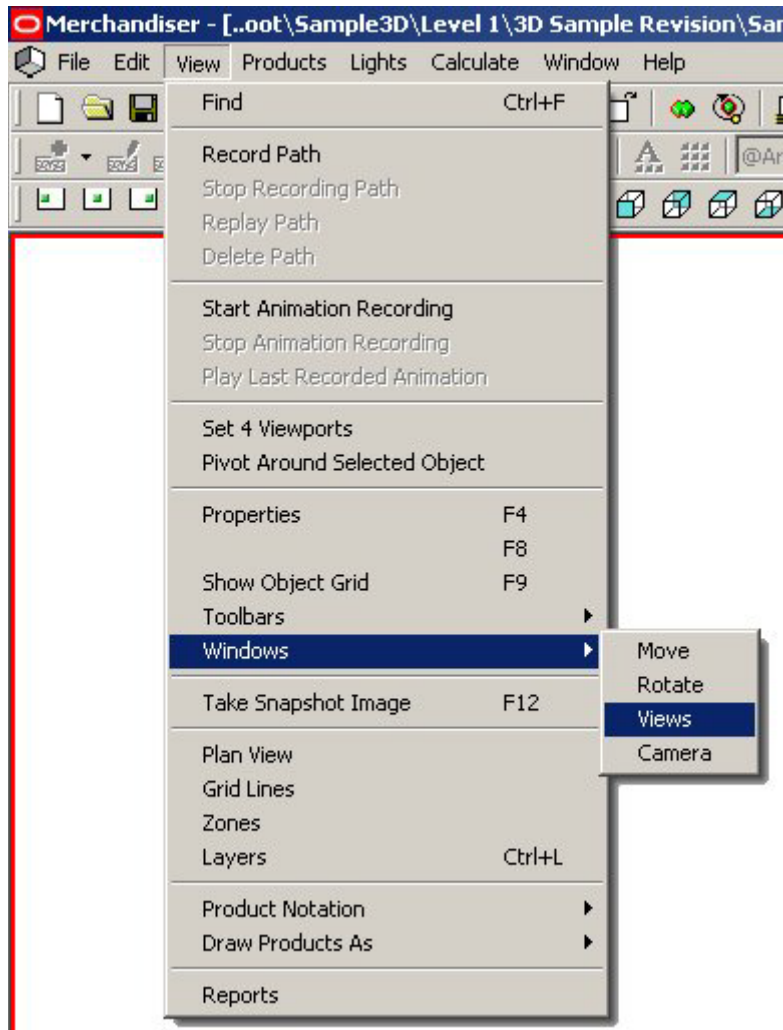
Switch to 1 ViewPort



Next view

Saving and Restoring ViewPorts

While working in a Virtual Reality store, it is possible to **save ViewPorts** for later restoration. To do this, the user should select the Windows > Views option from the View pull down menu.



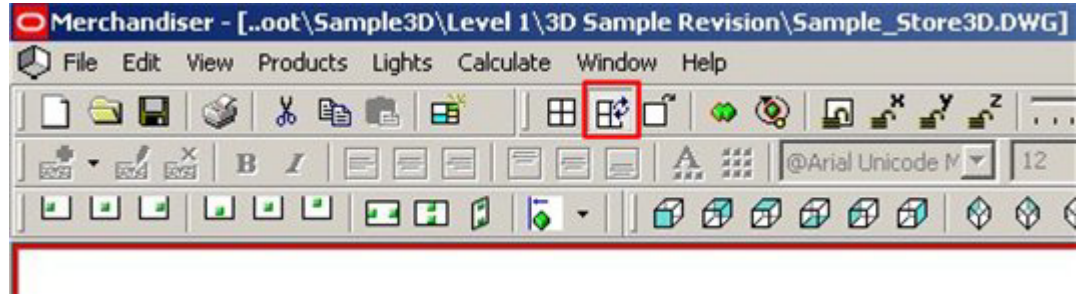
This will bring up the Views dialogue box.



This enables users either to save or restore specific ViewPorts

Synchronizing ViewPorts

The views in the 4 ViewPorts can be **synchronized** if required. This is achieved from the toolbar.



Clicking on the Synchronize icon will immediately switch all four viewpoints to that they mirror the viewpoint in the currently active window.

Clicking on the Synchronize icon again will desynchronize the four viewpoints to that they can be manipulated independently.

Note: If the user has toggled from Show 1 Viewport to Show 4 ViewPorts and 3 ViewPorts are blank, clicking on the synchronize icon is a quick way of populating the blank ViewPorts with views.

Overview of Object Display

The way objects display in a store plan can be changed in three ways in Merchandiser. The drawing is subdivided into layers and each class of object (fixture, fitting, product, etc), has its own specific layer. By changing the properties of the layer, the user can change how the objects on that layer display.

Locking the Layer

Locking the layer prevents objects on that layer being moved or deleted.

Changing the Visibility

It is possible to turn layers on or off. If a layer is turned on objects on it are visible. If a layer is turned off, they are hidden.

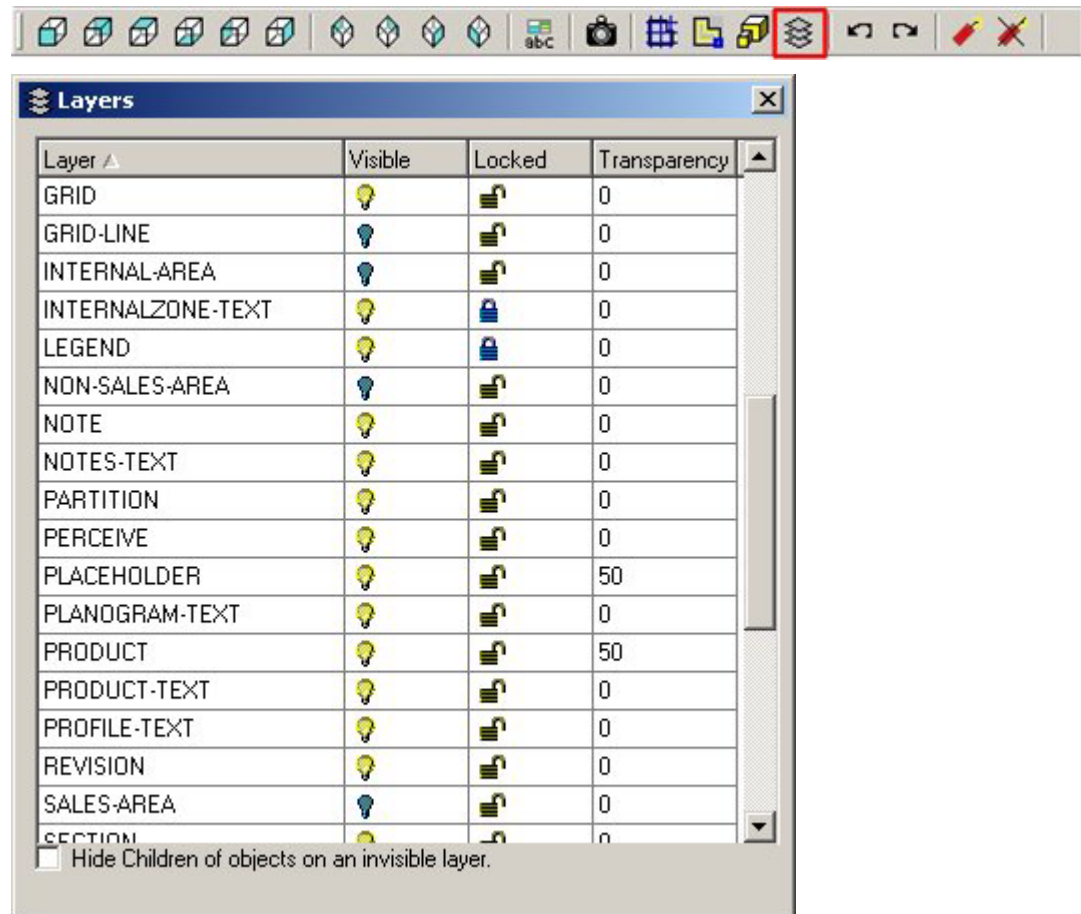
Changing the Transparency

The transparency values for a layer (and the objects on that layer) can be changed anywhere within a range of 0% - 100%. If the transparency is set to 0%, objects are completely opaque. If the transparency is set to 100% objects are completely transparent.



Overview of Locking Objects

It is possible to **lock objects** so that they cannot be altered when in place in the Merchandiser environment.

This is done by using the locking option in the Layers dialogue box, accessible from the View toolbar



This shows the layers and whether they are locked or not.

| Icon | Description |
|---|----------------|
|  | Layer unlocked |
|  | Layer locked. |

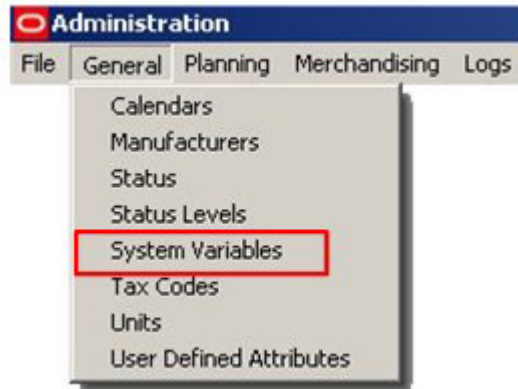
The lock for each layer can be toggled on or off by clicking on the appropriate icon.

Note: Depending on the system variable settings, some layers will be automatically locked depending on which Object Browser tab the user is in.

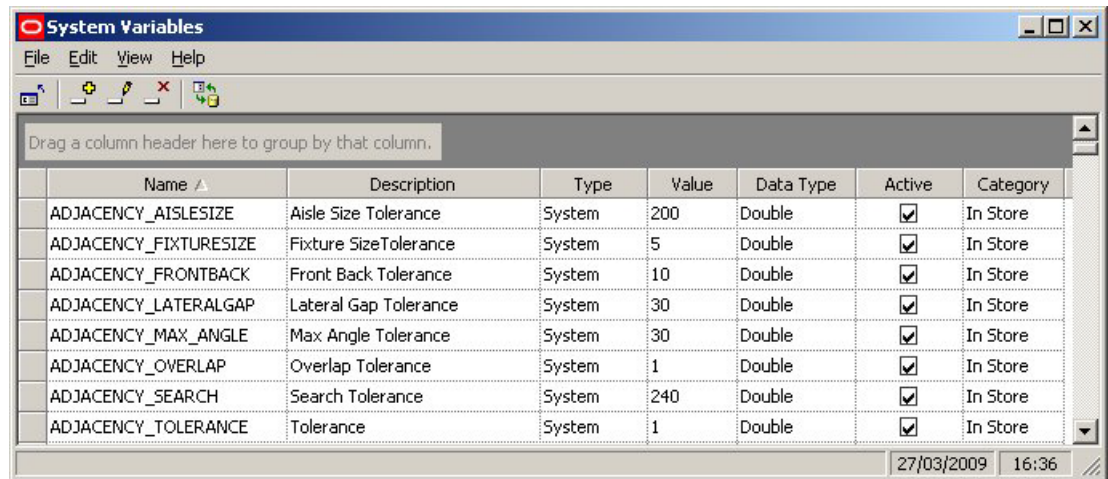
If the system variable is enabled, when in the Fixturing Tab, all layers associated with merchandising are locked. Similarly, when in the Merchandising Tab, all layers associated with fixturing are locked.

LOCK_OBJECTS_ON TAB_CHANGE System Variable

The LOCK_OBJECTS_ON_TAB_CHANGE system variable is accessed from General Menu in the Administration Module.



This brings up the System Variables dialogue box.



LOCK_OBJECTS_ON_TAB_CHANGE can be set to 0 or 1.

If set to 0, the layers will not be locked when changing from the Fixturing to the Merchandising Tabs and vice versa.

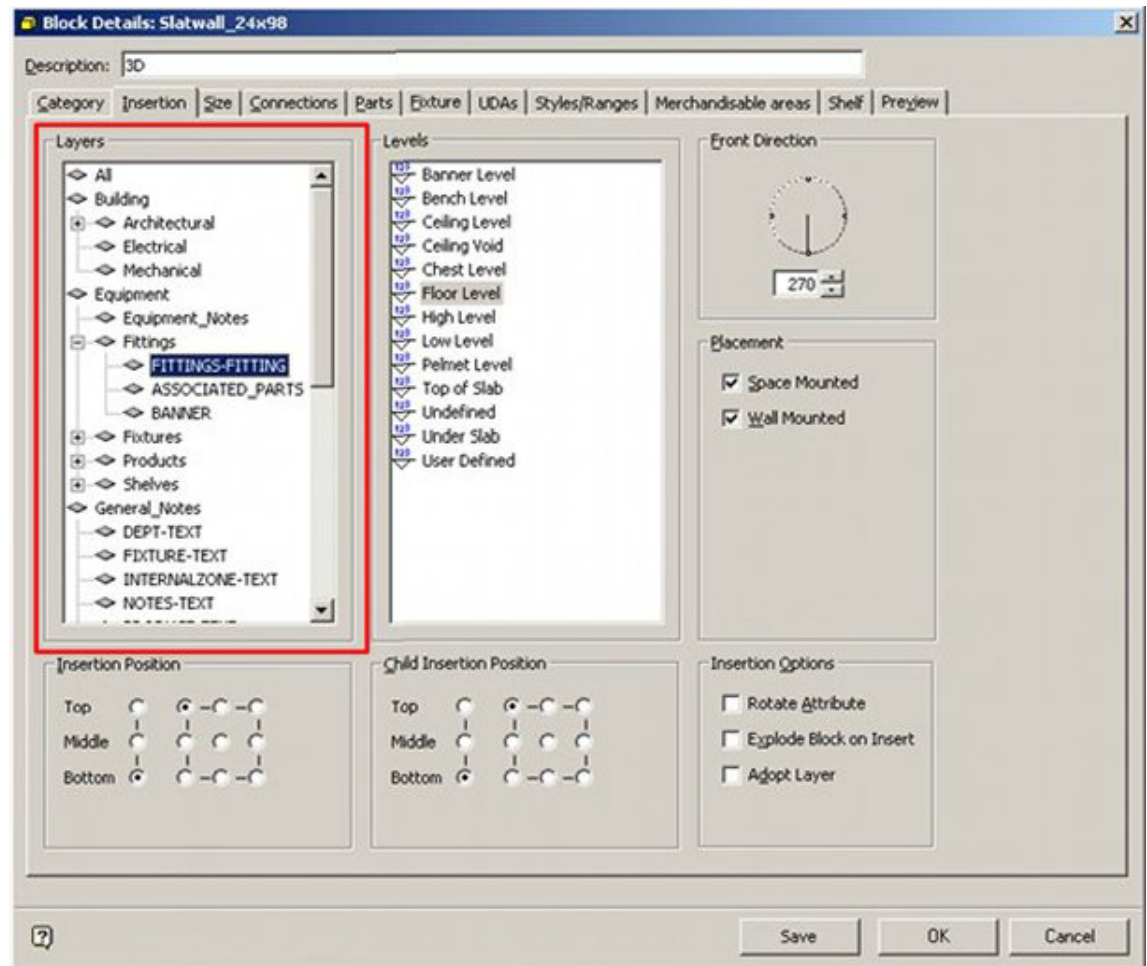
If set to 1, the layers will be automatically locked.

Note: Changing (and especially deleting) system variables can have a significant effect on the way Macro Space Management operates. It is recommended that Macro Space Management users consult their System Administrator or consult Oracle's Technical Support Team.

Locking Objects

Locking of specific classes of objects is achieved by locking the layers that those objects are placed on.

The layer for the majority of objects, such as fixtures, fittings and shelves, will be determined when the object is created in Fixture Studio:



Note: Layers selected for classes of objects should be consistent. If they are not then only some of the class of objects will be locked when a specific layer is turned off.

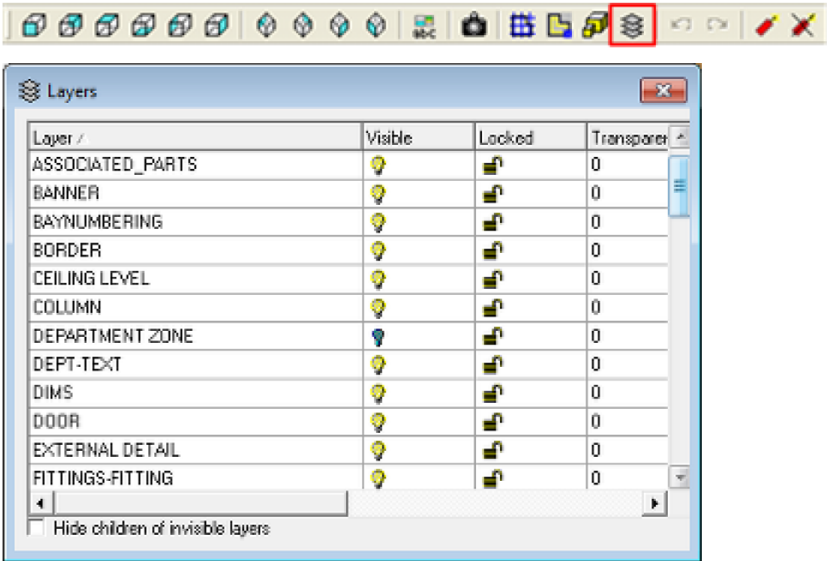
- Layers for zones will be determined by the Zone Type.
- Fixtures and fittings should be placed on specifically defined and consistent layers.
- Products are placed on their own specific layer.
- Locking layers is particularly useful for any object that is on the building layer, i.e. pillars, which should not be modified in the Merchandiser environment.
- Locked objects can still be selected, so that properties can be determined, etc.
- When locked objects are selected, a small warning will appear at the bottom of the screen.



Note: If objects are locked, then they cannot be deleted, moved, etc. If it is desired to do this, the layer must first be unlocked.



Changing the Transparency and Visibility of Objects

The transparency and visibility of objects can be changed in the floor plan. This is done by using the options in the Layers dialogue box, accessible from the View toolbar.



Changing the Visibility of Objects

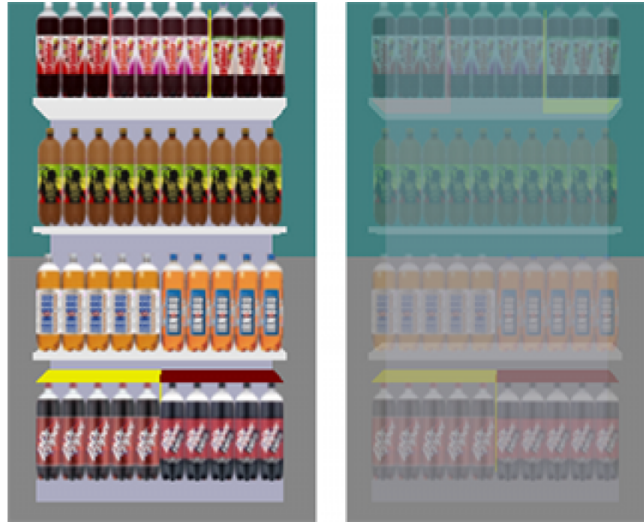
When objects are placed in a Merchandiser floor plan they go onto a specific layer in that floor plan. For example fixtures go on the FIXTURES layer, Fixture Text on the FIXTURE-TEXT layer. The layer can be turned on or off. If the layer is turned off, that layer and all the objects on it will no longer be visible in the floor plan. They can be restored to view by turning the layer back on.

| Icon | Description |
|---|------------------|
|  | Layer turned on |
|  | Layer turned off |

If is desired to show fixtures without any accompanying text, the FIXTURES layer can be left turned on, while the FIXTURE-TEXT layer can be turned off. The fixture text can be returned to view at any time by turning the FIXTURE-TEXT layer back on.

Changing the Transparency of Objects

The transparency of objects can also be modified in the Layers dialog box. Each specific layer can have its transparency set to any value from 0 (completely opaque) to 100 (completely transparent). In the example below, a fixture and its shelves and products are shown fully opaque and then 75% transparent.



Planogram Publishing

Overview of Planogram Publishing

Note: The way that planogram publishing performs in the Planner and Merchandiser modules is dependent of settings in other modules. This section is included so that users of the Planogram Publishing Functionality can discuss requested changes with the Administrators.

Note: the default settings for the Planogram Publishing dialog box are derived from settings in the Planogram Publishing Configuration dialog box in the Administration module.

The purpose of publishing a planogram is to disseminate information on the type, quantity and location of shelves and merchandise to those tasked with implementing the change. Publishing a planogram design can be done in hard copy or electronic format. The date at which this is executed depends on the Publish Date set in the Details tab of the Planogram Design dialog box in the Merchandiser module.

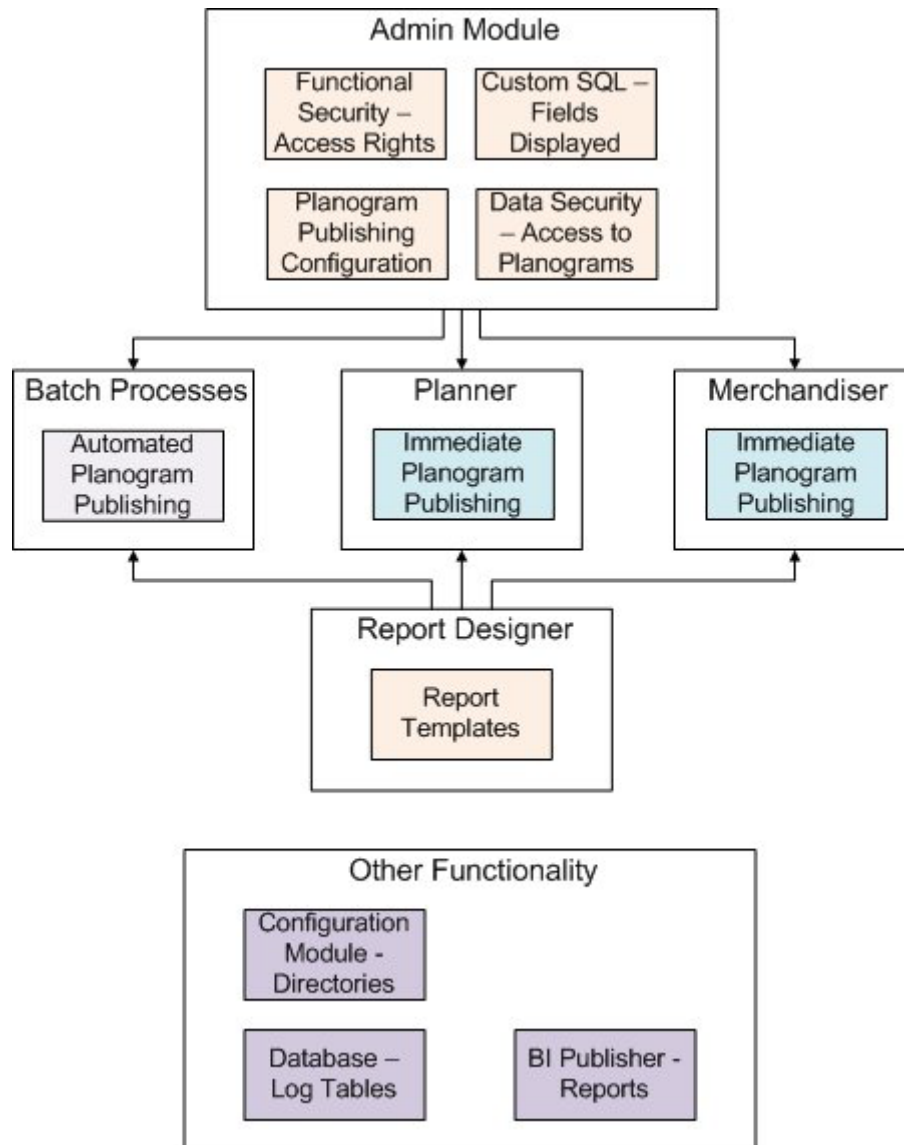
The screenshot shows a software window titled "Planogram: 1_Bay_Bottled_Coke". It has a tabbed interface with tabs for Details, Properties, Stores, Seasons, Fixture Styles, Design, Financial, and UDAs. The "Details" tab is active, displaying various fields for planogram configuration. The fields are organized into two columns. The left column includes Name, Description, Associated Document, Size Description, Status, Family Code, Assortment Code, Temperature Range, Weight Range, Publish Date, Effective Date, Expiry Date, Stock Type, Autofill Rule, Preferred Template, and Can be Split. The right column includes Revision, Client Code, Buddy Family Code, Units, Time Units, Manpower Set Time, Manpower Dismantle Time, Category Role, Inventory Model, Rank, Traffic Flow, and Requires Power. At the bottom right, there are buttons for OK, Save As, and Cancel.

| Field | Value |
|-------------------------|---|
| Name | 1_Bay_Bottled_Coke |
| Revision | 1 |
| Description | 1 Bay Bottled Coke - 3 Shelves |
| Associated Document | |
| Size Description | 36 x 24 x 72 |
| Status | Current |
| Family Code | |
| Assortment Code | |
| Temperature Range | Ambient Goods |
| Weight Range | < No Ranges Selected > |
| Publish Date | 28 April 2011 |
| Effective Date | 10 May 2011 |
| Expiry Date | 31 December 2999 |
| Stock Type | Normal |
| Autofill Rule | < No Rule Selected > |
| Preferred Template | < No Template Selected > |
| Can be Split | <input type="checkbox"/> |
| Client Code | |
| Buddy Family Code | |
| Units | imperial inch |
| Time Units | standard hour |
| Manpower Set Time | 4.00 |
| Manpower Dismantle Time | 2.00 |
| Category Role | Routine |
| Inventory Model | |
| Rank | 0 |
| Traffic Flow | <input checked="" type="radio"/> Left to Right <input type="radio"/> Right to Left |
| Requires Power | <input type="checkbox"/> |

The Planogram Publishing functionality is used to disseminate planogram designs to specified printers or Windows folders to facilitate implementing those planogram designs.

Note: a retail organization will still need a method of distributing the planogram designs from the printer or Windows folder to the end user.

The basic method of operation is as follows:



1. Administration Module

The Administration module is used to configure access to the different parts of the functionality. It is also used to assign permissions to print or publish specific floor plans and planograms. Finally, it is used to configure how the batch processes for publishing floor plans will work. There are three options that affect publishing and printing of floor plans.

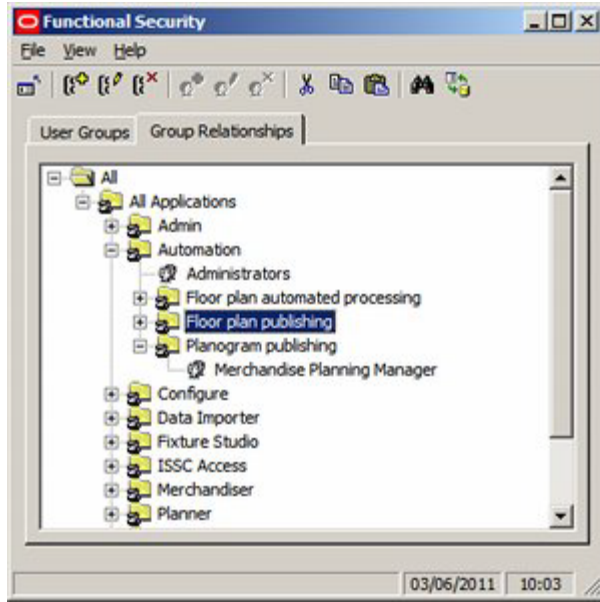
- The Functional Security option (Security menu) allows Administrators to control who can run Planogram Publishing as a batch process. It also controls who can access Immediate Planogram Publishing in the Planner Module. It also allows Administrators to control who can access Report Designer to create report templates for publishing planogram designs.
- The Data Security option (Security menu) allows Administrators to control what planograms a user can print or publish from in the Planner and Merchandiser modules (and in In-Store Space Collaboration).

- The Custom Query dialog box allows an Administrator to specify what fields will appear in the Immediate Planogram Publish dialog box in the Planner module.
- 2. Configuring Outputs for Batch Process
The outputs for the batch process output of Planograms are configured in the administration module using the Planogram Publishing Configuration dialog box.
- 3. Running as a Batch Processes
Planogram Publishing can be run as a batch process - typically run overnight so that this processor hungry tasks can be executed without affecting the manual users of the system. The settings determining how this operates are set in the Planogram Publishing Configuration dialog box.
The rights to do this are set in Functional Security in the Administration Module.
- 4. Planner Module
Within the Planner module, the Immediate Publishing of Floor Plans functionality can only be used by users for whom permissions have been granted in the Administration module.
- 5. Merchandiser Module
Within the Merchandiser module, the Immediate Publishing of Floor Plans functionality can only be used by users for whom permissions have been granted in the Administration module.
- 6. Report Designer
Report Designer can be used to create report templates that determine the format the planogram design is published in.
- 7. Other Functionality
There are three other items of functionality that affect planogram publishing.
 - Configuration Module - the Directories tab allows users to specify where the root folders holding published planograms are located. Sub-folders holding specific planograms will be created as children of this root folder.
 - Tables in the Macro Space Planning database hold the results of planogram publishing operations.
 - BI Publisher (or a similar application) can be used to generate reports based on the information held in the database - for example the names and results of planograms that have been published.

Permissions to Run Immediate Planogram Publishing

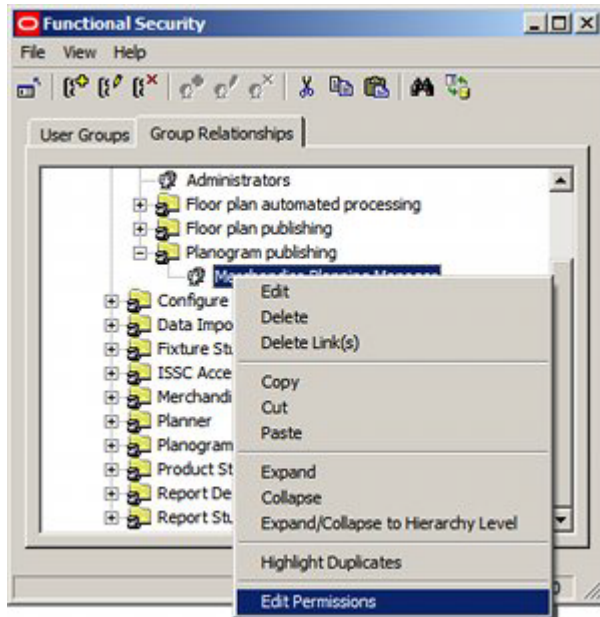
Before a user can run Immediate Planogram Publishing, they must first have been assigned the appropriate permissions in the Administration module. This is done using the Functional Security dialog box accessed from the Security menu.

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

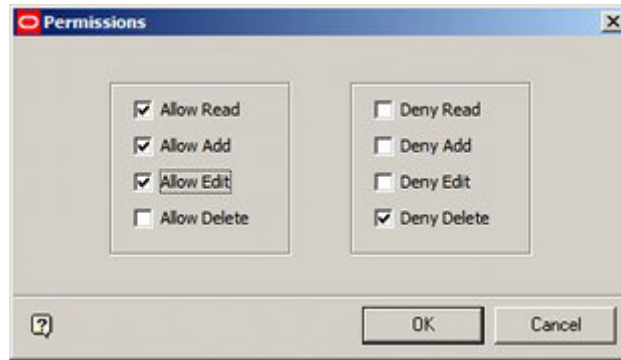


Users assigned to the Automation Command Group (such as the Administrator User Group) can run all Automation Functionality. User Groups assigned to the child Command Groups (Floor plan automated publishing, Floor plan publishing, Planogram publishing) have the ability to use that functionality. In the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

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



This will bring up the Permissions dialog box.



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

Dates Planograms will be Published

The purpose of publishing a planogram is to disseminate information on the type, quantity and location of shelves and merchandise to those tasked with implementing the change. Publishing a planogram design can be done in hard copy or electronic format. The date at which this is executed depends on the Publish Date set in the Details tab of the Planogram Design dialog box in the Merchandiser module.

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

Planogram: 1_Bay_Bottled_Coke

Details | Properties | Stores | Segsons | Fixture Styles | Design | Financial | UDAs

Name: 1_Bay_Bottled_Coke Revision: 1

Description: 1 Bay Bottled Coke - 3 Shelves

Associated Document:

Size Description: 36 x 24 x 72

Status: Current Client Code:

Family Code:

Buddy Family Code:

Assortment Code:

Units: imperial inch

Temperature Range: Ambient Goods Time Units: standard hour

Weight Range: < No Ranges Selected > Manpower Set Time: 4.00

Publish Date: 28 April 2011 Manpower Dismantle Time: 2.00

Effective Date: 10 May 2011 Category Role: Routine

Expiry Date: 31 December 2999 Inventory Model:

Stock Type: Normal Rank: 0

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

Preferred Template: < No Template Selected > Requires Power: ☐

Can be Split: ☐

OK Save As Cancel

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

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

Planogram Publishing Configuration

Output | Template | Collation | Validation

Format
☒ PDF File
☐ Print
 Setup...

Directory Structure
 Sample Directory:
 No sample data available
☐ Organize by Planogram Hierarchy
☒ Create Planogram Department Sub-folder
☒ Create Planogram Class Sub-folder
☒ Create Planogram SubClass Sub-folder
☒ Organize by Store
☒ Mimic Hierarchy
 Cluster Type: Regional
☐ Include Week Number

General
 System Publishing Lead Period (days): 30
 Lead Time Tolerance (hours): 0
 Re-publish planogram if files are missing: ☒

Filename Structure
 Sample Filename:
 No sample data available
 Prefix:
 Field Separator:
 Suffix:
☒ Include Store Code
☐ Include Planogram Department
☐ Include Planogram Class
☐ Include Planogram SubClass
☒ Include Planogram Name
☐ Include Planogram Description
☐ Include Planogram Code
☐ Include Planogram Import Code
☐ Include Planogram Revision Number
☒ Include Date
☒ Include Effective Date
 Format: DD-MM-YYYY
☐ Include Week Number

OK Cancel

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

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

Criteria for Publishing Planograms

There are two criteria for publishing planograms:

1. Publish Date has been exceeded

If the Publish Date set in the Planogram Design dialog box in Merchandiser exceeds the current date (taking into account the Lead Time Tolerance (Hours) setting), the floor plan will be published.

2. Planogram has been Updated since it was Published

It is possible that the floor plan may have been modified after it was last published - for example of a later revision has been created. The condition for this is that the Last

Modified date is greater than the Last Published Date. These can be seen on the Properties tab of the Planogram Design dialog box in the Merchandiser module.

The screenshot shows a software window titled "Planogram: 1_Bay_Brandy". It has a tabbed interface with the following tabs: Details, Properties (selected), Stores, Seasons, Fixture Styles, Design, Financial, and UDAs. The Properties tab displays the following information:

| | | | |
|-------------------------------|---------------|----|----|
| Source: | MSM | | |
| Import Identifier: | | | |
| Imported Name: | | | |
| Last Imported: | | | |
| Parent Product: | Spirits | | |
| Created: | 28 April 2011 | | |
| Created By: | pw | | |
| Last Modified: | 10 May 2011 | | |
| Last Modified By: | pw | | |
| Last Published: | | | |
| Size (Length, Depth, Height): | 36 | 25 | 72 |
| Number of Bays: | 1 | | |
| Total Number of Facings: | 44 | | |

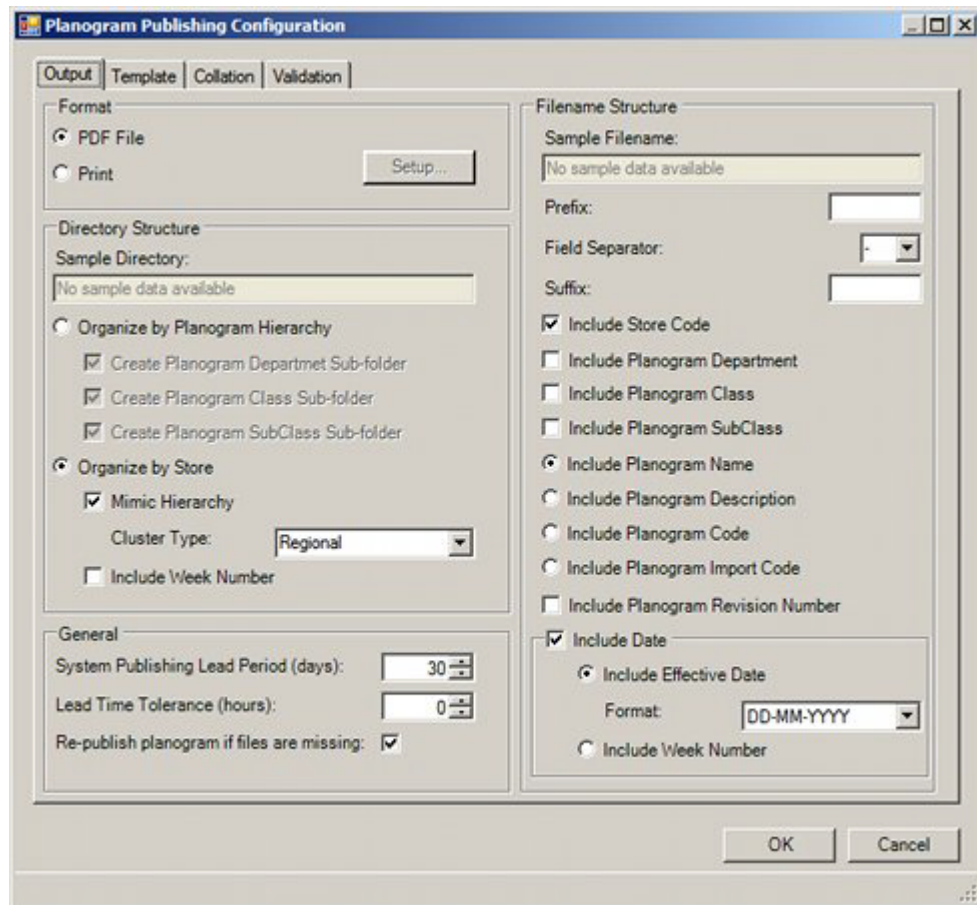
At the bottom right of the dialog box are three buttons: OK, Save As, and Cancel.

Note: Planograms may also be republished if the Republish planogram if files are missing option has been checked in the Planogram Publishing Configuration dialog box.

Locations Planogram Designs will be Published To

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

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



The dialog box is titled "Planogram Publishing Configuration" and has four tabs: "Output", "Template", "Collation", and "Validation". The "Output" tab is currently selected.

Format:

- ☒ PDF File (with a "Setup..." button next to it)
- ☐ Print

Directory Structure:

Sample Directory: [No sample data available]

- ☐ Organize by Planogram Hierarchy
 - ☒ Create Planogram Department Sub-folder
 - ☒ Create Planogram Class Sub-folder
 - ☒ Create Planogram SubClass Sub-folder
- ☒ Organize by Store
 - ☒ Mimic Hierarchy
 - Cluster Type: [Regional]
 - ☐ Include Week Number

General:

- System Publishing Lead Period (days): [30]
- Lead Time Tolerance (hours): [0]
- Re-publish planogram if files are missing: ☒

Filename Structure:

Sample Filename: [No sample data available]

Prefix: []

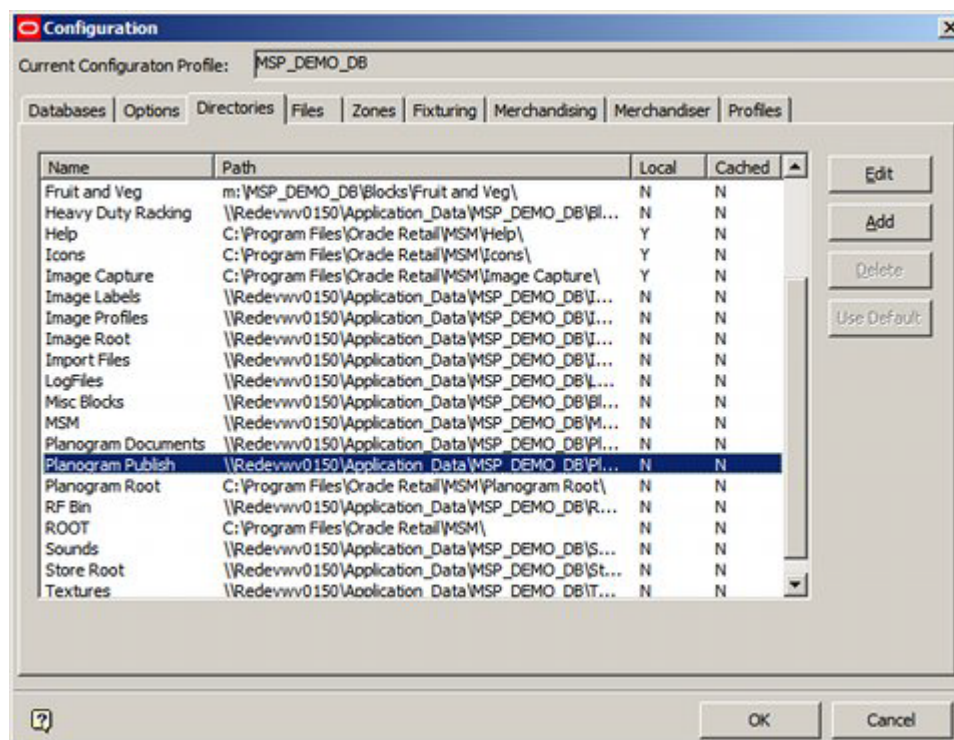
Field Separator: []

Suffix: []

- ☒ Include Store Code
- ☐ Include Planogram Department
- ☐ Include Planogram Class
- ☐ Include Planogram SubClass
- ☒ Include Planogram Name
- ☐ Include Planogram Description
- ☐ Include Planogram Code
- ☐ Include Planogram Import Code
- ☐ Include Planogram Revision Number
- ☒ Include Date
 - ☒ Include Effective Date
 - Format: [DD-MM-YYYY]
 - ☐ Include Week Number

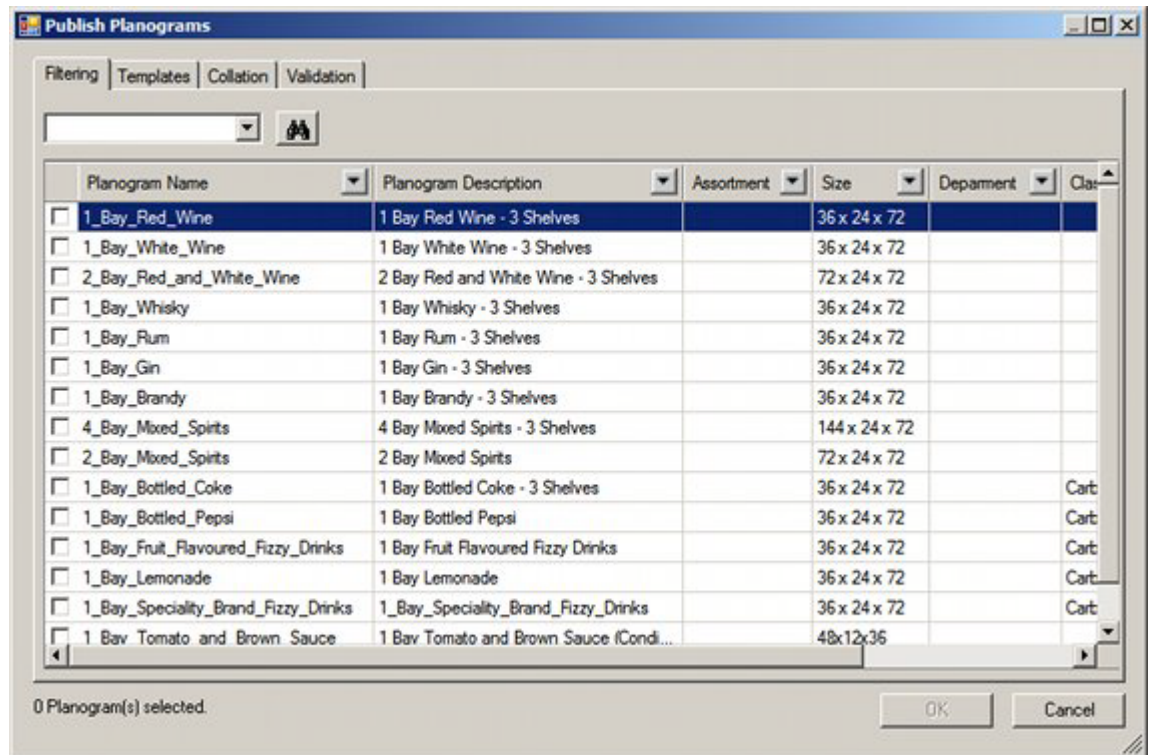
Buttons: OK, Cancel

This dialog box allows Administrators to specify the directory structure, file format and file name that will be used when planogram designs are published. The starting point for the location planograms will be published to in electronic form can be seen in the details for the Planogram Publish system directory specified in the Directories Tab of the Configuration module.



The Filtering Tab

The Filtering Tab is used to select the planograms to publish.



Find

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



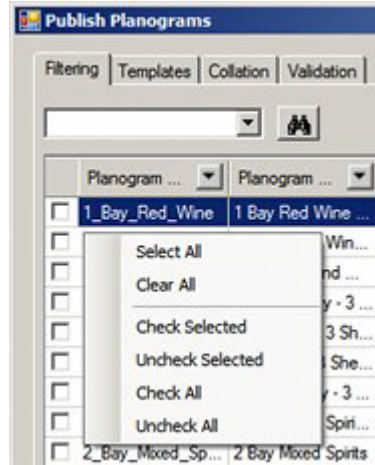
Find operates with explicit or implied wild cards. The explicit wild cards are:

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

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

Right Click Menu

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



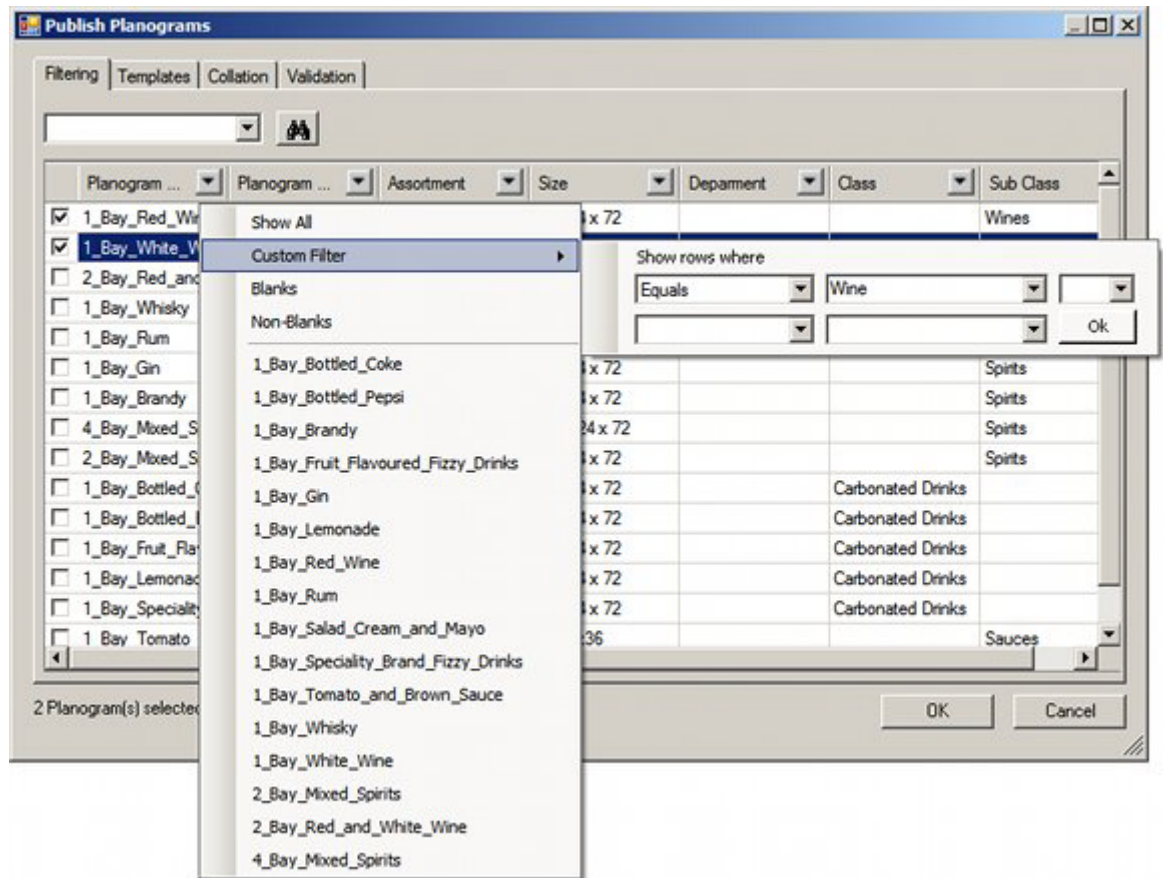
- Select All will select (but not check) all rows of data
- Clear All will deselect (but not uncheck) all rows of data
- Check Selected will check all rows of selected data
- Uncheck Selected will uncheck all rows of selected data
- Check All will check all rows of data
- Uncheck All will uncheck all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

Selecting Planograms to Process

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

Using Filters in the Filtering Tab

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



They are used as follows:

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

The Template Tab

The Template Tab is used so specify the type of report that will be used to output details of the planogram design.

Print Planograms

Filtering | **Templates** | Collation

Options

☐ Use associated planogram document

☐ Raise error if associated planogram document is missing

☐ Use template if associated planogram document is missing

☒ Use template

☐ Use planogram's preferred template, if defined

☒ Use selected templates from list below

Report Templates

[Dropdown Menu] [Icon]

| Name | Paper Type | Paper Name | Orientation | Created | Created By | Modified |
|--|------------|------------|-------------|------------|------------|------------|
| <input checked="" type="checkbox"/> Basic Planogram Report | 9 | A4 | P | 02/11/2010 | Phil Wells | 02/11/2010 |
| <input checked="" type="checkbox"/> Planogram Equipment Report | 9 | A4 | P | 01/06/2011 | Phil Wells | 01/06/2011 |
| <input checked="" type="checkbox"/> Planogram Product Report | 9 | A4 | P | 01/06/2011 | Phil Wells | 01/06/2011 |
| | | | | | | |
| | | | | | | |

Print Cancel

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

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

Planogram: 1_Bay_Mixed_Fizzy_Drinks

Details Properties Stores Seasons Fixture Styles Design Financial UDAs

Name: 1_Bay_Mixed_Fizzy_Drinks Revision: 1

Description: 1 Bay Mixed Fizzy Drinks

Associated Document:

Size Description: 36 x 24 x 72

Status: Current Client Code: Example

Family Code: EXAMPLE Buddy Family Code: EXAMPLE

Assortment Code: EXMAPLE Units: Imperial inch

Temperature Range: Ambient Goods Time Units: standard hour

Weight Range: < No Ranges Selected > Manpower Set Time: 4.00

Publish Date: Manpower Dismantle Time: 2.00

Effective Date: 11 May 2011 Category Role: Routine

Expiry Date: 31 December 2999 Inventory Model: EXAMPLE

Stock Type: Normal Rank: 0

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

Preferred Template: Basic Planogram Report Requires Power: ☐

Can be Split: ☐

OK Save As Cancel

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

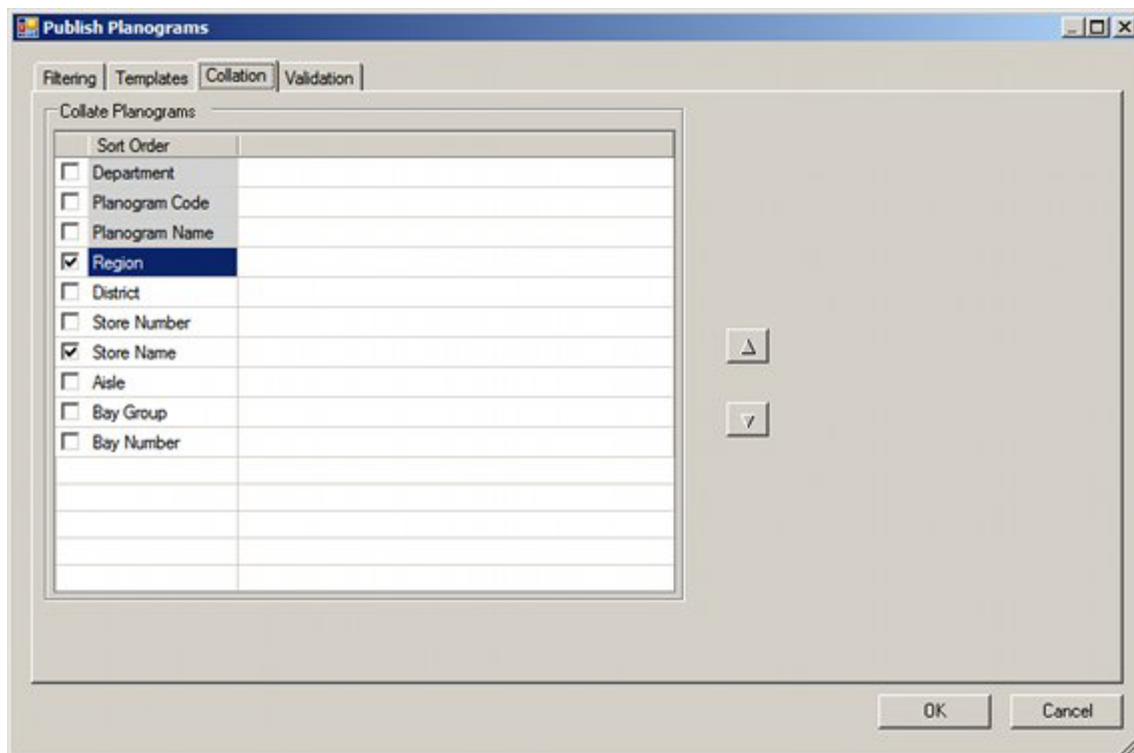
- Write an error to the AVTTB_PUBLISH_POG_LOG table. Information in this table can be read by means of a BI Publisher report or similar.
 - Use the default Report Designer template.
2. Use Template - this option allows the user to define the way the template from the Report Designer module is selected. There are two options (selected using the radio button):
 3. Use Planograms preferred template, if defined - this option is specified in the Preferred Template drop down list in the Details tab of the Planogram Design dialog box in the Merchandiser module.
 4. Use Selected Template from List Below - this option can be set by checking items in the list of available templates. One or more templates may be selected. If multiple templates are selected, the name of the template will be added to the file name in brackets - for example 1_Bay_Mixed_Fizzy_Drinks (Basic Planogram Report).pdf
- If necessary, the list of templates can be searched by entering a text string into the drop down list, then clicking the Find button. (Actual or implied wild cards can be used). Each click of the Find button will cause the search engine to move forward through the matching results until no results are left.

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

The Collation Tab

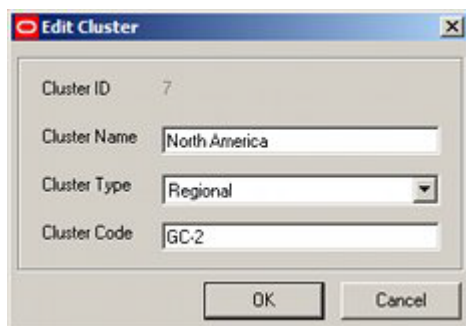
The Collation Tab allows users to specify the sequence the planogram designs will be published or printed in. Its main use is in printing hard copy versions of the designs where the sequence they are printed in makes it easier to sort and distribute them after printing.

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



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

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



3. Store Number is the Store Code in the Store dialog box in Store Manager.

4. Store Name is the Store Name in the Store dialog box in Store Manager.

Edit Store

General Units Address Attributes

Store ID: 16

Store Code: NEW002

Store Name: New York

Directory Name: Large Stores\New York.

Latitude: 0

Longitude: 0

Status: Open

Opened Date: 21/10/2010

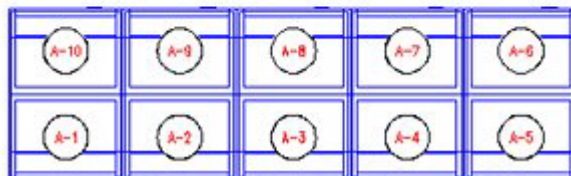
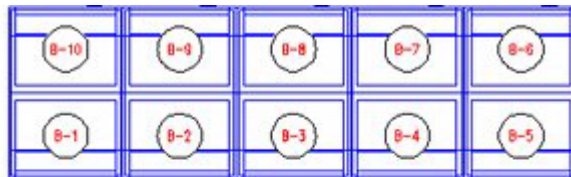
Closed Date: 31/12/2999

Store Prototype: Large Prototype Store

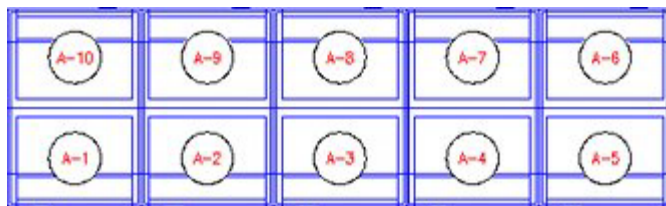
Set as Prototype: ☐

OK Cancel

5. Department is the department (zone) in the floor plan the planogram is associated with.
6. Aisle is the aisle the planogram is associated with. For this option to operate, aisles must first be drawn in the floor plan in the Planner module. In the example below, Aisle F-1 has been drawn between two runs of fixtures.



7. Bay Number is the bay number associated with the fixtures the planogram is placed on. For this option to operate, the fixtures in the floor plan must previously have been bay numbered.



8. Bay Group is the Name assigned to a number of fixtures sharing a common characteristic. It is assigned in the Name field of the Bay Numbering dialog box in the Planner module.

9. Planogram Name is the name of the planogram. This is set in the Name field of the Planogram Design dialog box in Merchandiser.
10. Planogram Code is the code for the planogram. This is set in the Client Code field of the Planogram Design dialog box in Merchandiser.

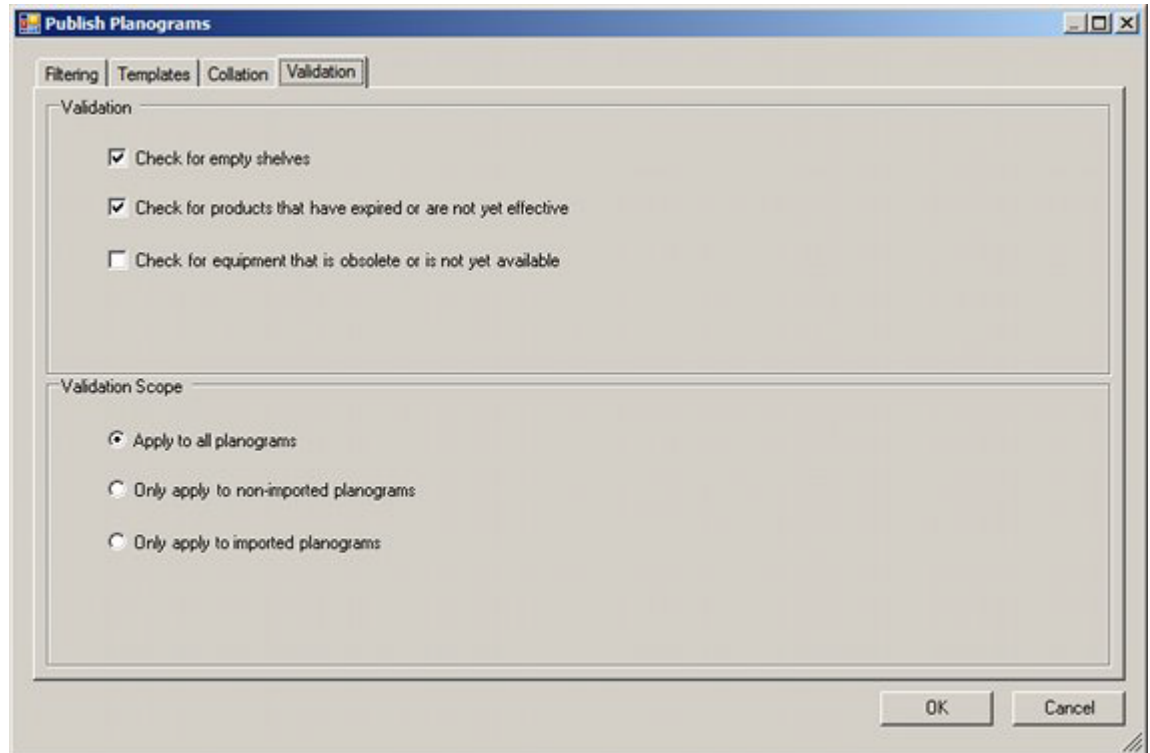
The screenshot shows a software window titled "Planogram: 1_Bay_Mixed_Fizzy_Drinks". It has a tabbed interface with the following tabs: Details, Properties, Stores, Seasons, Fixture Styles, Design, Financial, and UDAs. The "Details" tab is currently selected. The form contains the following fields and controls:

- Name:** 1_Bay_Mixed_Fizzy_Drinks
- Revision:** 1
- Description:** 1 Bay Mixed Fizzy Drinks
- Associated Document:** (empty field with a browse button)
- Size Description:** 36 x 24 x 72
- Status:** Current (dropdown)
- Client Code:** Example
- Family Code:** EXAMPLE
- Buddy Family Code:** EXAMPLE
- Assortment Code:** EXMAPLE
- Units:** Imperial inch (dropdown)
- Temperature Range:** Ambient Goods (dropdown)
- Time Units:** standard hour (dropdown)
- Weight Range:** < No Ranges Selected > (dropdown)
- Manpower Set Time:** 4.00 (spin box)
- Publish Date:** (empty dropdown)
- Manpower Dismantle Time:** 2.00 (spin box)
- Effective Date:** 11 May 2011 (calendar)
- Category Role:** Routine (dropdown)
- Expiry Date:** 31 December 2999 (calendar)
- Inventory Model:** EXAMPLE
- Stock Type:** Normal (dropdown)
- Rank:** 0 (spin box)
- Autofill Rule:** < No Rule Selected > (dropdown)
- Traffic Flow:** Left to Right (radio button selected), Right to Left (radio button)
- Preferred Template:** Basic Planogram Report (dropdown)
- Requires Power:** (checkbox, unchecked)
- Can be Split:** (checkbox, unchecked)

At the bottom right, there are three buttons: OK, Save As, and Cancel.

The Validation Tab

The Validation tab enables users to set a series of validation checks that must be satisfied before the planogram design is published. If any of the checks are failed, the details will be written to the AVTTB_PUBLISH_POG_LOG table. Information in this table can be read by means of a BI Publisher report or similar.



1. Check for empty shelves - this option will check the parent fixture and associated shelf objects. It will raise an error report if:
 - The fixture and associated shelf objects can be populated with product placeholders, but no product placeholder has been placed.
 - The fixture and associated shelf objects can be populated with display styles, but no display styles have been placed.
2. Check for products that have expired or are not yet effective - this option will check all products in the planogram against the effective date of the planogram. It will raise an error report if:
 - The Product Effective Date is after the Planogram Effective Date - i.e. the product is not yet available to place in the planogram.
 - The Product Expiry Date is before the Planogram Effective Date - i.e. the product will expire while the planogram is still in service.

The check will be ignored if the product effective or expiry date is undefined.

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

Planogram: 1_Bay_Mixed_Fizzy_Drinks

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

Name: 1_Bay_Mixed_Fizzy_Drinks Revision: 1

Description: 1 Bay Mixed Fizzy Drinks

Associated Document:

Size Description: 36 x 24 x 72

Status: Current

Family Code: EXAMPLE

Assortment Code: EXMAPLE

Temperature Range: Ambient Goods

Weight Range: < No Ranges Selected >

Publish Date:

Effective Date: 11 May 2011

Expiry Date: 31 December 2999

Stock Type: Normal

Autofill Rule: < No Rule Selected >

Preferred Template: Basic Planogram Report

Can be Split: ☐

Client Code: Example

Buddy Family Code: EXAMPLE

Units: Imperial inch

Time Units: standard hour

Manpower Set Time: 4.00

Manpower Dismantle Time: 2.00

Category Role: Routine

Inventory Model: EXAMPLE

Rank: 0

Traffic Flow: ☒ Left to Right ☐ Right to Left

Requires Power: ☐

OK Save As Cancel

The Product Effective and Expiry dates are set in the Details tab of the SKU dialog box in Product Studio.

Product SKU - Example SKU

Details | Physical | Financial | Custom

Name: Example SKU

Description: Example SKU

UPC Type: Anything

Code: 12345678

UPC:

Category Role: Routine

Strategy: Standard Product

Manufacturer: Generic Product

Supplier: Generic Product

Status: Active

Icon: Product SKU

Brand: Example

Sub-brand: Example 2

Client Code: ABCDEF

Client Barcode: 12345678

Publish Date: 31 March 2011

Effective Date: 07 April 2011

Expiry Date: 01 January 2012

Rank: 0

Import Identifier: 0

Import Name:

Import Date:

Creation Date: 31 March 2011

Created By: pw

Last Modified Date: 31 March 2011

Last Modified By: pw

OK Cancel

3. Check for equipment that is obsolete or not yet available - this option will check all equipment in the planogram against the effective date of the planogram. It will raise an error report if:

- The Equipment Effective Date is after the Planogram Effective Date - i.e. the equipment is not yet available for the planogram.
- The Equipment Expiry Date is before the Planogram Effective Date - i.e. the equipment will be taken out of service while the planogram is still in use.

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

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

Block Details: I_Basic_Chiller_48x36x72

Description: Basic Chiller 48 in x 36 in x 72 in

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

Equipment Type

Retail Type:

Can Populate with Display Style ☒

Can Populate with Placeholder ☒

Attaches to Primary Equipment ☐

Attaches to Secondary Equipment ☐

Accepts Secondary Equipment ☒

Corner Block: ☐

General

Directory:

Manufacturer:

Category:

Units:

Material:

Print Material:

Status:

Effective Date:

Expiry Date:

Product Code:

Icon:

Cost:

Type

☒ Fixed Size

☐ Symbol

☐ Scaled Size

☐ Drawn 1:1

Graphics

☐ No Graphics

☒ 3D

☒ 2D

>>>

Working/Stacking Axes

Working ☒ X ☐ Y ☐ Z

Stacking ☐ X ☒ Y ☒ Z

Area Calc Directions

N ☐

E ☒

S ☒

W ☒

Reporting Options

☐ Exclude from Reports

☐ Exclude Instances in DB

☐ Exclude Attributes

☒ Include in Fixture Annotation

Save OK Cancel

4. Validation Scope - this controls when to apply the validation checks. There are three options - selectable by the radio button.

- Apply to all planograms.
- Apply to non-imported (manually created) planograms.
- Apply to imported planograms.

The application will automatically distinguish between imported and manually created planograms by means of the information held in the Macro Space Planning database.

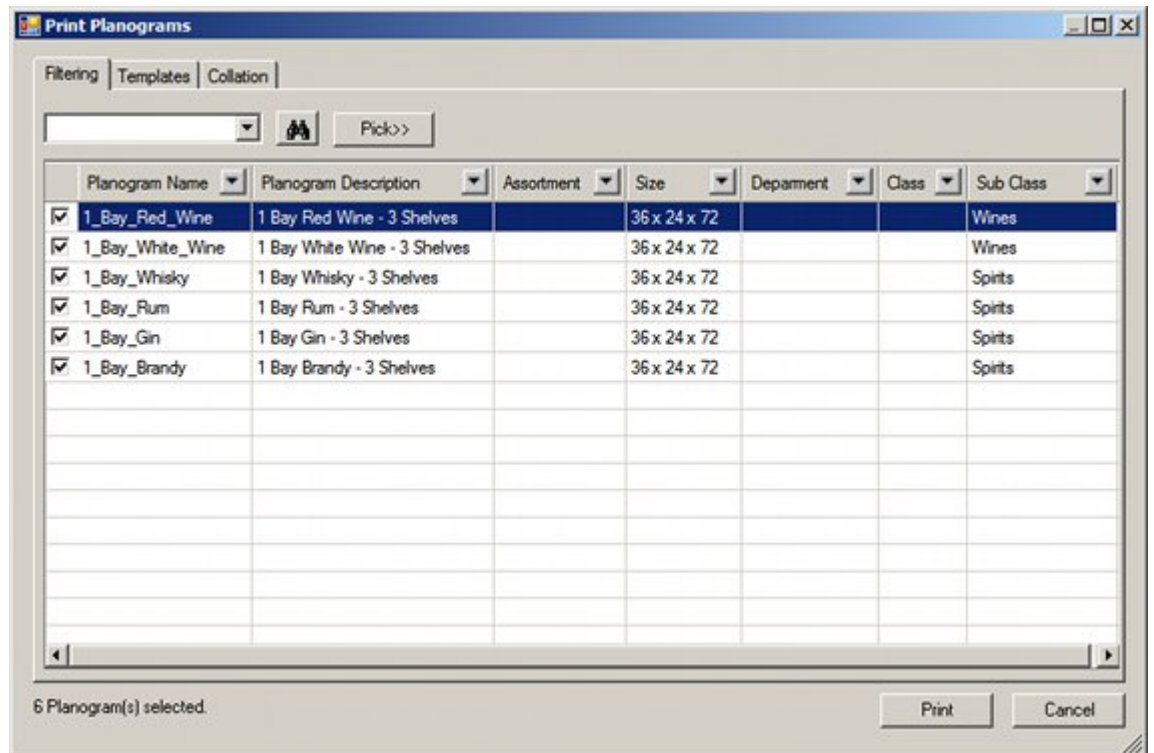
Planogram Printing

Overview of Planogram Printing

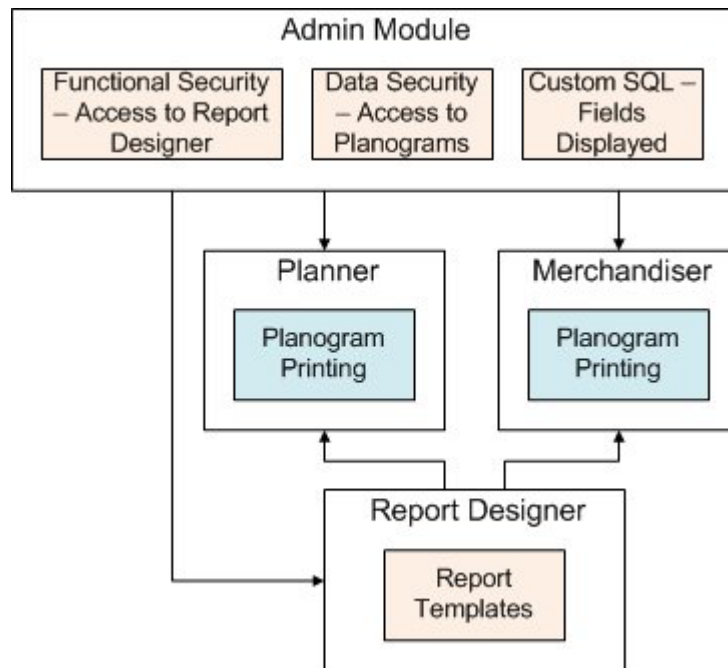
Planogram Printing allows users to select planograms in the currently active floor plan and print out information on the ones they have permissions to print.

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

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



The basic method of operation is as follows:



1. Administration Module

Within the Administration Module:

- The planogram users have permissions to print are assigned in the Data Security dialog box - Planograms Tab.
- The fields that display in the Filtering Tab of the Print Planograms dialog box are configured in the Custom SQL dialog box.
- Planograms can be printed using report templates specified in the Report Designer module. Permission to access this module is specified in the Functional Security dialog box.

These settings determine what will appear in the Print Planograms dialog box (and the reports that will be available) when it is accessed in the Planner and Merchandiser modules.

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

2. Planner Module

The Print Planograms dialog box may be accessed from the File Menu - a floor plan containing planograms must previously have been opened. Users with permissions to access the Planner module automatically have permission to use the functionality.

3. Merchandiser Module

The Print Planograms dialog box may be accessed from the File > Print Menu - a floor plan containing planograms must previously have been opened. Users with permissions to access the Merchandiser module automatically have permission to use the functionality.

4. Report Designer

The Report Designer module is used to design report templates that can be specified for use in the Print Planograms dialog box. Permissions to access this module are assigned in the Functional Security dialog box in the Administration module.

Using Planogram Printing

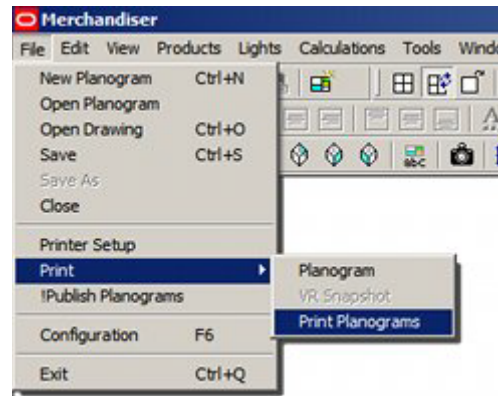
The functionality is used as follows:

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

Accessing the Print Planogram Functionality

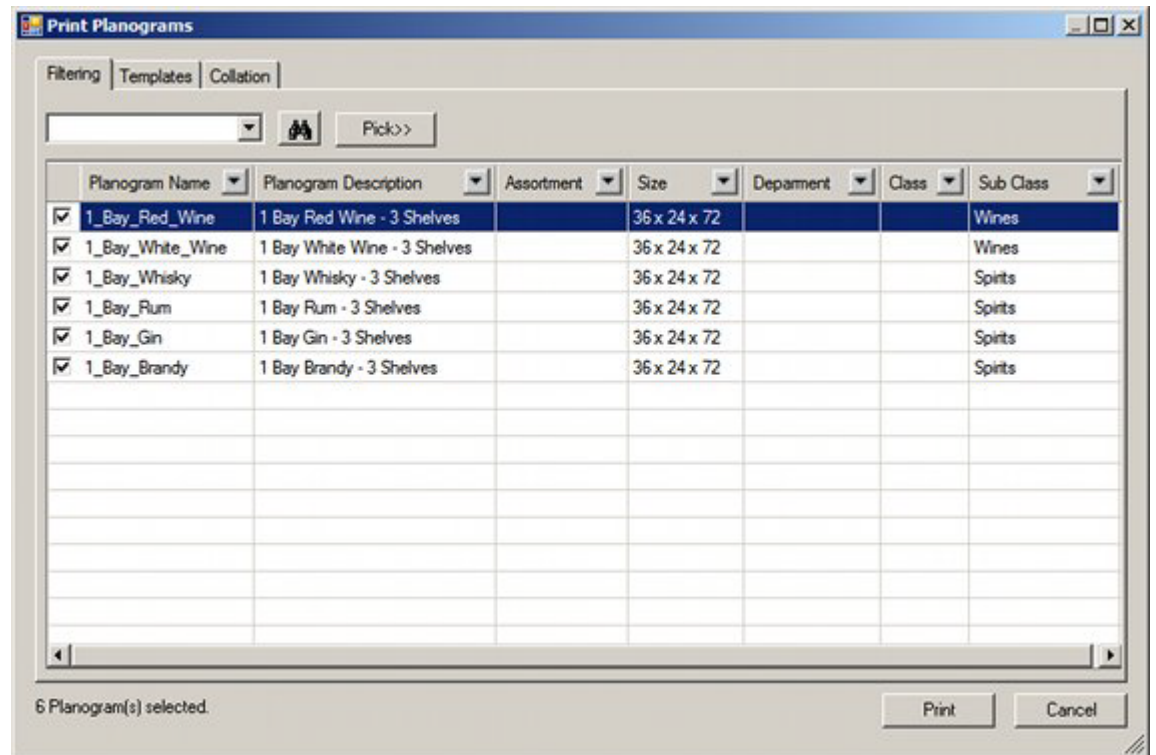
Note: before accessing the Print Planogram functionality, users should open a floor plan containing planograms.

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



Opening State of Functionality

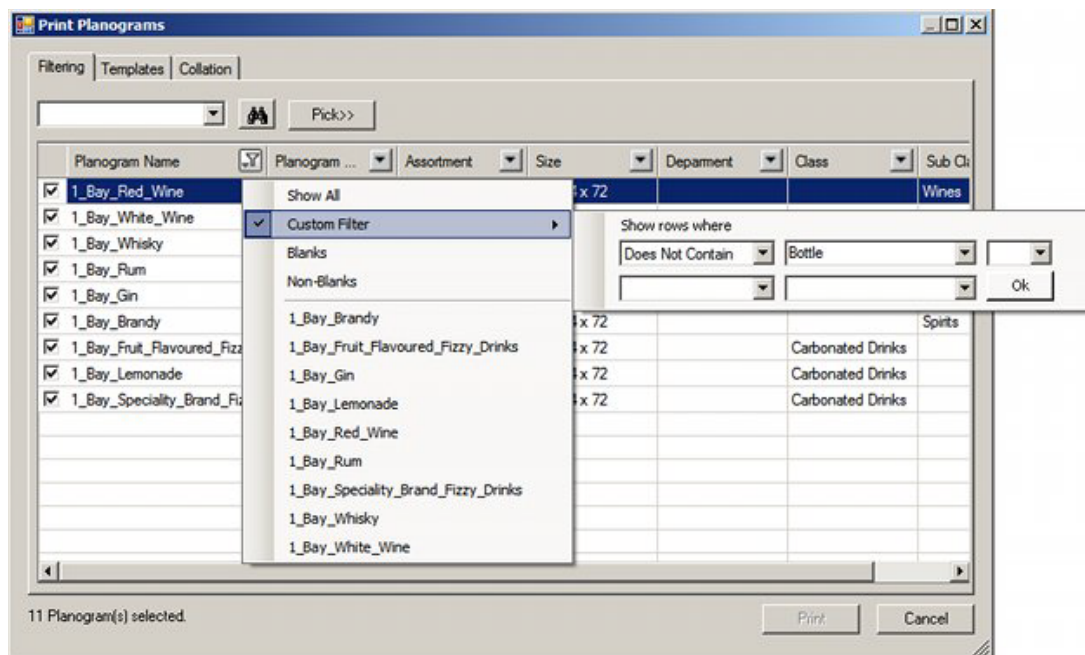
When the Print Planogram dialog box opens it will be populated with all planograms in the currently active floor plan. By default, they will be checked for selection.



Note: the columns that are displayed in the dialog box are configurable in the Custom SQL option available from the General Menu in the Administration module.

Using Filters in the Filtering Tab

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



They are used as follows:

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

The Templates Tab

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

Important Note: There is a known issue with planogram templates. The Planogram Publishing Configuration dialog box in the Macro Space Management Administration Module has an option to print associated planogram documents. At present this option is not available in the Print Planogram dialog box. Accordingly, the Template Tab in the Planogram Publishing Configuration dialog box should have the option set to **Use Template**.

Print Planograms

Filtering | **Templates** | Collation

Options

- ☒ Use associated planogram document
 - ☐ Raise error if associated planogram document is missing
 - ☒ Use template if associated planogram document is missing
- ☐ Use template
 - ☐ Use planogram's preferred template, if defined
 - ☒ Use selected templates from list below

Report Templates

| | Name | Paper Type | Paper Name | Orientation | Created | Created By | Modified |
|-------------------------------------|----------------------------|------------|------------|-------------|------------|------------|------------|
| <input checked="" type="checkbox"/> | Basic Planogram Report | 9 | A4 | P | 02/11/2010 | Phil Wells | 02/11/2010 |
| <input checked="" type="checkbox"/> | Planogram Equipment Report | 9 | A4 | P | 01/06/2011 | Phil Wells | 01/06/2011 |
| <input checked="" type="checkbox"/> | Planogram Product Report | 9 | A4 | P | 01/06/2011 | Phil Wells | 01/06/2011 |
| | | | | | | | |
| | | | | | | | |

Print Cancel

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

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

Planogram: 1_Bay_Mixed_Fizzy_Drinks

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

Name: 1_Bay_Mixed_Fizzy_Drinks Revision: 1

Description: 1 Bay Mixed Fizzy Drinks

Associated Document:

Size Description: 36 x 24 x 72

Status: Current Client Code: Example

Family Code: EXAMPLE Buddy Family Code: EXAMPLE

Assortment Code: EXMAPLE Units: Imperial inch

Temperature Range: Ambient Goods Time Units: standard hour

Weight Range: < No Ranges Selected > Manpower Set Time: 4.00

Publish Date: Manpower Dismantle Time: 2.00

Effective Date: 11 May 2011 Category Role: Routine

Expiry Date: 31 December 2999 Inventory Model: EXAMPLE

Stock Type: Normal Rank: 0

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

Preferred Template: Basic Planogram Report Requires Power: ☐

Can be Split: ☐

OK Save As Cancel

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

- Write an error to the AVTTB_PUBLISH_POG_LOG table. Information in this table can be read by means of a BI Publisher report or similar.
 - Use the default Report Designer template.
2. Use Template - this option allows the user to define the way the template from the Report Designer module is selected. There are two options (selected using the radio button):
- Use Planograms preferred template, if defined - this option is specified in the Preferred Template drop down list in the Details tab of the Planogram Design dialog box in the Merchandiser module.
 - Use Selected Template from List Below - this option can be set by checking items in the list of available templates. One or more templates may be selected. If multiple templates are selected, the name of the template will be added to the file name in brackets - for example 1_Bay_Mixed_Fizzy_Drinks (Basic Planogram Report).pdf

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

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

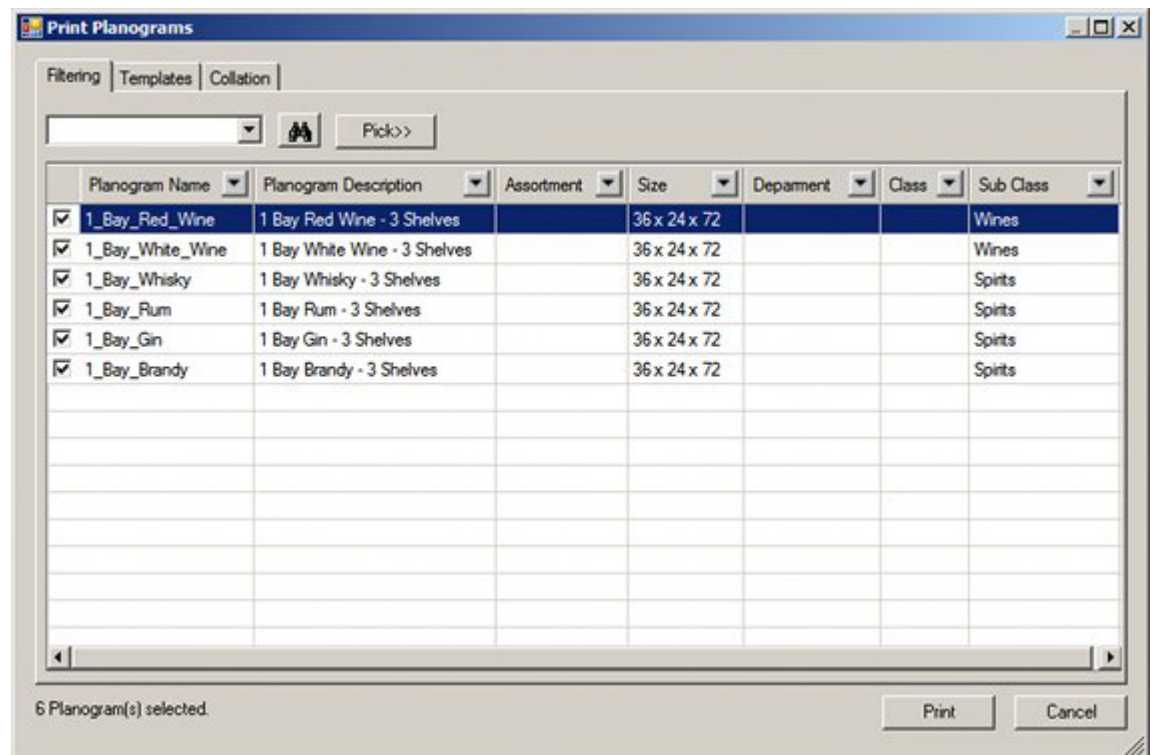
The Filtering Tab

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

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

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

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



Find

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



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

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

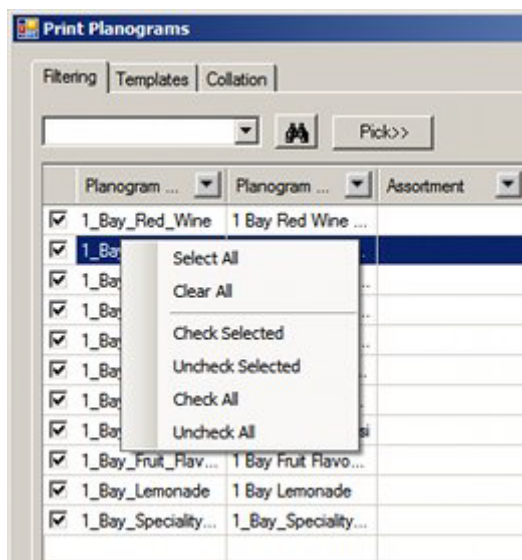
If explicit wild cards are not used, implicit wild cards will be assumed. For example the text entry 'Wine' will be treated as '*wine*' and will find I Bay Red Wine, 1 Bay White Wine, etc.

Pick (Planner Only)

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

Right Click Menu

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



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

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

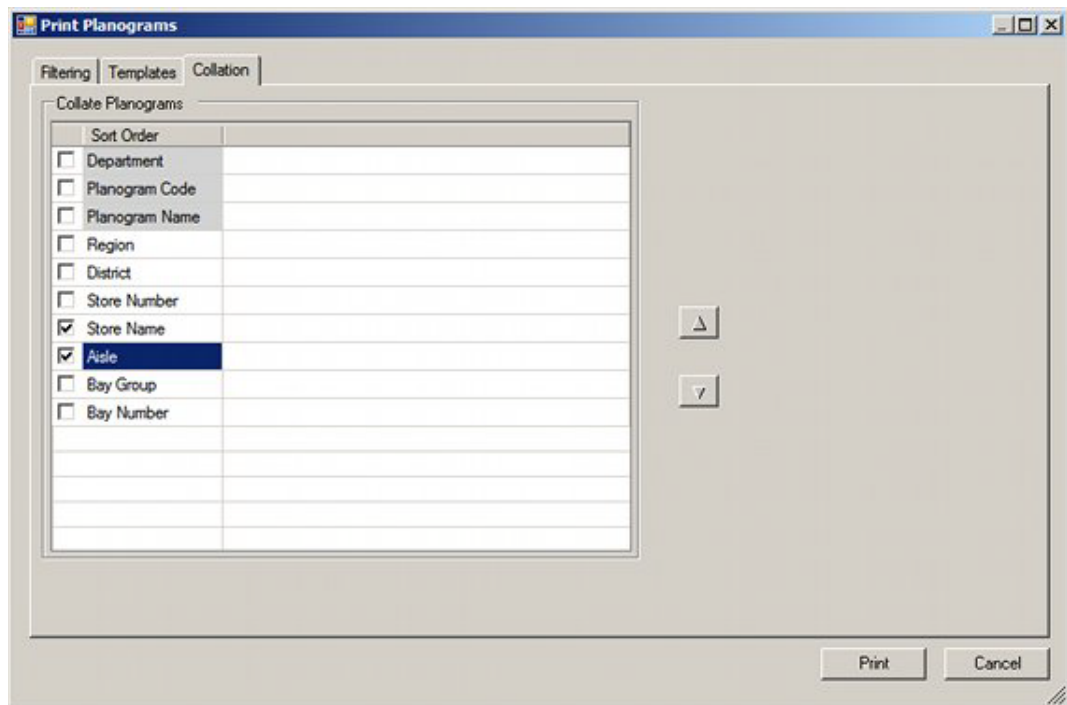
Selecting Planograms to Print

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

The Collation Tab

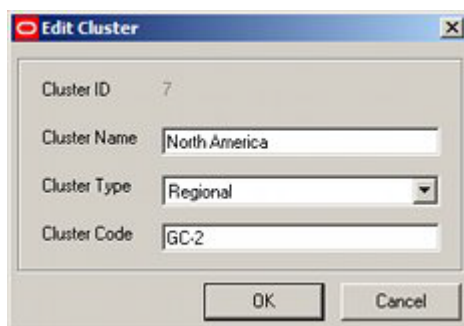
The Collation Tab allows users to specify the sequence the planogram designs will be published or printed in. Its main use is in printing hard copy versions of the designs where the sequence they are printed in makes it easier to sort and distribute them after printing.

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



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

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

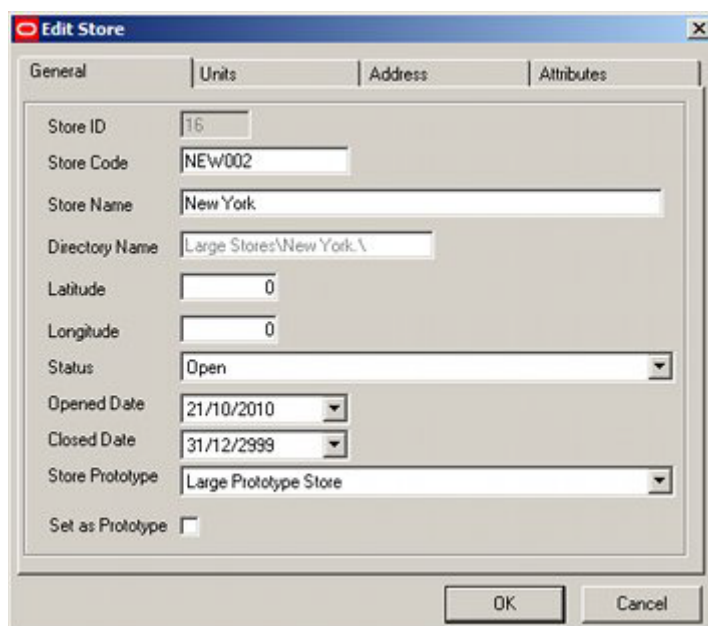


The 'Edit Cluster' dialog box contains the following fields:

- Cluster ID: 7
- Cluster Name: North America
- Cluster Type: Regional (dropdown menu)
- Cluster Code: GC-2

Buttons: OK, Cancel

3. Store Number is the Store Code in the Store dialog box in Store Manager.
4. Store Name is the Store Name in the Store dialog box in Store Manager.

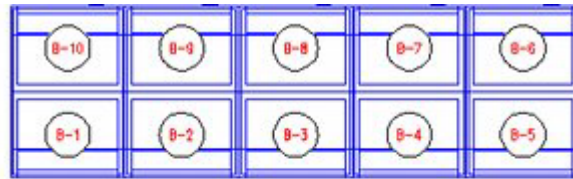


The 'Edit Store' dialog box has four tabs: General, Units, Address, and Attributes. The 'General' tab is active and contains the following fields:

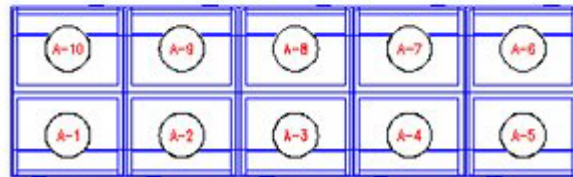
- Store ID: 16
- Store Code: NEW002
- Store Name: New York
- Directory Name: Large Stores\New York\
- Latitude: 0
- Longitude: 0
- Status: Open (dropdown menu)
- Opened Date: 21/10/2010 (dropdown menu)
- Closed Date: 31/12/2999 (dropdown menu)
- Store Prototype: Large Prototype Store (dropdown menu)
- Set as Prototype: ☐

Buttons: OK, Cancel

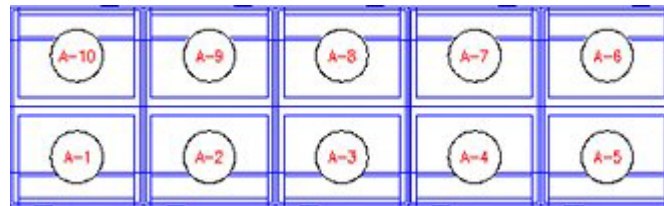
5. Department is the department (zone) in the floor plan the planogram is associated with.
6. Aisle is the aisle the planogram is associated with. For this option to operate, aisles must first be drawn in the floor plan in the Planner module. In the example below, Aisle F-1 has been drawn between two runs of fixtures.



F-1



7. Bay Number is the bay number associated with the fixtures the planogram is placed on. For this option to operate, the fixtures in the floor plan must previously have been bay numbered.



8. Bay Group is the Name assigned to a number of fixtures sharing a common characteristic. It is assigned in the Name field of the Bay Numbering dialog box in the Planner module.

9. Planogram Name is the name of the planogram. This is set in the Name field of the Planogram Design dialog box in Merchandiser.
10. Planogram Code is the code for the planogram. This is set in the Client Code field of the Planogram Design dialog box in Merchandiser.

Planogram: 1_Bay_Mixed_Fizzy_Drinks

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

Name: 1_Bay_Mixed_Fizzy_Drinks Revision: 1

Description: 1 Bay Mixed Fizzy Drinks

Associated Document:

Size Description: 36 x 24 x 72

Status: Current Client Code: Example

Family Code: EXAMPLE Buddy Family Code: EXAMPLE

Assortment Code: EXMAPLE Units: Imperial inch

Temperature Range: Ambient Goods Time Units: standard hour

Weight Range: < No Ranges Selected > Manpower Set Time: 4.00

Publish Date: Manpower Dismantle Time: 2.00

Effective Date: 11 May 2011 Category Role: Routine

Expiry Date: 31 December 2999 Inventory Model: EXAMPLE

Stock Type: Normal Rank: 0

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

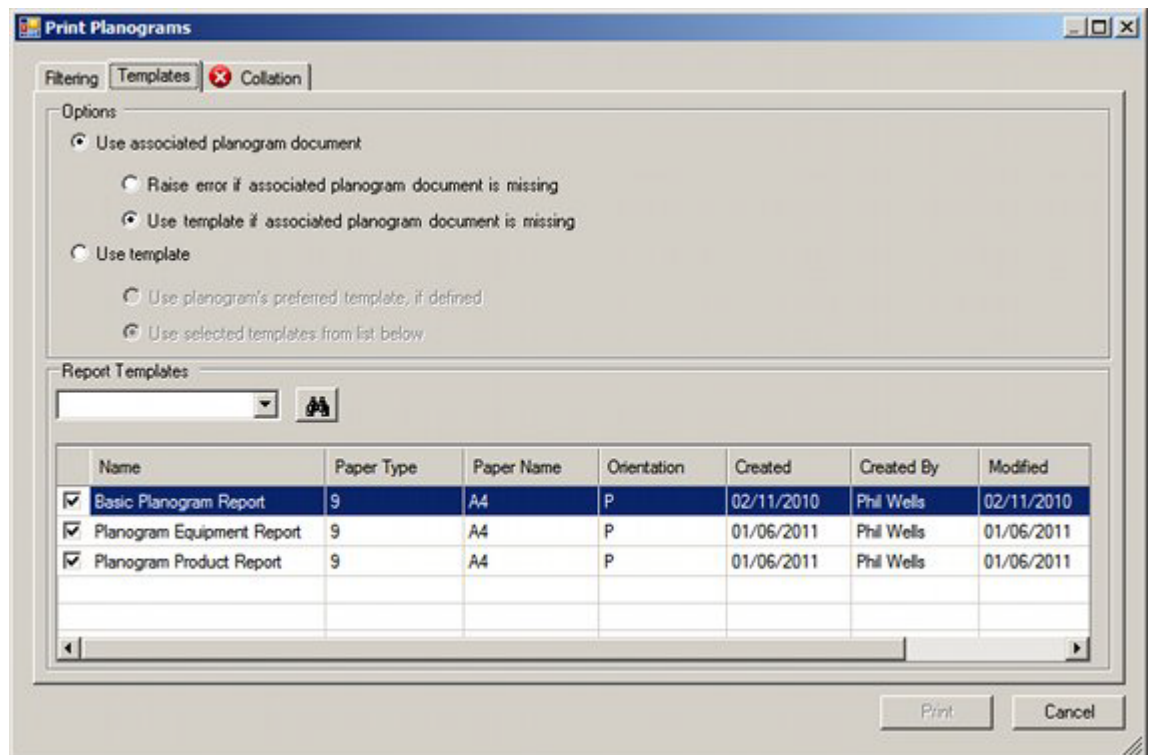
Preferred Template: Basic Planogram Report Requires Power: ☐

Can be Split: ☐

OK Save As Cancel

Errors and Results

If any settings in the Print Planograms dialog box will lead to errors during printing, an error symbol will be displayed on the tab containing the data with the problem. The Print button will also be grayed out and unavailable.



The dialog box titled "Print Planograms" has three tabs: "Filtering", "Templates", and "Collation". The "Collation" tab is active and marked with a red 'X'. Under the "Options" section, there are several radio button options: "Use associated planogram document" (selected), "Raise error if associated planogram document is missing", "Use template if associated planogram document is missing", "Use template", "Use planogram's preferred template, if defined", and "Use selected templates from list below". Below the options is a "Report Templates" section with a dropdown menu and a button with a printer icon. A table lists three report templates, all of which are checked in the first column. The table has columns for Name, Paper Type, Paper Name, Orientation, Created, Created By, and Modified. At the bottom right are "Print" and "Cancel" buttons.

| | Name | Paper Type | Paper Name | Orientation | Created | Created By | Modified |
|-------------------------------------|----------------------------|------------|------------|-------------|------------|------------|------------|
| <input checked="" type="checkbox"/> | Basic Planogram Report | 9 | A4 | P | 02/11/2010 | Phil Wells | 02/11/2010 |
| <input checked="" type="checkbox"/> | Planogram Equipment Report | 9 | A4 | P | 01/06/2011 | Phil Wells | 01/06/2011 |
| <input checked="" type="checkbox"/> | Planogram Product Report | 9 | A4 | P | 01/06/2011 | Phil Wells | 01/06/2011 |
| | | | | | | | |
| | | | | | | | |

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

The results from Floor Plan printing are stored in two tables within the database. These results can be viewed via reports generated from BI Publisher (or similar software).

Zones in Merchandiser

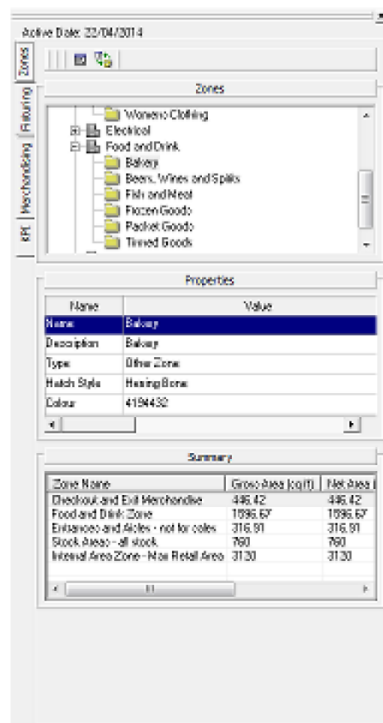
Zones in Merchandiser

Overview of Zones

Zones are specified areas of floor within a store used for a defined purpose. They are configured in the Planner module and can only be viewed in Merchandiser. Zones serve a number of purposes including:

- Identifying equipment and merchandise for reporting purposes.
- Filtering merchandise to speed up placement.

Zones on the Object Browser



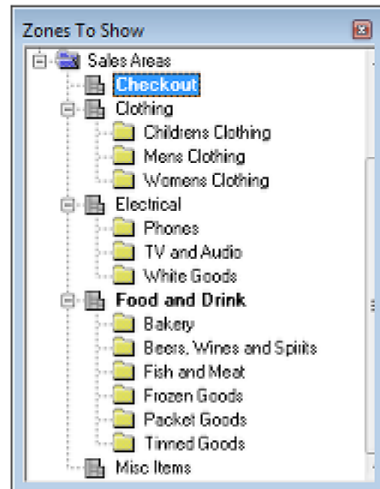
The Object Browser allows users to view information on zones, but not to modify them in any way. Users can see the zone hierarchy, information on specific zones and a summary of zones placed in the currently selected floor plan.

Selecting a Specific Zone

Users can go to a specific zone in the floor plan by selecting the Show zones form from the directions and Product Text toolbar.



This will bring up the Zones to Show dialog box. Users can then highlight a zone in the hierarchy, bring up the right click menu and select Go to Zone in VR.

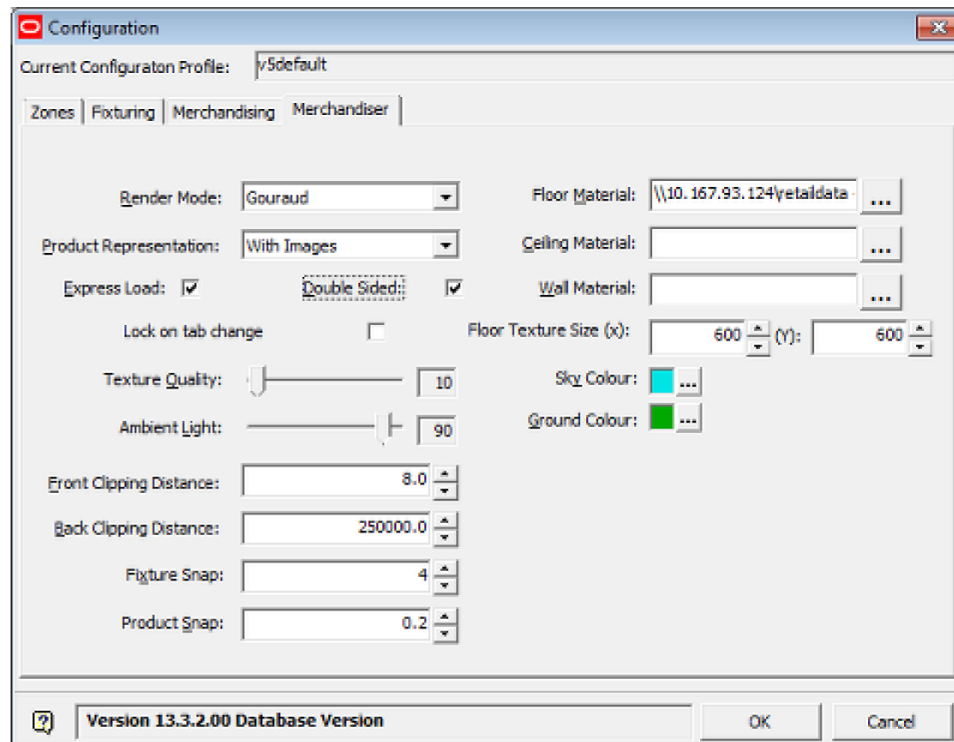


Express Loading

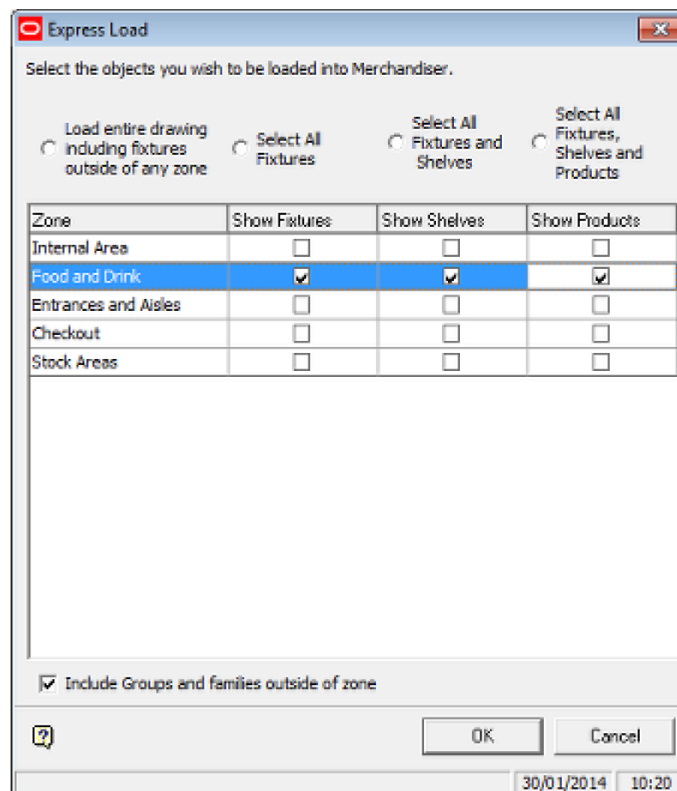
Express Loading is used to load only some of the zones available in the drawing. This allows Macro Space Management users to load just the sections of the floor plan that are of interest to them and reduces the amount of detail in the drawing that the user has to view. It will also slightly speed up movement in the Virtual Reality environment as less data is being manipulated when the user's viewpoint moves. Drawings that are express loaded with only some of the available Zones will still be checked out to the user, preventing anyone from working on the Zones that have not been loaded.

Activating Express Loading

Express Loading is enabled in the Configuration Module. The Merchandiser Tab contains an Express Load checkbox - selecting it results the Express Load dialog box when a floor plan is opened.



The **Express Load** dialog box allows the user to select which Zones, Fixtures, Shelves and Products will be loaded.



The four radio buttons at the top of the dialog box control what is loaded in the selected zones.

Load entire drawing results in every zone in the drawing being loaded. This will include any fixtures not included within a zone.

Select all Fixtures will select the fixtures in every zone in the drawing.

Select all Fixtures and Shelves will select the fixtures and shelves in every zone in the drawing.

Select all Fixtures, Shelves and Products will select the fixtures, shelves and products in every zone in the drawing.

Note: Using the Select all Fixtures, Select all Fixtures and Shelves and Select all Fixtures, Shelves and Products options will not select from Fixtures, Shelves or Products that are not in a zone.

Alternatively, the requirements for Individual Zones can be set by checking or unchecking the respective boxes for Fixtures, shelves and Products for those zones.

Objects that are not at floor level (for example banners) are still associated with the zone they are within and will be displayed accordingly - i.e. the level of an object does not affect whether it is associated with a zone.

The Include Groups and Families outside of the Zone checkbox (if selected) will result in all fixtures (and their associated shelves and products) belonging to a group or family that extend outside the selected zones being displayed.

If this option is not checked, then only fixtures (and their associated shelves and products) that cross the boundary of the selected zones will be displayed.

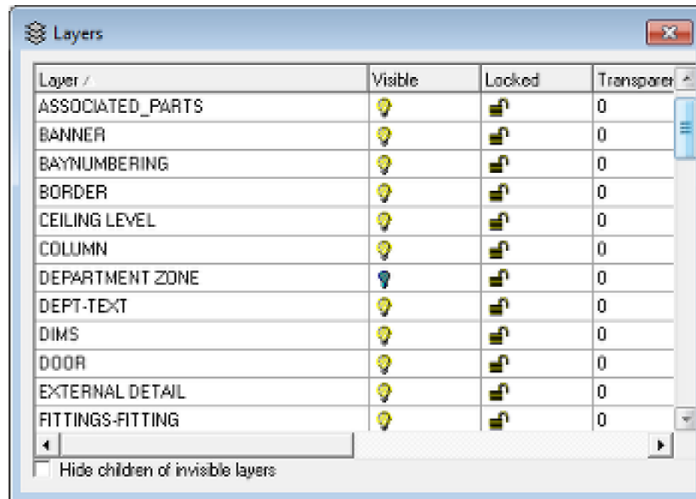
Zone Display and the Zone Grid

Zone Display

Zones show as colored backgrounds at floor level. These colors are set in the Administration module and cannot be varied by standard users. The display of Zones can be turned on or off by means of the Layers dialog box. This is accessed from the Directions and Product Text toolbar.



This will bring up the Layers dialog box.



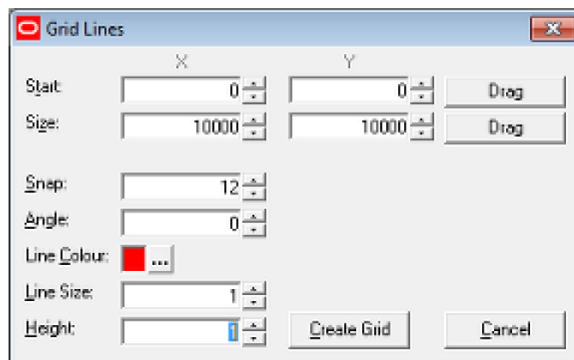
Zone display can then be turned on or off by clicking on the icon for any appropriate layers - for example Department zone.

The Zone Grid

The Zone Grid provides a way of locating fixtures when they are placed in a floor plan. It is activated by clicking the Grid Lines option on the directions and Product Text Toolbar.

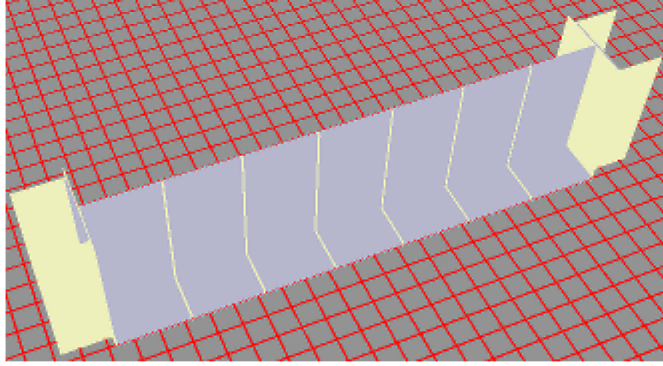


This will bring up the Grid lines dialog box.



- The Start X and Y Coordinates specify the starting point of the grid.
- The Size X and Y coordinates specify the extent of the grid.
- The Snap size specifies both the size of individual squares in the grid and the size of the points the mouse cursor will snap to when placing equipment.
- The Angle specifies the default rotation angle when placing equipment.
- The Line Color specifies the color of the grid.
- The Line Size specifies how thick the lines will appear when the grid is drawn.
- The Height specifies how high the lines will be drawn above floor level.

Clicking the Create Grid option will display the grid in the current floor plan - the settings are specific to that floor plan.

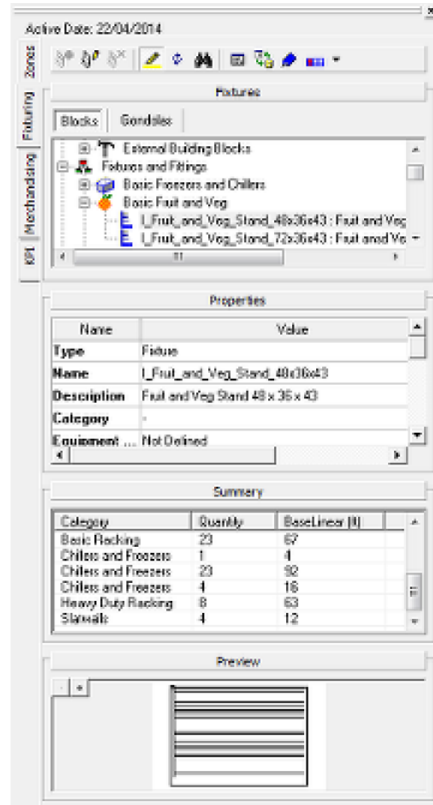


Grid display can then be turned on or off by turning the Grid lines layer on or off in the **Layers** dialog box (accessed from the Directions and Product Text toolbar).

Equipment in Merchandiser

Equipment on the Object Browser

Equipment (fixtures and gondolas) can be added, edited, moved and deleted in Merchandiser. Many of the controls are located on the Object Browser. (For more information see the section on the Object Browser)



- Fixturing is selected by clicking the Fixturing tab.
- Users can then toggle between fixtures and gondolas by clicking on the Blocks or Gondolas sub-tabs.
- The toolbar allows users to select from a number of possible actions.
- A list of fixtures or gondolas is shown in the hierarchy.
- Details of any selected Fixture are shown in the Properties window. (No information is available for gondolas).
- The Summary window gives a list of equipment placed in the currently active floor plan.
- The Preview window will show a preview of any currently selected Fixture. (No information is available for gondolas).

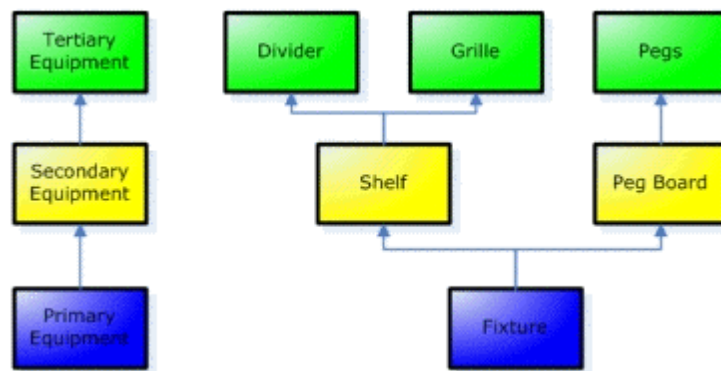
Overview of Equipment Types and Connection Points

The **equipment** used in building a store layout falls into three categories: Primary, Secondary and Tertiary.

Primary Equipment indicates the most fundamental form of equipment. All Primary Equipment is capable of being placed directly on the floor. Some Primary Equipment is capable of accepting subsidiary equipment, (Secondary Equipment). Only Primary Equipment has an Insertion Point that is directly placed in the floor plan of a store.

Secondary Equipment indicates items of equipment that attach directly to Primary Equipment. Secondary equipment cannot be placed directly on the floor. Some Secondary Equipment is capable of accepting further subsidiary equipment, (Tertiary Equipment). Secondary Equipment has an insertion point relative to the insertion point of its parent Primary fixture.

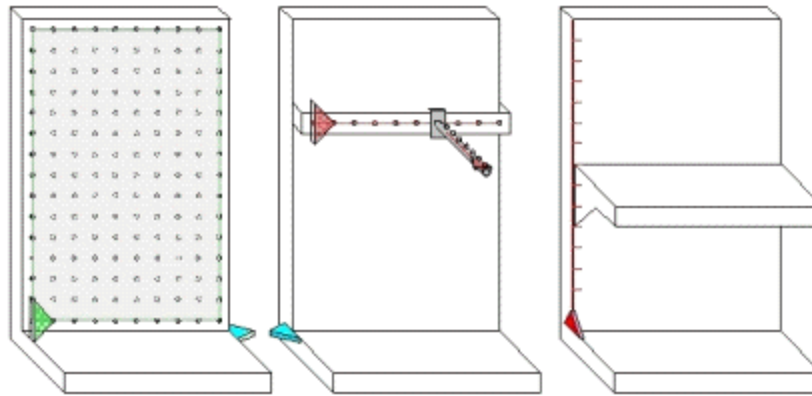
Tertiary Equipment indicates equipment that is attached to Secondary Equipment. Equipment can therefore be arranged in a hierarchy, as in the example below.



Within the Merchandiser environment, store furniture can be assembled in standard or custom configurations by joining together items of equipment.

For example, a back panel could be placed directly on the floor. This back panel could then have runs of shelving attached, and the shelves in turn have dividers placed on them.

Macro Space Management's internal rules determine exactly how items of equipment can connect together. Within the Merchandiser environment, connection points give visual indications as to how individual items of equipment can be assembled.



Overview of Macro Space Management Equipment

A Store in the Merchandiser environment is populated by equipment. This can include fixtures, fittings, shelves and many other items of store furniture.

The way these items behave is affected by the properties they have been assigned, how they are grouped together for collective manipulation and by what the System variables are set to.

Object Properties

Each of these items of equipment has been initially created as a graphic (using for example AutoCAD). The graphic contains basic properties such as dimensions and an insertion point.

The graphic has then been imported into Macro Space Management and turned into a Macro Space Management Block. During this process, the Macro Space Management Block is assigned additional properties that allow it to act in an 'intelligent' manner when in the Macro Space Management CAD and Virtual Reality Environments.

Knowledge of how these 'Intelligent Properties' affect the behavior of equipment within Macro Space Management is important in understanding the behavior of the software. Some of these properties are:

| Characteristic | Definition |
|------------------------|--|
| Insertion Points | Determine the locations at which equipment and merchandise is placed in Merchandiser |
| Child Insertion Points | Determine the justification which products are placed on fixtures and shelf objects |
| Connection options | Determines how one item of equipment connects to another. |
| Placement Options | Determines the alignment, etc, when product is placed onto open shelves, pegs and other shelf objects |
| Styles | Determines which items of equipment are compatible with another. Also determines which shelf objects products can be placed on. |
| Alignments | Determines how groups of products on shelf objects can be aligned (justified) relative to that shelf object. |
| Product Orientations | Individual product items can be placed in specified orientations, for example with the front, side or top of the packaging facing forward on the shelf object. |

Grouping of Objects

Multiple objects (collections of either equipment or products) can be selected for collective operation. This is done by:

- Selection sets: used for a single collective operation.
- Groups: sets of objects in horizontal alignment that can repeatedly manipulated
- Families: sets of objects in vertical alignment that can repeatedly manipulated

System Variables

In addition there are a number of System Variables that affect Macro Space Management. These may be set to different values – each of which will cause a modification to the behavior of the Macro Space Management environment.

Equipment in Fixture Studio

This section gives a high level overview of the creation and configuration of fixtures and gondolas in Fixture Studio. It is intended for users without access to Fixture Studio and gives a basic idea of the capabilities of that module.

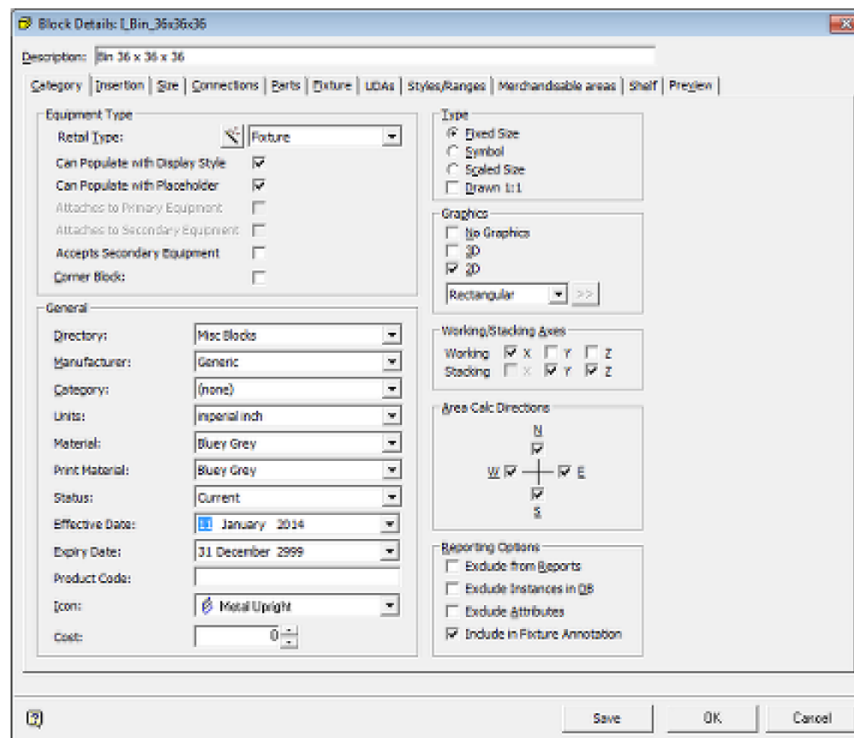
Fixture and Gondola Hierarchies

Fixture and Gondola Hierarchies are created and edited in Fixture Studio. They then appear in the Object Browser.

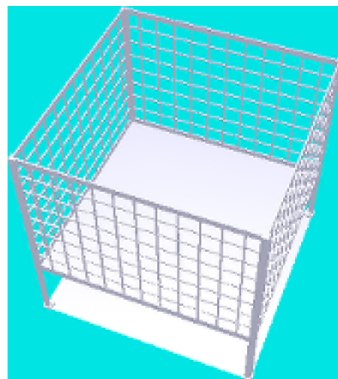
Fixtures, Fittings and Shelves

Fixtures, **Fittings** and **Shelves** are created and properties assigned in the Fixture Studio Module. The process is as follows:

- A raw AutoCAD drawing of the fixture, fitting or shelf is created in the Planner module.
- The drawing is imported into Fixture Studio. This registers it in the Macro Space Planning database.
- Macro Space Planning specific properties are then assigned in the Block Details dialog box. These properties control some of the behavior of the equipment in Merchandiser.

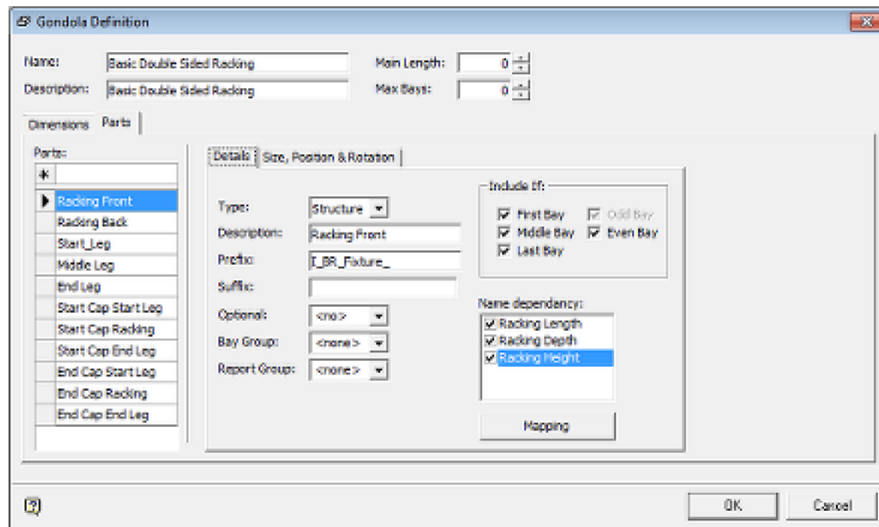


- The AutoCAD block is used to create as 3DS file - this is what is displayed in Merchandiser.

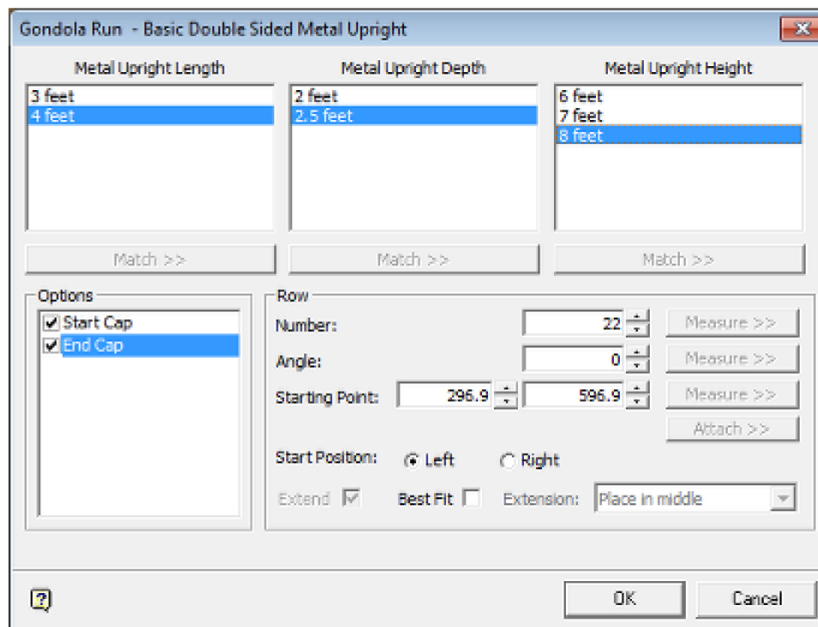


Defining Gondolas

Gondolas are created and configured in Fixture Studio using the Gondola Definition dialog box.



Settings in this dialog box affect the information that appears in the Add Gondolas dialog box. Examples that can be configured include the sizes displayed and whether end caps are optional or not.



Working and Stacking Axes

Working and Stacking Axes define how product is placed onto fixtures and shelf objects. Fixtures and shelf objects that do not have at least one working and one stacking axis defined cannot accept product.

Working Axis

When products are placed onto a shelf object they have to be aligned with each other during placement.

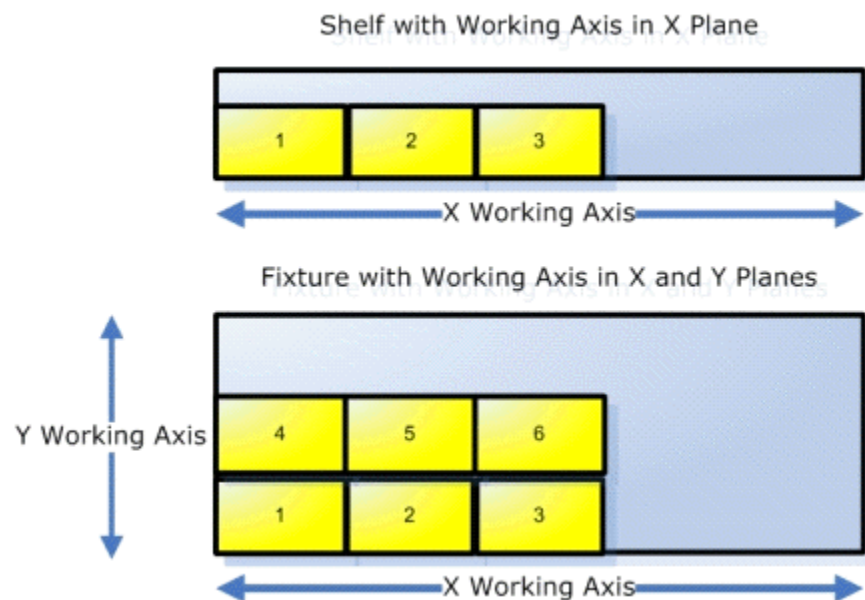
The working axes of an item of shelf equipment are the axis's which product that is being sequentially placed is aligned along.

- The X working axis is from left to right.
- The Y working axis is from front to back.
- The Z working axis is used for vertical placement.

The working axis set should be appropriate for the type of fixture or shelf object.

For example a shelf will normally have only an X working axis as product is normally placed along the length of a shelf.

A freezer cabinet might have an X and a Y working axis as product is placed both along the length of the cabinet and from back to front

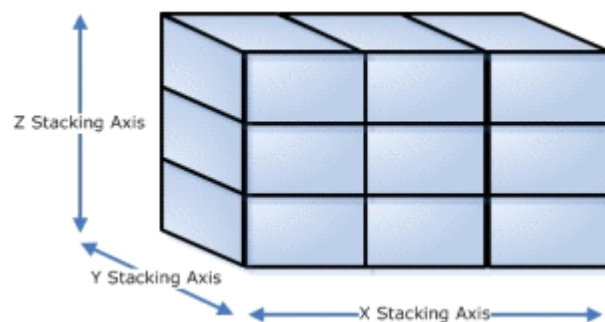


The working axis set should be appropriate for the type of fixture or shelf object.

Stacking Axis

The stacking axis (or axis's) is the direction(s) that products may be stacked on a fixture or shelf object.

- The X stacking axis is from left to right.
- The Y stacking axis is from front to back.
- The Z stacking axis is used for vertical stacking.



The stacking axis set should be appropriate for the type of fixture or shelf object.

Examples of the Working and Stacking Axis's of Fixtures and Shelf Objects

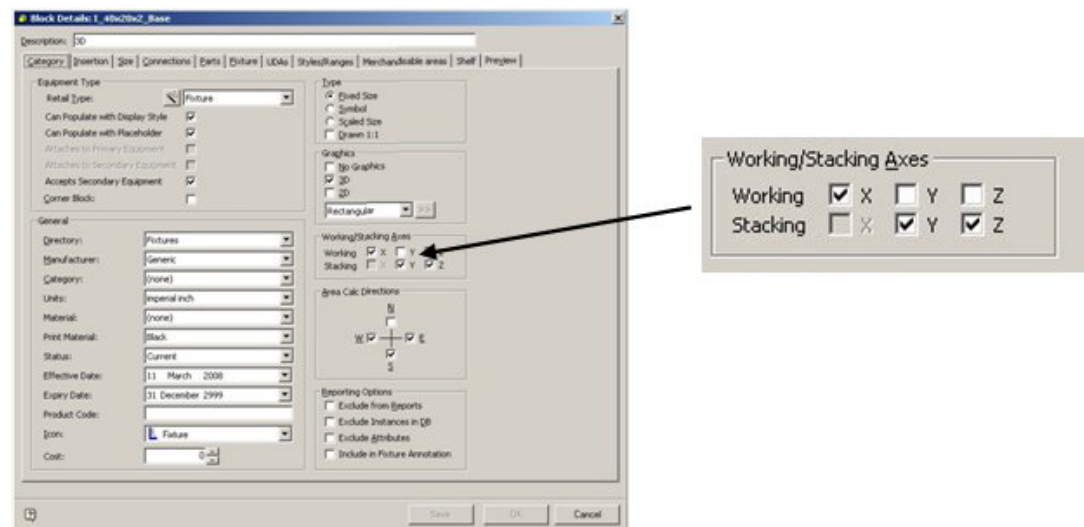
An open shelf will have objects placed along the length of the shelf (X working axis). It can have objects stacked next to each other (X axis) behind each other (Y axis) and on top of each other (Z axis). Accordingly an open shelf should have all three stacking axes checked.

| SHELF | X | Y | Z |
|----------|--------------------------|--------------------------|--------------------------|
| Working | <input type="checkbox"/> | | |
| Stacking | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

A peg on the other hand can only have products placed along its length (Y working axis). A peg can only have products slid along its length – they are constrained so they can only move in that direction. Accordingly, a peg should only have its Y stacking axis enabled.

| PEG | X | Y | Z |
|----------|--------------------------|--------------------------|--------------------------|
| Working | <input type="checkbox"/> | <input type="checkbox"/> | |
| Stacking | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

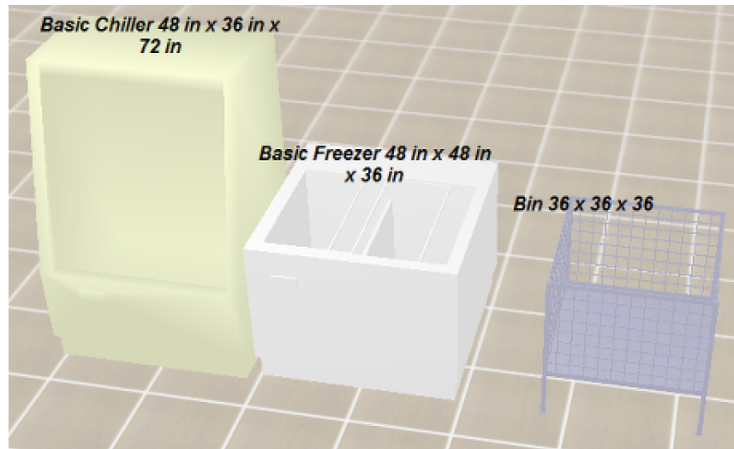
Working and Stacking Axes are set in Fixture Studio.



The rotation of products is theoretically allowed in any axis. In practice this is constrained by the Working/Stacking axes of the shelf objects.

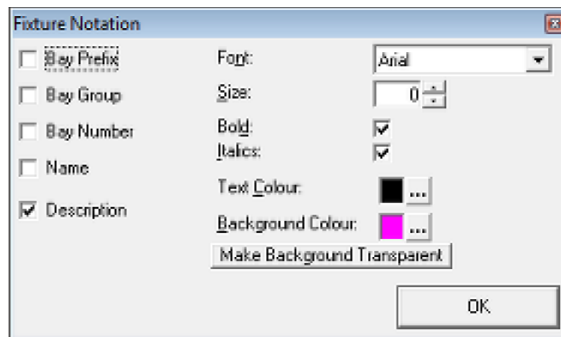
Fixture Annotation

Fixtures can be annotated in Merchandiser.



Configuring Fixture Annotation

Fixture annotation is configured by selecting the **Fixture Notation** option on the **View** menu. This will bring up the Fixture Notation dialog box.



The check boxes on the left determine the information that is displayed. Users can opt to show the **Bay Prefix**, **Bay Group** and **Bay Number**. (These must first have been assigned in the Planner module). They can also show the **Name** and **Description**.

The **Font**, **Size**, **Bold** and **Italic** options can also be chosen to configure the appearance of the text. If the size is set to 0, the text will remain at a constant scaled size as the user zooms in and out of the floor plan. If the size is set to a specific value, it will remain at a fixed size and appear larger or smaller as the users zoom in and out.

The **Text Color** and **Background Color** can also be selected. If the **Make Background Transparent** button is clicked, the background color will be set to the value set in the **DEFAULT_TRANSPARENCY_COLOUR** system variable (configured in the Administration Module) and the background will appear transparent in the floor plan.

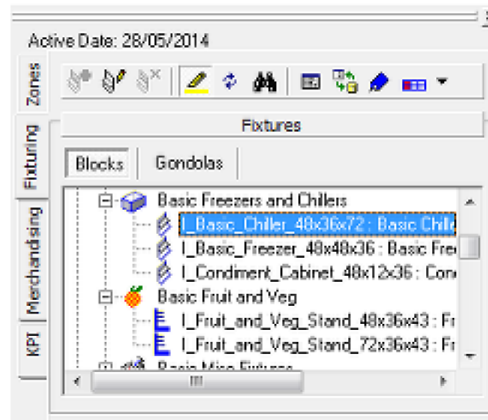
Changes in the appearance of the annotation can be seen in the floor plan by clicking **OK**. When the appearance of the text is satisfactory, close the Fixture Notation dialog box by clicking the 'X' in the upper right corner.

Controlling Display of Fixture Annotation in the Floor Plan

Display of Fixture Annotation in the floor plan is controlled by the **2D Label Distance** slider control in the **View** toolbar. If this is reduced to a small value the fixture annotation will be hidden from view. Increase it and the fixture annotation will reappear.

Adding Fixtures

Fixtures are placed in the Merchandiser module by selecting a fixture from the Object Browser and dragging and dropping into the floor plan.

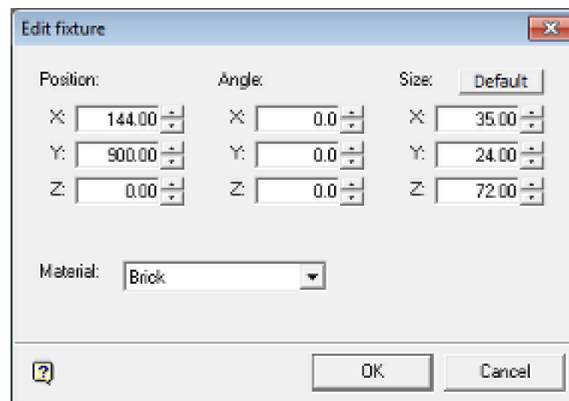


The fixture will then place in the floor plan.

Editing and Deleting Fixtures

Editing Fixtures

To edit a fixture, select it and right click to bring up the right click menu. Select the **Edit** option from the menu. This will bring up the Edit Fixture dialog box.



Position

These spin controls enable the user to adjust the position of the fixture within the floor plan.

Angle

These spin controls enable the user to modify the angle at which the fixture is in the floor plan.

Size

These spin controls enable the user to change the size of the fixture. Hitting the **Default** button returns the fixture to its specified dimensions.

Note: Changing the size of the fixture is not recommended if a bill of materials is to be produced from the floor plan - it could render it inaccurate.

Material

The options in the Material drop down list enable the user to change the displayed color of the fixture from its default color.

Making the Changes

Clicking **OK** will make the specified changes to the fixture.

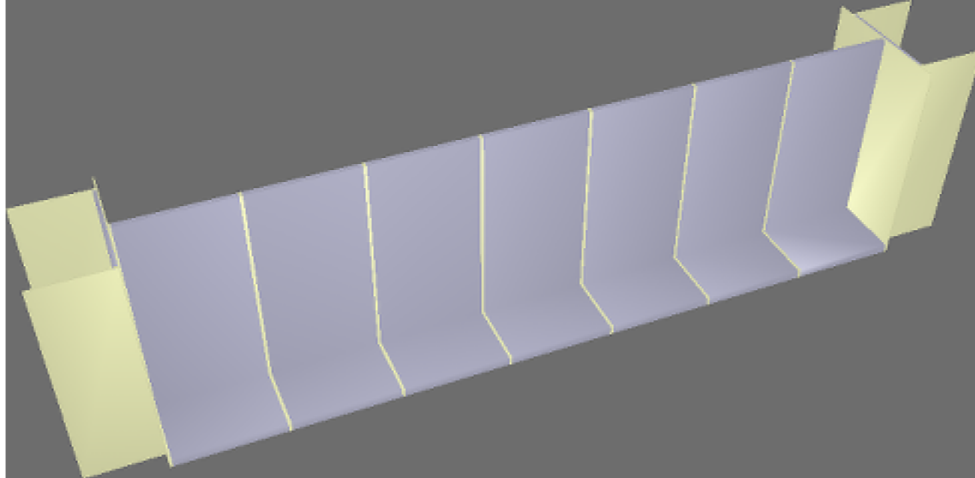
Deleting Fixtures

A fixture can be deleted by turning Grouping **Off**, selecting the specific fixture and clicking **Delete**. It will be deleted without further confirmation.

Gondolas

Placing a Gondola

Gondolas are pre-defined arrangements of fixtures and fittings. This enables long runs of fixtures to be put down quickly, making it easy to lay out or modify equipment in a floor plan.

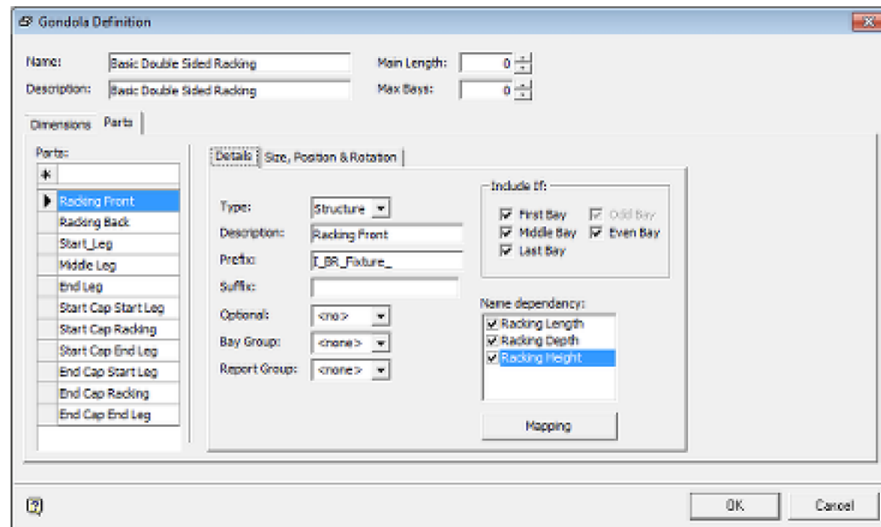


The above example shows a double sided gondola with end caps as placed in merchandiser.

Note: Gondolas can be added in both the Planner and Merchandiser. Most users add them in the Planner module as it is easier to achieve accurate placement.

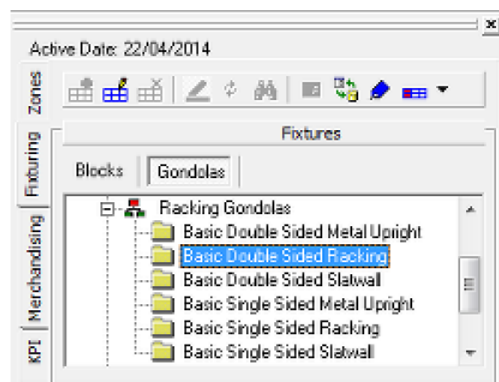
Fixture Studio

Gondolas are configured in the Fixture Studio Module in the Gondola Definitions dialog box. This enables all details of the gondola to be configured including which options will appear in the Add Gondola dialog box in the Planner and Merchandiser modules.



Placing a Gondola

Gondolas are placed in the Merchandiser module by selecting a Gondola from the Object Browser and dragging and dropping into the floor plan.



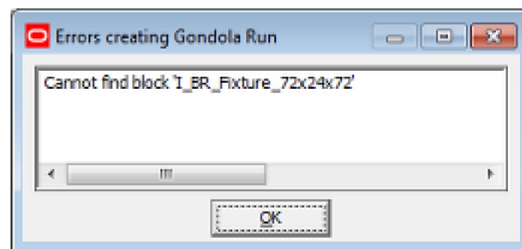
After being invited to select a start position, the Add Gondola dialog box will appear. Some options will be grayed out because they are only available in the Planner module.

- Number allows the user to draw a line in the floor plan. This specifies the length of the gondola and which end of the line the first bay of the gondola will be drawn at.
- Starting Point enables the user to specify point in the drawing which will be the origin from where the gondola will be drawn. This is specified in Cartesian coordinates from the origin (0,0) of the floor plan.
- Start Position (left or right) specifies whether the first bay of gondola is at the left end or right end of the gondola run.
- Extend or Best Fit determines whether the number of bays drawn will fit entirely inside the line or partially extend outside of the line.

Make the required selections, click **OK** and the gondola will be placed.

Problems with Gondola Placement

For a gondola to draw correctly, the block used to draw it must have been registered in Fixture Studio. If the block does not exist a warning will be generated.

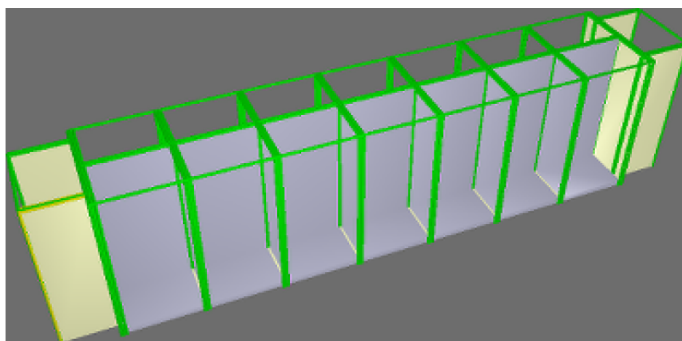


A common reason for this problem is that the combination of dimensions chosen in the Add Gondola dialog box does not correspond to an existing block. This problem can be addressed by looking at how the gondola has been configured in Fixture Studio.

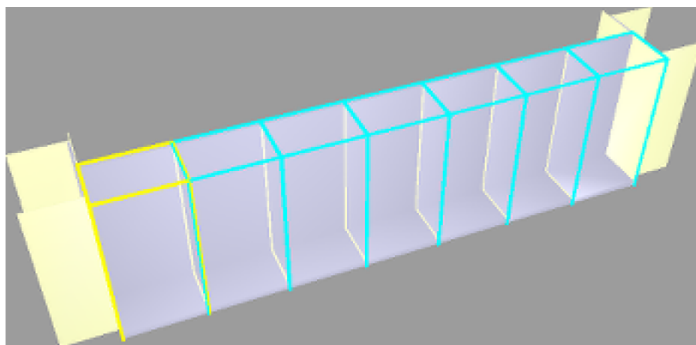
Editing and Deleting Gondolas

Grouping

Once gondolas are placed, they effectively become a collection of associated fixtures. The behavior of a gondola for editing is determined by whether grouping is on or off. This is set using the Grouping option on the status bar. If grouping is on, selecting a single fixture on the gondola will automatically select all fixtures. If grouping is off, individual fixtures in the gondola can be selected.



This screen shot shows a gondola selected with Grouping **On**. The selection frames are green.



This screen shot shows individual fixtures selected in a gondola with Grouping **Off**. The selection frames are cyan and yellow.

Moving Gondolas

Once selected, gondolas can be moved in one of two ways:

- They can be moved in both Walk and Edit modes by means of the cursor keys.
- They can be moved in Edit mode by moving the mouse cursor over the selected fixtures, holding the left mouse key down, dragging the fixtures to the required position and releasing the mouse key.

Deleting Gondolas

A gondola can be deleted by turning Grouping **On**, selecting the gondola and clicking the **Delete** key. It will be deleted without further confirmation.

Planner and Synchronization

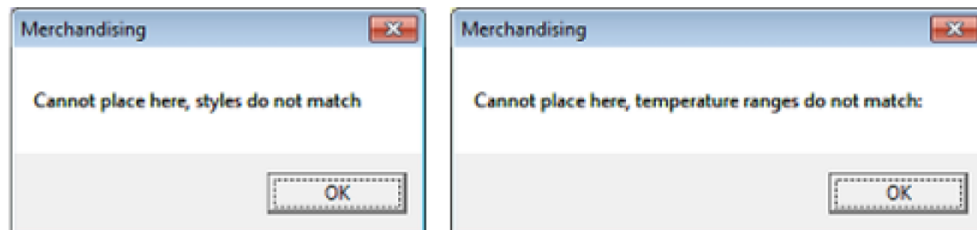
Dependent on settings in Planner, users opening the same floor plan in planner may need to synchronize the floor plan so read the changes made in Merchandiser into the floor plan used in Planner.

Adding Shelves

Shelves can be added to fixtures in Merchandiser (but not in Planner).

Restrictions on Adding Shelves

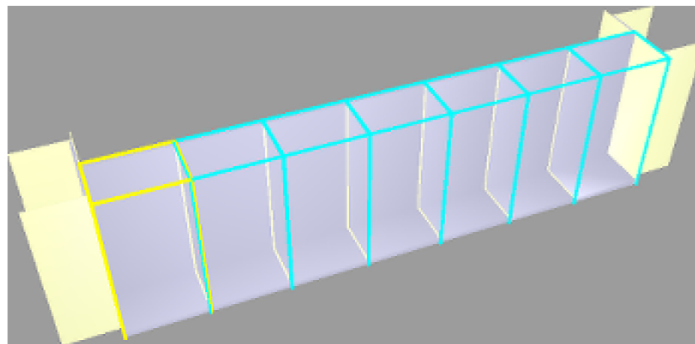
In order for shelves to be added, their styles must be compatible, as must their temperature ranges. If they do not, an error message will result.



Styles and temperature ranges are assigned in Fixture Studio. It is possible to use custom SQL configure the Properties window in the Object Browser to show the assigned styles and temperature ranges for specific items of equipment - see the *Oracle Retail Macro Space Planning Data Model* for more information.

Selecting the Fixtures

If no fixtures are selected, they will be added to the fixture they are dragged and dropped on. Alternatively shelves will be placed on any pre-selected fixtures they are dragged and dropped to.



There are two ways of selecting fixtures:

- With Grouping (button on status bar) Off, select individual fixtures by clicking on them in turn.
- With Grouping On, select a set of fixtures by clicking on any fixture in the group. If this option is selected, any fittings must be de-selected. This is done by right clicking on a fixture and then selecting Group>Select without Fittings from the right click menu.

The above example shows selecting the fixtures along one side of a double sided gondola with Grouping set to **Off**.

Note: If fittings are not de-selected, shelves may place on them. This would lead to reporting errors if a bill of materials is generated from a floor plan.

Adding the Shelf

Once the fixtures have been selected, a shelf can be selected from the hierarchy in the Object Browser and dragged and dropped onto the selected fixtures. This will result in the Add Shelves dialog box appearing.

| Slot | Height | Width | Depth | Angle | |
|------|--------|-------|-------|-------|-------|
| 3 | 21 | -0.50 | -1.00 | 0.00 | Basic |

Height 66 Slots: 18 First Slot: 12 Spacing: 3
Width -0.5 Slots: 0 First Slot: -0.5 Spacing: 0
Depth -1 Slots: 0 First Slot: -1 Spacing: 0

This will appear in its basic form and allows a number of aspects of the shelf to be edited. The most common way is to use the **Slot** spin control to adjust the height of the shelf. However, most users want to place multiple shelves. This can be done by clicking the **Array>>** button on the upper right of the dialog box. This will result in the full version of the dialog box being revealed.

Add shelves

Height: Slot: Array <<
 Width: X Slot:
 Depth: Y Slot: Add
 Angle:
 Shelf:
 Preferred Style:

| Slot | Height | Width | Depth | Angle | |
|------|--------|-------|-------|-------|-------|
| 4 | 24 | -0.50 | -1.00 | 10.00 | Basic |
| 9 | 39 | -0.50 | -1.00 | 10.00 | Basic |
| 14 | 54 | -0.50 | -1.00 | 10.00 | Basic |

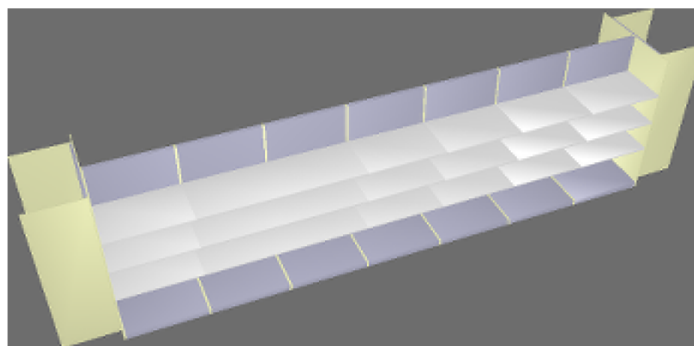
Height 66 Slots: 18 First Slot: 12 Spacing: 3
 Width -0.5 Slots: 0 First Slot: -0.5 Spacing: 0
 Depth -1 Slots: 0 First Slot: -1 Spacing: 0

Array Details
 Z Quantity:
 Z First Shelf: Height Slots
 Z Spacing:
 X Quantity:
 X First Shelf: Width Slots
 X Spacing:
 Y Quantity:
 Y First Shelf: Depth Slots
 Y Spacing:

OK Cancel

To place multiple shelves:

1. Set the Z Quantity to the required number of shelves.
2. Set the Z First Shelf to the required height. This is the height of the first shelf.
3. Set the Z Spacing to the required spacing between shelves.
4. Click the Add button to add the shelves to the list of those to be added in the list view on lower left.
5. Click the OK button to add the shelves to the fixtures.

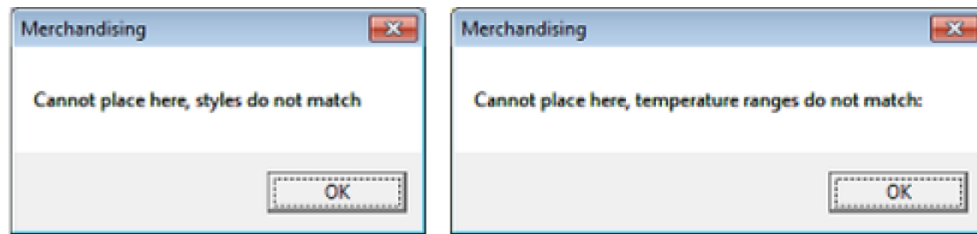


Adding an Array of Pegs

There are two ways to add an array of pegs to a fixture: via connection points, or via the Shelf dialog box. This section of help discusses how to do it via the Shelf dialog box.

Restrictions on Adding Shelves

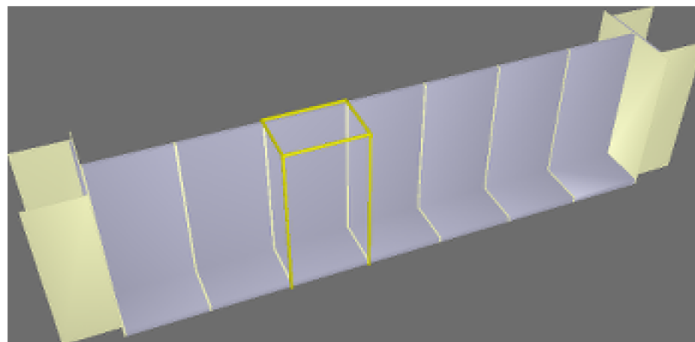
In order for pegs to be added, their styles must be compatible, as must their temperature ranges. If they do not, an error message will result.



Styles and temperature ranges are assigned in Fixture Studio. It is possible to use custom SQL configure the Properties window in the Object Browser to show the assigned styles and temperature ranges for specific items of equipment - see the *Oracle Retail Macro Space Planning Data Model* for more information.

Selecting a Fixture

If no fixtures are selected, they will be added to the fixture they are dragged and dropped on. Alternatively shelves will be placed on any pre-selected fixtures they are dragged and dropped to.



There are two ways of selecting fixtures:

- With Grouping (button on status bar) Off, select individual fixtures by clicking on them in turn.
- With Grouping On, select a set of fixtures by clicking on any fixture in the group. If this option is selected, any fittings must be de-selected. This is done by right clicking on a fixture and then selecting Group>Select without Fittings from the right click menu.

The above example shows selecting a fixture along one side of a double sided gondola with Grouping set to **Off**.

Note: If fittings are not de-selected, shelves may place on them. This would lead to reporting errors if a bill of materials is generated from a floor plan.

Adding the Pegs

Once the fixtures have been selected, a peg can be selected from the hierarchy in the Object Browser and dragged and dropped onto the selected fixture. This will result in the Add Shelves dialog box appearing.

Add shelves

Height: 43 Slot: 43 Array >>
 Width: 0 X Slot: 0
 Depth: 0 Y Slot: 1 Add
 Angle: 0
 Shelf: Peg 1 x 6 x 1
 Preferred Style: (None)

| Slot | Height | Width | Depth | Angle | Peg |
|------|--------|-------|-------|-------|-----|
| 43 | 43 | 0.00 | 0.00 | 0.00 | Peg |

Height 69 Slots: 69 First Slot: 0 Spacing: 1
 Width 35 Slots: 35 First Slot: 0 Spacing: 1
 Depth 23 Slots: 24 First Slot: -1 Spacing: 1

OK Cancel

This will appear in its basic form and allows a number of aspects of the shelf to be edited. The most common way is to use the **Slot** spin control to adjust the height of the shelf. However, most users want to place multiple shelves. This can be done by clicking the **Array>>** button on the upper right of the dialog box. This will result in the full version of the dialog box being revealed.

Add shelves

Height: 43 Slot: 43 Array << Add

Width: 0 X Slot: 0

Depth: 0 Y Slot: 1

Angle: 0

Shelf: Peg 1 x 6 x 1

Preferred Style: (None)

| Slot | Height | Width | Depth | Angle | |
|------|--------|-------|-------|-------|-----|
| 12 | 12 | 4.00 | -1.00 | 0.00 | Peg |
| 17 | 17 | 4.00 | -1.00 | 0.00 | Peg |
| 22 | 22 | 4.00 | -1.00 | 0.00 | Peg |
| 27 | 27 | 4.00 | -1.00 | 0.00 | Peg |
| 32 | 32 | 4.00 | -1.00 | 0.00 | Peg |
| 37 | 37 | 4.00 | -1.00 | 0.00 | Peg |
| 42 | 42 | 4.00 | -1.00 | 0.00 | Peg |
| 47 | 47 | 4.00 | -1.00 | 0.00 | Peg |
| 52 | 52 | 4.00 | -1.00 | 0.00 | Peg |
| 57 | 57 | 4.00 | -1.00 | 0.00 | Peg |
| 62 | 62 | 4.00 | -1.00 | 0.00 | Peg |
| 67 | 67 | 4.00 | -1.00 | 0.00 | Peg |
| 12 | 12 | 8.00 | -1.00 | 0.00 | Peg |
| 17 | 17 | 8.00 | -1.00 | 0.00 | Peg |
| 22 | 22 | 8.00 | -1.00 | 0.00 | Peg |
| 27 | 27 | 8.00 | -1.00 | 0.00 | Peg |

Height 69 Slots: 69 First Slot: 0 Spacing: 1
Width 35 Slots: 35 First Slot: 0 Spacing: 1
Depth 23 Slots: 24 First Slot: -1 Spacing: 1

Array Details

Z Quantity: 12
Z First Shelf: 12
Z Spacing: 5

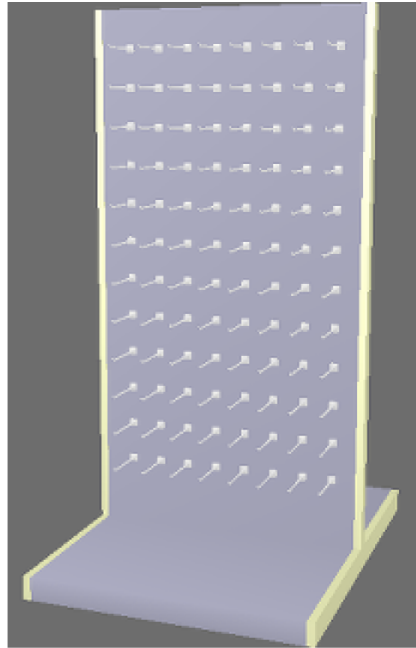
X Quantity: 8
X First Shelf: 4
X Spacing: 4

Y Quantity: 1
Y First Shelf: -1
Y Spacing: 24

OK Cancel

To place:

1. Set the Z Quantity to the required number of vertical pegs.
2. Set the Z First Shelf to the required height. This is the height of the first peg.
3. Set the Z Spacing to the required vertical spacing between pegs.
4. Set the X Quantity to the required number of horizontal pegs.
5. Set the X First Shelf to the required value. This is the distance of the first peg from the left edge of the fixture.
6. Set the X Spacing to the required horizontal spacing between pegs.
7. Click the Add button to add the pegs to the list of those to be added in the list view on lower left.
8. Click the OK button to add the pegs to the fixture.



Editing and Deleting Shelves

Editing Shelves

To edit a shelf, select it and right click to bring up the right click menu. Select the **Edit** option from the menu. This will bring up the Edit Shelf dialog box.

| Position: | | Slot: | | Angle: | | Size: | |
|-----------|------|-------|----|--------|-----|-------|-------|
| X: | -0.5 | X: | 0 | X: | 0.0 | X: | 36.00 |
| Y: | -1 | Y: | 0 | Y: | 0.0 | Y: | 23.00 |
| Z: | 54 | Z: | 14 | Z: | 0.0 | Z: | 1.00 |

Fixture - Height: 66 Slots: 18 First Slot: 12 Spacing: 3
Width: -0.5 Slots: 0 First Slot: -0.5 Spacing: 0

Material:

Preferred Style:

OK Cancel

Position

These spin controls enable the user to adjust the position of the shelf on the fixture. For shelves, the most common use would be to alter the Z value to change the height of the shelf on the fixture. For a peg the position can be changed by means of the Z (height) and X (horizontal position) values.

Slot

If slots or a pegboard grid (connection points) have been defined for the parent fixture in Fixture studio, these spin controls enable the user to move the shelf (or peg) from one predefined position to another.

Angle

These spin controls enable the user to modify the angle at which the shelf or peg is at on the fixture.

Size

These spin controls enable the user to change the size of the shelf or peg. Hitting the **Default** button returns the fixture to its specified dimensions.

Note: Changing the size of the shelf or peg is not recommended if a bill of materials is to be produced from the floor plan - it could render it inaccurate.

Material

The options in the Material drop down list enable the user to change the displayed color of the e from its default color.

Preferred Style

This option can be used where multiple style relationships have been defined in the Administration Module. If it is possible to place a display style in a shelf in both a Folded and a Loose style, it is possible to select the preferred style so that it is automatically selected when a user places a product.

Making the Changes

Clicking **OK** will make the specified changes to the shelf.

Deleting Shelves

There are two methods for deleting shelves: directly or by selecting the parent fixture.

Deleting a Shelf or Peg Directly

A shelf or peg can be deleted by turning Grouping **Off**, selecting the specific object and clicking the **Delete** key. It will be deleted without further confirmation.

Deleting a Shelf via the Parent Fixture

Shelves can also be deleted by selecting the parent fixture, bring up the right click menu and selecting **Delete Shelves**.

Connection Points

Overview of Connection Points

Connections points are used to join items of equipment together. They can either be used singly, or aligned in lines, planes or boxes.

Connection Points are used to attach items of equipment together.

Connection Lines are used where items like crossbars have set positions along their length that can accommodate Tertiary Equipment such rods.

The position of the arrow indicates the position of the connection point.

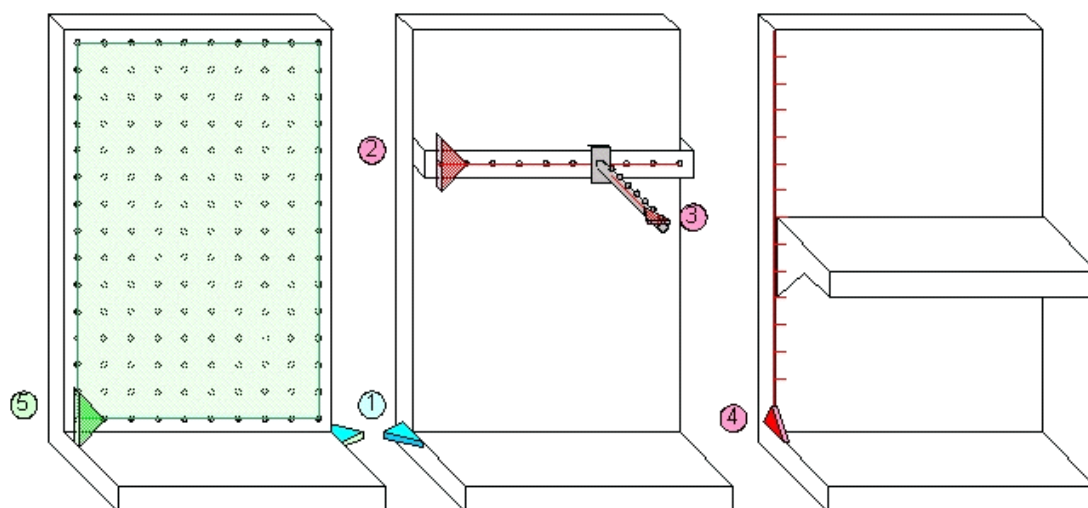
The increments between set positions along a connection line are defined in Fixture Studio.

The position of the connection arrow defines the leftmost position of the first point on the connection line.

Connection Planes are used where Secondary Equipment such as peg boards or slotted back panels have a 2 dimensional array of possible connection points for Tertiary Equipment such as pegs.

The increments between set positions in a connection plane are defined in Fixture Studio.

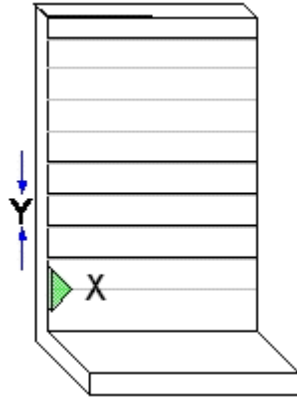
The position of the connection arrow defines the bottom left position of the first point on the connection plane.



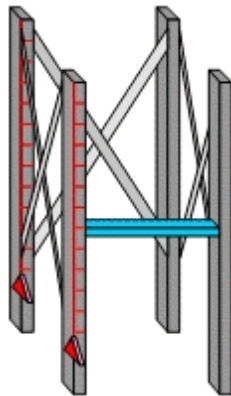
In the above diagram, blue arrows (1) represent Connection Points; red arrows (2, 3, and 4) represent Connection Lines and the green arrow (5) represents a Connection Plane.

The arrow direction indicates the X axis and the arrow lies in the X, Y plane.

Slatted back panels use a connection plane with the X spacing set to 0 so that rods can be slip to any position along the slot. The Y spacing is set to the distance between slots.



It is also possible to use more than one connection line, as for example with racking.



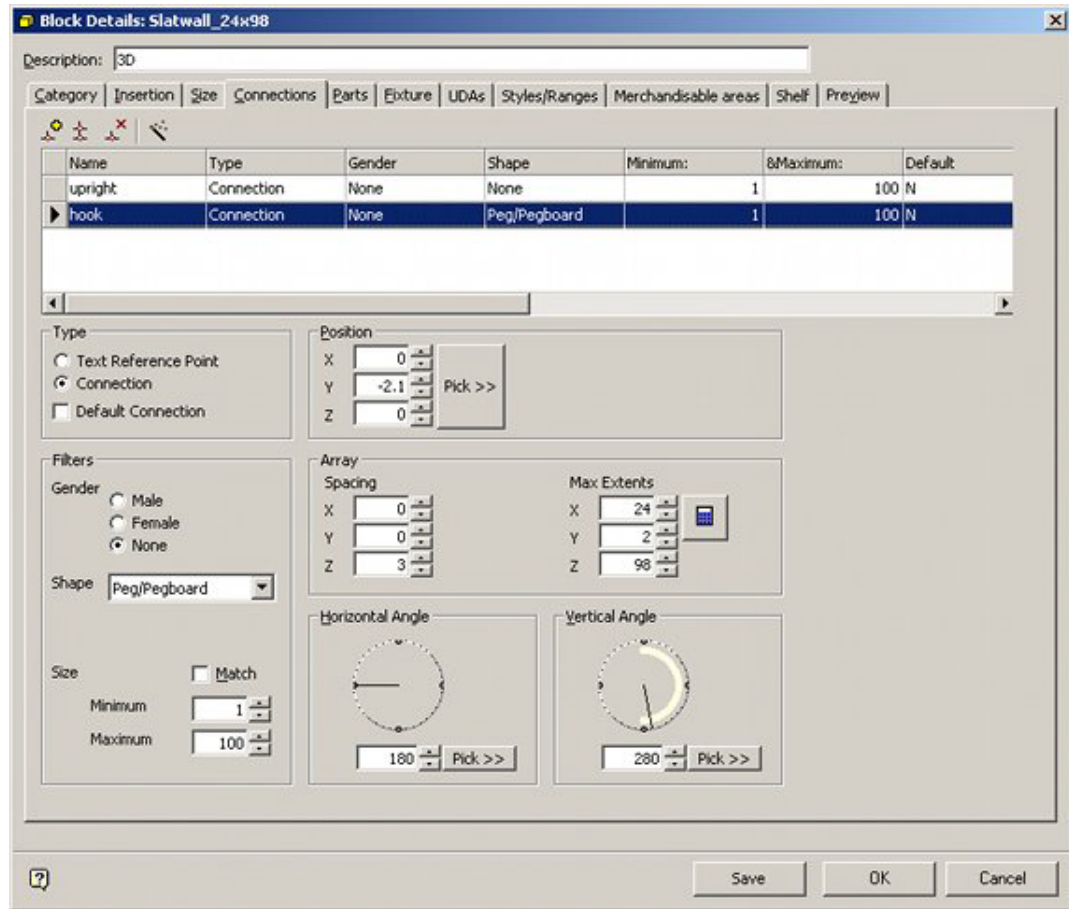
The fixture could be defined as two uprights (front and back), plus the cross-bracing. This would allow beams (blue) to be added to either the front or the back.

Macro Space Management will use the nearest connection arrow to the drop/pick point when deciding which to use.

Connection points are used to define the exact point on the dropped object (shelf or peg or rod) that attaches to the notch position. The connection line/plane filters must match the connection point filters. If no connection point is defined for the dropped object, it will use the insertion point of the shelf/peg.

The Connections Tab in Fixture Studio

The **Connections Tab** in the Block Details dialogue box in Fixture Studio lets the user specify the connection options for Macro Space Management blocks.



A small Toolbar at the top lets users Add, Copy and Delete connections, while the Wizard on the toolbar allows the user to add three basic connections.

The Connections List below the toolbar lists all current connections for the Macro Space Management Block.

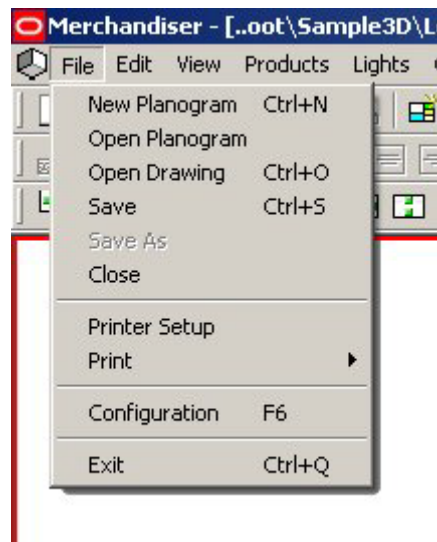
The defined connection points are the defaults for that fixture type and will be applied for every instance placed in the drawing.

Note: See the Fixture Studio Help File for more information.

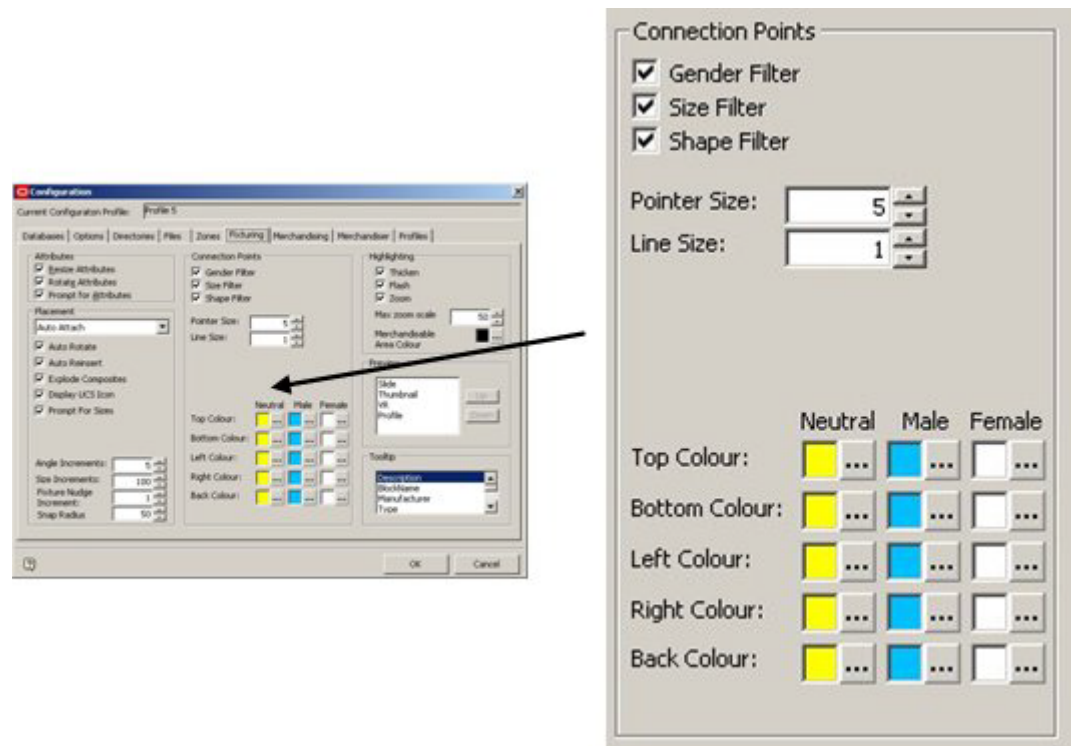
The Connections Tab and the Configuration Module

Settings in the Configuration Module can affect how connection points appear and behave. Settings are local and can be customized for the user.

Access the Configuration Module by selecting the Configure Option in the file pull down menu.



Within the Configuration module, select the Fixturing Tab. The Connection Points frame can then be used to change their appearance.



Pointer Size and **Line Size** affect the appearance of the connection points as displayed.

Colors for Neutral, Male and Female connection points can also be set.

A series of check boxes allow users to configure some aspects of how connection points operate:

- Gender Filter determines whether connection genders are taken into account when deciding if connections are compatible.
- Size Filter determines whether connection sizes are taken into account when deciding if connections are compatible.

- Shape Filter options determine whether connection shapes are taken into account when deciding if connections are compatible.

These settings are local and will not affect other users of Macro Space Management.

Connection Details

Each **connection** needs the following information to be specified for it in Fixture Studio.

- Name
- Type
- Layer
- Gender
- Shape
- Size
- Whether it is the Default
- Position, Array and Angle settings

For one item of equipment to connect to another the following must be true.

| | Requirement | Optional or Mandatory |
|---------------|--|--|
| Gender | The connection points must have compatible genders | This requirement can be disabled in the Configuration Module |
| Shape | The connection points must have the same shape | This requirement can be disabled in the Configuration Module |
| Size | The connection points must have compatible sizes | This requirement can be disabled in the Configuration Module |

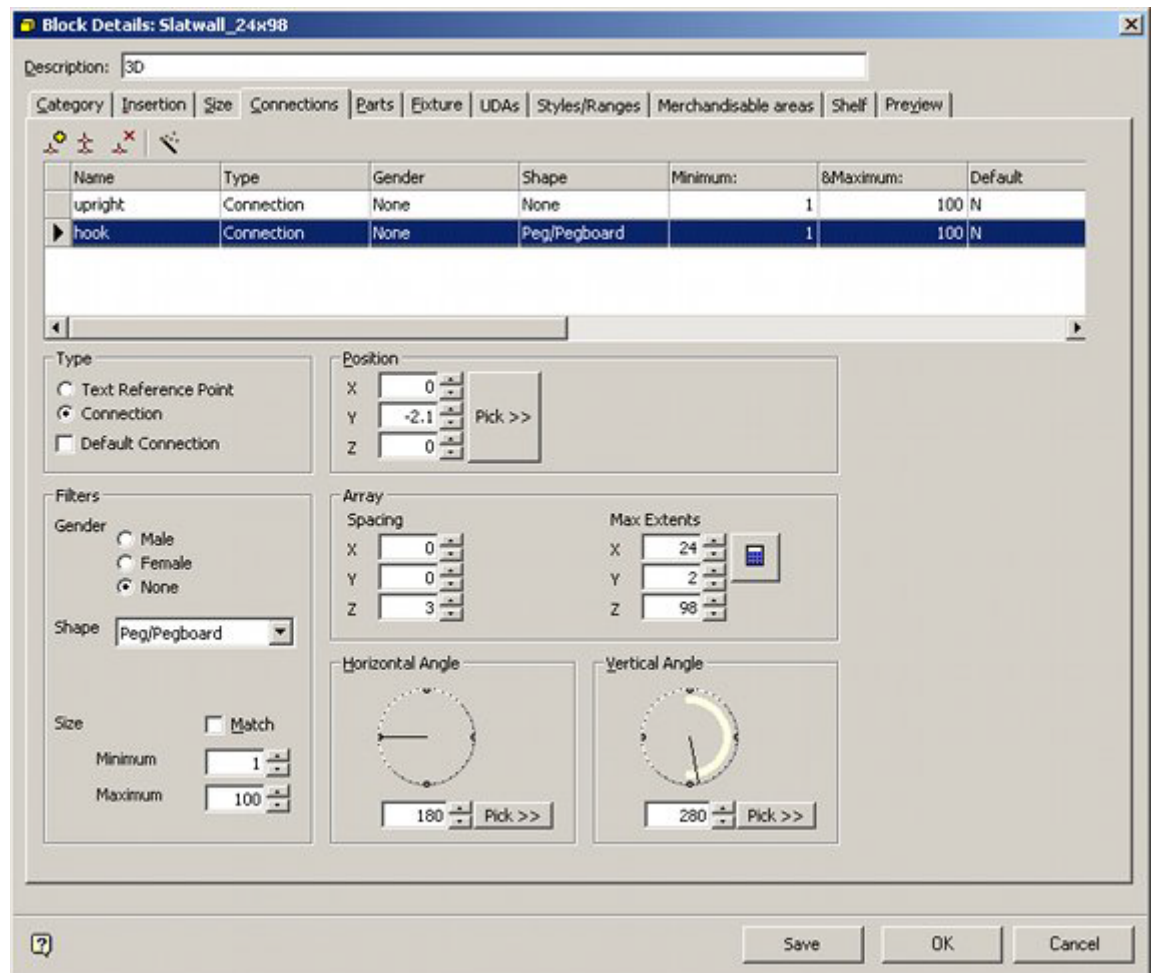
If any of these criteria are not true, then a connection cannot be made.

In addition, if the details of the connections are not correctly specified relative to each other, equipment may connect together in unintended alignments.

Connection Point Parameters

Setting Connection Point Parameters

The **Connection Point** parameters are set using the Block Details dialogue box in Fixture Studio.

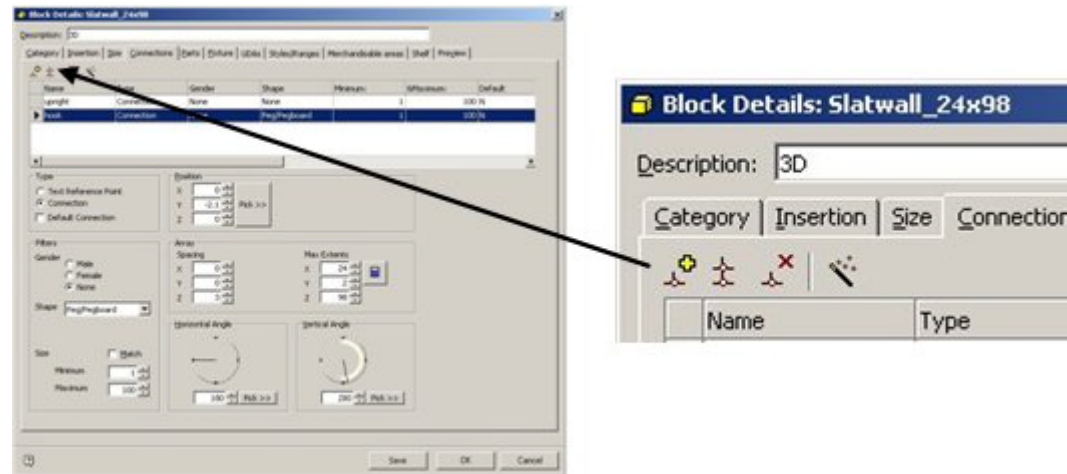


Brief details will be discussed in the following sections - see the Fixture studio help file for more detailed information.

The Connections Toolbar

The **Connections Toolbar** is found to the upper left of the Connections Tab in the Block Details dialogue box in Fixture Studio.

It allows users to Add, Copy and Delete Connections. It also allows the user to invoke the Connections Wizard.



| Icon | Description |
|------|-------------------------|
| | Add a Connection |
| | Copy a Connection |
| | Delete a Connection |
| | Connection Point Wizard |

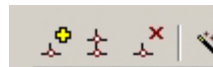
Add a Connection

Clicking on the Add a Connection icon causes a line to be added to the Connections List ready for further details of the connection to be added.

| Name | Type | Gender |
|-------|------------|---------|
| Left | Connection | Male |
| Right | Connection | Female |
| Back | Connection | Neutral |

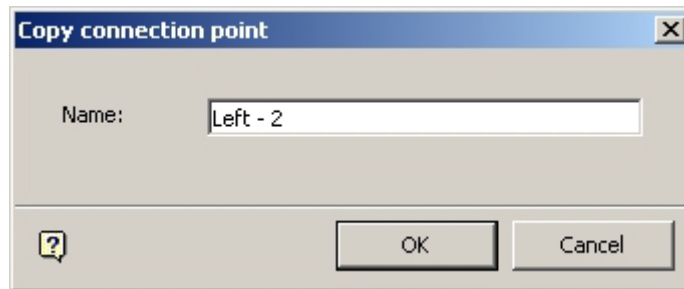
Copy a Connection

Clicking on the Copy a Connection icon causes a line to be copied again to the Connections List mirroring details of the connection to be added.



| | Name | Type | Gender |
|--|-------|------------|---------|
| | Left | Connection | Male |
| | Right | Connection | Female |
| | Back | Connection | Neutral |

Before clicking the Copy icon, select the connection to be copied. Clicking on the icon will bring up the connection naming dialogue box.

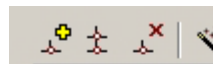


Copy connection point

Name:

Edit the name to one suitable for the new connection. In the example Left has been edited to Left - 2.

On clicking OK, a duplicate connection will be added, save for the changed name.

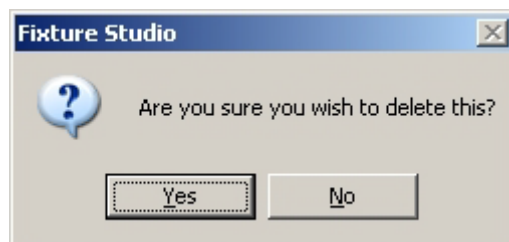


| | Name | Type | Gender |
|--|----------|------------|---------|
| | Left | Connection | Male |
| | Right | Connection | Female |
| | Back | Connection | Neutral |
| | Left - 2 | Connection | Male |

Delete a Connection

To delete a connection, highlight the connection to be deleted and click on the Delete icon.

The User will be asked to confirm deletion.



Fixture Studio

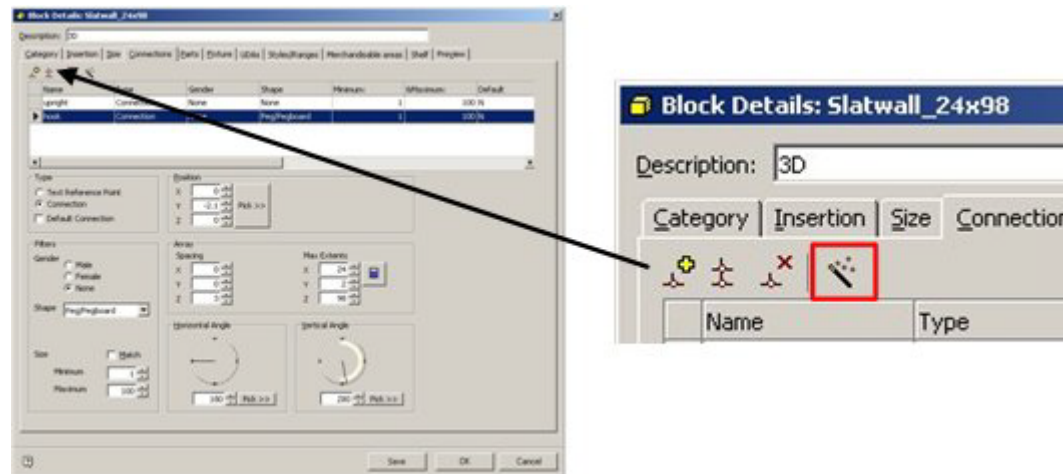
Are you sure you wish to delete this?

Connection Wizard

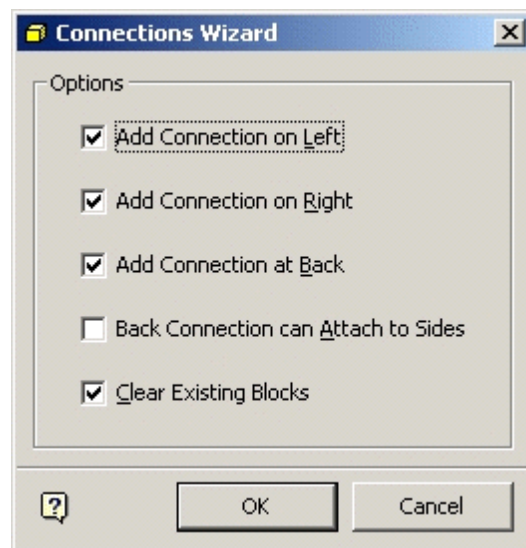
The Connection Wizard is discussed in its own section

The Connections Wizard

The **Connections Wizard** can be invoked from the Wizard icon in the toolbar in the Connections Tab in the Block Details dialogue box in Fixture Studio.



This will bring up the Connections Wizard dialogue box.



- Checking the Add connection on Left checkbox will add a Connection on the left.
- Checking the Add connection on Right checkbox will add a Connection on the right.
- Checking the Add connection at Back checkbox will add a Connection at the back.

The left connection is male and the right female so that fixtures can only attach when they are facing the same way. The left connection is additionally set to be the default.

The Back connection has no gender, so it will attach to any other connection.

Checking the Clear Existing Blocks checkbox will remove any existing connections.

On clicking OK on the Wizard, the selected default connections will be added.

| | Name | Type | Gender | Shape | Default | Justifica |
|---|-------|------------------|--------|------------|---------|-----------|
| ► | Left | Connection Point | Male | Triangular | True | Offset |
| | Right | Connection Point | Female | Triangular | False | Offset |
| | Back | Connection Point | None | Triangular | False | Offset |

Other Connection Point Parameters

Other connection point parameters can be set in the Connections Tab in the Block Details dialogue box in Fixture Studio.

Block Details: Slatwall_24x98

Description: 3D

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

| Name | Type | Gender | Shape | Minimum: | Maximum: | Default |
|---------|------------|--------|--------------|----------|----------|---------|
| upright | Connection | None | None | 1 | 100 | N |
| ► hook | Connection | None | Peg/Pegboard | 1 | 100 | N |

Type

☐ Text Reference Point
☒ Connection
☐ Default Connection

Position

X: 0
Y: -2.1
Z: 0
Pick >>

Filters

Gender: ☐ Male, ☐ Female, ☒ None

Shape: Peg/Pegboard

Size

☐ Match
Minimum: 1
Maximum: 100

Array

Spacing: X: 0, Y: 0, Z: 3

Max Extents: X: 24, Y: 2, Z: 98

Horizontal Angle

180
Pick >>

Vertical Angle

280
Pick >>

Save OK Cancel

These include Type, Position, Array Spacing, Gender, Shape, Size, Horizontal Angle and Vertical Angle.

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

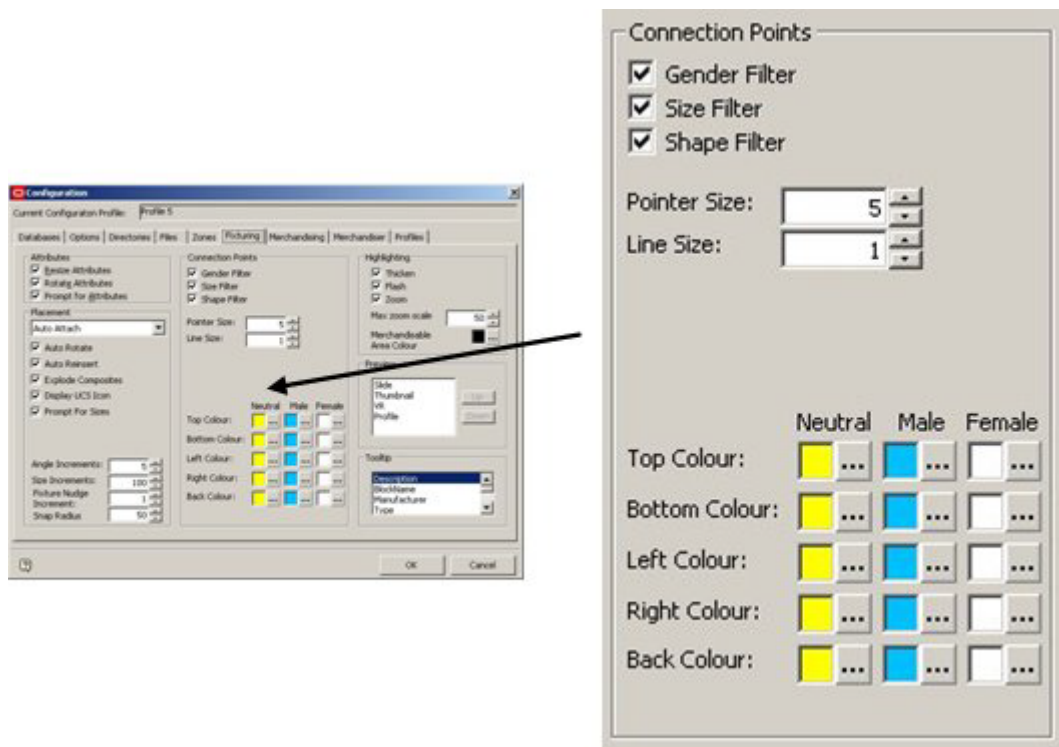
Using Connection Points

Overview of Using Connection Points

Connection points can be used to attach one piece of equipment to another.

For the equipment to connect, the connection points must be compatible.

Some factors affecting compatibility are set in the Configuration Module.



Other fixture specific factors are set in the Configuration Tab of the Block Details dialogue box in Fixture Studio.

Block Details: Slatwall_24x98

Description: 3D

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

| Name | Type | Gender | Shape | Minimum: | Maximum: | Default |
|---------|------------|--------|--------------|----------|----------|---------|
| upright | Connection | None | None | 1 | 100 | N |
| hook | Connection | None | Peg/Pegboard | 1 | 100 | N |

Type: ☐ Text Reference Point ☒ Connection ☐ Default Connection

Position: X: 0 Y: -2.1 Z: 0 [Pick >>](#)

Filters: Gender: ☐ Male ☐ Female ☒ None Shape: Peg/Pegboard

Size: ☐ Match Minimum: 1 Maximum: 100

Array Spacing: X: 0 Y: 0 Z: 3 Max Extents: X: 24 Y: 2 Z: 98

Horizontal Angle: 180 [Pick >>](#) Vertical Angle: 280 [Pick >>](#)

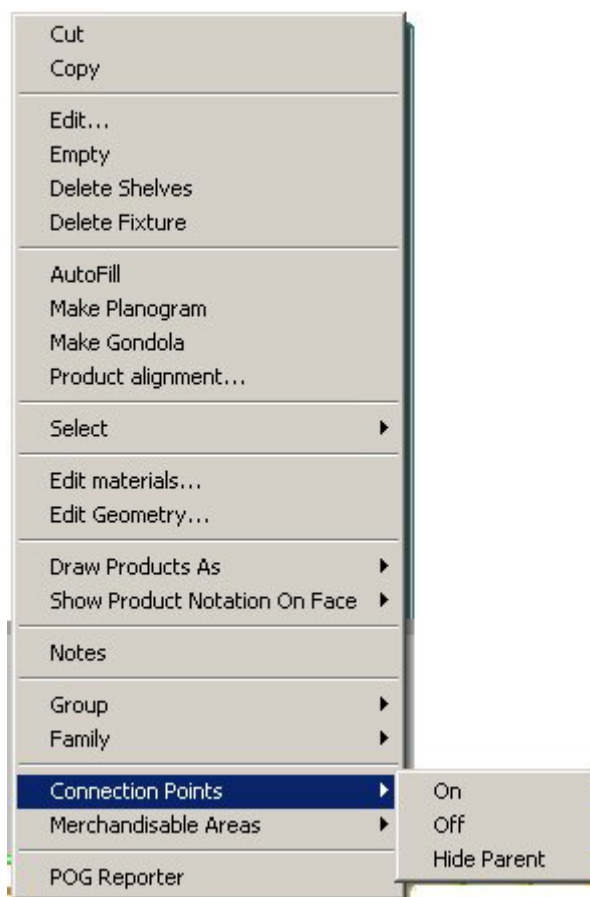
[Save](#) [OK](#) [Cancel](#)

The combination of both sets of parameters will determine whether two connection points are compatible with each other.

Turning Connection Display On and Off

The **Connection Display** can be turned on and off for individual fixtures or a selection set of fixtures within the Merchandiser Module.

Select one or more fixtures, then move the mouse pointer inside a fixture and use <Ctrl> plus right click to bring up the pop-up menu.

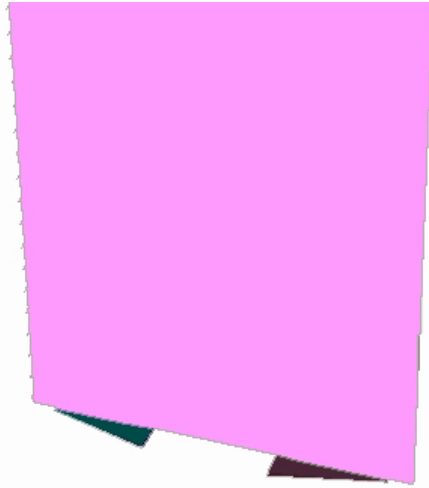


Clicking on the Connection Points option in the pop-up menu allows connection display to be turned on and off.

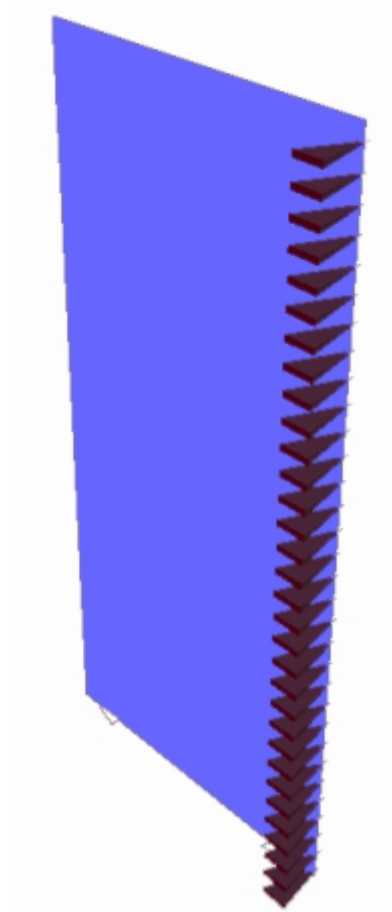
Hide parent will turn off connection point display the parent fixture when (for example) a child object such as a shelf is selected.

Connection Point Appearance

When visible, Connection Points are shown as triangles.



The color and size of the connection points can be specified in the Configuration Module. Their angle, gender, and so on for a specific fixture can be defined in Fixture Studio. Connection Points can appear in lines and arrays, as well as discrete points. The example below shows a Connection Line.



Checklist for Compatibility

For one item of equipment to connect to another the following must be true.

| | Requirement | Optional or Mandatory |
|---------------|--|--|
| Gender | The connection points must have compatible genders | This requirement can be disabled in the Configuration Module |
| Shape | The connection points must have the same shape | This requirement can be disabled in the Configuration Module |
| Size | The connection points must have compatible sizes | This requirement can be disabled in the Configuration Module |

Gender

The gender of a connection determines whether that connection is compatible with another. There are three genders; male, female and neutral. They connect as follows:

| | Can connect with | |
|----------------|----------------------|---------|
| Male | Female | Neutral |
| Female | Male | Neutral |
| Neutral | Any other connection | |

Shape

The shape of a point connection can be specified from a list provided by Oracle. They connect as follows:

| | Can connect with | |
|------------------|----------------------------|------|
| None | Any other connection shape | |
| Rectangle | Rectangle | None |
| Circle | Circle | None |
| Oval | Oval | None |
| Triangle | Triangle | None |
| Hexagonal | None | None |

The shape of a connection point is a theoretical concept used to make it easier to remember what connects to what - i.e. fixtures with 'Oval' connection points can only connect to other fixtures with 'Oval' connection points.

(When displayed in Merchandiser, all connection points will appear visually as triangles).

Size

A maximum and minimum size for the connection can be set in Fixture studio

A pair of connection points must have compatible sizes to connect together.

If the Match check box is ticked, then the connections must have identical maximum and minimum sizes. If they are not identical, the connections will not mate.

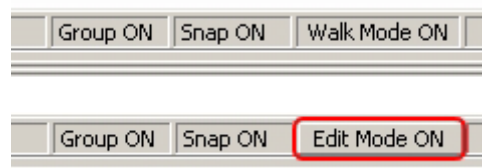
If the Match check box is not ticked, then the connections must have overlapping size ranges. If they are not overlapping, the connections will not mate.

| | Connection 1 | Connection 2 | Result |
|------------|--------------|--------------|--------------|
| Size Range | 0 - 50 | 25 - 75 | Compatible |
| Size Range | 0- 25 | 50 - 75 | Incompatible |

Connecting two objects in Edit Mode

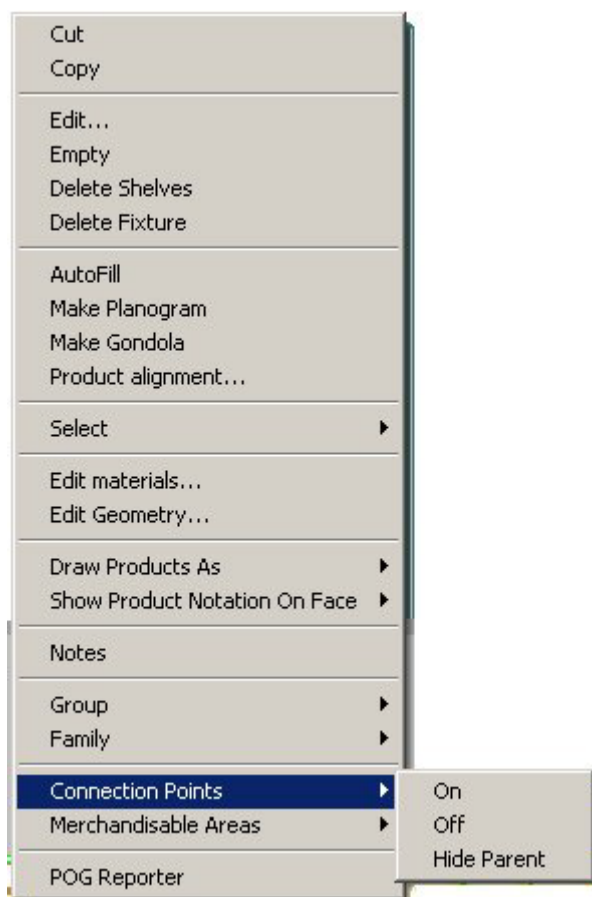
Swap to Edit Mode

To connect two objects in edit mode, first ensure that edit mode has been selected by toggling from Walk Mode to edit mode on the status bar.

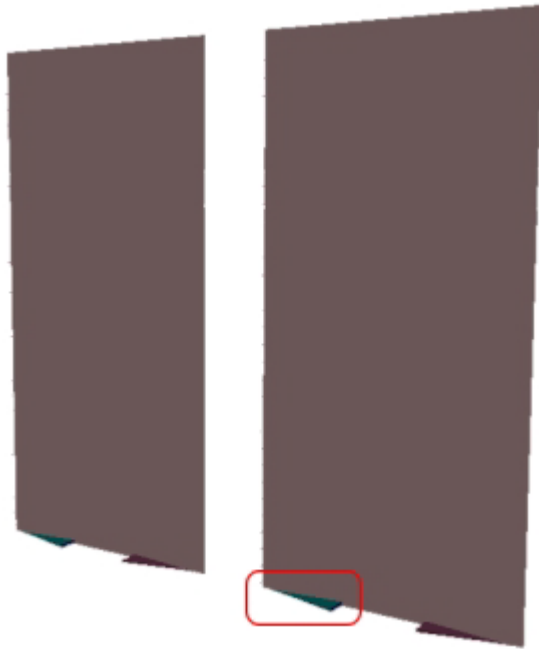


Turn Connection Points On

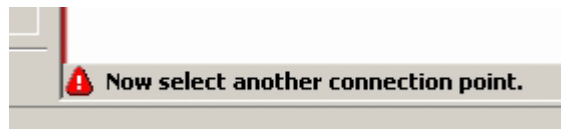
Next, ensure that the connection points have been toggled on by selecting a least two fixtures and use <Ctrl> plus right click to bring up the pop-up menu.



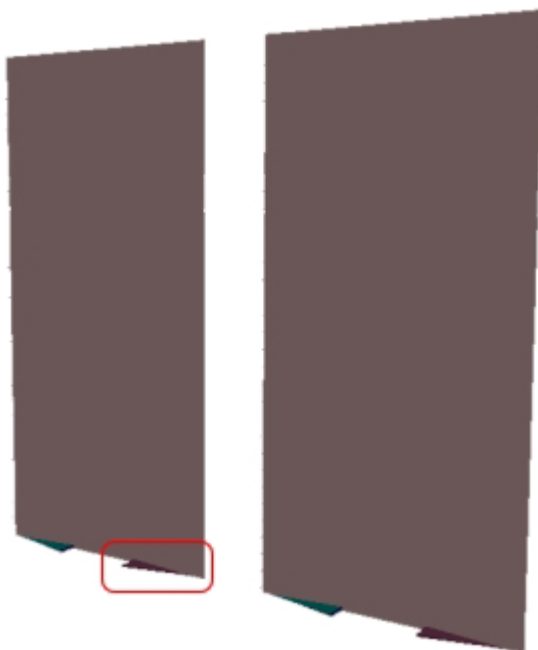
1. Turn connection points on and they will appear as triangles in the drawing.
2. Click First Connection Point and Follow Prompts
3. Click on the first connection point. (Circled in red in the image below)



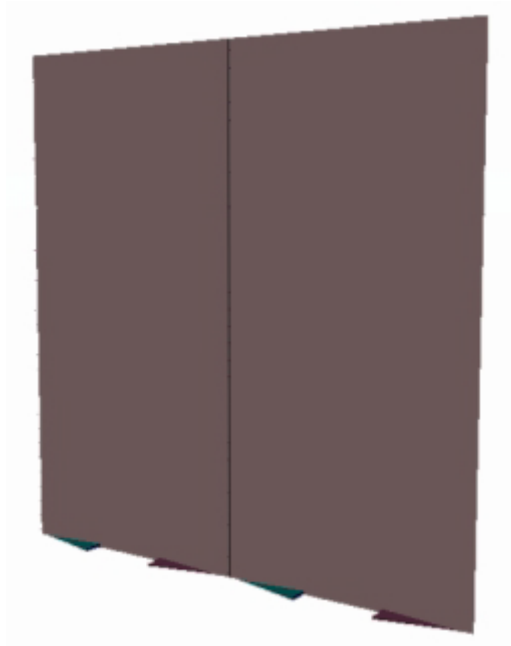
A prompt will then appear in the status bar asking the user to select the



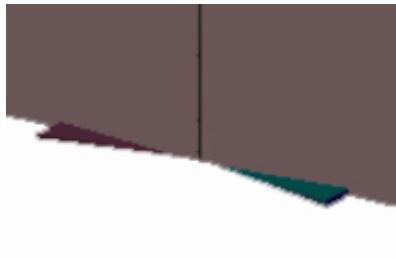
Select a connection point on the other fixture (circled in red in the image below).



As soon as the second connection point is clicked, the first object will be connected to the second one.



Note how the two connection points now meet:



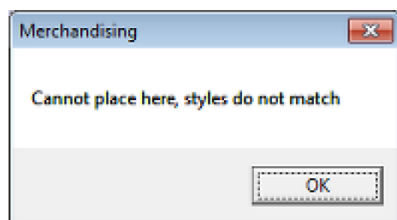
Merchandise in Merchandiser

Overview of Adding Merchandise

Merchandise can be added in two forms in Merchandiser: as products (or product placeholders) and as planograms. Settings in other modules determine what merchandise can be placed where in the Merchandiser module. Settings in the Administration Module, Fixture Studio and Product Studio constrain what products and planograms can be placed on what items of equipment. The settings may prevent products being physically placed. Planograms can still be placed after a warning dialog is overwritten.

Products

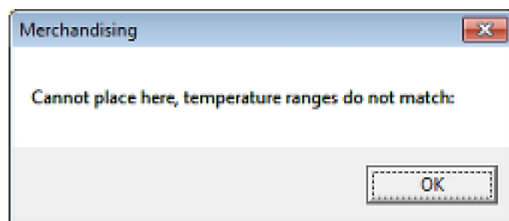
Products at display style level in merchandiser are assigned a style in Product Studio. If this style is not compatible with the style assigned in Fixture Studio to the fixture or shelf it is being placed on, a warning will result. This is intended to prevent (for example) products designed to go onto shelves being assigned to pegs by mistake.



This can be corrected by ensuring that:

1. The correct style has been assigned to the parent fixture, shelf or peg in Fixture Studio.
2. The correct style has been assigned to the Display Style in Product Studio.
3. A Style Relationship exists between the parent fixture, shelf or peg and the display style that will be placed. This can be verified in the Administration Module.

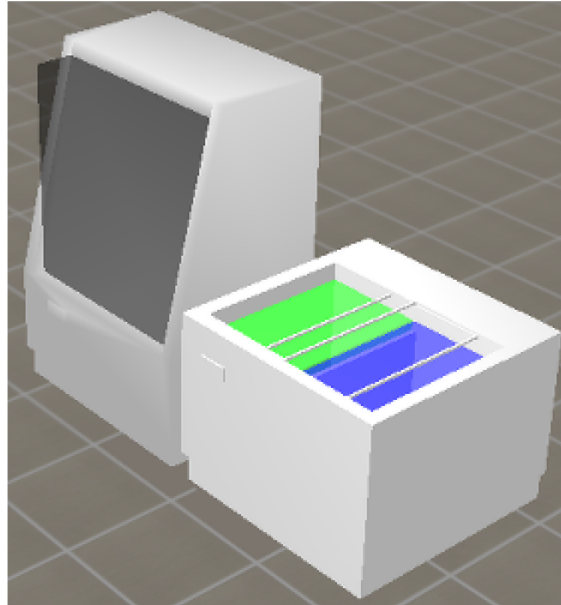
Similarly, temperature ranges are assigned to products and equipment in Product Studio and Fixture Studio respectively. If they do not match, another warning will result. This is designed (for example) to prevent ice cream being placed anywhere but a freezer unit.



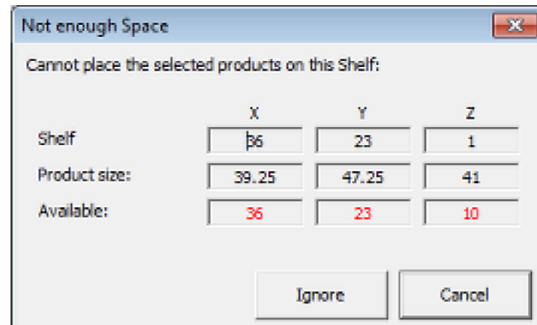
This can be corrected by ensuring that:

4. The correct temperature range has been assigned to the parent fixture, shelf or peg in Fixture Studio.
5. The correct temperature range has been assigned to the parent SKU for the display style in Product Studio.

Finally, fixtures and shelves are assigned a merchandisable area. This is the maximum area that can be taken up by products for sale. Display of these merchandisable areas can be turned on or off by the **Merchandisable Areas** option on the menu accessed by highlighting an item of equipment and right clicking. In the example below, the chiller and freezer unit show different forms of merchandisable areas.



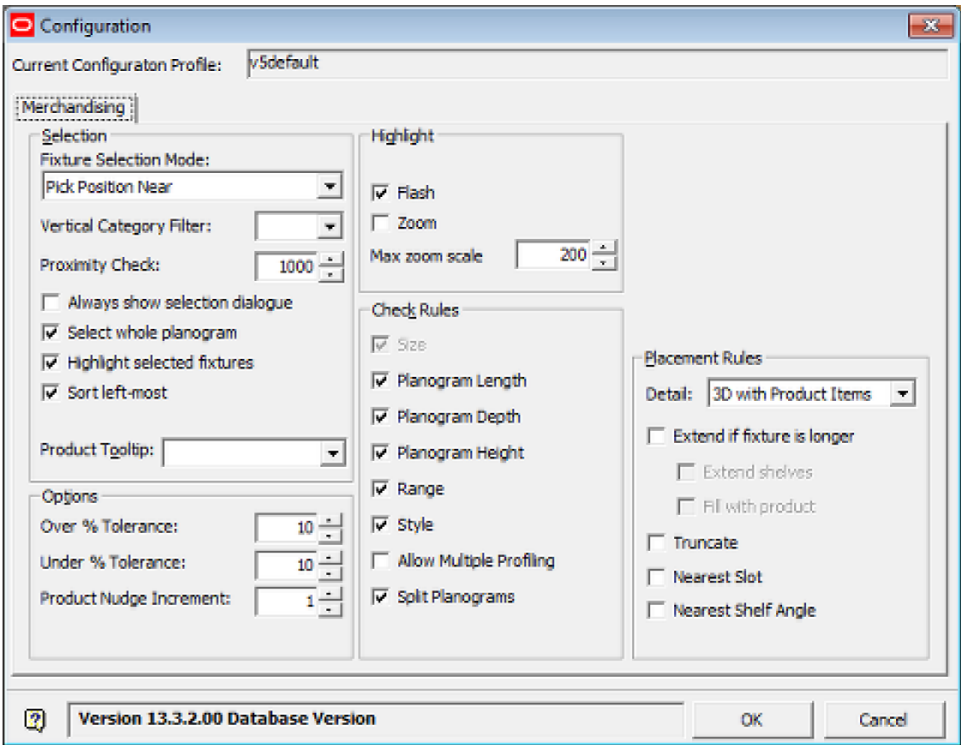
If users attempt to place a product at display style level for which there is insufficient space, a warning will result.



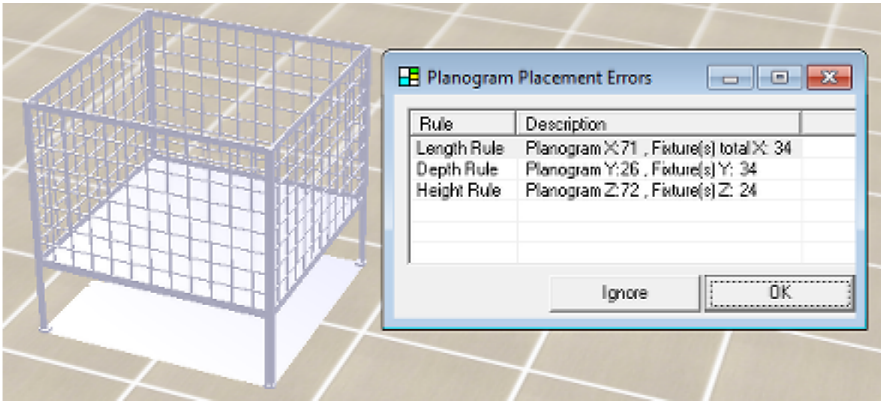
If the error is minor, the problem can be overcome by reducing the space assigned to other display styles on the parent fixture, shelf or peg. If there is a serious mismatch of dimensions, an alternative item of equipment may be indicated.

Planograms

Planograms are validated against the fixtures on which they are to be placed. The factors which are checked are set in the Check Rules frame of the Merchandising Tab of the Configuration Module.



If a planogram is placed on equipment for which it was not designed, a warning will result.



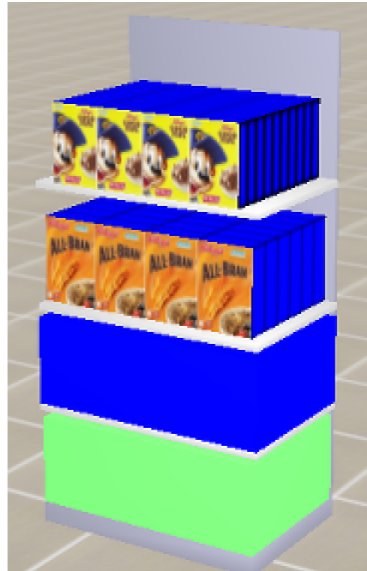
Clicking the **OK** button will stop the planogram being placed, clicking **Ignore** will allow it. If planograms are placed by using the Ignore option, this may lead to compliance problems when the planogram is set in the store. For example, if the fixture size is smaller than that which the planogram was designed for, there will not be enough space for the designed facings of products.

Forms Merchandise can be Added

Merchandise can be added in several forms.

Products

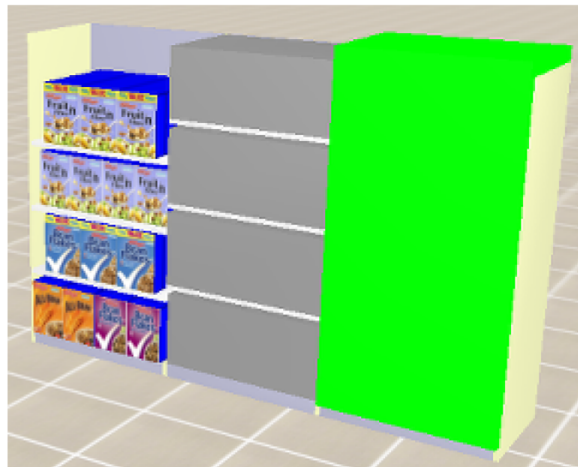
Products can either be added as placeholders or display styles. In the example below, the lower two products are in placeholder form; the upper two in display style form.



- Placeholders represent products at any level in the hierarchy from SKU upwards. They show what form of object is on the fixture or shelf but give no information as to quantity, position or orientation.
- Display Styles represent a physical form of a specific SKU. For example a specific shirt may come in boxed, folded or hung styles. When a display style is placed, this allows information to be stored on quantity, position, and orientation.

Planograms

Planograms can be displayed in one of three forms: 2D, 2.5D or 3D



- A 2D planogram (shown on the right of the image above) indicates the presence of the planogram, but gives no information on the shelves or the products.
- A 2.5D planogram (shown in the centre) shows the position of the shelves and represents the products as placeholders.
- A 3D planogram (shown on the left) shows the position of the shelves and full details of the products in display style form.

The form in which planograms will be initially placed is determined by what the user selects using the **Placement Rules** drop down list in the Merchandising Tab of the Configuration Module.

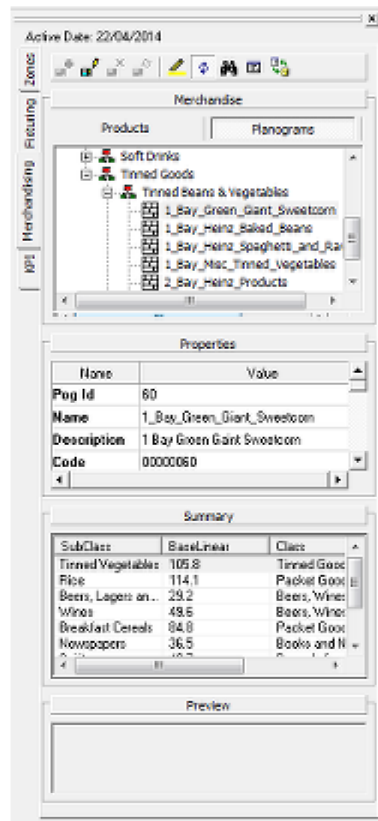
Planograms can be exploded to 3D form and imploded to 2D form using the Implode and Explode options on the directions and Product Text Toolbar.



If one or more fixtures are selected, the planograms on those fixtures will be imploded or exploded. If no fixtures are selected, all planograms in the floor plan will be imploded or exploded.

Merchandise on the Object Browser

Merchandise (products and planograms) can be added, edited, moved and deleted in Merchandiser. Many of the controls are located on the Object Browser. (For more information see the section on the Object Browser)



- Merchandising is selected by clicking the Merchandising tab.
- Users can then toggle between products or planograms and gondolas by clicking on the Products or Planograms sub-tabs.
- The toolbar allows users to select from a number of possible actions.
- A list of products or planograms is shown in the hierarchy.
- Details of any selected fixture or planogram are shown in the Properties window.
- The Summary window gives a list of equipment placed in the currently active floor plan.
- The Preview window will show a preview of any currently selected product. (No information is available for planograms).

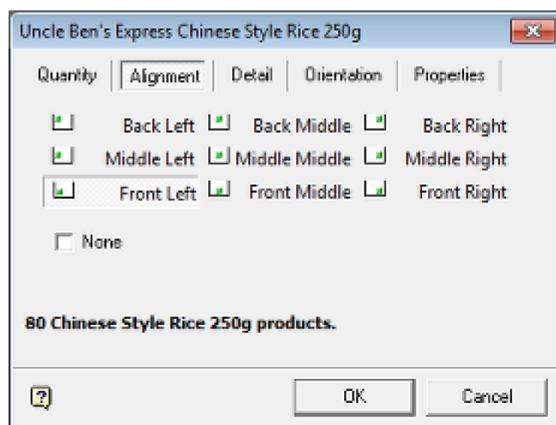
Adding Products

Adding Products

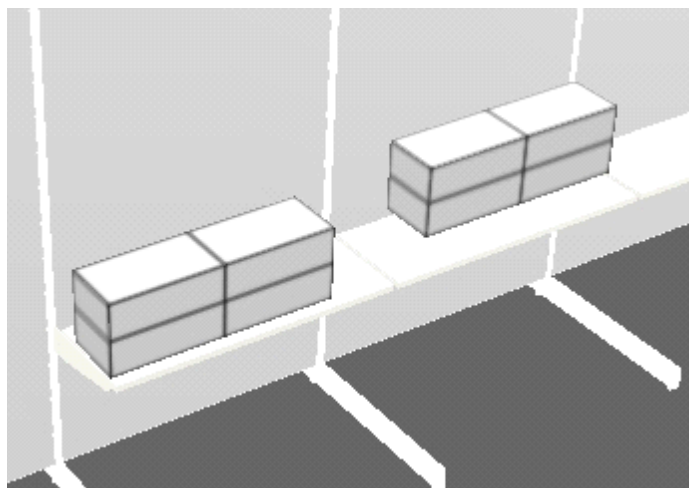
Products are added by selecting a product from the hierarchy in the Object Browser or the list on the Object Grid.

The Alignment Tab

The **Alignment Tab** allows alignment of the initial product placement to be adjusted horizontally, i.e. in the X, Y plane.



In the example below, the products on the left hand shelf have been placed with a Left Front alignment, and the products on the right hand shelf have been placed with a Back Right alignment.



The Detail Tab

The **Detail Tab** gives information on dimensions and quantities.

| | X | Y | Z |
|-----------------|----|----|----|
| Size: | 4 | 1 | 6 |
| Gap: | 0 | 0 | 0 |
| Min Stack: | 0 | 0 | 0 |
| Max Stack: | 9 | 23 | 1 |
| Shelf capacity: | 36 | 23 | 10 |

46 Chinese Style Rice 250g products.

Size is the size of one instance of the Product.

Gap is the gap between instances of the product. The gap is preset when the product is designed in Product Studio and may be necessary where merchandise like glass or crockery is concerned.

Min stack is the minimum quantity that can be placed.

Max Stack is the calculated maximum quantity that can be placed.

Shelf Capacity is the dimension of the shelf on which the products are being placed.

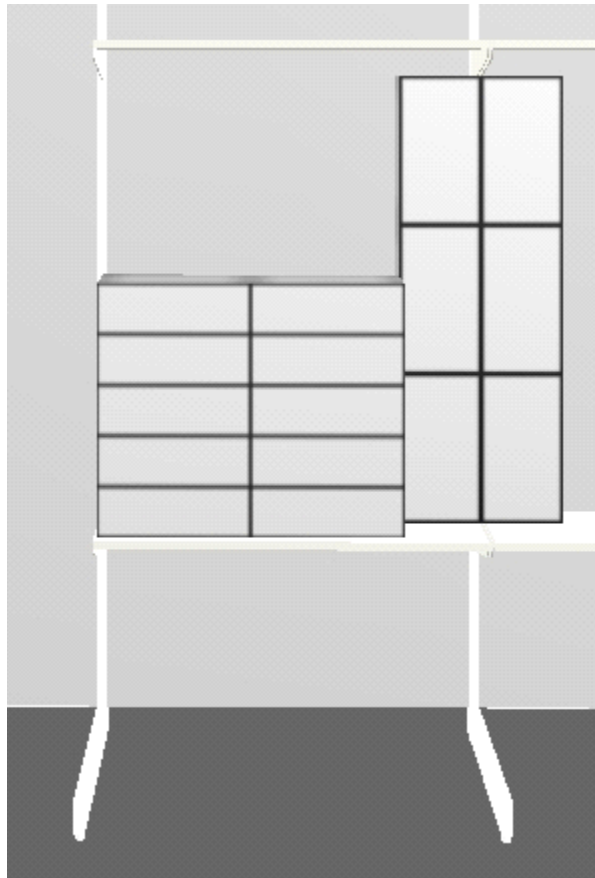
The Orientation Tab

The **Orientation Tab** allows the orientation of the product to be defined when it is placed on the shelf. It will by default be placed with the front of the product facing the front of the shelf or the fixture, but other orientations are possible. For example, the product could be placed with the right hand side facing the front of the shelf or the fixture.

| | | |
|--|---|--|
| <input type="radio"/> Front Max: 0 | <input type="radio"/> Left Max: 0 | <input checked="" type="radio"/> Top Max: 108 |
| <input type="radio"/> Back Max: 0 | <input type="radio"/> Right Max: 0 | <input type="radio"/> Bottom Max: 108 |
| <input type="radio"/> Front Side Max: 138 | <input type="radio"/> Left Side Max: 120 | <input type="radio"/> Top Side Max: 108 |

6 Chinese Style Rice 250g products.

The maximum amount that can be placed for each orientation will be shown, while non available orientations will be grayed out.

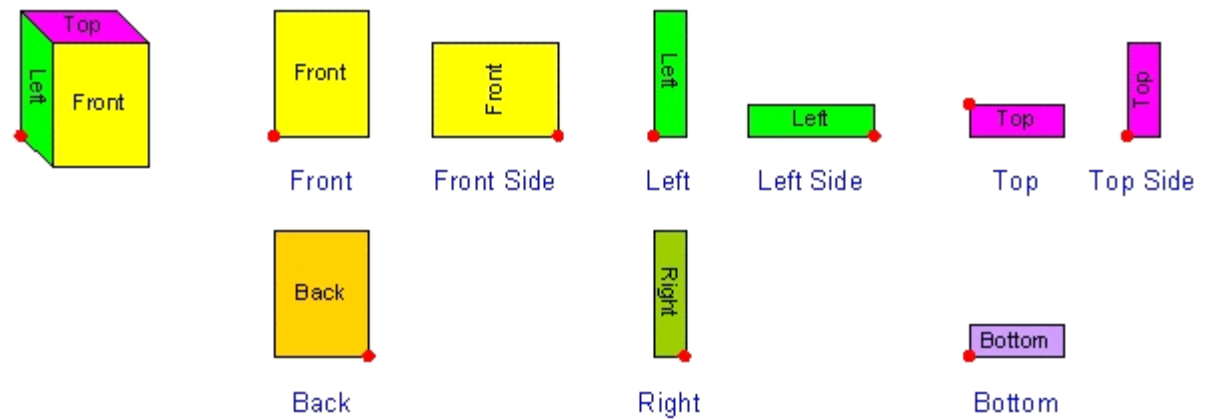


In the above example the product group on the left has been placed with the Front orientation. A second example of the same product group has then been placed to its right in the Top Side orientation.

Note: Changing orientation will also change the quantity on the Quantities Tab to the maximum possible in that orientation. This is to allow the user to see if changing the orientation will increase the quantities that can be placed on the shelf.

Product Orientations

The nine possible orientations are as follows:



(The red dot indicates the insertion point).

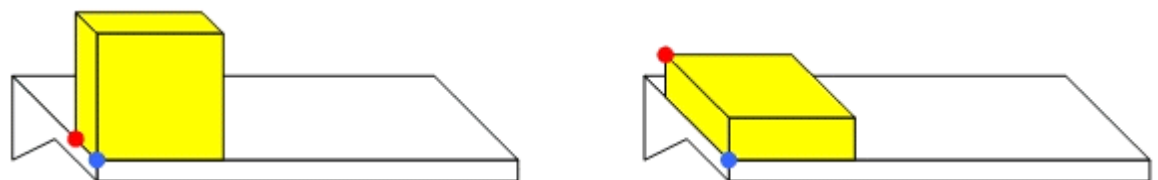
Front is the default orientation. The other orientations are achieved by the following rotations from the default.

| Orientation | Rotation in X Axis | Rotation in Y Axis | Rotation in Z Axis |
|-------------|--------------------|--------------------|--------------------|
| Front | None | None | None |
| Front Side | None | 270° | None |
| Back | None | None | 180° |
| Left | None | None | 90° |
| Right | None | None | 270° |
| Left side | None | 270° | 90° |
| Top | 90° | None | None |
| Top side | 90° | 270° | None |
| Bottom | 270° | None | None |

Effect of Rotations

Then the object is rotated to change its orientation, it occupies the same relative position on its parent object. This is done by means of child insertion points.

In the example of the box on a shelf, the child insertion point (the datum for the boxes' position) is shown in blue. It is set at the front left of the shelf.



When the box is rotated, it is still aligned relative to the child insertion point, although the boxes' insertion point (shown in red) has moved

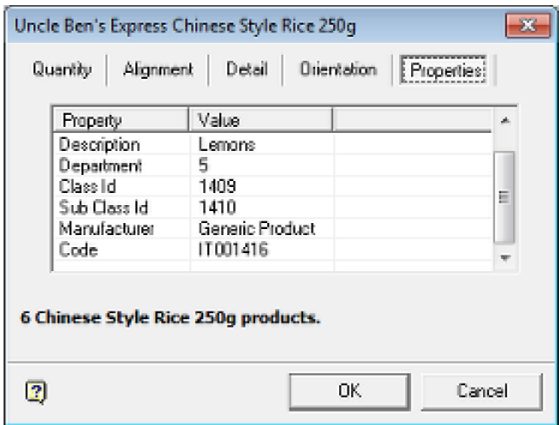
A similar effect can be seen in the example of a box being rotated relative to its parent peg.



The child insertion point (shown in blue) is at the front of the peg. When the box is rotated it remains in the same relative position to the child insertion point although its own insertion point has changed position.

The Properties Tab

The **Properties** tab displays a customizable list of properties associated with the products being placed - the exact list of information displayed being dependent on information in the AVTTB_CUSTOM_SQL table. (This information can only be edited by Administrators with access to the database).



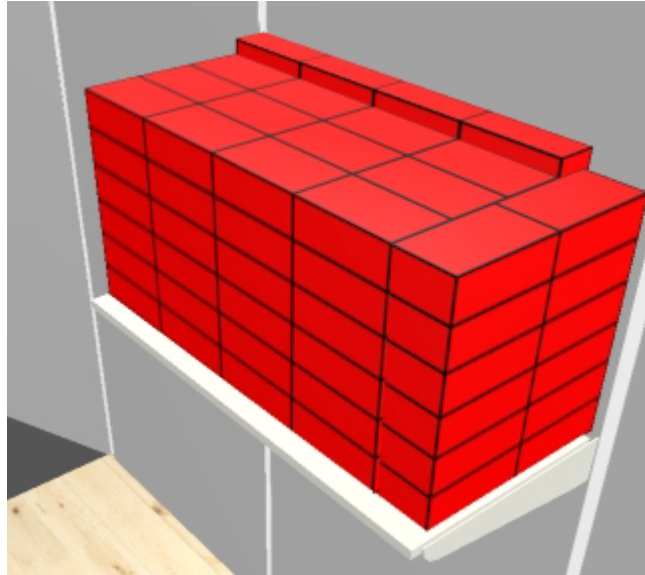
The information is intended to be of use to merchandisers populating the floor plan.

Overview of Calculation Option Method

This section of help details how the calculate option can be used to simplify maximizing the number of products placed on a shelf.

There are two options for adding products in Merchandiser; by manually adding then and by automatically adding them by using the calculate option.

To maximize the number of products on a shelf it is sometimes necessary to use end caps, as in the example below.

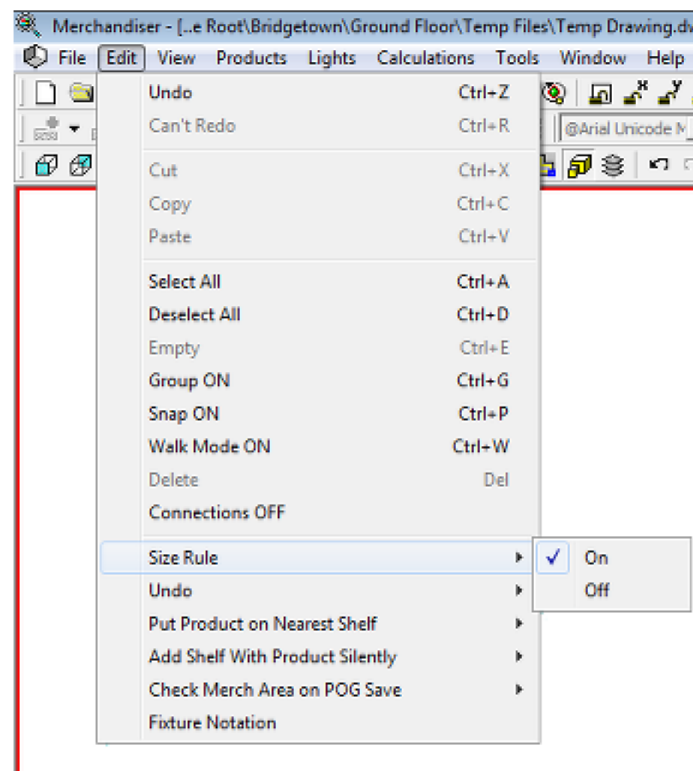


It is possible to achieve this manually by placing the main body of product, then placing the rear end cap and then the size end cap. This may require some time to achieve.

It is also possible to achieve this in a single operation using the Calculate option. This can result in considerable savings in time when populating shelves.

Size Rule

When placing product it is recommended the **Size Rule** is turned on, either from the edit menu or the icon on the toolbar.



This will restrict the number of products added to those permitted by the confines of the shelf.

If this option is not enabled, it is possible that product will overlap shelves to the left, right or above.

Using the Calculation Option

The **Add Products dialogue box** allows the user to control the calculated quantity and orientation of the product being placed. The Add Product dialog box will initially show the maximum number of products that can be achieved in a single, standard orientation.

The screenshot shows a dialog box titled "Cherry Coke 2 litre". It has five tabs: "Quantity", "Alignment", "Detail", "Orientation", and "Properties". The "Quantity" tab is active. It contains three rows of radio buttons: "Facings:", "Depth:", and "Stack:". Each row has three options: "One", "Fill", and "Other". In all three rows, "One" is selected. To the right of these rows are three spin controls with values 10, 6, and 1 respectively. Below these is a "Required:" label followed by a spin control set to 60 and a small icon. At the bottom left is a "Grouped:" label with a checked checkbox. At the bottom center is a status bar that reads "60 Cherry Coke 2 litre - Bottle products.". At the bottom right are "OK" and "Cancel" buttons.

This can be changed to the maximum number of products using all possible orientations to produce caps by means of the Calculate option.

This screenshot is identical to the previous one, but with the "Fill" radio button selected in the "Facings:", "Depth:", and "Stack:" rows. The status bar still shows "60 Cherry Coke 2 litre - Bottle products.".

To calculate a maximized quantity for a shelf or fixture:

1. Select the Calculate option by means of the appropriate radio button.
2. Use the spin control to set the total quantity to that above the total number of products the shelf (or fixture) can accommodate.
3. The Calculate Button can then be used to open the calculation screen.

After the **calculate button** is clicked, the calculation screen will appear.

Quantities Calculator

Required Quantity: 80

Quantity Tolerance: 0

Main Orientation: Front

| Direction | Priority | Fill | Allow Caps | Fixed Quantity |
|----------------------|----------|-------------------------------------|-------------------------------------|----------------|
| X - Width, Facings | 1 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Y - Depth | 2 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Z - Height, Stacking | 3 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |

Proposed Solution:

| Type | Orientation | Facings | Depth | Stack | Total |
|-------|-------------|---------|-------|-------|-------|
| Main | Front | 10 | 6 | 1 | 60 |
| Z Cap | Top | 10 | 1 | 2 | 20 |

OK Cancel

4. The Required Quantity is that set in the preceding Add Products dialogue box. If necessary this can be edited to a different value while in the screen.
5. The Quantity Tolerance allows the user to set the permissible variation in quantity.
 - If set to 0, Macro Space Management will try and calculate an exact solution. If set to >0 Macro Space Management will accept the first calculated solution that comes inside the permissible range.
 - For example, if set to 60 ± 5 , the first calculated solution that falls in the range 55 – 65 will be accepted.
6. The Main Orientation of the product can be set from the drop down list.

80

0

Front

Front

Back

Left

Right

Top

Bottom

FrontSide

LeftSide

This determines which part of the products' packaging faces the front of the shelf.

7. The Priority for the working axes can be set by clicking on the appropriate axis to highlight it then using the + and – buttons to change the order of priority.
8. Macro Space Management will calculate the quantities in the order the axes have been selected. For example, if the X axis has been chosen, the software will stack the maximum number of products along that axis then take the dimensions of those placed products in account when calculating how many products can be placed along the second priority axis.
9. If the Fill check box is selected, then Macro Space Management will place the maximum number of products in that direction. If the Fill checkbox is not selected,

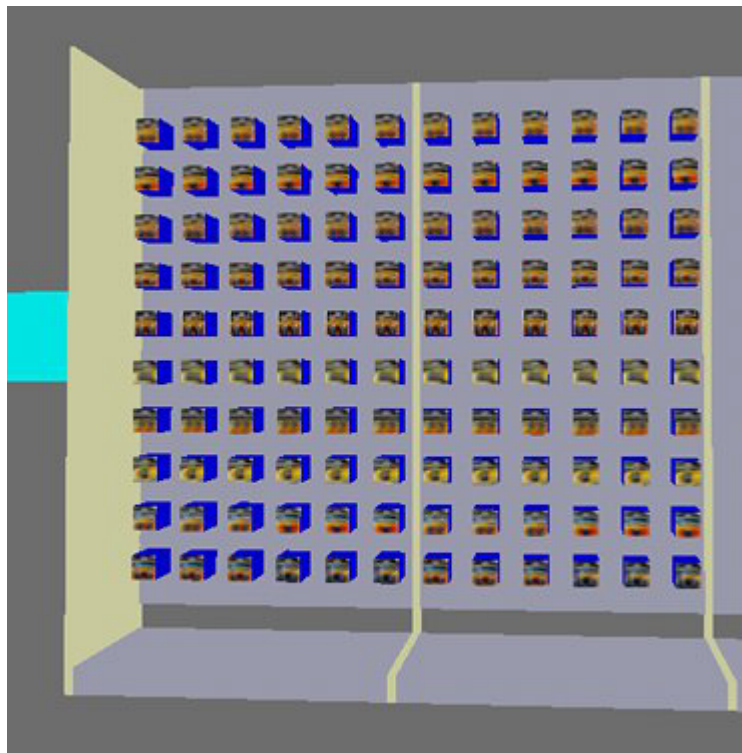
then a Fixed Quantity can be entered in the appropriate box. If a Fixed Quantity is entered, this will also disable the Allow Caps option as the fixed quantity only applies to products placed in the Main Orientation. If a quantity greater than the maximum number that will fit is entered then the number will default to the largest value possible.

10. End Caps can be allowed or prevented by selecting or un-selecting the check box as appropriate.
11. The results will show in the Proposed Solution frame. (A warning will appear if the number of products that can be placed is below that in the Required Number setting).
12. If the details are correct, click on the OK button to place the products.

Adding Products using Pegs

Adding Products using Pegs is similar to adding products to a shelf - the product is dragged and dropped onto an existing peg.

Note: if Joints have been set up in the Administration Module, products can be dragged onto a parent fixture (such as a slatwall or pegboard) and the peg will be added at the same time.



In the example above products have been placed on pegboard using pegs to hang them from.

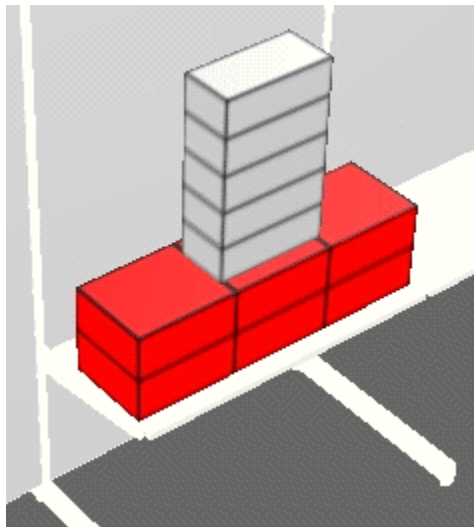
Additional Ways of Placing Products

There are a number of additional ways of placing products - they reflect ways that might be used in real life within stores. These ways are:

Placing on Product on Top of Another

To place on product on top of another drag the required product from the options in the merchandising tab over to the product on top of which you wish to place it. Ensure the mouse cursor is just inside the object to be placed on top of, and release the mouse key. The desired products will then be placed on top. This might be used to place a 'display' version of a product on top of boxed versions of the same product.

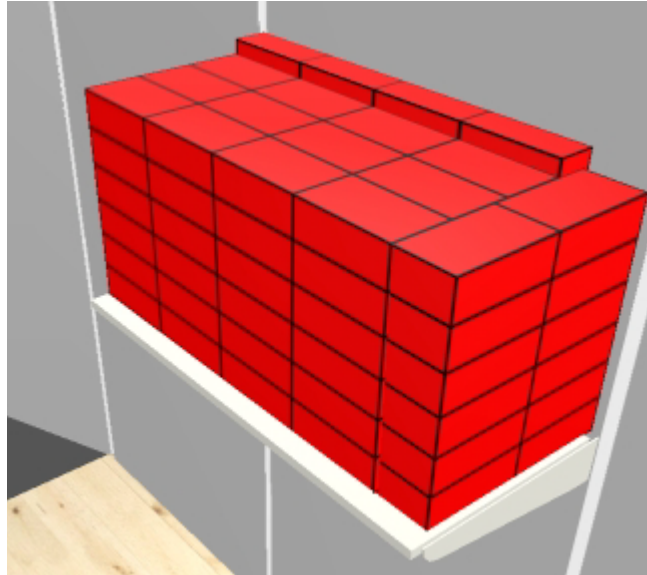
Note: If the mouse cursor is just above the object to be placed on top of when the key is released, then the object being placed will be inserted to one side, rather than on top.



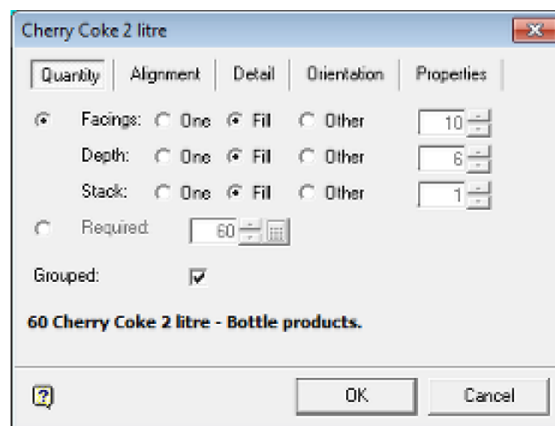
The depth and number of facings of the object being placed on top cannot exceed those determined by the length and depth of the object of which it has been placed on top.

Caps

Caps are when the same product is placed over another product, using a different orientation, in order to fill space. This can be achieved manually, by placing several instances of the same product next to each in different orientations.

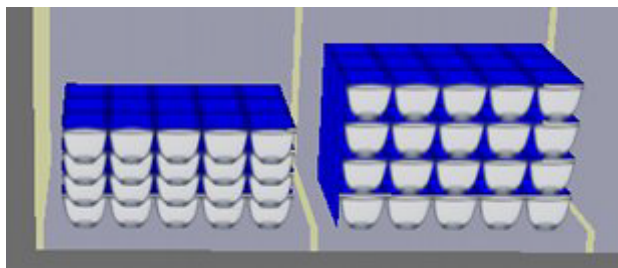


It can also be achieved automatically by making use of the Calculate option on the Add Products dialog box.



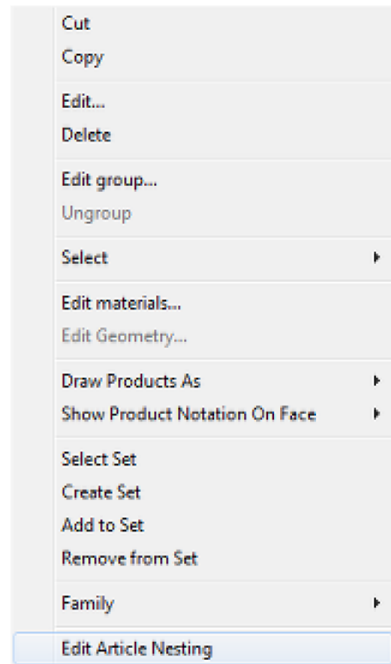
Nesting

Nesting allows you to take into account how products could be stacked inside each other. In the example below, the Pyrex bowls on the left are nested inside each other, the ones on the right are not. Nesting allows a more accurate determination of the number of products than can fit inside a specified volume.



Nesting can be specified in the Size and Shape tab of the Display Style dialog box in Product Studio. This means that products placed on a shelf or fixture will automatically nest when placed. Nesting can only be specified for one axis - for example height as in the above example.

Alternatively, nesting can be manually set in the Merchandiser module. This can be done by taking two separate layers of products one product high and then selecting the Edit Article Nesting option from the right click menu.



Note: Nesting will not work if a single instance of the product has been placed two items high. The product must be placed as two instances, each a minimum of one layer high.

Adding Planograms

Adding Planograms

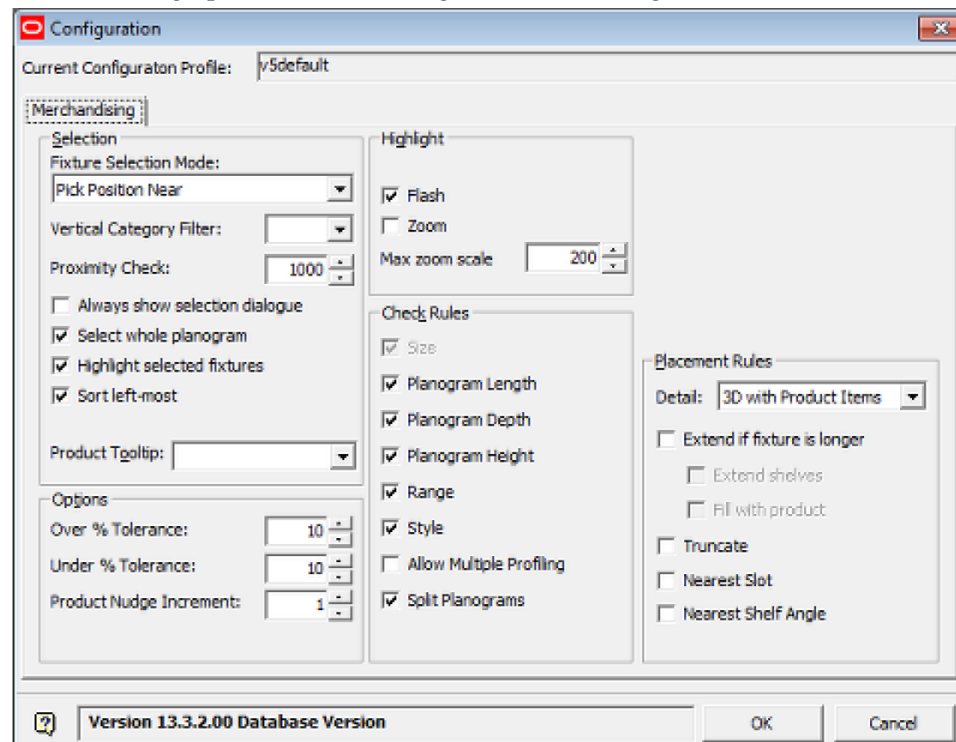
This section describes how setting in the planogram module affect planogram placement. It then gives a worked example of placing a planogram.

Planograms and the Configuration Module

The form planograms are added in and the placement warnings that result are controlled on a user by user basis by settings in the Configuration Module. This can be accessed from the **View** menu, pressing F6 or from the **Options** icon on the toolbar in the Merchandising tab of the Object Browser.

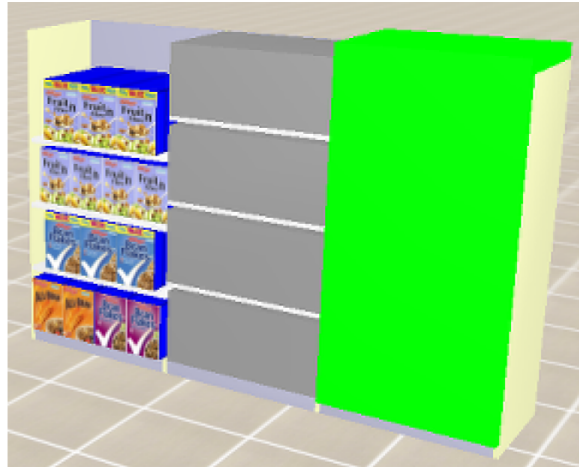


This will bring up the Merchandising Tab of the Configuration Module.



Placement Rules

The Placement Rules drop down list determines the form planograms will be placed in:



- A 2D planogram (shown on the right of the image above) indicates the presence of the planogram, but gives no information on the shelves or the products.
- A 2.5D planogram (shown in the centre) shows the position of the shelves and represents the products as placeholders.
- A 3D planogram (shown on the left) shows the position of the shelves and full details of the products in display style form.

Planograms can be exploded to 3D form and imploded to 2D form using the Implode and Explode options on the directions and Product Text Toolbar.



If one or more fixtures are selected, the planograms on those fixtures will be imploded or exploded. If no fixtures are selected, all planograms in the floor plan will be imploded or exploded.

Placement Warnings

The placement warnings that come up when planograms are added to fixtures are determined by making selections in the check rules frame. The options are:

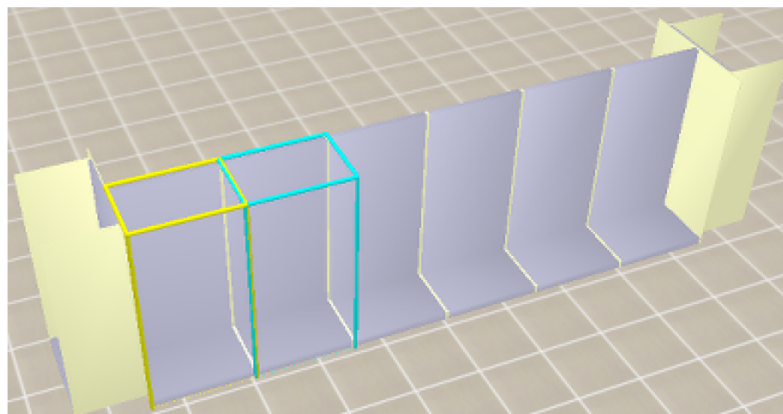
- Length: Warn if the total length of the selected fixtures the planogram is to be placed on is different from that the planogram is designed for.
- Depth: Warn if the depths of one or more of the selected fixtures the planogram is to be placed on is different from that the planogram is designed for.
- Height: Warn if the heights of one or more of the selected fixtures the planogram is to be placed on is different from that the planogram is designed for.
- Range: Warn if the temperature ranges of one or more of the selected fixtures the planogram is to be placed on is different from that the planogram is designed for.
- Style: Warn if the styles assigned of one or more of the selected fixtures the planogram is to be placed on are different from those the planogram is designed for.
- Allow Multi-Profiling: Only check this option if the user wants to place multiple planograms on a single fixture without a warning.
- Split Planograms: Warn if the Planogram is to be placed on fixtures that are not adjacent to each other.

Adding Planograms

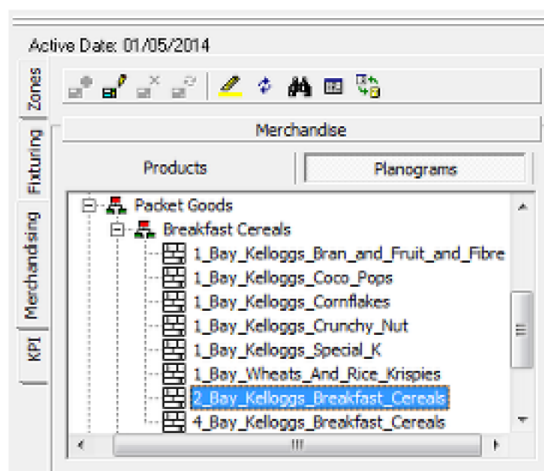
Planograms are added in Merchandiser as follows:

1. Identify the planogram to be placed. Identify the number and dimensions of the fixtures required. Also determine the styles and ranges required for the fixtures. These can often be determined by selecting the required object and looking at the details in the Properties Window of the Object Browser.
2. Ensure Grouping is turned Off (status bar). Select the required fixtures. In this example, a 2 bay planogram is to be placed.

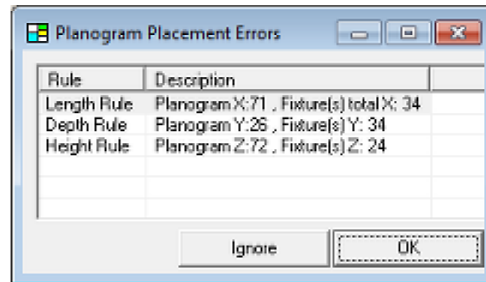
Note: Placing a planogram adds both the products and the requires shelves. Accordingly, the fixtures should be empty before placing the planogram.



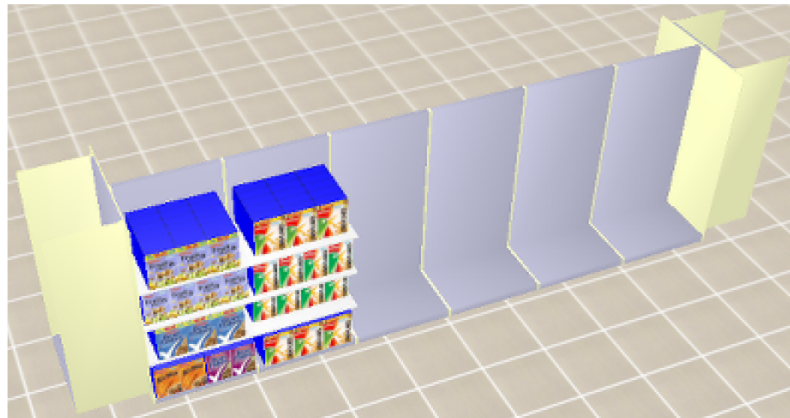
3. Select the required planogram from the Object Browser or Object Grid. In this example, it is to be selected from the Object Browser



4. Drag and drop the planogram from the Object Browser to one of the selected fixtures. If there are differences between the fixtures selected and those for which the planogram was designed for, a warning will display. Clicking OK will stop the planogram placement. Clicking Ignore will over-ride the warnings and place the planogram.



5. The planogram will then be present on the fixtures.



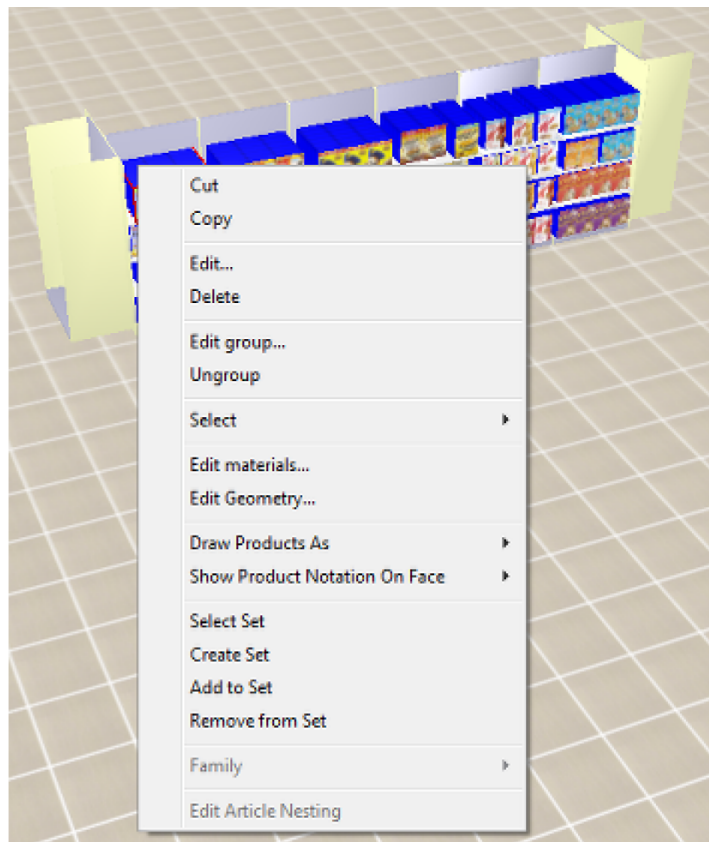
Editing and Deleting Merchandise

Editing Merchandise

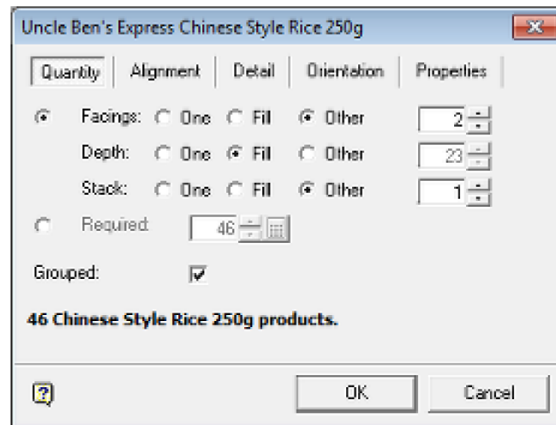
This section covers editing products and planograms.

Editing Products

To edit products, highlight a specific product and bring up the right click menu.



Select **Edit Group** from this menu and the **Add Products** dialog box will come up. This can be used to edit the group of products including number and orientation.



Editing Planograms

Planograms can be edited in place:

- The position of the shelves and other equipment can be altered.
- The quantity and orientation of products can be altered.

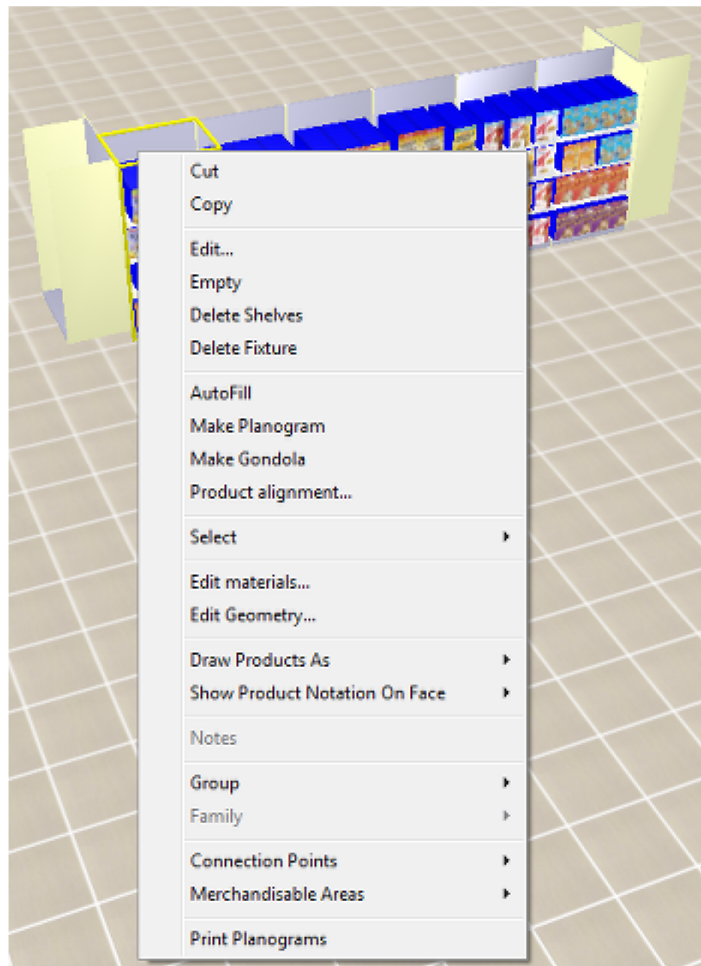
However, when this is done, the planogram shown in the store will no longer match the original planogram design. This may cause problems in relating results to the performance of the planogram as designed.

Deleting Merchandise

Both products and planograms can be deleted by similar methods.

Deleting Products

Products can be deleted by selecting the parent fixture and bringing up the right click menu.



Select **Empty** and the products will be removed.

Deleting Planograms

Deleting a planogram is very similar to deleting products.

1. Select the parent fixture and bring up the right click menu. Select Empty and the products will be removed. This will leave the shelves behind.
2. Re-select the parent fixture and bring up the right click menu. Select Delete shelves and they will be removed.

Alignment

Aligning and Distributing Products

Products are aligned and distributed by first selecting the required products on a shelf or fixture and then selecting the required option on the Align Products toolbar.



Each alignment only works in one axis at a time - for example along the length of the shelf. Where necessary, alignment or distribution operations can be applied sequentially to get products into the required position.

Clash Detection

Clash Detection should be turned on when carry out aligning or distributing operations otherwise products could occupy overlapping positions on the shelf. Clash detection is toggled On or Off by clicking on the **Clash Detection** icon in the **Views** toolbar



Alignment and Distribution Options

Alignment and distribution options only apply to the selected products. These define the left, right, front and back limits within which redistribution will happen. Buttons for aligning along or across the shelf will only be enabled if at least one product is selected and the floor plan is not read-only. Buttons for distributing across the shelf will be enabled if at least three products are selected and the floor plan is not read-only.

Aligning along length of shelf

| | |
|--|-----------------|
| | Align to Left |
| | Align to Center |
| | Align to Right |

Aligning across depth of shelf

| | |
|--|-----------------|
| | Align to Front |
| | Align to Middle |
| | Align to Back |

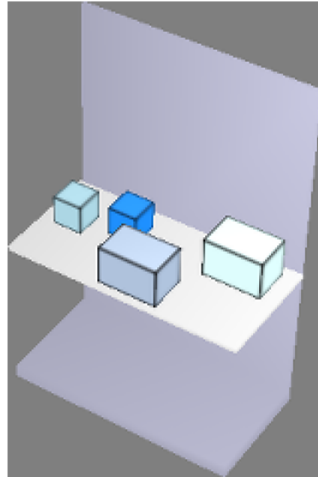
Distributing across volume of shelf

| | |
|--|-----------------------|
| | Distribute Left/Right |
| | Distribute Front/Back |

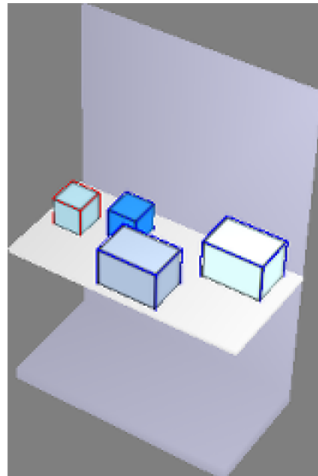


Example of Alignment of Selected Products

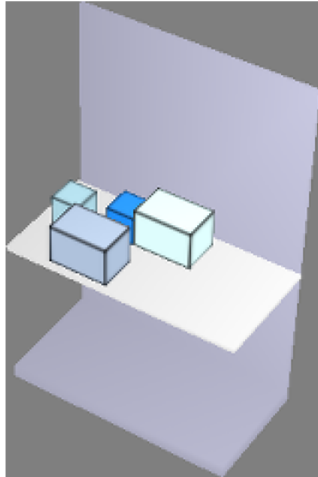
Alignment moves the selected products as far as possible in the selected direction. In the example below, a shelf contains four products.



The first stage is to select them for alignment - this can be seen by the colored selection boxes.

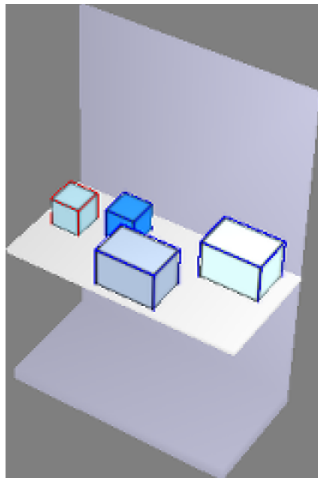


After the Align Left button is selected, the products are moved as far as possible to the left as the left most selected product allows.

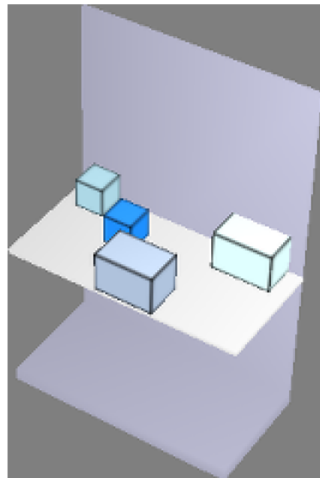


Example of Distribution of Selected Products

Distribution spreads the selected products as evenly as possible in the selected axis. In the example below, a shelf contains four products.



After the Distribute Front to Back (Justify Y) button is selected, the products are distributed as evenly as possible as the forward and rear most selected products allow.



Aligning and Distributing Products on a Shelf




Products are aligned and distributed on a shelf by first selecting the parent shelf or fixture and then selecting the required option on the Align Products toolbar. Where necessary alignment or distribution operations may be applied sequentially to get products into the required position.






Alignment and Distribution Options

Alignment and distribution options apply to the extents of the selected parent object. These define the left, right, front and back limits within which redistribution will happen. Buttons for aligning or distributing products on a shelf of fixture will only be enabled if at least one shelf or fixture is selected and the floor plan is not read-only.



Aligning along length of shelf

| | |
|---|-----------------|
|  | Align to Left |
|  | Align to Center |
|  | Align to Right |

Aligning across depth of shelf

| | |
|---|-----------------|
|  | Align to Front |
|  | Align to Middle |
|  | Align to Back |

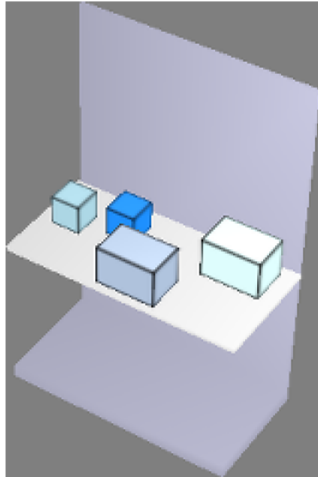
Distributing across volume of shelf

| | |
|---|--------------------------|
|  | Distribute Left/Right |
|  | Distribute Front/Back |

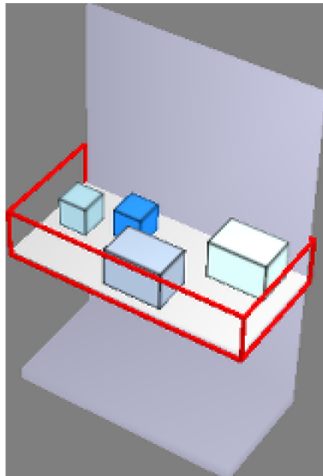


Example of Alignment of Selected Products on a Shelf

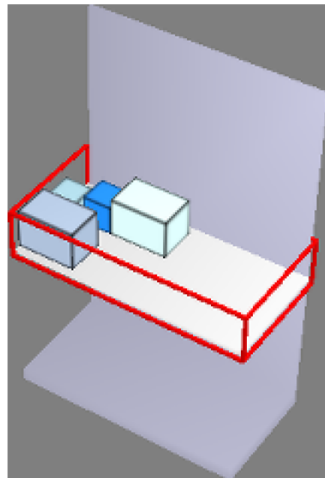
Alignment moves the selected products as far as possible in the selected direction. In the example below, a shelf contains four products.



The first stage is to select the parent shelf for alignment - this can be seen by the colored selection box.

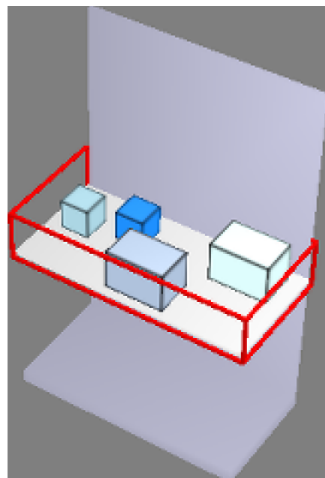


After the Align Left button is selected, the products on the shelf are moved as far as possible to the left of the shelf.

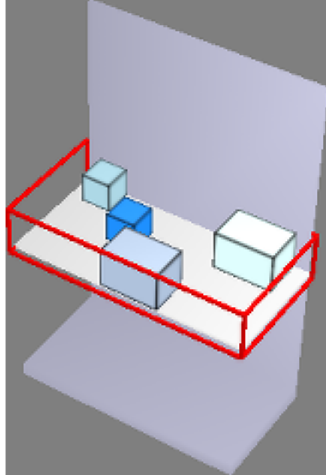


Example of Distribution of Selected Products on a Shelf

Distribution spreads the selected products as evenly as possible in the selected axis. In the example below, a shelf contains four products.



After the Distribute Front to Back (Justify Y) button is selected, the products are distributed as evenly as possible as the forward and rear most selected products allow.



Aligning to Non-Rectangular Objects

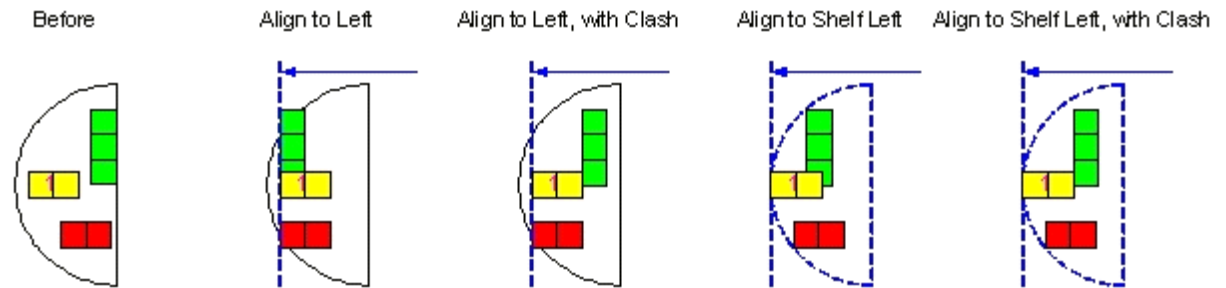
Macro Space Planning allows alignment to non rectangular objects such as semi-circular fixtures or corner shelves in Merchandiser.

The shape of the non-rectangular shelf is defined in Fixture Studio - all products placed on the shelf will be confined to the bounds of the non-rectangular area.

Note: See the Fixture Studio help file for more information on configuring non-rectangular areas.

Shelves

Alignment on non-rectangular objects should be carried out using the Shelf alignment options and with clash detection on.



Products

Non-rectangular products will be treated as boxes for alignment purposes.

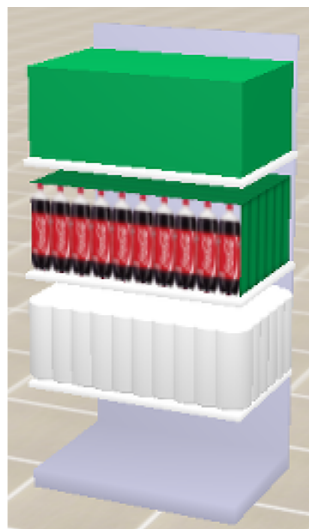
Other Information on Merchandise

Forms Products can be Drawn

Products at display style level can be drawn in three forms in the floor plan. These are controlled from the **View** menu > **Draw Products As** option



In order to change the product form, select the parent item of equipment. This can be a shelf for specific products or the fixture for all products on it. The form of the product can then be changed.

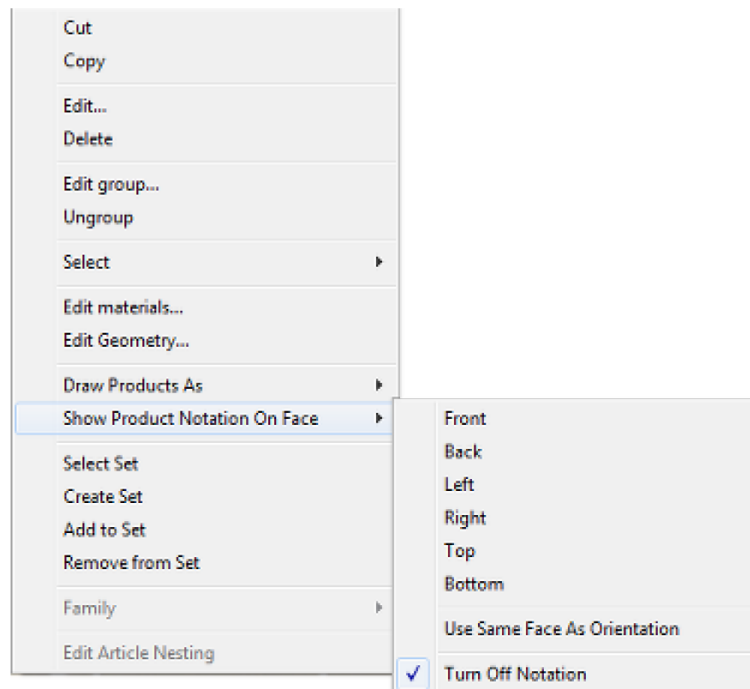


These forms are:

- Simple Box (top shelf): show the product as a simple block occupying the total volume of the product.
- Textured Box (middle shelf): show the product as individual items. If images are present, individual images will be shown. Otherwise the products will be shown as outlined cubes.
- Graphical (bottom shelf): This will only be functional if a product block has been assigned to the display style in Product Studio. Then the product will be displayed showing the shape of that product block. In the above example, this is a simple bottle shape.

Product Notation

It is possible to annotate products. Select the parent item of equipment. This can be a shelf for specific products or the fixture for all products on it. Right click to bring up the right click menu.



Varying forms of product notation are possible. In the example below, the products have been drawn as Simple Boxes. The top shelf has a product with no annotation. The middle shelf has a product with annotation on the front and the lower shelf has a product with annotation specified for the right side.

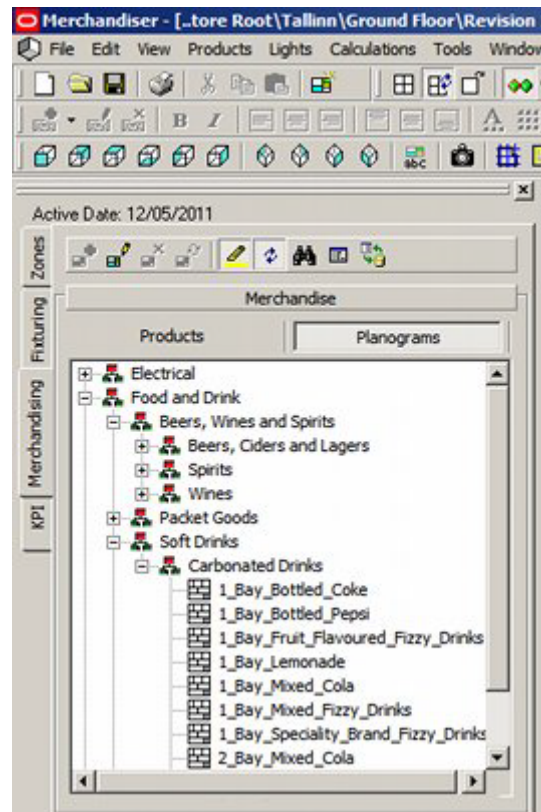


Planogram Design

The Planogram Hierarchy

Overview of the Planogram Hierarchy

The **Planogram Hierarchy** is found towards the top of the Object Browser.



It is active when the planogram button is selected in the merchandising toolbar.

The hierarchy can be modified in one of two ways: groups and planograms.

Groups

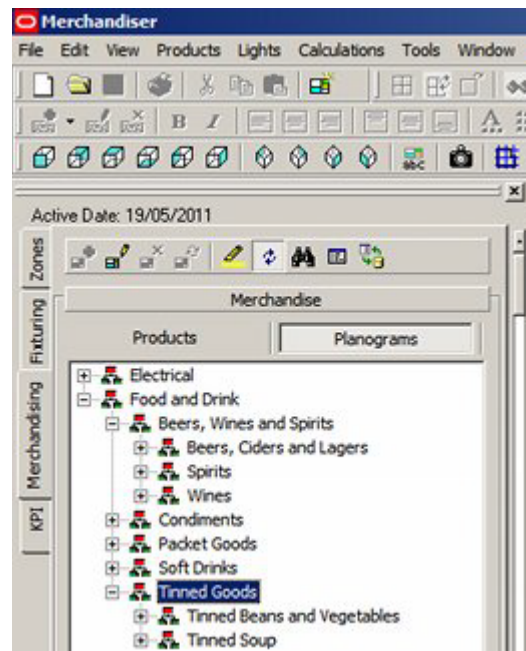
Groups hold collections of planograms. They can be set up in a hierarchical structure - for example Summer Promotion is a child of Promotional Items.

Planograms

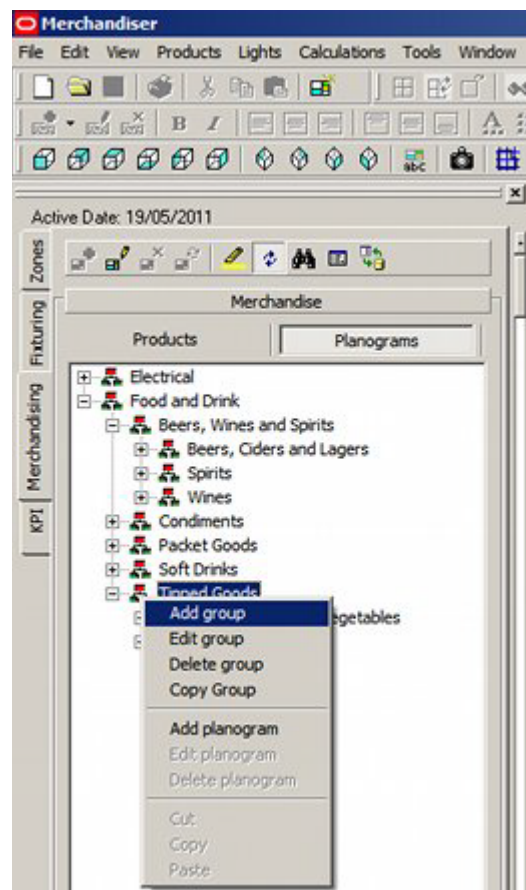
Planograms can be assigned to groups. Each Group holds a collection of planograms of similar purpose.

Adding a Group

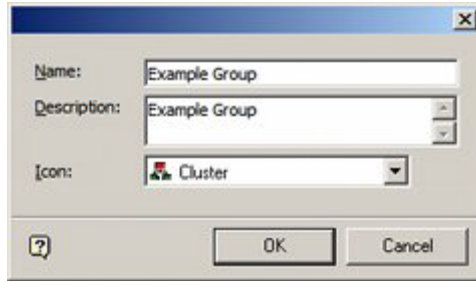
To **add a group**, highlight the node in the hierarchy the group is to be a child of.



In this case the Tinned Goods Group has been selected. Use <Ctrl> and Right click to bring up the pop-up menu.



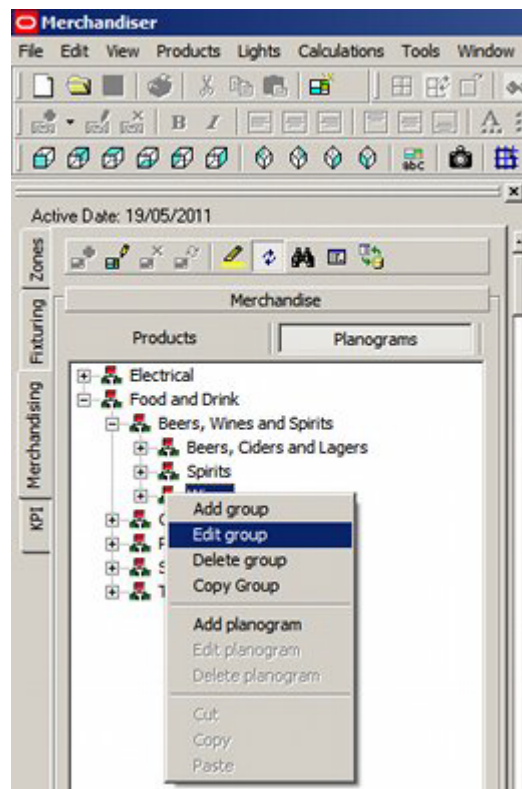
Select **Add Group**. This will bring up the Group dialogue box.



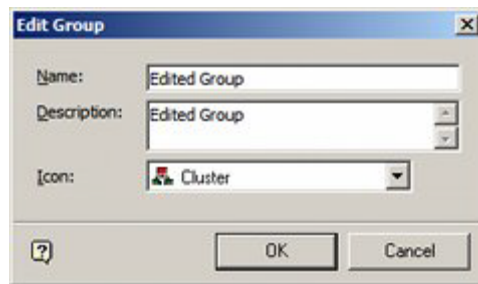
The Name and description can be typed in and the pertinent icon selected from a drop down list. On clicking on OK, the group will be added to the hierarchy.

Editing a Group

To edit the details of the Planogram Group, highlight the required group in the hierarchy and use <Ctrl> plus right click to bring up the pop-up menu.



Select the Edit Group option. This will bring up the Edit Group dialogue box. Modify it as required.

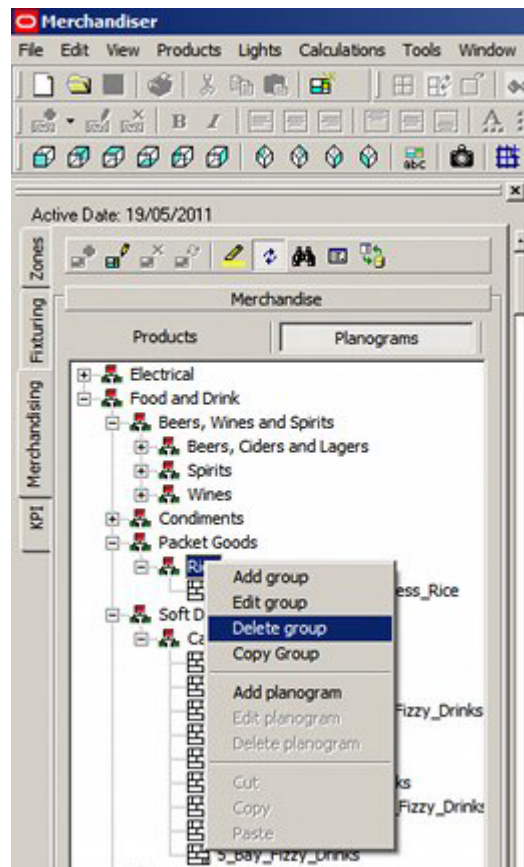


In this instance 'Example Planogram Group' has been changed to Modified Planogram Group'.

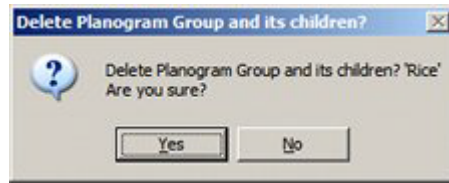
Click on OK and the details will be modified in the hierarchy.

Deleting a Group

To delete a Planogram Group, highlight it in the hierarchy, then bring up the right click menu.

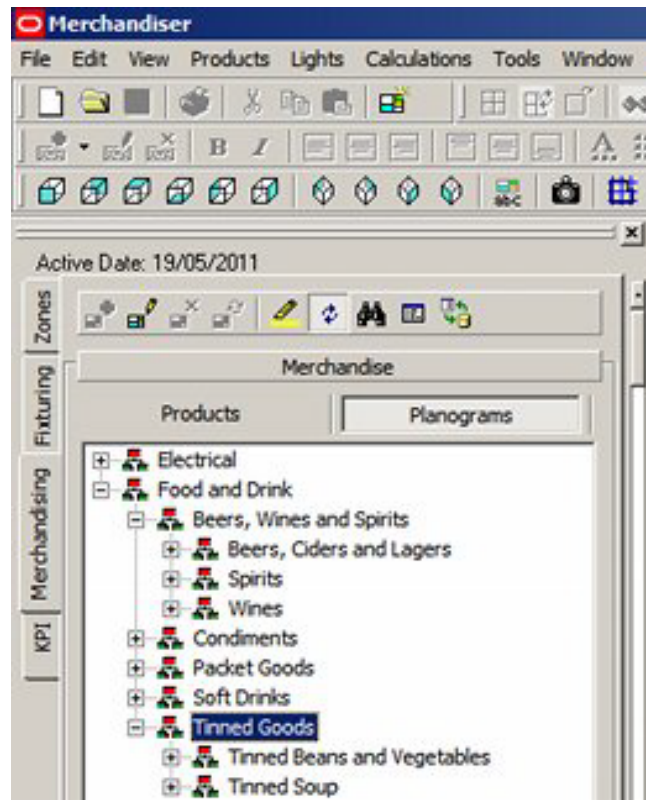


Click on Delete Group and the group will be deleted. If the Planogram group has planograms associated with it, these will be deleted as well. Before this can occur, a confirmatory dialog box will appear.



Adding Planograms

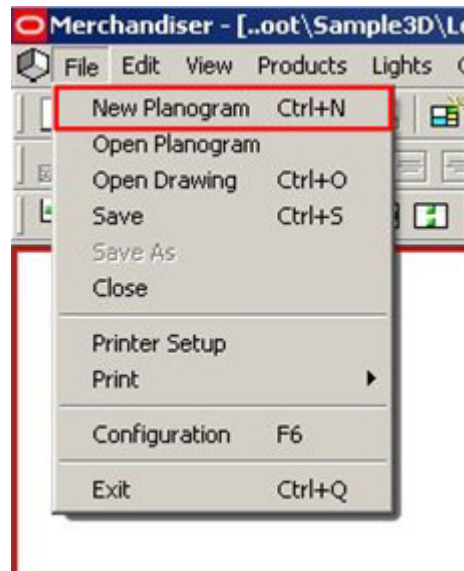
Planograms are added by selecting a parent group and highlighting it.



In this case we wish to add a Planogram to the 3D Samples Group.

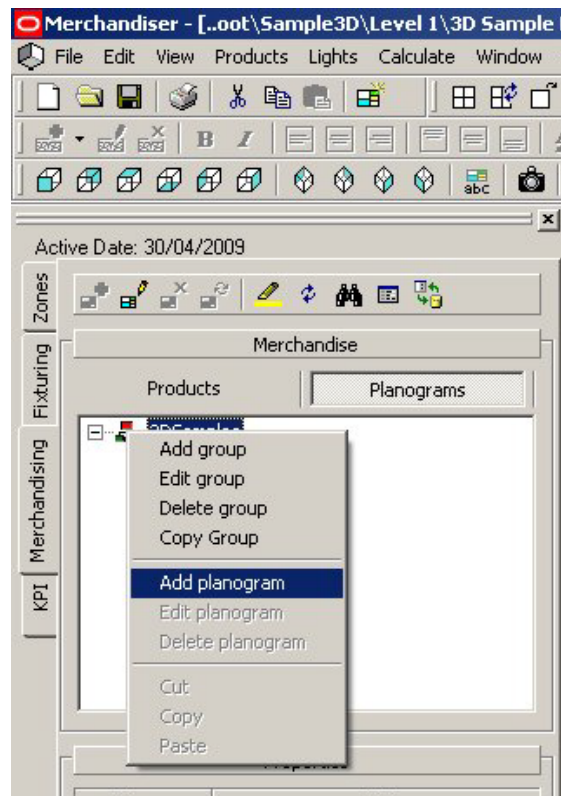
Once the group is highlighted, there are two ways to add a planogram; from the menu bar and from the pop-up menu.

- Planograms can be added from the File pull down menu:



Clicking on New Planogram will cause a blank Planogram dialogue box to appear, ready for the details of the planogram to be entered.

- Planograms can also be added by using <Ctrl> plus right click to bring up the pop-up menu.



The add planogram option will then cause a blank Planogram dialogue box to appear, ready for the details of the planogram to be entered.

: BoxedSocks

Details Stores Seasons Fixture Styles Design UDAs

Name: Revision:

Description:

Status: Source:

Effective Date: Imported Name:

Type: Last Imported:

Stock Type: Summary Product:

Autofill Rule: Temp Range:

Units: Created:

Can be Split: ☐ Created By:

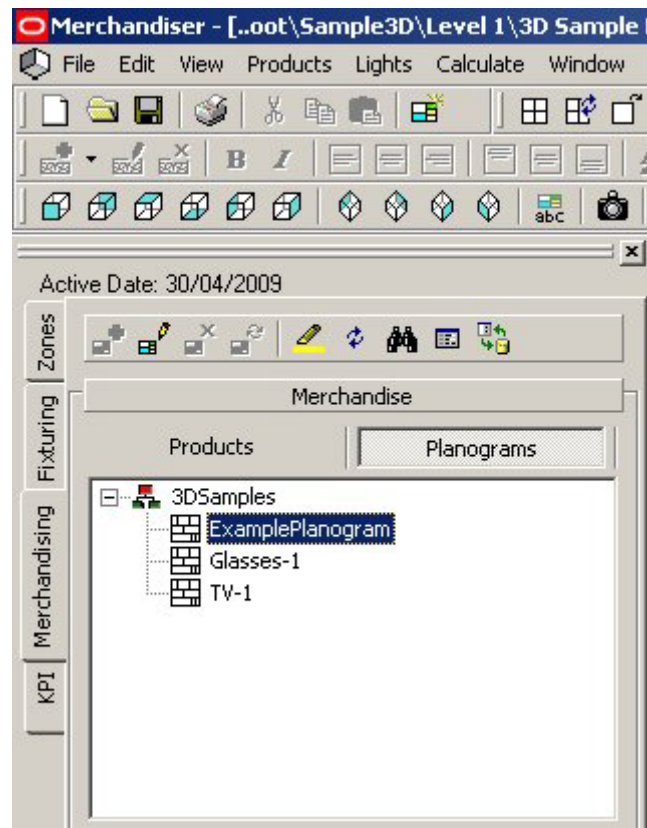
Number of Bays: Last Modified:

Size: Last Modified By:

Last Published:

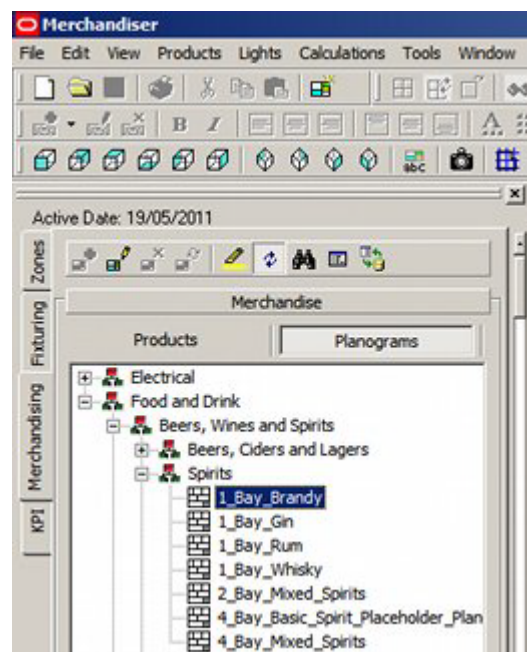
OK Save As Cancel

On saving of the Planogram dialogue, the new planogram will appear in the hierarchy.



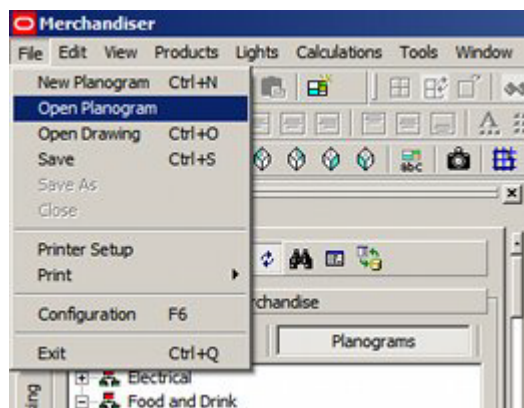
Editing Planograms

Planograms are edited by selecting a planogram and highlighting it.

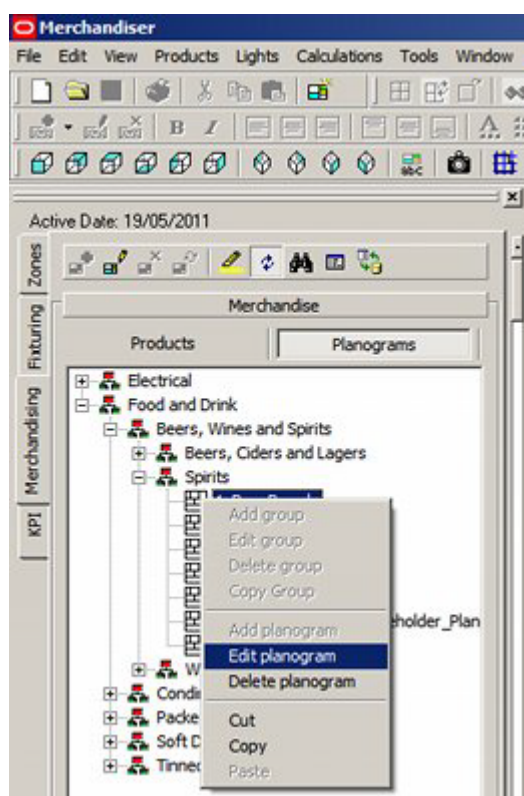


Planograms can be opened for editing in one of two ways: from the menu bar and from the pop-up menu.

- Planograms can be opened for editing from the File pull down menu:



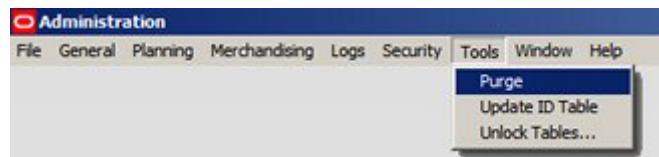
- Planograms can also be edited by using <Ctrl> plus right click to bring up the pop-up menu.



In both cases the Planogram dialogue box will open to allow the properties of the planogram to be edited.

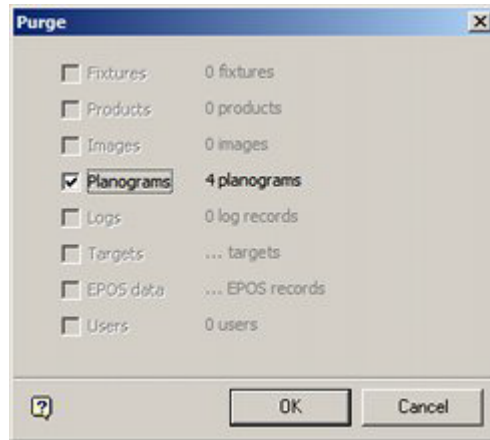
Purge Planograms Option

Purge options are available using the Purge option on the Tools pull down menu in the Administration Module.

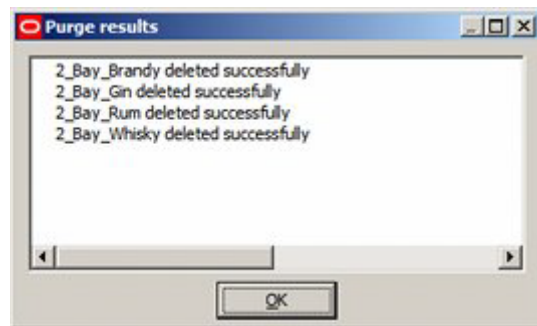


Note: The Administration module is only available to users with Administrator's privileges.

The planograms will not be permanently deleted from the database until the Planograms option is checked on the Purge dialogue and the OK button clicked.



Results will be reported in the Purge Results dialogue box.



Setting Access Permissions

Setting Access Permissions for Planogram Design

The ability for users to modify the planogram hierarchy and individual planograms is set in the Administration module. These permissions can be used to:

1. Allow users to add, edit or delete Planogram groups in the Planogram Hierarchy
2. Allow users to add, edit or delete individual planograms

Overview of Planogram Creation

Overview of Planogram Creation

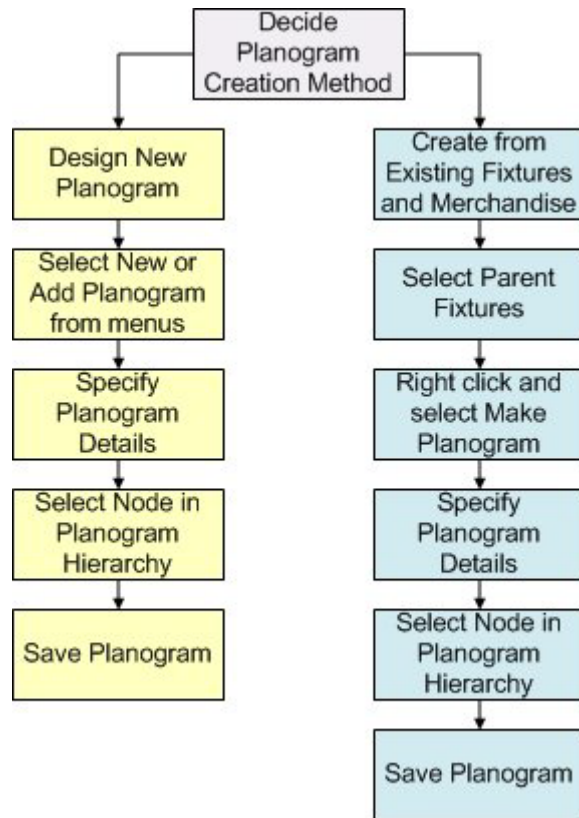
There are two basic ways of creating planograms.

- By designing a planogram in the planogram design dialog box.
- By selecting merchandised fixtures in the store and using them to create a planogram.

The first method is used for creating a planogram from scratch, including selecting the fixtures, shelves and products from those available.

The second method is used to turn an existing arrangement of fixtures, shelves and products in a floor plan into a planogram.

Both methods use a similar logic, and which one is used at a specific time will depend on the circumstances.

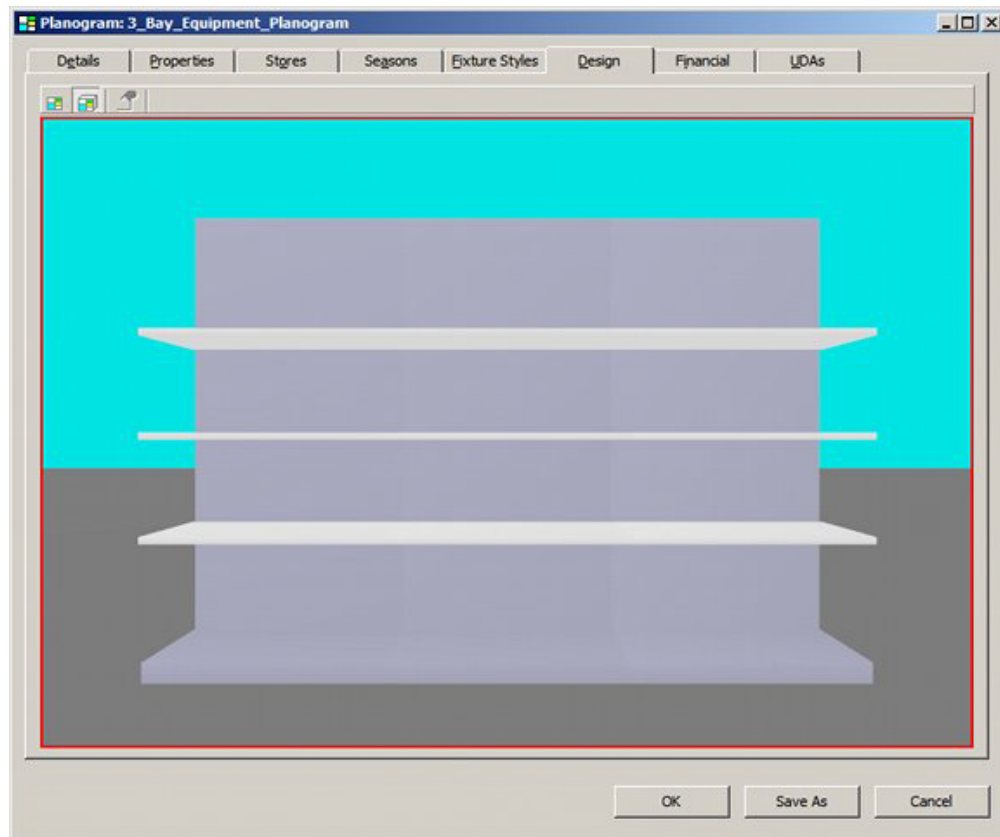


Special Forms of Planograms

There are two forms of planograms that can be used to supplement fully detailed, finished planogram designs.

Equipment Planograms

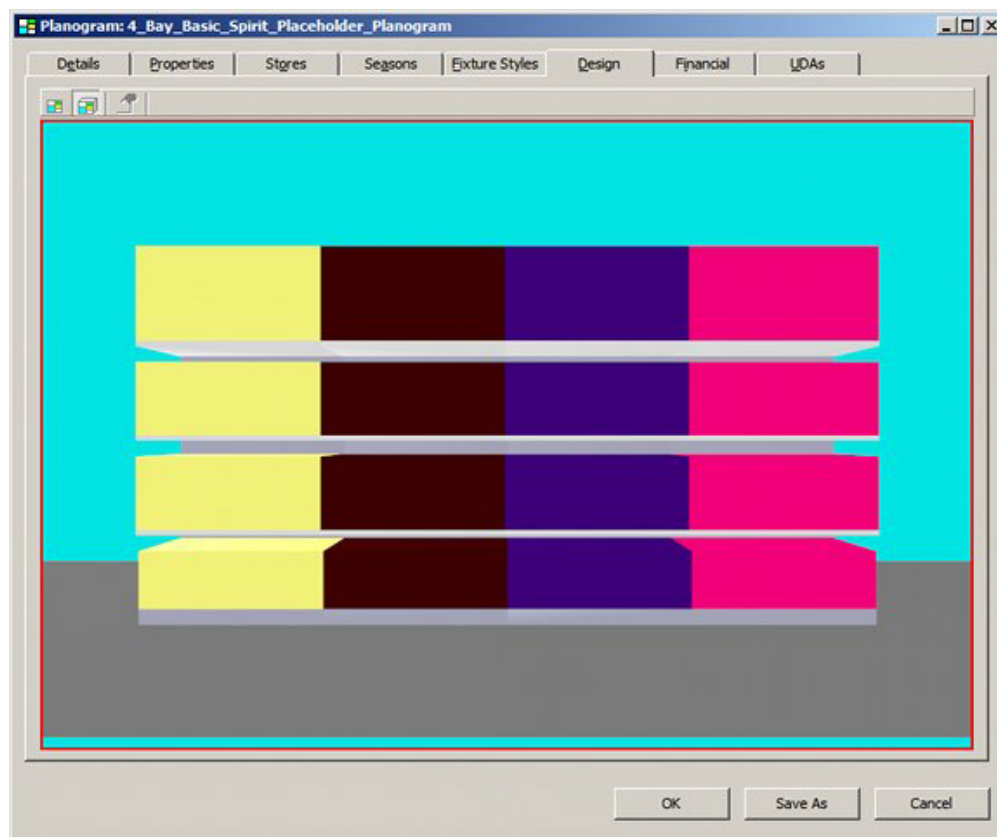
If a store plan is being developed, but planogramming is still at an early stage, it is possible to create equipment planograms. These can be used to lay out the shelves, etc, in the floor plan so that a bill of materials can be generated.



Note: it is also possible to place the shelves, etc, directly in the floor plan without using equipment planograms.

Placeholder Planograms

Planograms can be saved with product placeholders in place of display styles.



The usual purpose of this sort of planogram is to allow store planning to start before planogram design. The placeholder planogram is saved as Revision 1. When the design is finalized, it is saved as Revision 2. If Planogram Substitution is carried out in a floor plan containing Revision 1 (placeholder), that planogram will automatically update to Revision 2 (full detail).




Planogram Design Display Window and Toolbars







The Planogram Toolbar

The **Planogram toolbar** is found on the Merchandising Tab of the Object Browser. It is active when the Planogram button is selected.



It contains a series of icons allowing various operations to be carried out on Planograms.

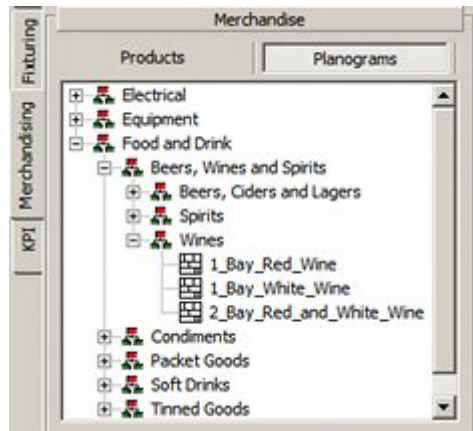
| Icon | Description | Comment |
|---|---------------------------|-------------------------------|
|  | Add to Selected Fixture | (Not enabled in Merchandiser) |
|  | Edit Planogram Definition | |
|  | Remove from Fixture | (Not enabled in Merchandiser) |

| Icon | Description | Comment |
|---|---------------------------------|-------------------------------|
|  | Reverse Planogram | (Not enabled in Merchandiser) |
|  | Highlight where used in store | |
|  | Highlight Selected Item in Tree | |
|  | Find Product or Planogram | |
|  | Show Merchandising Options | |
|  | Refresh | |

Some of these options are only available in the Planner environment - alternative methods being available in the Merchandiser module.

The Merchandising Hierarchy Window

The **Merchandising window** shows a hierarchical tree of all the available products or planograms.



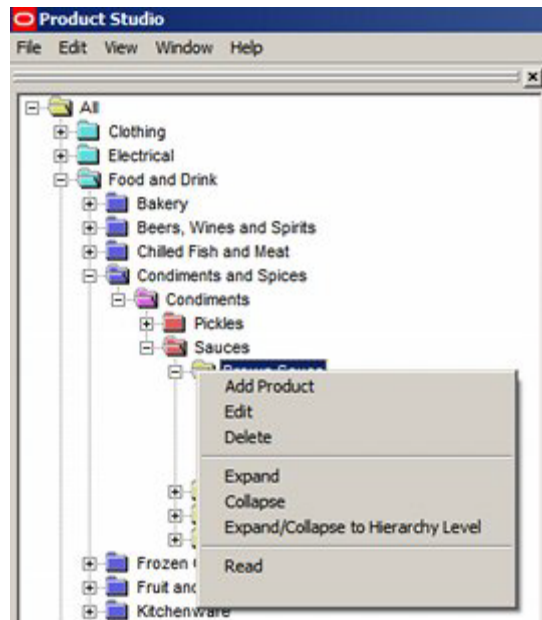
The tree can be expanded or contracted by clicking on the + or – icons.

The Merchandising window can be minimized by clicking on the splitter bar.

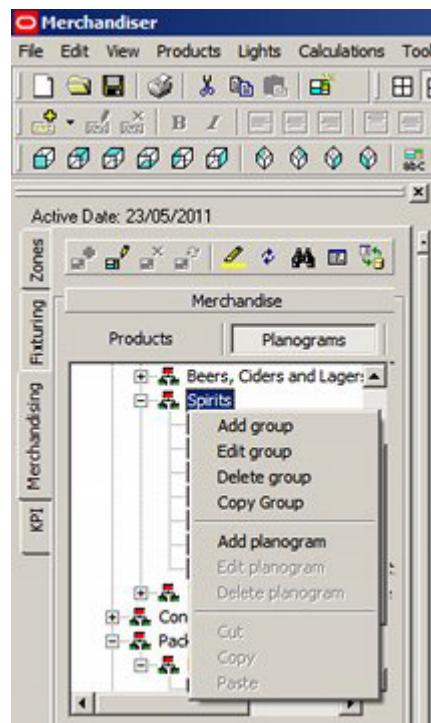


The Products or Planograms buttons immediately below the splitter bar determine whether the hierarchical tree shows products or planograms.

The Products hierarchical tree can be configured in Product Studio using the Add Product, Edit and Delete options on the menu available by right clicking.



The Planograms hierarchical tree can be configured in Merchandiser using the Add, Edit and Delete options on the menu available by right clicking.



The Group or Planogram options will be available or grayed out depending on whether a group or a planogram has been highlighted in the hierarchy.

The Properties Window

The **Properties Window** will show the properties for the currently selected product or planogram.

| Name | Value |
|-------------|------------------------------|
| Pog Id | 4 |
| Pog Name | 1_Bay_White_Wine |
| Description | 1 Bay White Wine - 3 Shelves |
| Pog Code | - |
| Bays | 1 |
| Width (In) | 36 |
| Depth (In) | 25 |

The Properties window can be minimized by clicking on the splitter bar.



The Summary Window

The **Summary Window** will show a user defined list of products or planograms placed in the drawing.

| SubCategory | Linear Feet | Target LF |
|-------------------|-------------|-----------|
| Carbonated Drinks | 14.6 | 0 |
| Condiments | 8 | 0 |
| Rice | 17.5 | 0 |
| Spirits | 11.7 | 0 |

Clicking on a column heading will re-order that column. Clicking again will reverse the sort order.

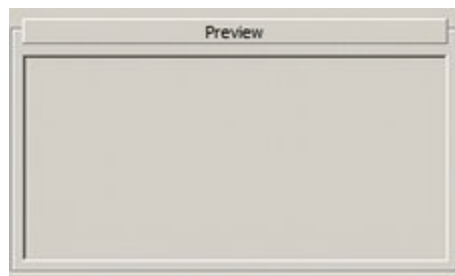
The Summary window can be minimized by clicking on the splitter bar.



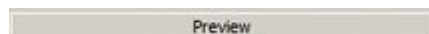
The information that appears in the summary window is customizable and is selected by means of a SQL statement.

The Preview Window

The **Preview Window** will be blank if a planogram is selected.



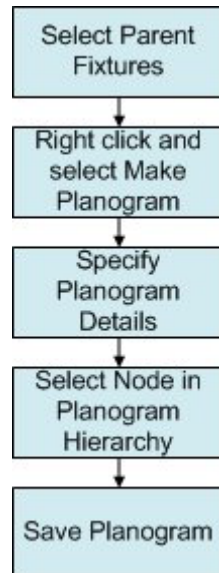
The Preview window can be minimized by clicking on the splitter bar.



Planogram Creation in Store

Overview of Planogram Creation in the Store

Planogram Creation within the Store requires the following stages:



Select Fixtures

This determines which fixtures (and associated products) will become the planogram.

Right click and Select Make Planogram

This starts the planogram definition process.

Specify Planogram Details

This allows the user to specify the Planogram Details, Store Dependency, Season Dependency, Fixture Styles, and User Defined Attributes, (UDA's).

It also allows the user to modify the fixtures and products originally selected for the planogram design.

Select Node in Planogram Hierarchy

This determines where the planogram will be saved in the hierarchy one it has been defined.

Save Planogram

This saves the defined planogram to the specified point in the planogram hierarchy in the Object Browser.

Select Fixtures

One or more fixtures (together with their associated merchandise) can be selected by holding down <Ctrl> and right clicking on the required fixtures. The fixtures will then be enclosed by a selection box.



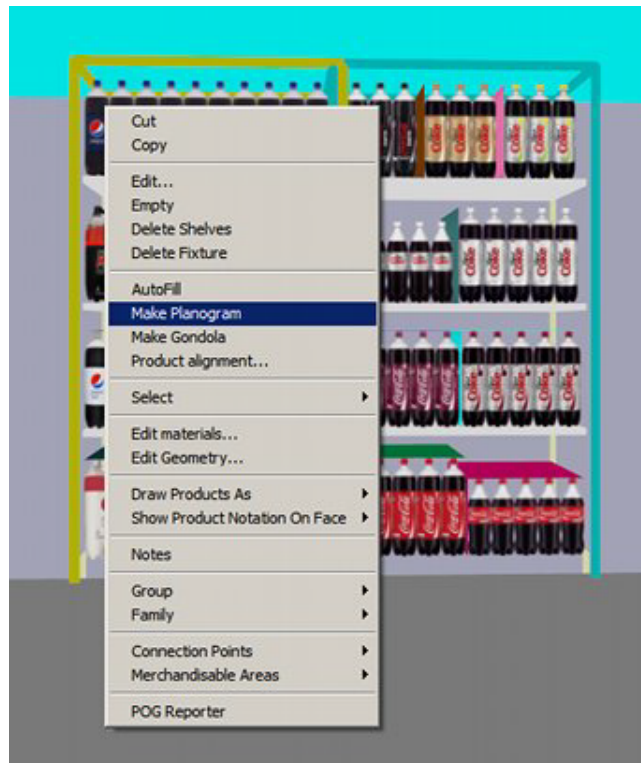
In this example, the first selected fixture is enclosed by a red selection box, and the second in a blue selection box. Other selection box colors may occur depending on whether multiple fixtures have been selected, or whether the fixtures belong to a group or family.

All selected fixtures will be included in the planogram.

Right click and select Make Planogram

Once the fixture(s) have been selected, position the mouse pointer over them and right click to bring up the pop-up menu.

Note: The Make Planogram option will only be available if fixtures are selected. If product or shelves are selected, it will not be available.



Selecting the Make Planogram Option will bring up a new Planogram dialogue box.

Planogram

Details | Properties | Stores | Segsons | Fixture Styles | Design | Financial | UDAs

Name: Revision:

Description:

Size Description:

Status: Client Code:

Family Code: Buddy Family Code:

Assortment Code: Units:

Temperature Range: Time Units:

Weight Range: Manpower Set Time:

Publish Date: Manpower Dismantle Time:

Effective Date: Category Role:

Expiry Date: Inventory Model:

Stock Type: Rank:

Autofill Rule: Traffic Flow: ☒ Left to Right

Can be Split: ☐ Requires Power: ☐ ☐ Right to Left

OK Save As Cancel

This requires completion and saving.

Specify Planogram Details

The **Planogram** dialogue box allows users to specify full details for the planogram.

The **Details Tab** allows the planogram name, effective date, etc, to be specified.

The **Stores Tab** allows users to select which stores the planogram is intended for.

The **Seasons Tab** allows users to select which time periods the planogram is intended for.

The **Fixture Styles Tab** allows users to specify which types of fixtures the planogram can be placed on.

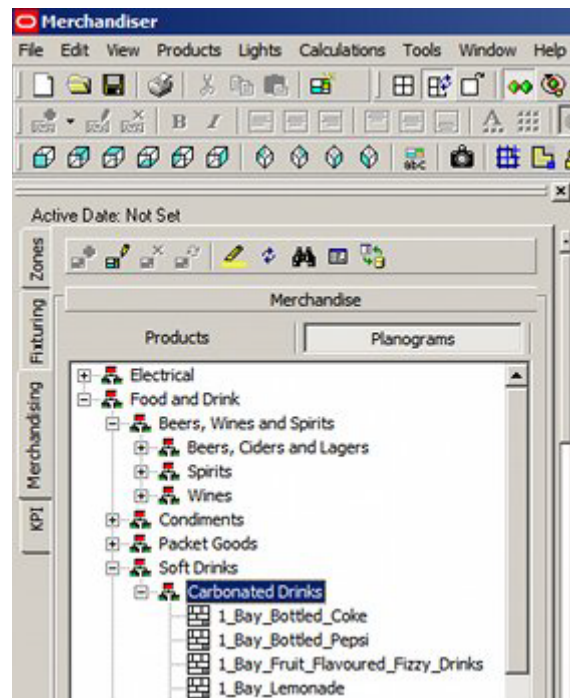
The **Design Tab** allows the planogram design to be modified relative to the fixtures and merchandise selected in the store.

The **Financial Tab** allows financial performance data to be assigned to the planogram.

The **UDA Tab** allows User Designed Attributes to be set for the Planogram.

Select Node in Hierarchy

Selecting the **node in the hierarchy** determines where the planogram will be saved once it has been created.



Here, the Carbonated Drinks Planogram Group has been highlighted, and the planogram will be saved under this node.

Save Planogram

Clicking on the **OK button** will save details of the planogram to the Macro Space Planning database.

Planogram: 2_Bay_Mixed_Cola

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

Name: 2_Bay_Mixed_Cola Revision: 1

Description: 2 Bay Mixed Cola

Size Description: 72x 24 x 72

Status: Current Client Code: Example

Family Code: EXAMPLE Buddy Family Code: EXAMPLE

Assortment Code: EXAMPLE Units: imperial inch

Temperature Range: Ambient Goods Time Units: standard second

Weight Range: < No Ranges Selected > Manpower Set Time: 0.00

Publish Date: Manpower Dismantle Time: 0.00

Effective Date: 11 May 2011 Category Role: Routine

Expiry Date: 31 December 2999 Inventory Model: EXAMPLE

Stock Type: Normal Bank: 1

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

Can be Split: ☐ Requires Power: ☐

OK Save As Cancel

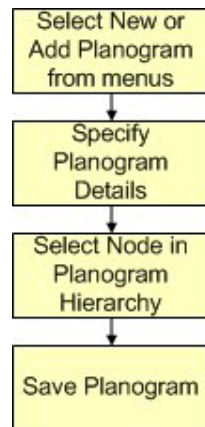
OK button Save As

Note: The **Save As button** is used to save a different version of an existing planogram. It is not normally used when creating a planogram from new.

New Planogram Design

Overview of New Planogram Design

Planogram Creation from new requires the following stages:



Select New Planogram from File pull down menu

This starts the planogram definition process.

Specify Planogram Details

This allows the user to specify the Planogram Details, Store Dependency, Season Dependency, Fixture Styles, and User Defined Attributes, (UDAs).

It also allows the user to modify the fixtures and products originally selected for the planogram design.

Select Node in Planogram Hierarchy

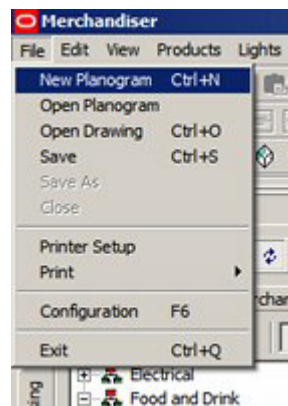
This determines where the planogram will be saved in the hierarchy one it has been defined.

Save Planogram

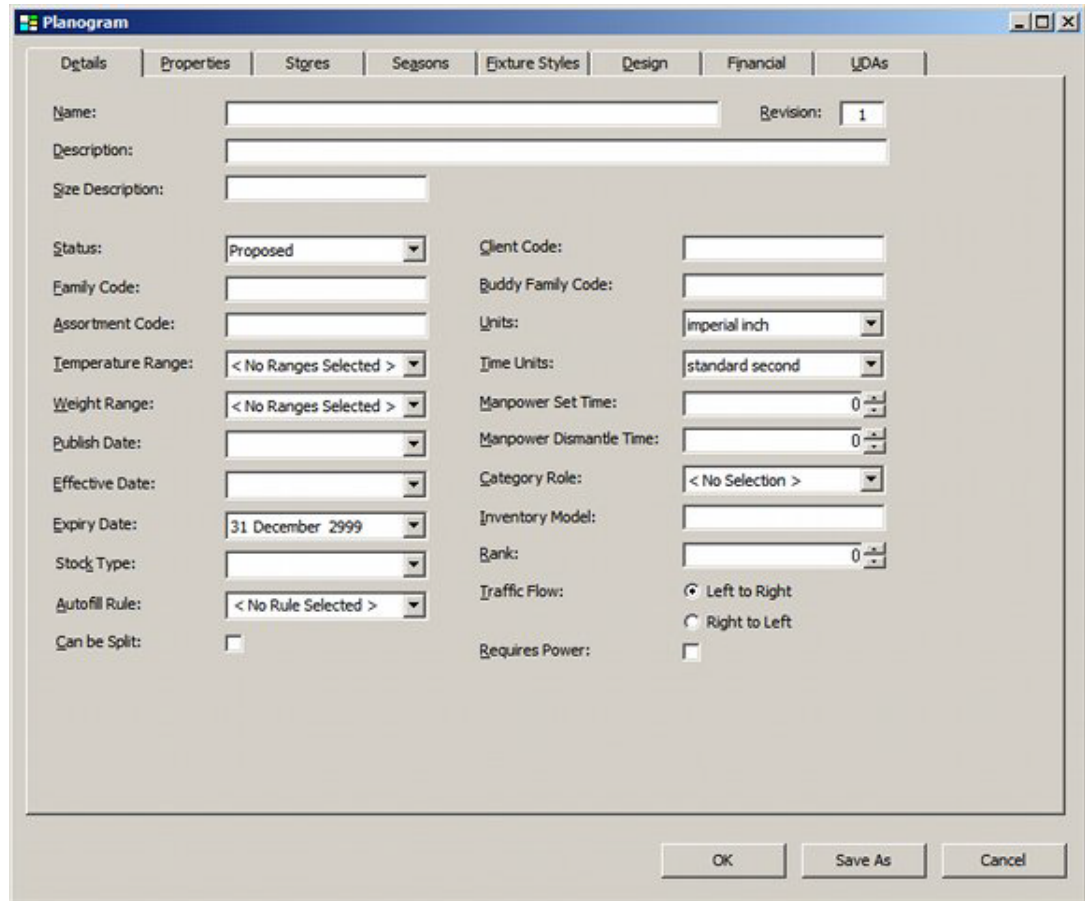
This saves the defined planogram to the specified point in the planogram hierarchy in the Object Browser.

Select New Planogram from File pull down menu

The **New Planogram Option** is selected from the File Pull down menu. (Alternatively, the Add Planogram option can be selected from the right click menu).



This will bring up a blank Planogram definition dialogue to allow the details of the planogram to be specified.



The image shows a software dialog box titled "Planogram". It has a tabbed interface with tabs for "Details", "Properties", "Stores", "Seasons", "Fixture Styles", "Design", "Financial", and "UDAs". The "Details" tab is currently selected. The dialog contains various input fields and controls for specifying planogram details. At the bottom right, there are three buttons: "OK", "Save As", and "Cancel".

| Field | Value |
|--------------------------|---|
| Name: | |
| Revision: | 1 |
| Description: | |
| Size Description: | |
| Status: | Proposed |
| Family Code: | |
| Assortment Code: | |
| Temperature Range: | < No Ranges Selected > |
| Weight Range: | < No Ranges Selected > |
| Publish Date: | |
| Effective Date: | |
| Expiry Date: | 31 December 2999 |
| Stock Type: | |
| Autofill Rule: | < No Rule Selected > |
| Can be Split: | <input type="checkbox"/> |
| Client Code: | |
| Buddy Family Code: | |
| Units: | imperial inch |
| Time Units: | standard second |
| Manpower Set Time: | 0 |
| Manpower Dismantle Time: | 0 |
| Category Role: | < No Selection > |
| Inventory Model: | |
| Bank: | 0 |
| Traffic Flow: | <input checked="" type="radio"/> Left to Right <input type="radio"/> Right to Left |
| Requires Power: | <input type="checkbox"/> |

Specify Planogram Details

The **Planogram** dialogue box allows users to specify full details for the planogram.

The screenshot shows a software window titled "Planogram: 2_Bay_Mixed_Cola". It has a tabbed interface with the following tabs: Details, Properties, Stores, Seasons, Fixture Styles, Design, Financial, and UDAs. The "Details" tab is currently selected. The form contains the following fields and controls:

- Name:** 2_Bay_Mixed_Cola
- Revision:** 1
- Description:** 2 Bay Mixed Cola
- Size Description:** 72x 24 x 72
- Status:** Current (dropdown)
- Family Code:** EXAMPLE
- Assortment Code:** EXAMPLE
- Temperature Range:** Ambient Goods (dropdown)
- Weight Range:** < No Ranges Selected > (dropdown)
- Publish Date:** (empty dropdown)
- Effective Date:** 11 May 2011 (dropdown)
- Expiry Date:** 31 December 2999 (dropdown)
- Stock Type:** Normal (dropdown)
- Autofill Rule:** < No Rule Selected > (dropdown)
- Can be Split:** ☐
- Client Code:** Example
- Buddy Family Code:** EXAMPLE
- Units:** Imperial inch (dropdown)
- Time Units:** standard second (dropdown)
- Manpower Set Time:** 0.00 (spin box)
- Manpower Dismantle Time:** 0.00 (spin box)
- Category Role:** Routine (dropdown)
- Inventory Model:** EXAMPLE
- Bank:** 1 (spin box)
- Traffic Flow:**
 - ☒ Left to Right
 - ☐ Right to Left
- Requires Power:** ☐

At the bottom right, there are three buttons: OK, Save As, and Cancel.

The **Details Tab** allows the planogram name, effective date, etc, to be specified.

The **Stores Tab** allows users to select which stores the planogram is intended for.

The **Seasons Tab** allows users to select which time periods the planogram is intended for.

The **Fixture Styles Tab** allows users to specify which types of fixtures the planogram can be placed on.

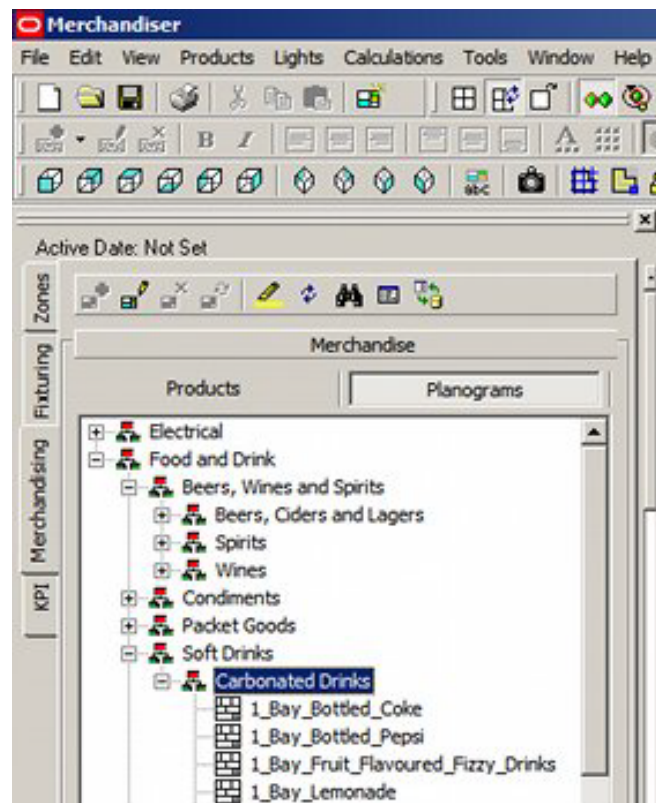
The **Design Tab** allows the planogram design to be created from the available fixtures and merchandise.

The **Financial Tab** allows financial performance data to be assigned to the planogram.

The **UDA Tab** allows User Designed Attributes to be set for the Planogram.

Select Node in Hierarchy

Selecting the node in the hierarchy determines where the planogram will be saved once it has been created.



In this example, only a simple hierarchy has been created, but considerably more complex hierarchies can exist in large retail organizations.

Here, the Clothing Planogram group has been highlighted, and the planogram will be saved under this node.

Save Planogram

Clicking on the **Save** button will save details of the planogram to the central Macro Space Management database.

Planogram: 2_Bay_Mixed_Cola

Details Properties Stores Seasons Fixture Styles Design Financial UDAs

Name: 2_Bay_Mixed_Cola Revision: 1

Description: 2 Bay Mixed Cola

Size Description: 72x 24 x 72

Status: Current

Family Code: EXAMPLE

Assortment Code: EXAMPLE

Temperature Range: Ambient Goods

Weight Range: < No Ranges Selected >

Publish Date:

Effective Date: 11 May 2011

Expiry Date: 31 December 2999

Stock Type: Normal

Autofill Rule: < No Rule Selected >

Can be Split: ☐

Client Code: Example

Buddy Family Code: EXAMPLE

Units: imperial inch

Time Units: standard second

Manpower Set Time: 0.00

Manpower Dismantle Time: 0.00

Category Role: Routine

Inventory Model: EXAMPLE

Bank: 1

Traffic Flow: ☒ Left to Right ☐ Right to Left

Requires Power: ☐

OK button Save As Cancel

Note: The Save As button is used to save a different version of an existing planogram. It is not normally used when creating a planogram from new.

Planogram Design Options

Overview of Planogram Design Options

The Planogram dialogue box allows users to specify full details for the planogram.

The screenshot shows a software window titled "Planogram: 4_Bay_Basic_Spirit_Placeholder_Planogram". It has a tabbed interface with the following tabs: Details, Properties, Stores, Seasons, Fixture Styles, Design, Financial, and UDAs. The "Details" tab is currently selected. The form contains the following fields and controls:

- Name:** 4_Bay_Basic_Spirit_Placeholder_Planogram
- Revision:** 1
- Description:** 4 bay Basic Spirit Placeholder Planogram
- Size Description:** 144 x 24 x 72
- Status:** Proposed (dropdown)
- Family Code:** EXAMPLE
- Assortment Code:** EXAMPLE
- Temperature Range:** Ambient Goods (dropdown)
- Weight Range:** < No Ranges Selected > (dropdown)
- Publish Date:** 13 June 2011 (calendar)
- Effective Date:** 30 June 2011 (calendar)
- Expiry Date:** 31 December 2999 (calendar)
- Stock Type:** Normal (dropdown)
- Autofill Rule:** < No Rule Selected > (dropdown)
- Can be Split:** ☐
- Client Code:** Example
- Buddy Family Code:** EXAMPLE
- Units:** Imperial inch (dropdown)
- Time Units:** standard hour (dropdown)
- Manpower Set Time:** 4.00 (spin box)
- Manpower Dismantle Time:** 2.00 (spin box)
- Category Role:** Routine (dropdown)
- Inventory Model:** EXAMPLE
- Bank:** 0 (spin box)
- Traffic Flow:**
 - ☒ Left to Right
 - ☐ Right to Left
- Requires Power:** ☐

At the bottom right, there are three buttons: OK, Save As, and Cancel.

The **Details Tab** allows the planogram name, effective date, etc, to be specified.

The **Stores Tab** allows users to select which stores the planogram is intended for.

The **Seasons Tab** allows users to select which time periods the planogram is intended for.

The **Fixture Styles Tab** allows users to specify which types of fixtures the planogram can be placed on.

The **Design Tab** allows the planogram design to be modified relative to the fixtures and merchandise selected in the store.

The **Financial Tab** contains performance data for the planogram.

The **UDA Tab** allows User Designed Attributes to be set for the Planogram.

The Details Tab

Overview of the Details Tab

The **Details Tab** is used for to set up the description of the planogram, together with other parameters concerning its operation.

Name, Description and Revision

The **Name**, **Description** and **Revision** allow users to enter information pertinent to the planogram.

Name is the filename by which the planogram will be referenced in the database.

Description is a longer and more informative version of the name.

Revision is the number of the initial revision of the planogram. The revision will be auto-incremented each time a new version of the planogram is saved.

Size Description is used to describe the nominal dimensions of the planogram.

Planogram Status and Dates

The planogram status and dates define when the planogram will come into service.

Planogram: 4_Bay_Basic_Spirit_Placeholder_Planogram

Details Properties Stores Seasons Fixture Styles Design Financial UDAs

Name: 4_Bay_Basic_Spirit_Placeholder_Planogram Revision: 1

Description: 4 bay Basic Spirit Placeholder Planogram

Size Description: 144 x 24 x 72

Status: Proposed

Family Code: EXAMPLE

Assortment Code: EXAMPLE

Temperature Range: Ambient Goods

Weight Range: < No Ranges Selected >

Publish Date: 13 June 2011

Effective Date: 30 June 2011

Expiry Date: 31 December 2999

Stock Type: Normal

Autofill Rule: < No Rule Selected >

Can be Split: ☐

Client Code: Example

Buddy Family Code: EXAMPLE

Units: Imperial inch

Time Units: standard hour

Manpower Set Time: 4.00

Manpower Dismantle Time: 2.00

Category Role: Routine

Inventory Model: EXAMPLE

Bank: 0

Traffic Flow: ☒ Left to Right ☐ Right to Left

Requires Power: ☐

OK Save As Cancel

Status

Status is set from the Status drop down list in the Details tab.

Status: Current

Family Code:

Assortment Code:

Proposed

Current

Superseded

Status can be set to one of three options:

- Proposed - the planogram is still in the process of being designed and approved. Planograms at Proposed status can be placed in floor plans - for example to allow floor plans to be developed before planogram designs are complete.

Note: it may be necessary to develop a report or KPI that shows planograms of Proposed status so they can be reviewed before a floor plan is authorized to go into service.

- Current - the planogram is in service and available for placement
- Superseded - the planogram is obsolete and has been taken out of service.

Note: additional statuses may be added using the Status option available from the General menu in the Administration module.

Publish Date

This date is a flag that can be used to indicate the data at which equipment and merchandiser required to implement the planogram can be ordered.

Effective Date

This is the date planograms come into service. If the MERCH_TREE_EFFECTIVE_DATE system variable is turned on (Administration module) the effective date of the planogram will be compared to the Active Date of the current floor plan (set at the top of the Object Browser). If the Planogram Effective Date is after the Active Date for the floor plan, the planogram will not be available for placement. This prevents planograms that will only be available after a specific date being placed

Expiry Date

The Expiry date is the date at which the planogram will be taken out of service. When a planogram is created, the date will be set to a default of 31st Dec 2999.

Planogram Information

Planogram Information

This section contains information on the planogram

Planogram: 4_Bay_Basic_Spirit_Placeholder_Planogram

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

Name: 4_Bay_Basic_Spirit_Placeholder_Planogram Revision: 1

Description: 4 bay Basic Spirit Placeholder Planogram

Size Description: 144 x 24 x 72

Status: Proposed

Family Code: EXAMPLE

Assortment Code: EXAMPLE

Temperature Range: Ambient Goods

Weight Range: < No Ranges Selected >

Publish Date: 13 June 2011

Effective Date: 30 June 2011

Expiry Date: 31 December 2999

Stock Type: Normal

Autofill Rule: < No Rule Selected >

Can be Split: ☐

Client Code: Example

Buddy Family Code: EXAMPLE

Units: imperial inch

Time Units: standard hour

Manpower Set Time: 4.00

Manpower Dismantle Time: 2.00

Category Role: Routine

Inventory Model: EXAMPLE

Bank: 0

Traffic Flow: ☒ Left to Right ☐ Right to Left

Requires Power: ☐

OK Save As Cancel

Note: Name, Description, Size Description, Revision, Status, Publish Date, Effective Date, Expiry Date is discussed elsewhere in this section.

Family Code indicates the Family the planogram belongs to. There might be a 1 bay planogram for printer cartridges for small stores and a 2 bay planogram with larger quantities of the same cartridges for a larger store. The Family Code can be used in reports of KPI's to check that only one instance of a printer cartridge planogram has been placed in a store.

Assortment Code gives further information on the purpose of the planogram. Codes are often client specific - for example HSL might indicate that the planogram was designed for stores with a Hispanic demographic, for stores of small size and does not have a large movement of products associated with it.

Temperature Range is the temperature that the products in the planogram will be displayed at. It is set using the drop down list. The selected temperature range must match the temperature range on the fixtures the planogram will be placed on in the floor plan. Temperature ranges are configured using the Ranges option in the Merchandising menu in the Administration module.

Weight Range indicates the total weight of the products in the planogram. This functionality is not yet in use.

Stock Type is not in use in this version of the software.

AutoFill Rule indicates the AutoFill rule that has been selected if the AutoFill functionality has been configured in the Merchandiser module.

Can be Split is a flag indicating whether the planogram must be placed on adjacent fixtures, or whether the selected fixtures can be separated from each other.

Client Code is a code assigned by the client to identify the planogram. The code will vary from retailer to retailer.

Buddy Family Code indicates the Family code of a planogram that should be associated with this planogram. For example, if the family code of a planogram is that of printer cartridges, the Buddy Family code might be that of printer paper. The Buddy Family Code can be used in reports or KPI's to check that the right pairing of planograms has been placed.

Units are the units of measure for the planogram dimensions. The list of available units can be configured using the Units option accessed from the General menu in the Administration Module.

Time Units are the units of measure for the set and dismantle times. The list of available units can be configured using the Units option accessed from the General menu in the Administration Module.

Manpower Set Time is the time it will take to add any shelving and place the products. The units are set in the Time units drop down list.

Manpower Dismantle Time is the time it will take to clear all shelving and products in preparation for placing the next planogram.

Category Role is the reason the retailer believes customers purchase products from that planogram.

Inventory Model indicates the Inventory Model used to provide the data for the planogram design.

Rank is an arbitrary number that can be assigned to indicate order

Traffic Flow indicates whether the planogram is designed to be viewed by people walking left to right or right to left.

Requires Power is a flag specifying whether the planogram requires electrical power or not. An example would be a planogram for televisions where the televisions in display are on.

The Properties Tab

Overview of the Properties Tab

The Properties tab (which is read only) gives information on the planogram.

| Field | Value |
|-------------------------------|---------------------|
| Source: | MSM |
| Import Identifier: | |
| Imported Name: | |
| Last Imported: | |
| Parent Product: | Spirits |
| Created: | 28 April 2011 |
| Created By: | pw |
| Last Modified: | 10 May 2011 |
| Last Modified By: | pw |
| Last Published: | |
| Size (Length, Depth, Height): | 142 25 72 |
| Number of Bays: | 4 |
| Total Number of Facings: | 176 |

Source is the source of the design of the planogram. MSM indicates that the planogram was created using Macro Space Management. Alternatively, this could be the name of the third party source of the planogram design. This information is read from the AVTTB_POG_SOURCE table in the database.

Import Identifier is assigned to identify the specific import that brought in the information.

Imported Name identifies the source of the import. This could be the name assigned to the planogram in the third party software, a cluster holding a series of planograms or a flat file holding a number of planograms.

Last Imported is the date of the last import. (Information may be imported a number of time to update - for example - financial data.

Parent Product is the name of the node in the hierarchy that is the common link between all of the products in the planogram. It can either be calculated by Macro Space Management or assigned during import.

Created is the date the planogram was first created or imported

Created By is the identifier of the user if the planogram was manually created. If the planogram was imported, this will be indicated instead.

Last Modified is the date the planogram was last saved or information was last imported.

Last Modified By is the identifier of the user if the planogram was manually updated. If the information was imported, this will be indicated instead.

Last Published is the date the planogram design was last printed in electronic or hard copy form.

Size is the calculated size of the planogram.

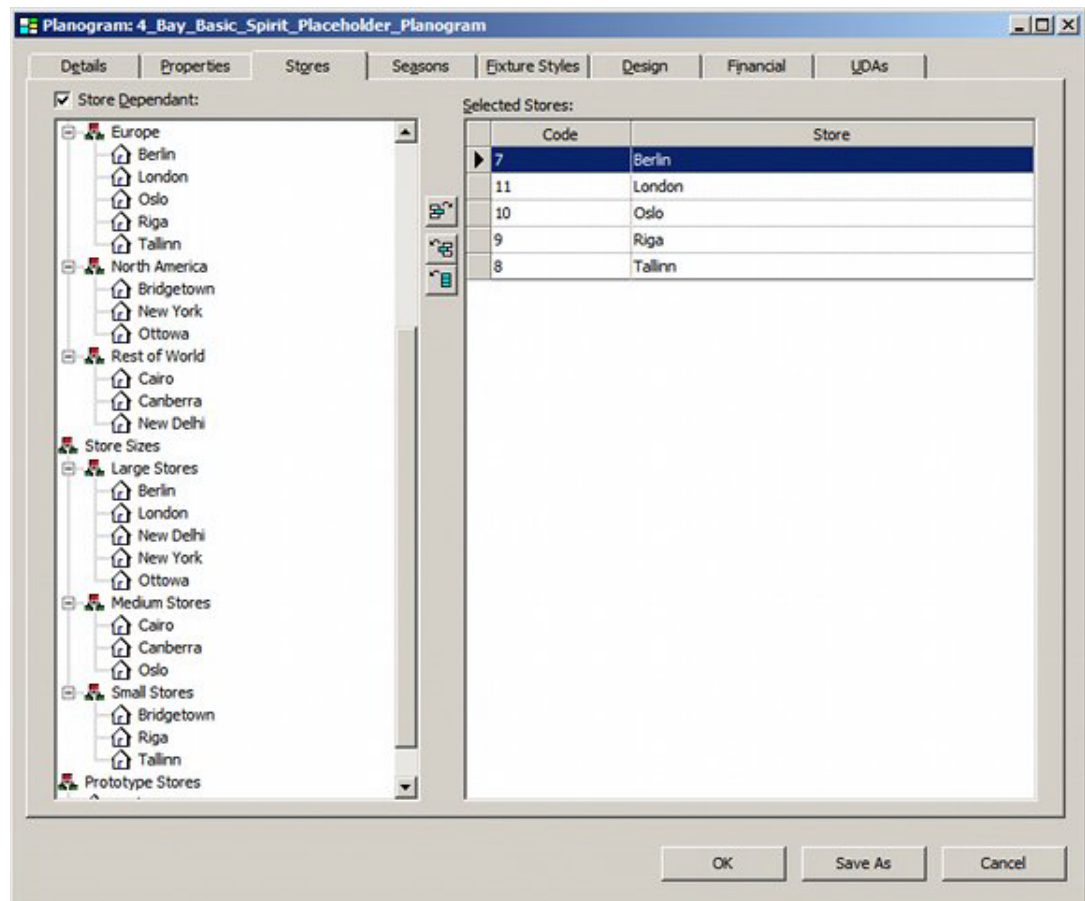
Number of Bays is the number of profiles (bays) in the planogram.

Total Number of Facings is the number of facings in the planogram.

The Stores Tab

Overview of the Stores Tab

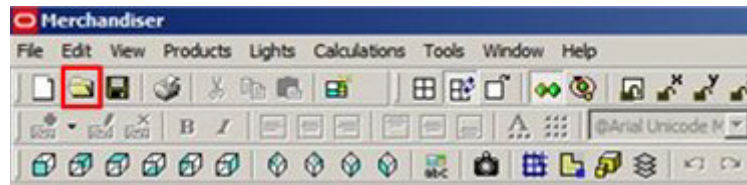
The **Stores** Tab is used to select the Stores the planogram is valid for.



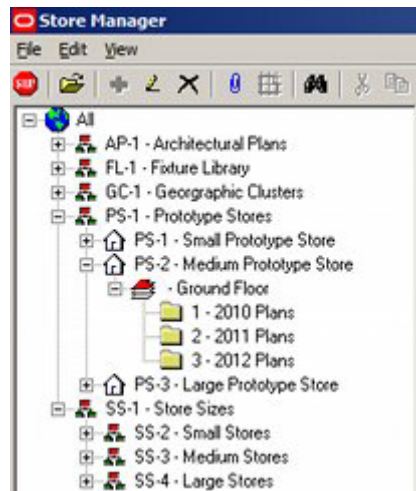
This information is for reporting purposes only and does not put any constraints on planogram placement.

Configuring the List of Stores

The **list of stores** can be configured by means of the Store Manager module. This is invoked by clicking the Store Manager Icon in the toolbar.

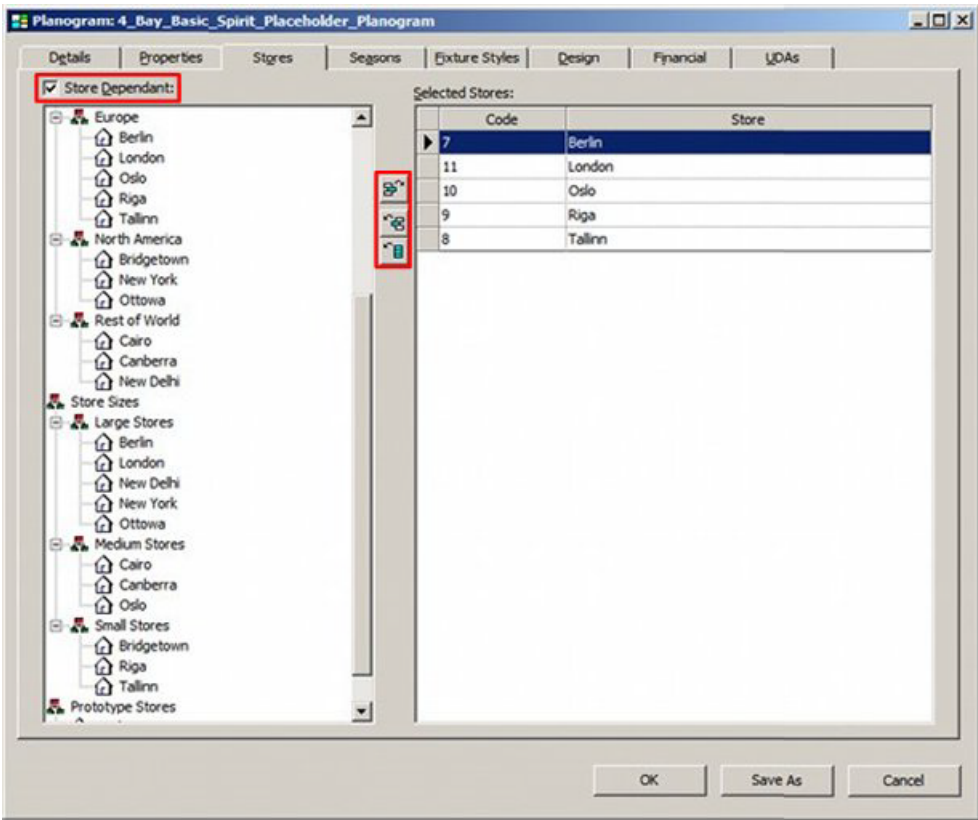


Store Manager allows the hierarchy of clusters and stores to be added to, edited and deleted from.






Adding or Removing Stores

To Add or Remove Stores check the Store Dependent box.



This will enable the Stores toolbar.

| Icon | Description |
|---|-------------------|
|  | Add Store |
|  | Remove Store |
|  | Remove all Stores |

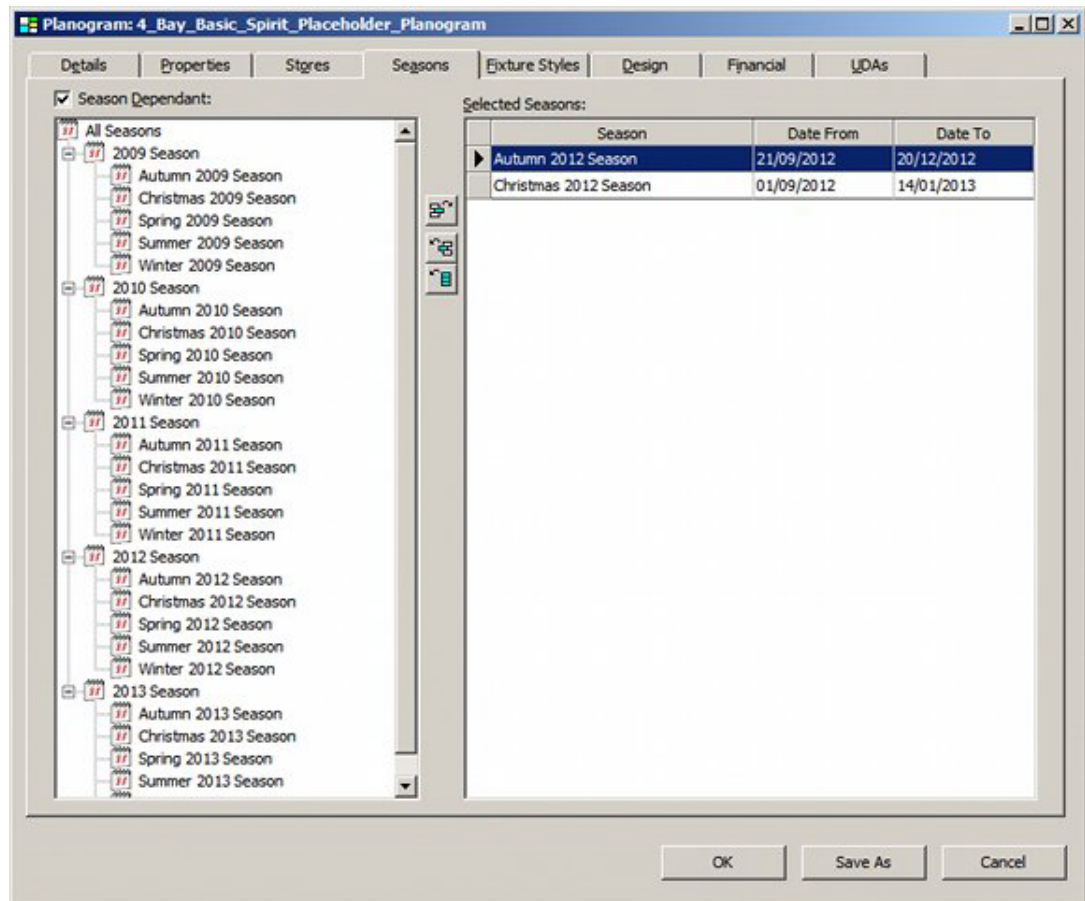
Individual Stores can be added or removed by using the Add Season or Remove Season icons.

Remove all Stores will remove all selected stores from the right of the display.

The Seasons Tab

Overview of the Seasons Tab

The **Seasons Tab** allows users to specify which seasons (if any) the planogram is valid for.



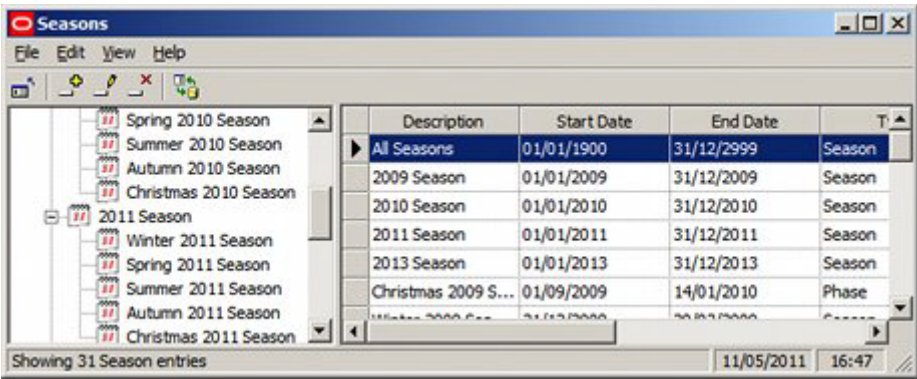
This information is for reporting purposes only and does not put any constraints on planogram placement.

Configuring the List of Seasons

The list of seasons is configured in the Administration Module. Select the Seasons option from the Merchandising Menu.



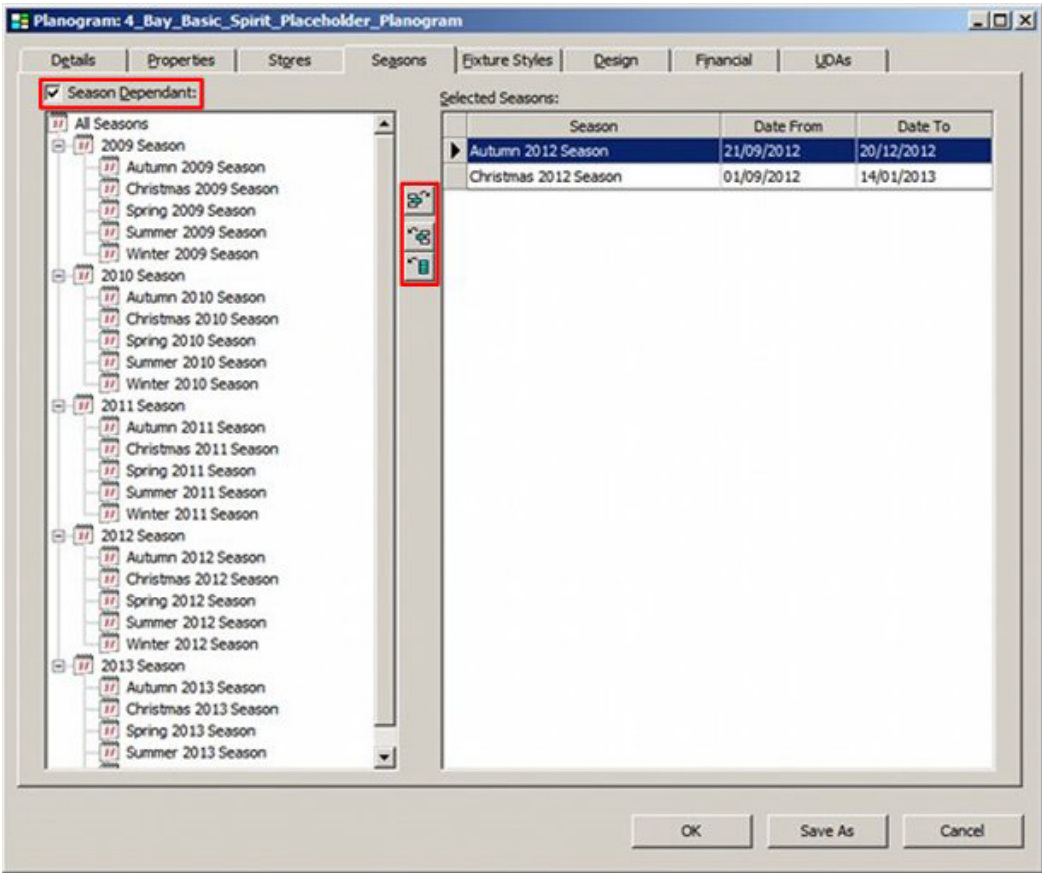
This will bring up the Seasons dialogue box.



This allows seasons to be added, edited or deleted.


Adding or Removing Seasons

To **Add** or **Remove** seasons check the Season Dependent box.



This will enable the season toolbar

| Icon | Description |
|------|---------------|
| | Add Season |
| | Remove Season |

| Icon | Description |
|---|--------------------|
|  | Remove all Seasons |

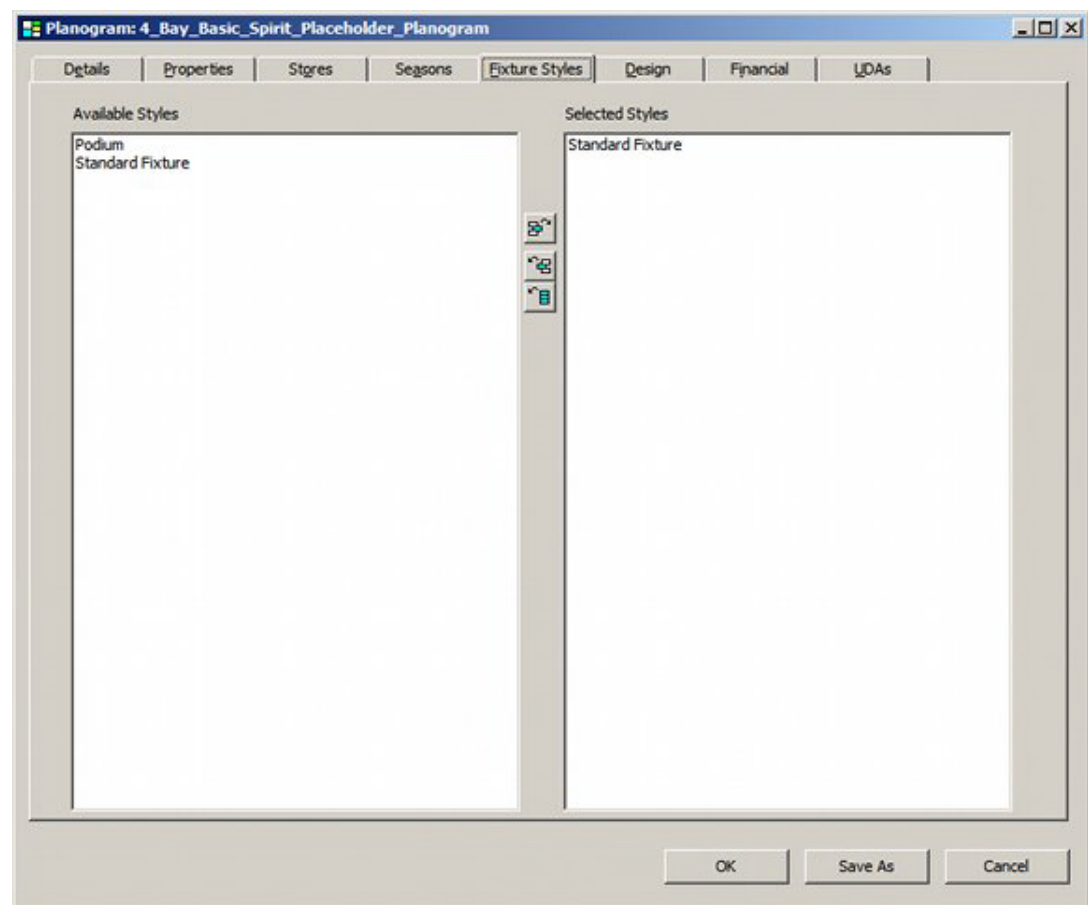
All available seasons can be added to the planogram by selecting all seasons on the left of the display, then clicking on the Add Season icon.

Individual seasons can be added or removed by using the Add Season or Remove Season icons. Remove all seasons will remove all selected Seasons from the right of the display.

The Fixture Styles Tab

Overview of the Fixture Styles Tab




The **Fixture Styles** tab allows users to specify which fixture styles the planogram can be placed on.



Planograms can only be placed on fixtures that have been assigned those styles.

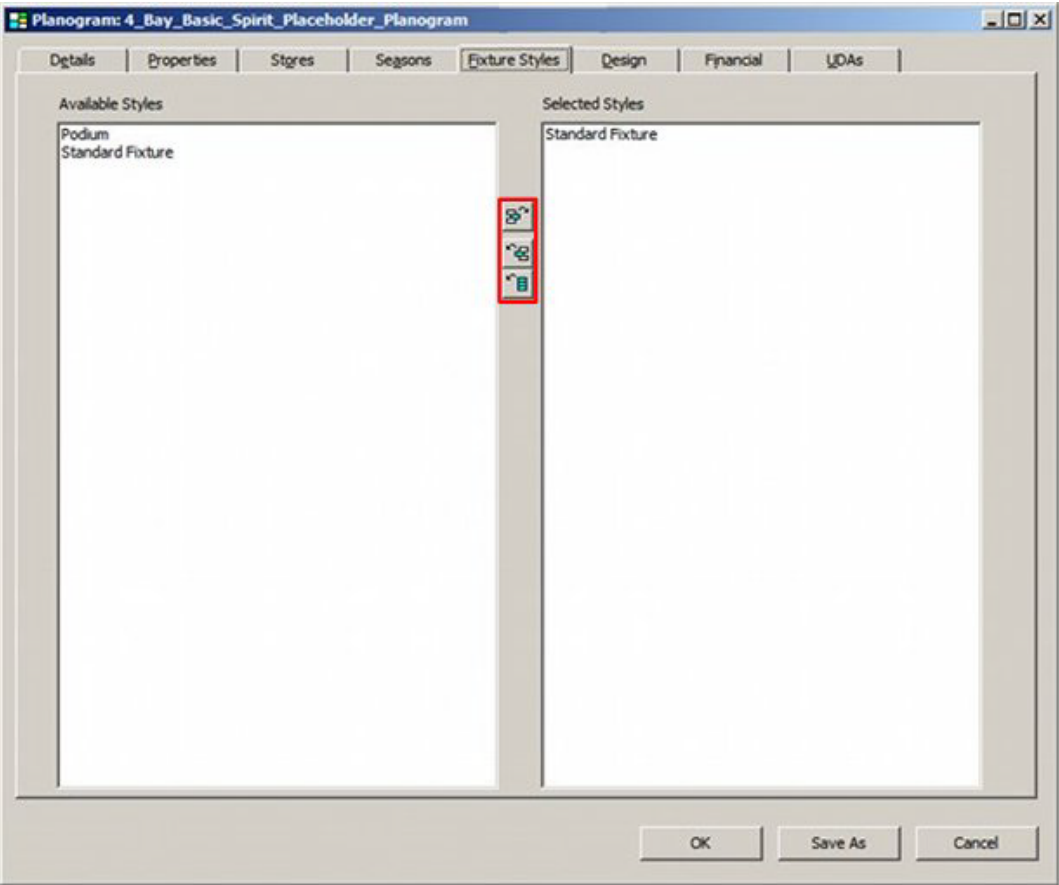
In the example above, the planogram can only be placed on fixtures that have been assigned the Standard Fixture style.

Selecting styles can be done by means of the toolbar.




| Icon | Description |
|---|-------------------|
|  | Add Style |
|  | Remove Style |
|  | Remove all Styles |

Adding or Removing Styles

Styles can be added or removed by means of the toolbar.



To add or remove a style, simply highlight it and click on the relevant icon.

| Icon | Description |
|---|-------------------|
|  | Add Style |
|  | Remove Style |
|  | Remove all Styles |

Remove all Styles will remove all selected Styles from the right of the display.

Configuring the List of Styles

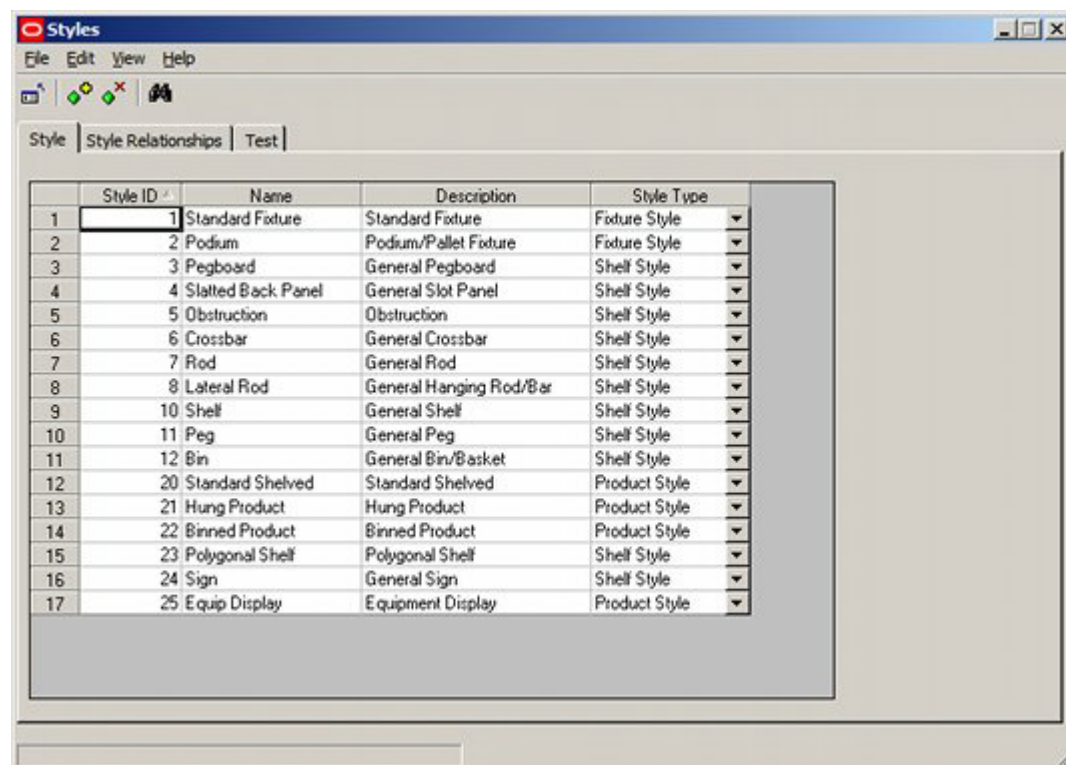
The list of available styles is configured in the Administration Module.

Note: Users will require the appropriate privileges to use the Administration Module

Select Styles from the Administration Module Merchandising Menu.



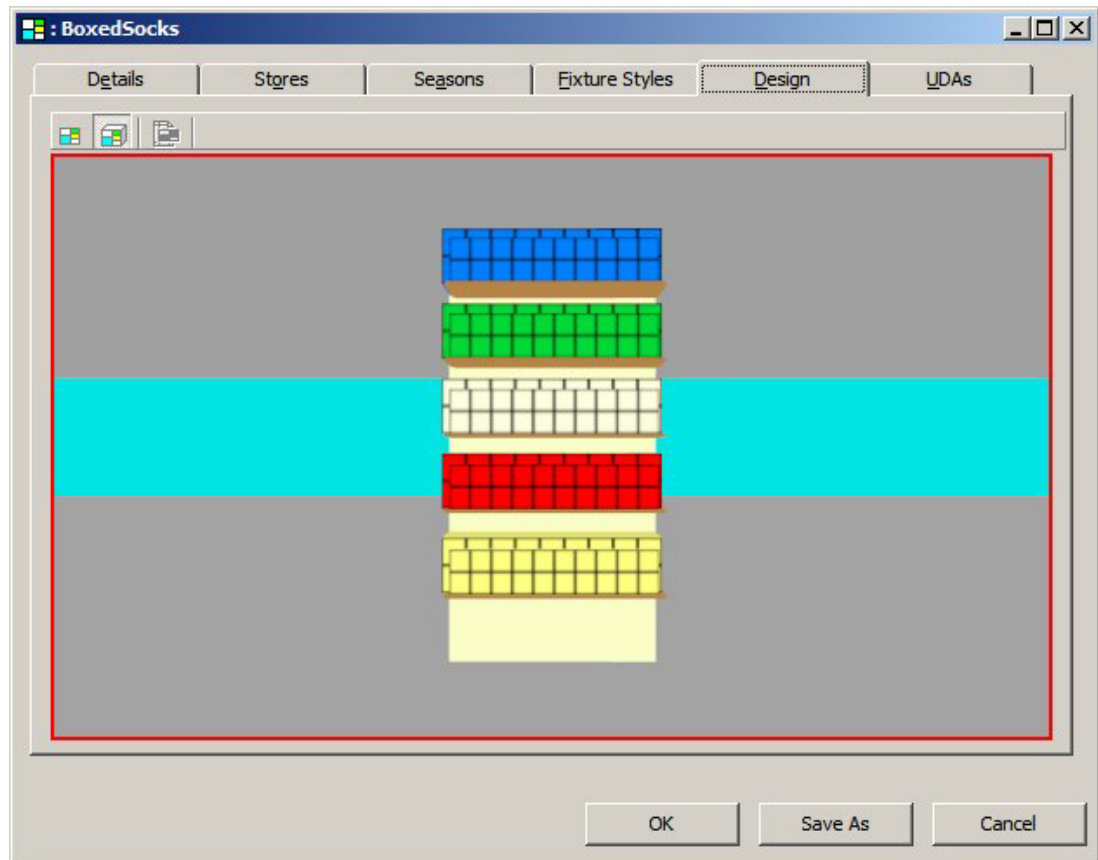
This will bring up the Styles dialogue box. This allows Styles to be defined, Style Relationships to be set and those style relationships to be tested.



The Design Tab

Overview of the Design Tab

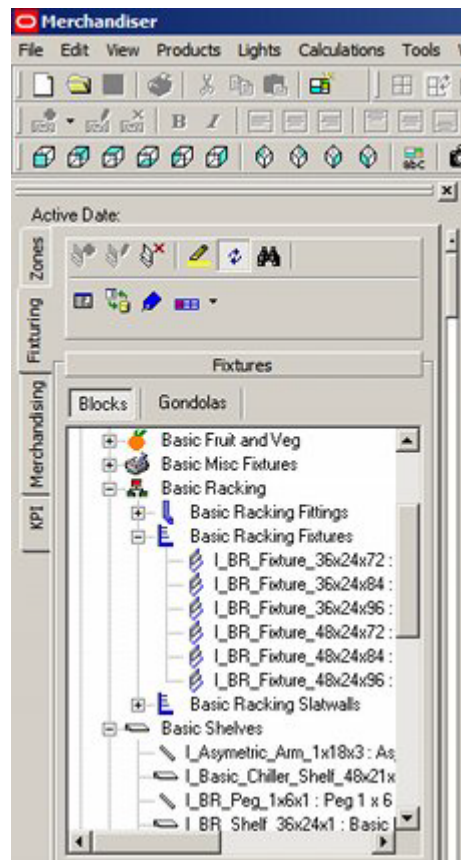
The **Design Tab** is used to design the planogram.



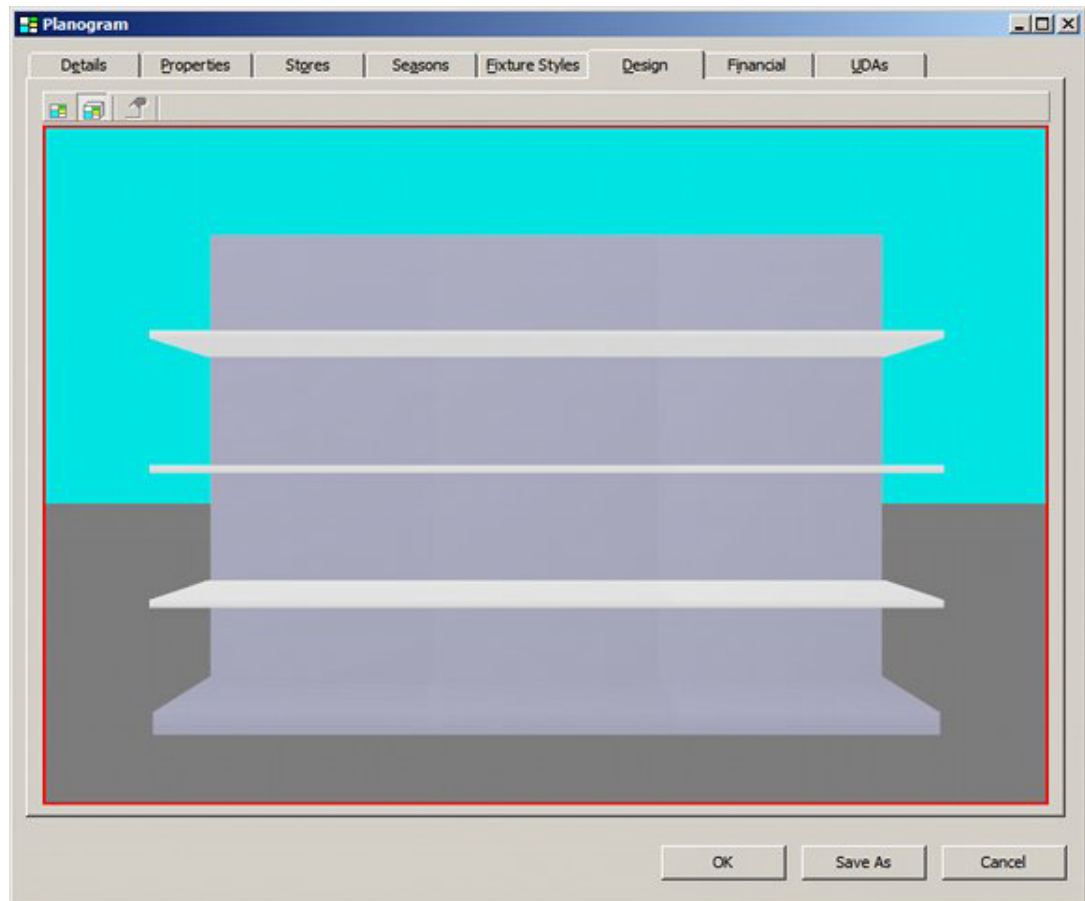
Selecting the Fixtures and Shelf Objects for the Planogram

When working in the Design tab, only fixtures and shelf objects can be added. It is not possible to using gondolas.

The fixtures required for the planogram can be selected from the hierarchy on the Object Browser and 'dragged and dropped' into the planogram design.



As fixtures are 'dragged and dropped' into the design window, they will align facing the user and ordered from left to right.

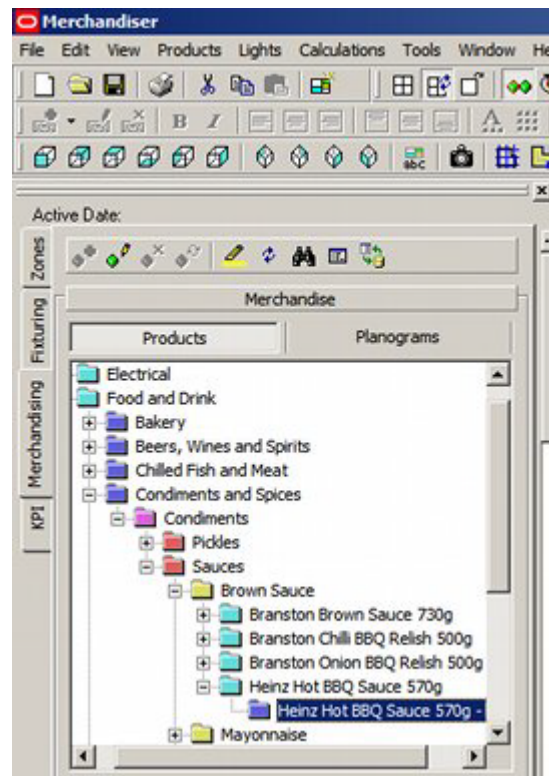


Similarly, shelf objects can be added by selecting the required parent fixtures and adding as necessary.

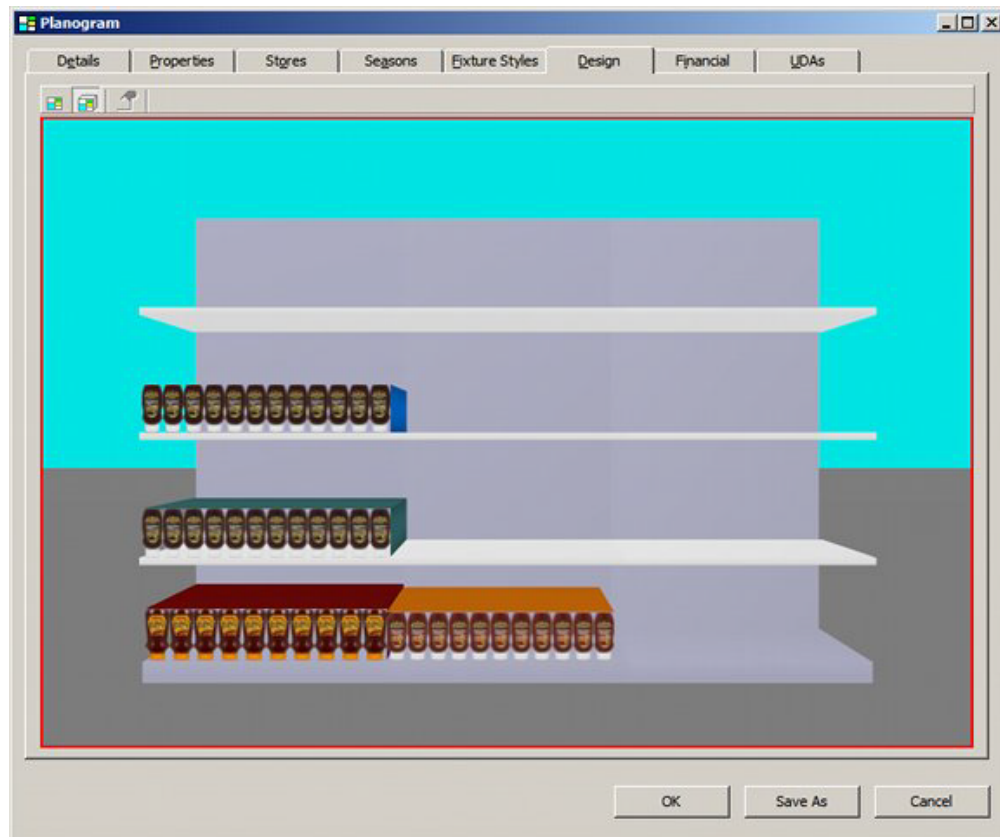
Selection details work in a similar manner to in a floor plan, as do Walk Mode and Edit Mode.

Selecting the Products for the Planogram

Products can then be placed using those available from the hierarchy in the Object Browser.



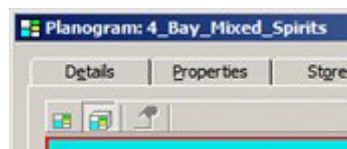
If objects are selected at SKU level or above, they will be placed as placeholders - indicating that type of merchandise is on that fixture or shelf, but giving no indication of position, size or quantity. If objects are selected at display style level, position, size and quantity are specified.



The screen shot above shows products being added to a planogram at display style level.

2D and 3D Views

There are two forms the planogram can be viewed in: 2D and 3D. The option in use is selected from the toolbar in the Design tab of the Planogram Design dialog box.



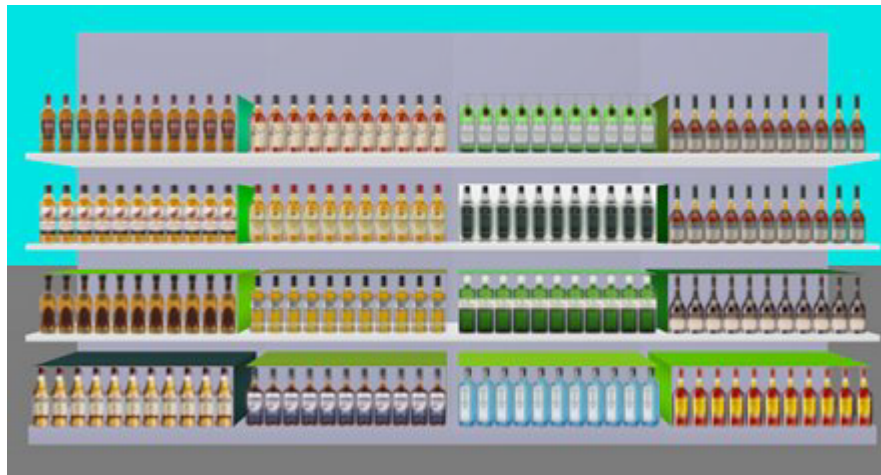
2D

The 2D option shows a flat 'Read Only' image of the planogram. It is a preview of the image that can be set to appear on the front of planograms when they are imploded into 2D form in Merchandiser floor plans.



3D

The 3D option shows a fully editable view of the planogram. It shows the planogram as it would appear when placed in a floor plan in the merchandiser module. It also allows equipment and merchandise to be added, edited and deleted.

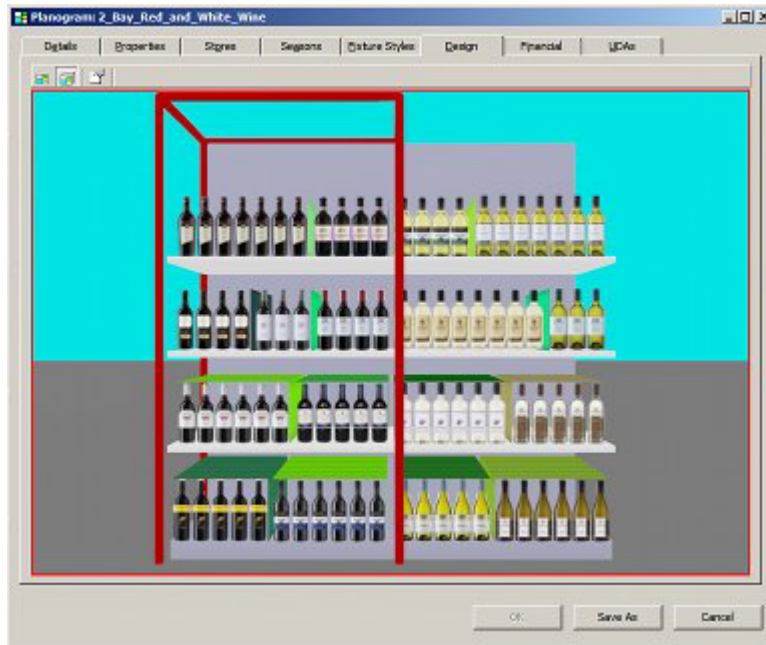


User Defined Attributes

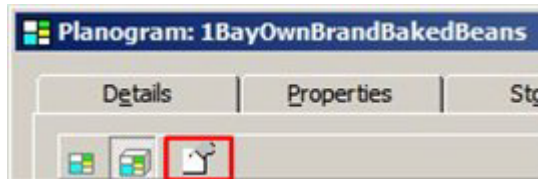
As well as the User Defined Attributes assignable to the planogram in general on the UDA tab, it is also possible to assign UDA information to individual profiles (bays), as to specific shelves and products.

UDA's associated with Planogram Profiles (bays) in the planogram design

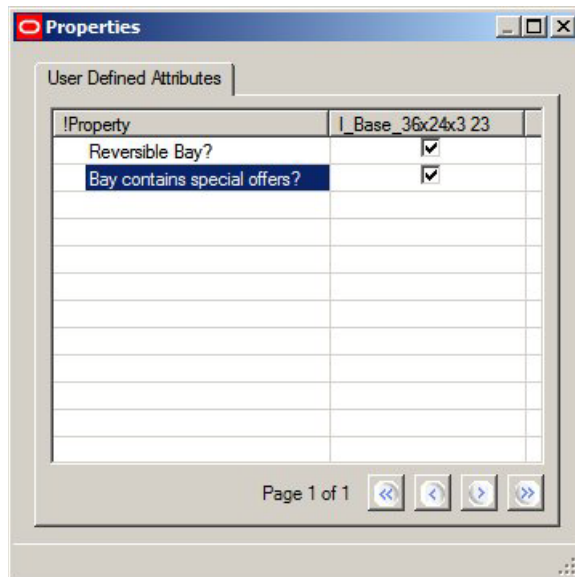
UDA's associated with a specific profile (bay) in a planogram can be seen by highlighting that bay in the Design tab.



Clicking the Object Properties icon on the toolbar will bring up the Profile User Defined Attributes dialog box.



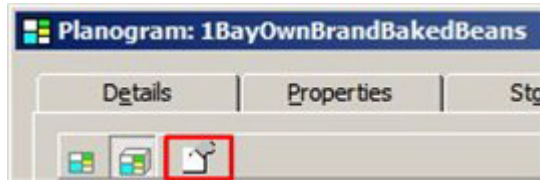
This will bring up the Profile User Defined Attributes dialog box.



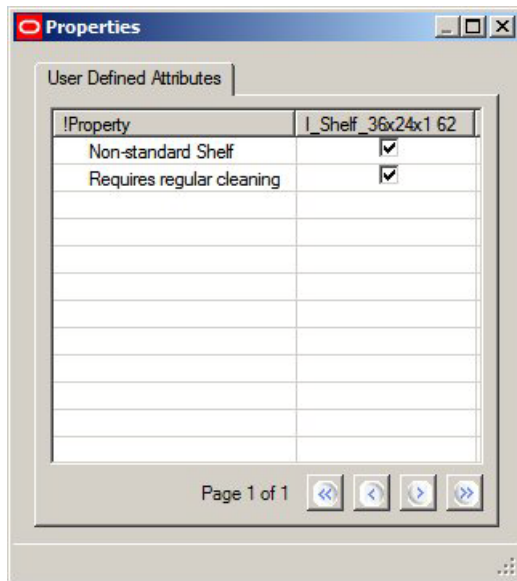
Note: the number after the parent fixture for the profile (23 in the above example) is the PRD_ID from the AVTTB_PROFILE table. It is a unique identifier for the profile/bay the UDA refers to.

UDA's associated with specific items of equipment in the planogram design

UDA's associated with a specific item of equipment in a planogram can be seen by highlighting that item of equipment in the Planogram Design window in the Merchandiser module and clicking the Object Properties icon on the toolbar.



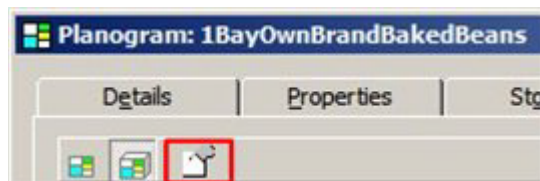
This will bring up the Equipment User Defined Attributes dialog box.



Note: the number after the item of equipment (62 in the above example) is the FXL_ID from the AVTTB_POG_FIXEL table. It is a unique identifier for the item of equipment the UDA refers to.

UDA's associated with specific products in the planogram design

UDA's associated with a specific product in a planogram can be seen by highlighting that item of merchandise in the Planogram Design window in the Merchandiser module and clicking the Object Properties icon on the toolbar.



This will bring up the Product User Defined Attributes dialog box.

| Property | Value |
|---------------------------|-------------------------------------|
| 1 Kg Own Brand Basmati 67 | |
| Special Offer? | <input checked="" type="checkbox"/> |
| Loss Leader? | <input checked="" type="checkbox"/> |
| Own Brand? | <input checked="" type="checkbox"/> |
| | |
| | |
| | |
| | |
| | |
| | |
| | |

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Note: the number after the item of merchandise (67 in the above example) is the PPR_ID from the AVTTB_POG_PRODUCT table. It is a unique identifier for the item of merchandise the UDA refers to.

The Financial Tab

Overview of the Financial Tab

The Financial Tab contains information of the performance of the planogram. This information can either be manually entered or imported as part of a planogram import.

The screenshot shows the 'Financial' tab of the 'Planogram: 4_Bay_Basic_Spirit_Placeholder_Planogram' dialog box. The 'Details' sub-tab is selected. The 'Currency' is set to 'UK Sterling'. The 'Calculate other fields after editing' checkbox is unchecked, and 'Use planogram size for dimensions' is also unchecked. The 'Linear' field is 36.00, 'Square' is 864.00, and 'Cubic' is 62208.00. The units are 'imperial foot', 'square feet', and 'cubic foot' respectively. The 'Demand Transference' is 5.00, 'Target Service Level %' is 10.00, and 'Target Number of Facings' is 125. The 'Target Capacity (% fill)' is 95.00, 'Historical Service Level %' is 9.00, and 'Return on Inventory Investment %' is 5.50. The 'Actual' and 'Forecast' sub-tabs are visible, with 'Actual' selected. The 'Actual' sub-tab shows 'Sales £' as 0.00, 'Gross Margin %' as 0.00, 'Profit £' as 0.00, and 'Movement' as 0. The 'Forecast' sub-tab shows 'SalesLinear', 'SalesSquare', 'SalesCubic', 'Gross MarginLinear', 'Gross MarginSquare', 'Gross MarginCubic', 'ProfitLinear', 'ProfitSquare', 'ProfitCubic', 'MovementLinear', 'MovementSquare', and 'MovementCubic' all as 0.00. The 'OK', 'Save As', and 'Cancel' buttons are at the bottom.

Financial Tab - Basic Details

This screenshot is identical to the one above, showing the 'Financial' tab of the 'Planogram: 4_Bay_Basic_Spirit_Placeholder_Planogram' dialog box. The 'Calculate other fields after editing' checkbox is unchecked.

Currency

The currency for the financial data is set from a drop down list. The data in this list is specified in the Units dialog box, accessed from the General Menu in the administration module.

Calculate other fields after editing

If checked, this causes all data associated with specific fields to be recalculated when data is changed elsewhere.

Use Planogram Size for Dimensions

This option substitutes the planogram size held in the database for the imported planogram size.

Linear

This field holds the base linear measurement of the planogram.

Square

This field holds the footprint of the planogram: the base linear multiplied by the depth

Cubic

This field holds the volume of the planogram: the base linear multiplied by the depth multiplied by the height.

Linear Units

This field holds the unit of measure for the length.

Square Units

This field holds the unit of measure for the area.

Cubic Units

This field holds the unit of measure for the volume.

Demand Transference

This is the probability that if a specific product is out of stock in a store, a customer will buy an alternative product. This probability could be very high - for example for baked beans. It could be very low for specific products - for example recently released computer software games.

Target Capacity

This is the minimum percentage of the merchandisable capacity of the parent fixtures that should be filled with product.

Target Service Level

This is the level of stock that will result in the specified percentage of merchandise being present in the stores across the retail chain. High Target Service Levels result in stock being increasingly available for customers, but also increase inventory costs.

Historical Service Level

This is the service level resulting from the historical levels of stock.

Target Number of Facings

This is the designed number of product facings in the planogram

Return on Inventory Investment

This is the Gross Margin Return on Investment.

Note: the calculation method may vary from retail organization to retail organization.

Financial Tab - Actual Data

The actual data is based on EPOS data collected by the retailer and imported into Macro Space Planning as updates to the planogram specific data during planogram imports.

Planogram: 4_Bay_Basic_Spirit_Placeholder_Planogram

Details Properties Stores Seasons Fixture Styles Design Financial UDAs

Currency: UK Sterling Calculate other fields after editing: ☐ Use planogram size for dimensions: ☐

Linear: 36.00 Square: 864.00 Cubic: 62208.00

Linear Units: imperial foot Square Units: square feet Cubic Units: cubic foot

Demand Transference: 5.00 Target Service Level %: 10.00 Target Number of Facings: 125

Target Capacity (% fill): 95.00 Historical Service Level %: 9.00 Return on Inventory Investment %: 5.50

Actual Forecast

| | | | |
|---------------|------|---------------------|------|
| Sales £: | 0.00 | Gross Margin %: | 0.00 |
| SalesLinear: | 0.00 | Gross MarginLinear: | 0.00 |
| SalesSquare: | 0.00 | Gross MarginSquare: | 0.00 |
| SalesCubic: | 0.00 | Gross MarginCubic: | 0.00 |
| Profit £: | 0.00 | Movement: | 0 |
| ProfitLinear: | 0.00 | MovementLinear: | 0.00 |
| ProfitSquare: | 0.00 | MovementSquare: | 0.00 |
| ProfitCubic: | 0.00 | MovementCubic: | 0.00 |

OK Save As Cancel

Note: the currency unit for the financial data is set using the Currency drop down list in the upper part of this dialog box.

Sales

This is the sales for this planogram. The time period is client dependent and may be daily average, weekly total, monthly total, etc.

Sales/Linear

This is the sales figure divided by the Linear figure for the planogram.

Sales/Square

This is the sales figure divided by the Square (footprint) value for the planogram.

Sales/Cubic

This is the sales figure divided by the Cubic (volume) value for the planogram.

Profit

This is the profit for this planogram. The time period is client dependent and may be daily average, weekly total, monthly total, etc.

Profit/Linear

This is the profit figure divided by the Linear figure for the planogram.

Profit/Square

This is the profit figure divided by the Square (footprint) value for the planogram.

Profit/Cubic

This is the profit figure divided by the Cubic (volume) value for the planogram.

Gross Margin

This is the gross margin for this planogram. Gross Margin is calculated by the formula

Gross Margin = (Profit/Sales) x 100%

The time period is client dependent and may be daily average, weekly total, monthly total, etc.

Gross Margin/Linear

This is the gross margin divided by the Linear figure for the planogram.

Gross Margin/Square

This is the gross margin divided by the Square (footprint) value for the planogram.

Gross Margin/Cubic

This is the gross margin divided by the Cubic (volume) value for the planogram.

Movement

Movement is the number of times the planogram will be replenished in a specific time period.

Movement/Linear

This is the movement divided by the Linear figure for the planogram.

Movement/Square

This is the movement divided by the Square (footprint) value for the planogram.

Movement/Cubic

This is the movement divided by the Cubic (volume) value for the planogram.

Financial Tab - Forecast Data

This tab contains forecast data for the performance of the planogram. It can be superseded by actual data as the planogram comes into service.

Note: the currency unit for the financial data is set using the Currency drop down list in the upper part of this dialog box.

Forecast Sales

This is the forecast sales for this planogram. The time period is client dependent and may be daily average, weekly total, monthly total, etc.

Forecast Sales/Linear

This is the forecast sales figure divided by the Linear figure for the planogram.

Forecast Sales/Square

This is the forecast sales figure divided by the Square (footprint) value for the planogram.

Forecast Sales/Cubic

This is the forecast sales figure divided by the Cubic (volume) value for the planogram.

Forecast Profit

This is the forecast profit for this planogram. The time period is client dependent and may be daily average, weekly total, monthly total, etc.

Forecast Profit/Linear

This is the forecast profit figure divided by the Linear figure for the planogram.

Forecast Profit/Square

This is the forecast profit figure divided by the Square (footprint) value for the planogram.

Forecast Profit/Cubic

This is the forecast profit figure divided by the Cubic (volume) value for the planogram.

Forecast Gross Margin

This is the forecast gross margin for this planogram. Gross Margin is calculated by the formula $\text{Gross Margin} = (\text{Profit}/\text{Sales}) \times 100\%$

The time period is client dependent and may be daily average, weekly total, monthly total, etc.

Forecast Gross Margin/Linear

This is the forecast gross margin divided by the Linear figure for the planogram.

Forecast Gross Margin/Square

This is the forecast gross margin divided by the Square (footprint) value for the planogram.

Forecast Gross Margin/Cubic

This is the forecast gross margin divided by the Cubic (volume) value for the planogram.

Forecast Movement

Forecast movement is the number of times the planogram will be replenished in a specific time period.

Forecast Movement/Linear

This is the forecast movement divided by the Linear figure for the planogram.

Forecast Movement/Square

This is the forecast movement divided by the Square (footprint) value for the planogram.

Forecast Movement/Cubic

This is the forecast movement divided by the Cubic (volume) value for the planogram.

Financial Data and Planogram Weighting

The data from the Financial tab is used in the Financial Weighing dialog box accessed from the Merchandising menu in the Administration module.

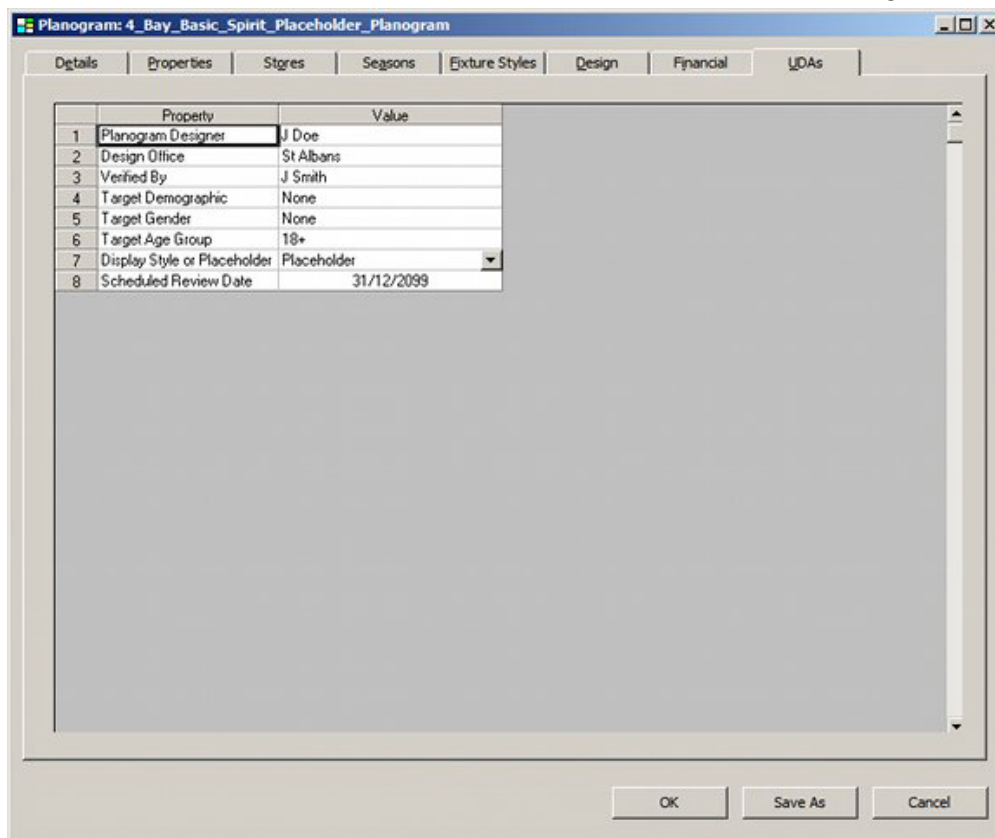


This option allows users to set up a system for calculating the relative performance of planograms from the imported or manually entered financial performance data.

The UDA Tab

Overview of the UDA Tab

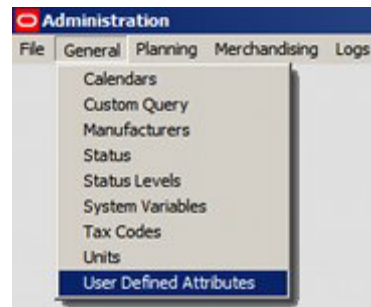
The UDA Tab is used to add User Defined Attributes (UDA's) to the Planogram.



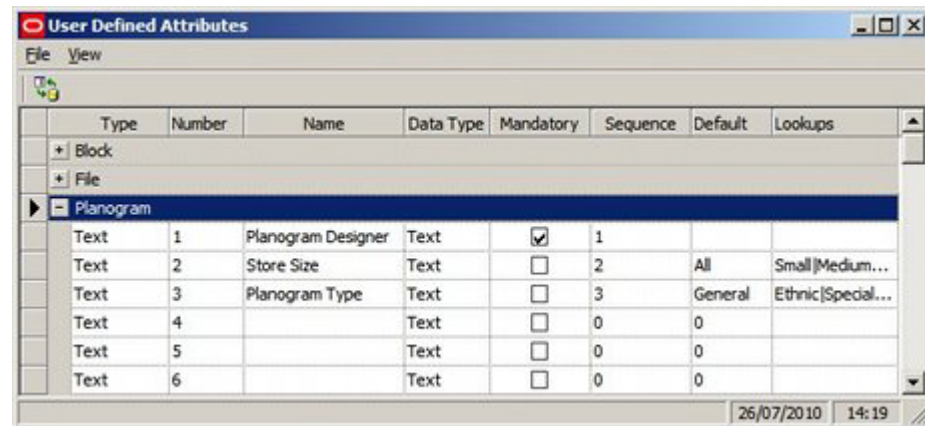
UDA's are implementation specific and can be customized according to customer requirements.

Configuring the Fields for the UDAs

The fields for the UDAs are configured in the Administration Module. Select the User Defined Attributes option from the Merchandising Menu.



This will bring up the User Defined Attribute dialogue box.



This allows the fields for the UDAs to be added, edited or deleted.

Adding, Editing or Deleting UDA Information

The UDA fields themselves are configured in the Administration Module. The title used for each UDA field is shown in the Property column. This information cannot be edited in the Planogram Design dialog box.

| Property | Value |
|--------------------------------|-------------|
| 1 Planogram Designer | J Doe |
| 2 Design Office | St Albans |
| 3 Verified By | J Smith |
| 4 Target Demographic | None |
| 5 Target Gender | None |
| 6 Target Age Group | 18+ |
| 7 Display Style or Placeholder | Placeholder |
| 8 Scheduled Review Date | 31/12/2099 |

The information in the Value field can be added, edited or deleted by the user. Data can be one of the following types:

| Type | Description |
|--------------|---|
| Text | A text field, for example a name |
| Whole Number | An integer, such as 1, 2 or 3 |
| Decimal | A number with values after the decimal point, for example 1.234 |
| Date | A date - for example a review date |
| Boolean | A Yes/No field. This appears as a checkbox. |
| Currency | Currency: a financial value. |

Saving Planograms

Saving Planograms as New Designs and New Revisions

Once a planogram has been designed, that design can be updated at a later date.

Changing the Revision Number of a planogram is straightforward.

The image shows the 'Planogram: Pasta' dialog box with the 'Details' tab selected. The 'Revision' field is highlighted with a red circle and the number 1. The 'Save As' button is highlighted with a red circle and the number 2.

| Planogram: Pasta | |
|-------------------|--------------------------|
| Name: | Pasta |
| Revision: | 1 |
| Description: | Standard Pasta Planogram |
| Status: | Proposed |
| Source: | Planogram Studio |
| Effective Date: | 12 September 2007 |
| Imported Name: | |
| Type: | Standard |
| Last Imported: | 13/08/2007 at 11:54 |
| Stock Type: | Normal |
| Parent Product: | |
| Autofill Rule: | < No Rule Selected > |
| Temp Range: | < No Ranges Selected > |
| Units: | Imperial inch |
| Created: | 10 Aug 2007 |
| Can be Split: | <input type="checkbox"/> |
| Created By: | pw |
| Number of Bays: | 0 |
| Last Modified: | 10 Aug 2007 |
| Size: | 0 0 0 |
| Last Modified By: | pw |
| Last Published: | 13 Aug 2007 |

Buttons: OK, Save As, Cancel

The Planogram Revision (1) can be seen at the top right of the dialogue box.

To change the revision, click on the Save As button (2). This will bring up the Save As dialogue.

The image shows the 'Save As' dialog box. The 'Save as New Revision' radio button is selected, and the 'Revision Number' field is set to 2.

| Save As | |
|---|---|
| <input type="radio"/> Save as New Planogram | |
| <input checked="" type="radio"/> Save as New Revision | |
| Revision Number | 2 |

Buttons: Ok, Cancel

Select the Save as New Revision radio button and enter the Revision Number. Click on OK to save the new revision.

Overview of Planogram Versions

Planogram designs can be updated. For example, a more up to date design of packaging could become available and the planogram updated accordingly.

The updated planogram is known as a new version.

When a planogram is revised in such a manner, the older version of the planogram has its status changed to 'superseded',

Planogram Import

Overview of Planogram Import

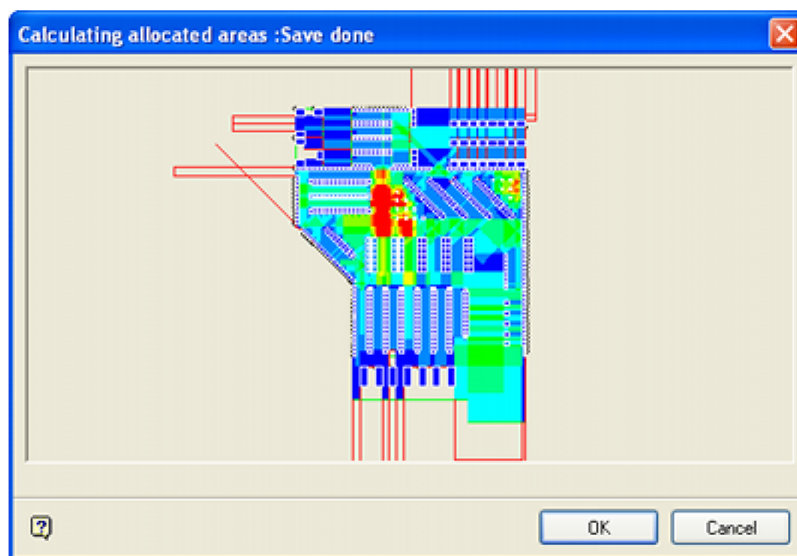
As an alternative to creating planograms within Merchandiser, Macro Space Management users have the option of importing existing planograms from third party software. This requires a customized import routine - planograms being imported into the central Macro Space Management database where they become available for placement into store plans. Contact Oracle's Technical Support Team for further information.

Calculations

Overview of Calculations

Macro Space Management has many capabilities. One of these is to understand space. After creating a floor plan, it is then possible to run a number of calculations that give information on how well (or how badly) the floor plan has been laid out. This information can then be used to further optimize the floor plan, enabling a retailer to maximize the sales and profit from the available area.

One example is area calculations: this apportions the floor area in a specific floor between the fixtures in that floor. This data then allows the amount of aisle space allocated to a fixture to be taken into account. In the screen shot below, the red areas show points where customers can stand in a floor plan and see a lot of fixtures - including end caps. This enables a retailer to identify prime areas to place high margin merchandise.



Custom Reports and KPIs

The results of the varying calculations write back to tables within the database. The template database supplied does not contain any specific reports or KPI's that can make use of that information. However, one of the aims of Macro Space Planning is to allow users to understand the use of space within their bricks and mortar retail outlets. It is possible to produce custom reports or KPI's that will enable them to optimize that space. Some of the reports/KPIs that can be created are detailed for each type of calculation within this section of the user guide.

Example of Use of Calculations

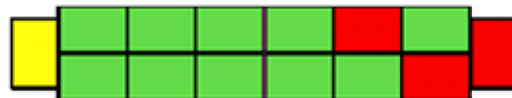
Consider a number of categories associated with snacks and convenience buys. Users not using Macro Space Management will have information in tabulated form.

| Category | Base Linear (feet) | Profit | Profit per foot | Base Linear |
|------------------------------|--------------------|---------|-----------------|-------------|
| Crackers and Savory Biscuits | 12 | \$3,600 | \$300 | |
| Chocolate | 16 | \$6,400 | \$400 | |
| Crisps and Snacks | 12 | \$3,000 | \$250 | |
| Sweet Biscuits | 8 | \$2,400 | \$300 | |
| Sweets, Mints and Gums | 4 | \$1,400 | \$350 | |

If users use the Allocated Area calculation, it is possible to extend this information to take into account the aisle space associated with the fixtures the products are on. For example, it is now possible to see that chocolate is showing a good profit when related to base linear, but a poor one when the about of floor space assigned to it is taken into account.

| Category | Base Linear (feet) | Profit | Profit per foot | Allocated Area (Square Feet) | Profit per Square Foot |
|------------------------------|--------------------|---------|-----------------|------------------------------|------------------------|
| Crackers and Savory Biscuits | 12 | \$3,600 | \$300 | 720 | \$5 |
| Chocolate | 16 | \$6,400 | \$400 | 1,600 | \$4 |
| Crisps and Snacks | 12 | \$3,000 | \$250 | 600 | \$5 |
| Sweet Biscuits | 8 | \$2,400 | \$300 | 400 | \$6 |
| Sweets, Mints and Gums | 4 | \$1,400 | \$350 | 280 | \$5 |

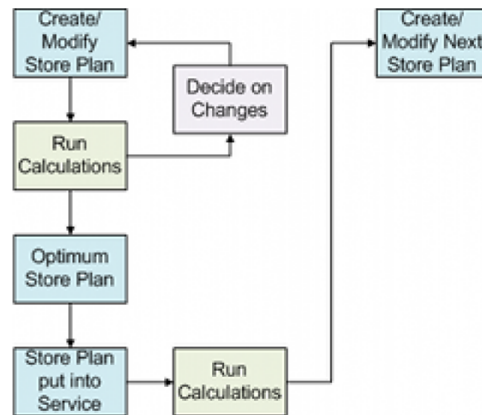
If used in conjunction with EPOS data, a KPI could be created that shows fixtures containing these products and whether they are on target for budgeted profit.



Here a store planner (or store manager) can see at a glance which fixtures contain products that are performing well or badly. In this case it is possible to see an end cap is performing below expectations and further investigation is required to identify the reasons.

Calculations and the Business Process

Calculations - providing the necessary reports and KPI's are available - can be used at any stage of the store planning process.



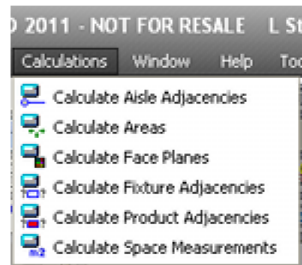
The initial stage would be for a floor plan to be created or modified. Calculations would then be run on that store plan, leading to information on how effectively the space within the store was being used. This information would allow a store planner to keep returning to his floor plan and optimizing it. Once optimized, the floor plan would be published and put into service. Once operational in a real life store, EPOS and other data from the 'live store' could be used to determine what improvements to make in the next iteration of the floor plan.

The necessary reports and KPIs resulting from the calculations are likely to be retailer specific - every retail chain has its own ideas and theories about how best to utilize the space within its retail outlets. These reports and KPIs can be developed from a thorough knowledge of the technicalities of retail and careful study of how data is stored within the Macro Space Planning database.

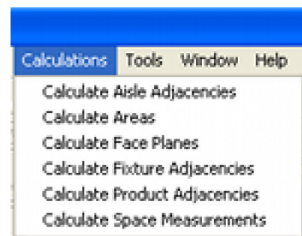
General Technicalities for Calculations

Initiating Calculations

Calculations are initiated from the Calculations menu in Planner.

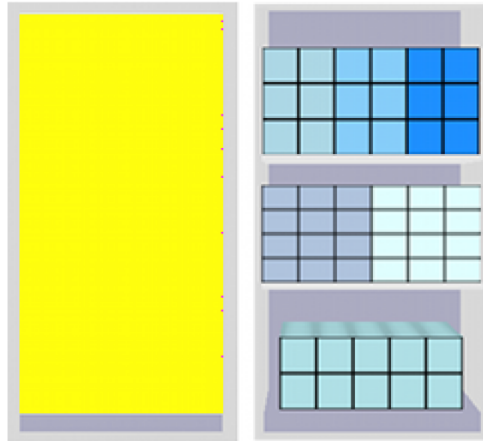


Alternatively, they can be initiated from the Calculations menu in Merchandiser.



Imploded and Exploded Planograms

Planograms can exist in two forms: 2D (imploded) and 3D (exploded).



The example planogram on the left is imploded (2D) and takes the form of a product block occupying the volume of the planogram. There is no information on the shelves and individual products present. The planogram on the right has been exploded to 3D form and contains information on both shelves and individual products. Planograms can be changed between the imploded and exploded form in the Merchandiser module. The Face Plane and Space Measurement calculations will only return meaningful results for planograms in 3D (exploded) form that contain Display Styles.

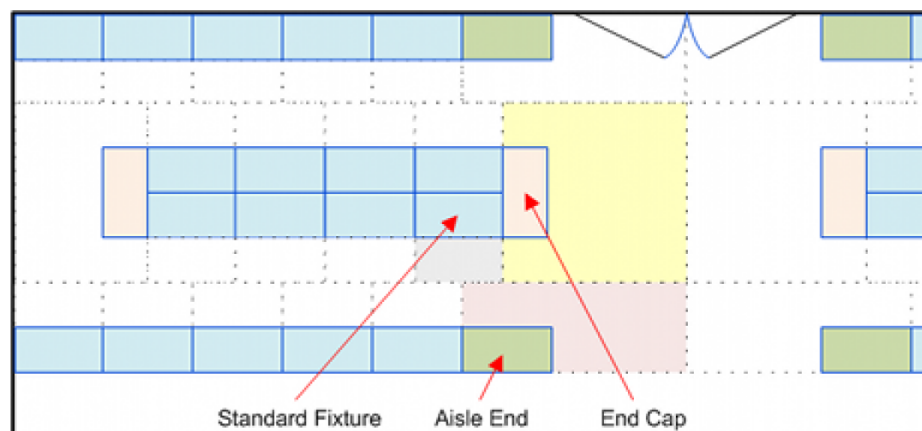
Information on Database Tables

Information is provided in the following sections on the database tables associated with the calculations. These are not generally accessible to normal users, but only to those with the correct privileges for accessing the database. This information has primarily been provided as an aid to anyone intending to produce custom reports.

Allocated Areas

Principles of Allocated Areas

The **Allocated Area** calculation is used to apportion areas of floor space to specific fixtures. This allows reports on performance to take into account the way the floor has been laid out.



In the above simplified example, fixtures are shown with a solid outline and the resulting allocated area with a dotted outline. It can be seen that an end cap will receive a greater allocated area than a standard fixture, while a fixture at an aisle end could have an

allocated area intermediate between the two. The result can be seen in the following table.

| Fixture | Footprint | Sales | Sales ft ² | Allocated Area | Sales ft ² |
|------------------|-------------------|----------|-----------------------|--------------------|-----------------------|
| Standard Fixture | 8 ft ² | \$1,200 | \$150 | 16 ft ² | \$75 |
| Aisle Fixture | 8 ft ² | \$1,800 | \$225 | 40 ft ² | \$45 |
| End Cap | 8 ft ² | \$54,000 | \$375 | 60 ft ² | \$90 |

If performance figures were looked at purely on the basis of fixture area (footprint), it would appear that the aisle end fixture was performing well. However, when the floor area allocated to it is taken into account, it can be seen that the sales per square foot are disappointing.

This form of analysis allows a number of facets of floor layout to be explored:

- Wider aisles may mean fewer fixtures in a store, but will increased product visibility lead to higher sales?
- Are products performing badly because visibility for their parent fixture is poor and customers can't see them?
- How significantly does fixture position (end of aisle, centre of aisle) impact on sales?

Space Measurements

The Allocated Area result is also used in the Space Measurement calculation.

Allocated Area Calculation Technicalities

System Variables Affecting Allocated Areas

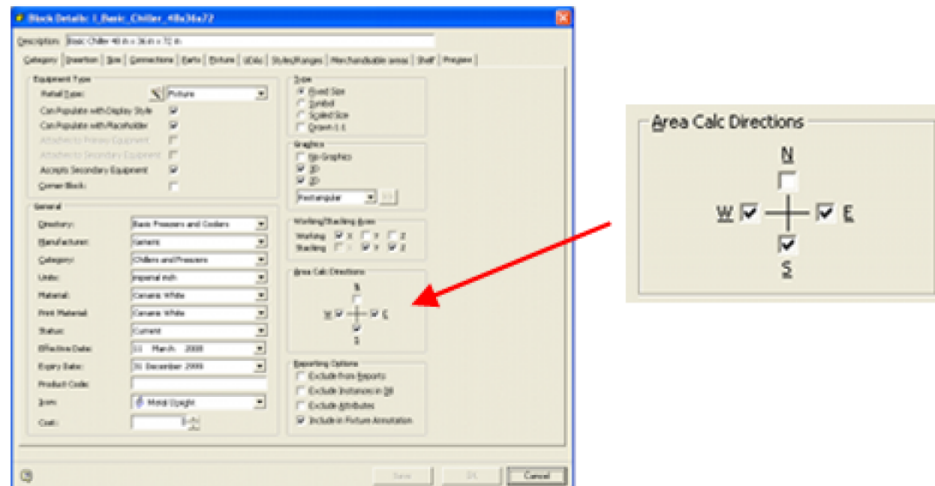
The following system variables affect the allocated areas calculation:

- AREA_LARGE_INCREMENT
- AREA_MEDIUM_INCREMENT
- AREA_SMALL_INCREMENT
- AREA_MAX_DISTANCE
- AREA_UNIT_OF_MEASURE

These system variables are set in the Administration Module - see the *Administration Module User Guide* for more information.

Area Calculation Directions

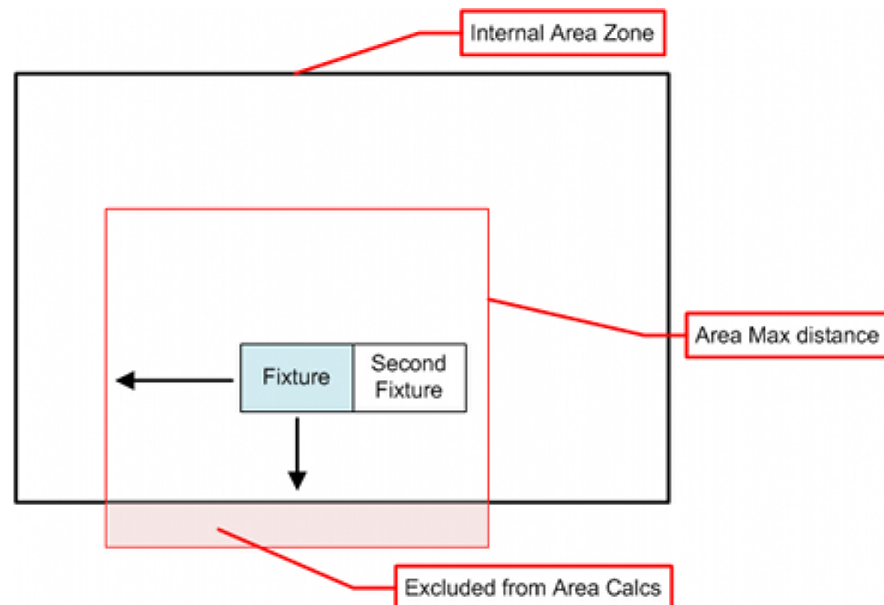
The directions for which the calculations apply for a specific type of fixture are set in the Block Details dialog box in Fixture Studio.



Fixtures such as spinners or bins that can be seen from all directions might have all four area calculation directions set. Conversely, fixtures such as slatwalls will not have the products visible from the back and will have their directions set to left, right and forward. See the *Fixture Studio User Guide* for more information.

Internal Area Zone and AREA_MAX_DISTANCE_SYSTEM_VARIABLE

Two factors affect the maximum area that can be allocated to a fixture: the Internal Area zone and the AREA_MAX_DISTANCE system variable.



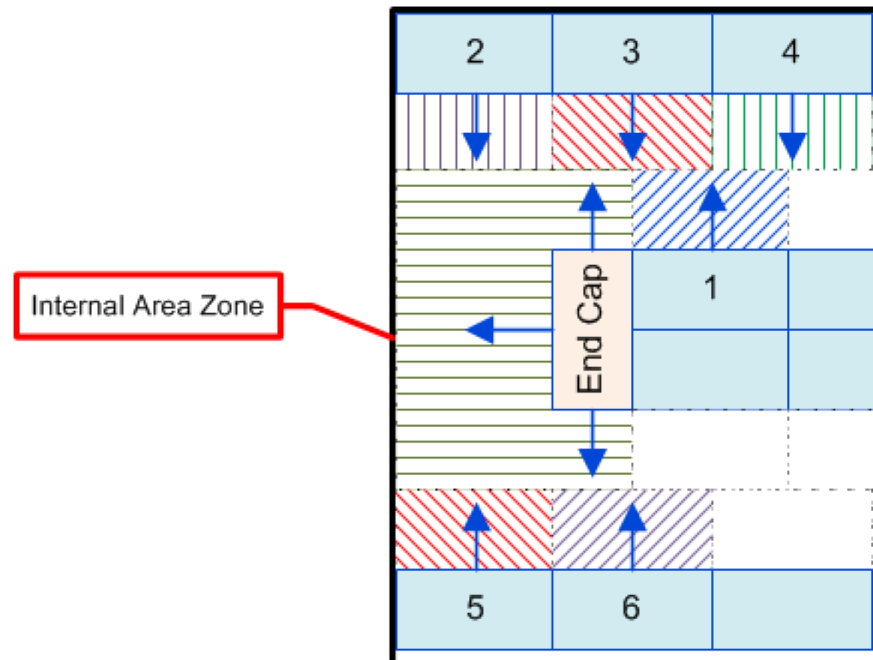
Individual fixtures 'feel out' in the specified directions until:

1. They reach another fixture.
2. They reach the boundary of the Internal Area zone.
3. They reach the distance specified in the AREA_MAX_DISTANCE system variable.

If the maximum distance is greater than the distance to the boundary of the Internal Area zone, the area allocated to that fixture will be determined by the distance to the Internal Area zone boundary.

Sharing Areas between Fixtures

If fixtures share areas, the space will be apportioned between them.

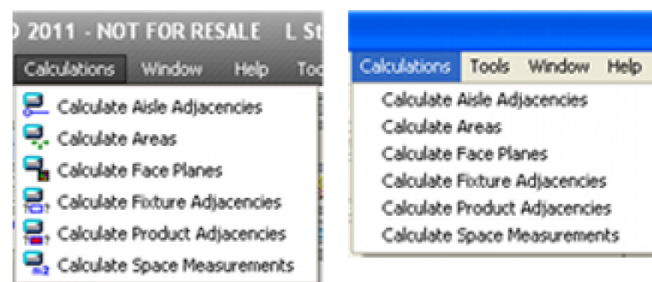


If we take the example of Fixture 1, it will feel out towards Fixtures 3 and 4. Similarly, Fixtures 3 and 4 will feel out towards Fixture 1. The total areas will be subdivided between them, which will approximate to the hatched areas in the diagram above. The end cap is more complex. It will feel out forwards until it reaches the boundary of the internal area. It will also feel out left and right and will be constrained by Fixtures 2, 3, 5 and 6. The end cap will thus be allocated a larger area.

Using the Allocated Area Calculation

Running the Allocated Area Calculation

The Allocated Area calculations can be run from the Calculations menu in either Planner or Merchandiser.



Allocated Area Results

Allocated Area results are stored in the AVTTB_FIXTURE table in the FIX_ALLOCATED_AREA field.

| FIL_ID | FIX_ID | FIX_ALLOCATED_AREA |
|--------|--------|--------------------|
| 266 | 4 | 6077.35 |
| 266 | 5 | 2587.89 |
| 266 | 7 | 2160.18 |
| 266 | 8 | 6669.46 |
| 266 | 10 | 2160 |

Allocated Areas are only assigned to fixtures - they are not assigned to fittings, shelves, etc. As the AVTTB_FIXTURE table contains entries for all types of equipment, the results will have to be filtered to be specific for fixtures.

Reporting Using Allocated Areas

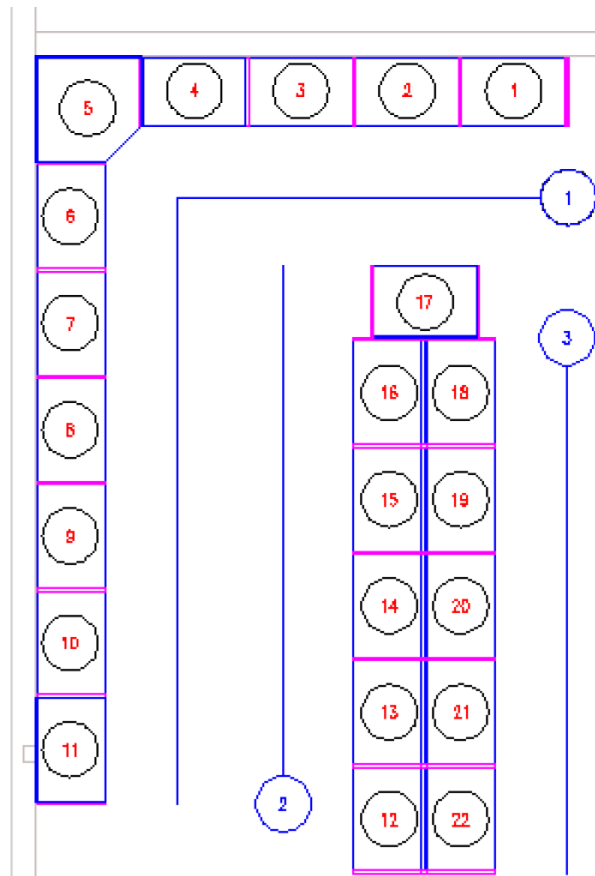
The default database supplied with Macro Space Planning does not contain any KPIs or Reports that use the results of Allocated Area calculations. These will have to be configured by the user; possibly using EPOS data. Possible reports include:

- Fixtures with allocated areas above or below a specified value.
- Total sales values per unit of allocated area.
- Total profit per unit of allocated area.
- Fixtures over and under-performing financially based on allocated area.

Aisle Adjacencies

Principles of Aisle Adjacencies

The Aisle Adjacency Calculation is used to assign fixtures to MSP Aisles. As these aisles have a direction, it is also possible to determine the sequence of the fixtures along that aisle. After products or planograms have been associated with those fixtures, it is then possible to generate reports stating whether those products are well or badly placed along the aisle.



In the above example, Aisle 3 contains fixtures 18 - 22, with Fixture 18 at the start of the aisle and Fixture 22 at the end. It is then possible to use this information in custom reports. For example, once the planograms on the fixtures are known, it would be possible to:

- Identify whether multi-bay planograms have been placed matching the direction of traffic flow they have been designed for.
- Identify whether there are desirable product affinities - for example are pasta sauces next to pasta.

Aisle Adjacency Technicalities

System Variables Affecting Aisle Adjacencies

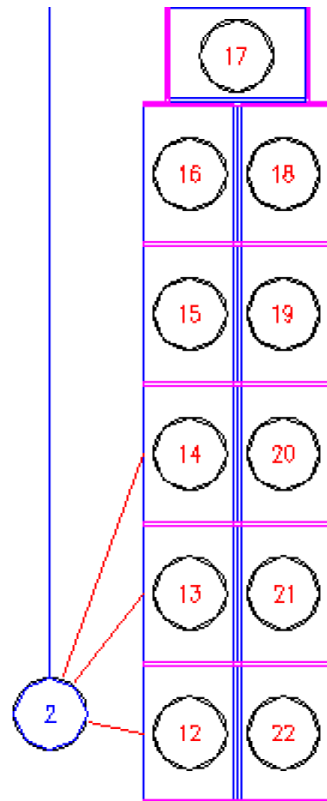
The `ADJACENCY_AISLESIZE` system variable specifies the maximum distance that a fixture can be from an Aisle and still be associated with it. For example, if the `ADJACENCY_AISLESIZE` is set to 48 inches (4 feet), no fixture greater than that distance from the aisle will be associated with it.

Method of Measuring Distances

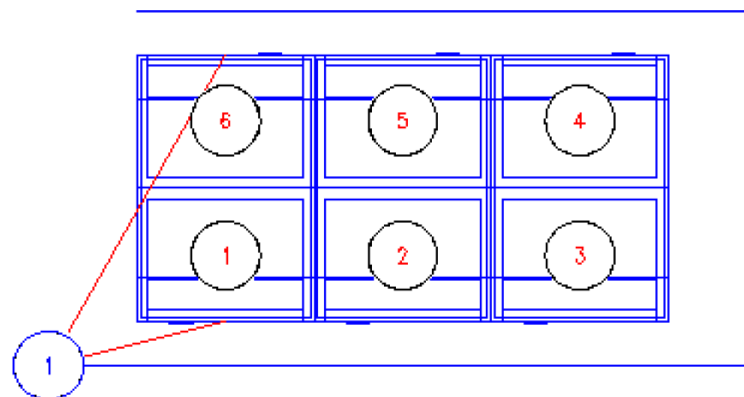
The `AVTTB_AISLE_ADJACENCY` table contains two distances associated with a specific aisle.

- `AIL_DISTANCE_FROM_START`

This distance is measured from the start position of the aisle to the centre of the front of the fixture.



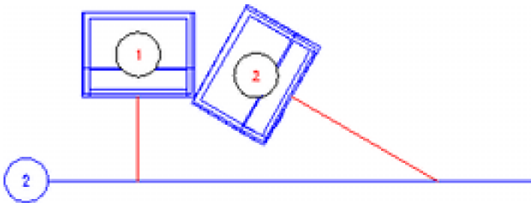
In the above example, the red lines indicate the distances from the start of Aisle 2 to Fixtures 12, 13 and 14. For this reason, it is best not to draw aisles using paths that turn through several right angles.



In the above example Fixtures 1 and 6 will be shown as the closest to the start of the aisle; the true sequence along the aisle is 1 - 6.

- AIL_DISTANCE_FROM_AISLE

This distance is calculated perpendicular to the front of the fixture.



In the above example the centres of the fronts of both fixtures are the same vertical distance from the aisle. However, because the distance to the aisle is measured perpendicular to the front of the fixture, Fixture 1 will be shown as being closer to the aisle than Fixture 2.

Items of Equipment that can be Assigned to Aisles

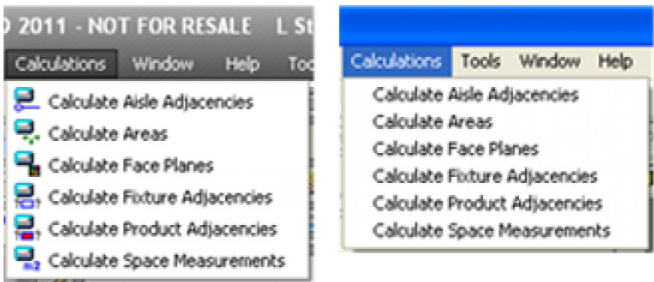
Only equipment of type **Fixture** can be assigned to aisles in the AVTTB_AISLE_ADJACENCY table. (Fixture types are assigned in the Category Tab of the Block Details dialog box in the Fixture Studio module - see the *Fixture Studio User Guide* for more information).

In addition Fixtures will only be assigned to a single aisle - this will be the nearest aisle within the limits set by the ADJACENCY_AISLESIZE system variable.

Using the Aisle Adjacency Calculations

Running the Aisle Adjacency Calculation

The Allocated Area calculations can be run from the Calculations menu in either Planner or Merchandiser.



Aisle Adjacency Results

Aisle Adjacency results are stored in the AVTTB_AISLE_ADJACENCY table.

| COLUMN_NAME | DATA_TYPE |
|-------------------------|--------------------|
| FIX_ID | NUMBER(10,0) |
| FIX_ID | NUMBER(10,0) |
| AIL_NAME | NVARCHAR2(64 CHAR) |
| AIL_SEGMENT | NUMBER(5,0) |
| AIL_ONRIGHT | NUMBER(10,0) |
| AIL_DISTANCE_FROM_START | FLOAT |
| AIL_DISTANCE_FROM_AISLE | FLOAT |

Using Aisle Adjacency Results

The default database supplied with Macro Space Planning does not contain any KPIs or Reports that use the results of Aisle Adjacency calculations. These will have to be configured by the user, and would require using data from other tables such as products (AVTTB_PRODUCT) and affinities between products (AVTTB_ADJACENCY_SEVERITY_TYPE). Possible reports include:

- Identifying whether multi-bay planograms have been placed matching the direction of traffic flow they have been designed for.
- Identifying whether planograms that require power (for example TV planograms) are in aisles that have been supplied with power
- Identifying whether there are desirable product affinities - for example whether pasta sauces are next to pasta.
- Identifying whether there are undesirable product affinities - for example whether shotgun shells are next to baby food.

If the ADJACENCY_AISLESIZE system variable is set to a sufficient size, it is possible to include the fixtures on both sides of the aisle, allowing the product affinities to be established for products sharing the entire aisle.

As an example, a short report could be generated for an aisle containing the 'Rice, Pasta and Noodles' category.

| Segment | Side of Aisle | Distance from Start | Base Linear of Product | Profit/Foot |
|--------------------|---------------|---------------------|------------------------|-------------|
| Instant Rice | Left | 0 ft | 12 ft | \$125 |
| Ready to Heat Rice | Right | 0 ft | 8 ft | \$150 |
| Instant Noodles | Left | 12 ft | 8 ft | \$75 |
| Instant Pasta | Right | 8 ft | 4 ft | \$125 |
| Dry Short Pasta | Right | 16 ft | 4 ft | \$100 |

This enables a store planner to see that the Instant Noodles segment with a profit of \$75 per base linear foot is placed in a prime position in the centre of the aisle yet is under-performing.

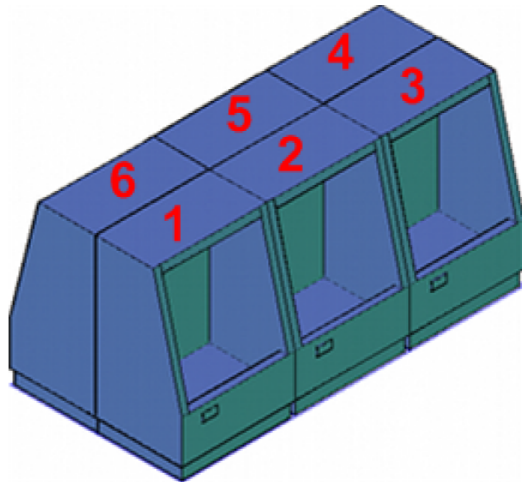
Fixture Adjacencies

Principles of Fixture Adjacencies

The Fixture Adjacency calculation is used for several purposes:

- To determine which fixtures are assigned to a specific gondola and what the relationship of the fixtures are to each other within the gondola.
- As a precursor to updating result in the AVTTB_FIXTURE_SEQUENCE table which is used to hold additional information on the arrangement of fixtures within gondolas.
- As a necessary predecessor to the Product Adjacency calculation.
- As a necessary predecessor to placing multi-bay planograms in In-Store Space Collaboration

The Fixture Adjacency calculation determines which fixtures are to the left, right, above or behind other fixtures.



In the above example, Fixture 2 has Fixture 1 to the left, Fixture 4 behind and to the right, etc.

Fixture Adjacency Technicalities

System Variables Affecting Fixture Adjacencies

The following system variables affect the fixture calculation:

- ADJACENCY_FIXTURE_SIZE
- ADJACENCY_LATERALGAP
- ADJACENCY_VERTICALGAP

These system variables are set in the Administration Module - see the *Administration Module User Guide* for more information.

Bitwise System Variables

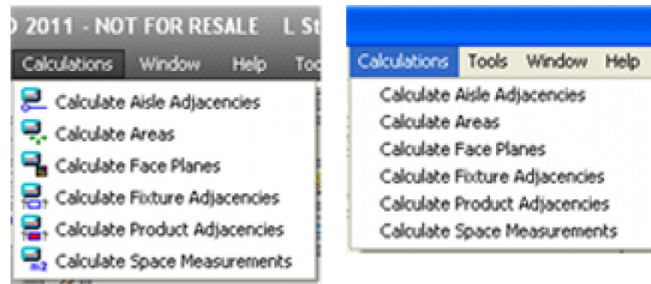
The results of the Fixture Adjacency calculations are stored in the AVTTB_FIXTURE_SEQUENCE table. The type of adjacency is stored in the ADJ_TYPE field as a bitwise system variable:

- 1 = Adjacent to Right
- 2 = Adjacent to Left
- 4 = Adjacent to Back
- 8 = Aisle Adjacency (Not in Use)
- 16 = Not in Use
- 32 = Adjacent Above

Bitwise variables can be built up of combinations of numbers, so 5 = Adjacent to Right and Behind.

Using Fixture Adjacencies

The Fixture Adjacency calculations can be run from the Calculations menu in either Planner or Merchandiser.



Fixture Adjacency Results

Aisle Adjacency results are stored in the AVTTB_FIXTURE_ADJACENCY table.

| COLUMN_NAME | DATA_TYPE |
|-------------|--------------|
| FIL_ID | NUMBER(10,0) |
| FIX_ID | NUMBER(10,0) |
| ADJ_ID | NUMBER(10,0) |
| ADJ_TYPE | NUMBER(5,0) |
| ADJ_LEVEL | NUMBER(5,0) |
| MER_ID | NUMBER(10,0) |
| ADJ_MER_ID | NUMBER(10,0) |

More information pertinent to gondolas is stored in the AVTTB_FIXTURE_SEQUENCE table.

| COLUMN_NAME | DATA_TYPE |
|--------------|--------------|
| FIL_ID | NUMBER(10,0) |
| FIX_ID | NUMBER(10,0) |
| FSQ_SEQUENCE | NUMBER(5,0) |
| FSQ_GONDOLA | NUMBER(5,0) |
| FSQ_LEVEL | NUMBER(5,0) |
| FSQ_BAY | NUMBER(5,0) |
| FSQ_FRONTAGE | NUMBER(5,0) |
| FSQ_SIDE1 | NUMBER(5,0) |
| FSQ_SIDE2 | NUMBER(5,0) |
| MER_ID | NUMBER(10,0) |

Using the Fixture Adjacency Results

1. Product Adjacencies

Fixture Adjacency results are a necessary precursor for running the Product Adjacency calculations.

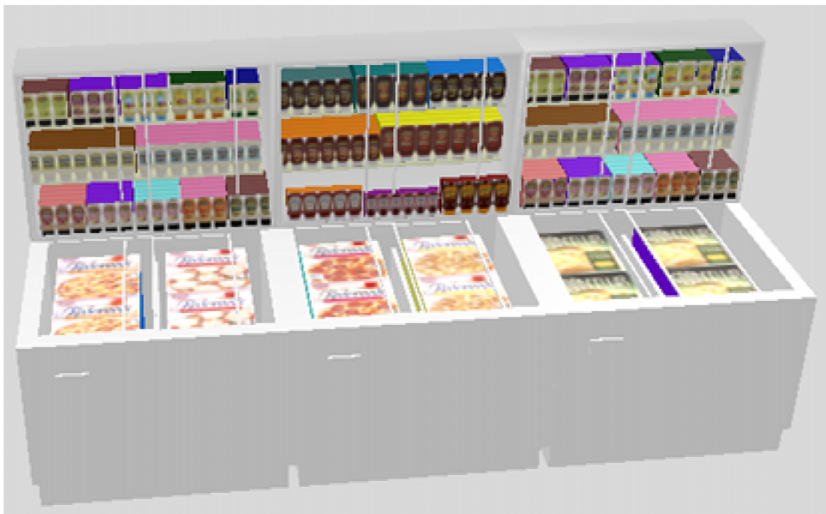
2. Reports Based on Fixture Adjacencies

Although it is not usual to generate reports or KPIs based on Fixture Adjacencies, it would be possible to produce specialized reports. An example would be to generate a report that used Fixture UDAs to identify if a fixture used to hold hot food has been placed directly behind a fixture used for frozen products.

Product Adjacencies

Principles of Product Adjacencies

The Product Adjacency Calculation is used to determine the relationship of products on adjacent fixtures to one another. Products may be to the left, right, above or on the same fixture as other products. Results are aggregated up to sub-class (sub-category/sub-segment) level.



A necessary precursor for running the product adjacency calculations is that the Fixture Adjacency Calculation has been run first.

When run, Product Adjacency aggregates the products up to subclass (sub-category/sub-segment) level and then reports which products are to the left/right/above other products. This information can then be used in conjunction with the Adjacency Severity rules to identify products that are well or badly placed.

The Adjacency Severity rules are configured in the Administration module.



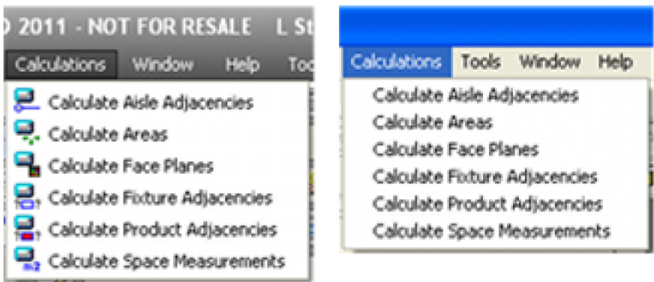
| Description | Product 1 | Product 2 | Rule |
|------------------|--------------------------|-------------------|---------------------------------------|
| Beer + Spirits | Beers, Lagers and Ciders | Spirits | EXCELLENT: Sub-classes well placed |
| Beer + Wines | Beers, Lagers and Ciders | Wines | EXCELLENT: Sub-classes well placed |
| Beer and Cereals | Beers, Lagers and Ciders | Breakfast Cereals | Satisfactory: Sub-classes near enough |
| Bread + Cakes | Bread | Cakes | Satisfactory: Sub-classes near enough |
| Bread + Rolls | Bread | Rolls | EXCELLENT: Sub-classes well placed |

The results are stored in the AVTTB_ADJACENCY_RULE table.

Using Product Adjacencies

Running the Product Calculation

The Product calculations can be run from the Calculations menu in either Planner or Merchandiser.



Product Adjacency Results

Product Adjacency results are stored in the AVTTB_PRODUCT_ADJACENCY table.

| COLUMN_NAME | DATA_TYPE |
|--------------------|-------------------|
| FIL_ID | NUMBER(10,0) |
| PRD_ID | NUMBER(19,0) |
| PAJ_START_SEQUENCE | NUMBER(5,0) |
| PAJ_GONDOLA | NUMBER(5,0) |
| PAJ_LENGTH | FLOAT |
| PAJ_END_SEQUENCE | NUMBER(5,0) |
| PAJ_BAYGROUP | VARCHAR2(25 BYTE) |
| PAJ_BAYNUMBER | NUMBER(5,0) |
| ZON_ID | NUMBER(10,0) |
| PRD_ID_LEFT | NUMBER(10,0) |
| PAJ_LENGTH_LEFT | FLOAT |
| PRD_ID_RIGHT | NUMBER(10,0) |
| PAJ_LENGTH_RIGHT | FLOAT |
| PRD_ID_SAME | NUMBER(10,0) |
| PAJ_LENGTH_SAME | FLOAT |
| POG_ID | NUMBER(10,0) |
| POG_ID_LEFT | NUMBER(10,0) |
| POG_ID_RIGHT | NUMBER(10,0) |
| POG_ID_SAME | NUMBER(10,0) |
| AST_ID_LEFT | NUMBER(5,0) |
| AST_ID_RIGHT | NUMBER(5,0) |
| AST_ID_SAME | NUMBER(5,0) |

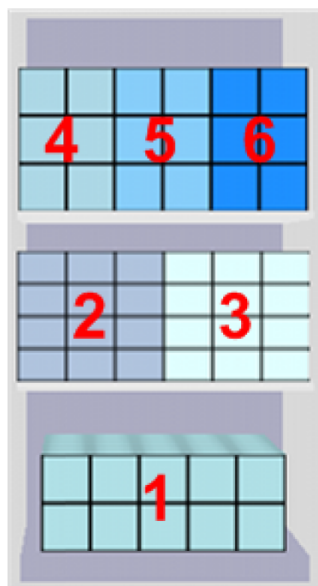
Using the Product Adjacency Results

The main way of using the product adjacency results (AVTTB_PRODUCT_ADJACENCY table) is in conjunction with the Adjacency Rules table (AVTTB_ADJACENCY_RULE table). This allows a report to be generated specifying whether products that are to the left, right or above another product are products that are desirable or undesirable to have in that relationship.

Face Planes

Principles of Face Planes

Face Planes can be used to calculate the frontal area of products at display style level.



In the above example the base of the fixture contains a single product (1), the first shelf two products (2 & 3) and the top shelf three products (4, 5 & 6). The Face Plan calculation can be used to relate sales information to the frontal area of the products.

| Product Number | Sales | Area | Sales ft ² |
|----------------|-------|----------------------|-----------------------|
| 1 | \$225 | 4.5 ft ² | \$50/ft ² |
| 2 | \$135 | 2.25 ft ² | \$60/ft ² |
| 3 | \$90 | 2.25 ft ² | \$40/ft ² |
| 4 | \$75 | 1.5 ft ² | \$50/ft ² |
| 5 | \$45 | 1.5 ft ² | \$30/ft ² |
| 6 | \$105 | 1.5 ft ² | \$70/ft ² |

This allows (for example) space trading to be carried out. Product 5 is occupying the same frontal area as Product 6, but is generating less than half the sales per square foot. There would thus be a case to increase the number of facings of Product 6 and correspondingly reduce the number of facings of Product 5.

Note: For a similar calculation using volumes see the section on Space Measurement.

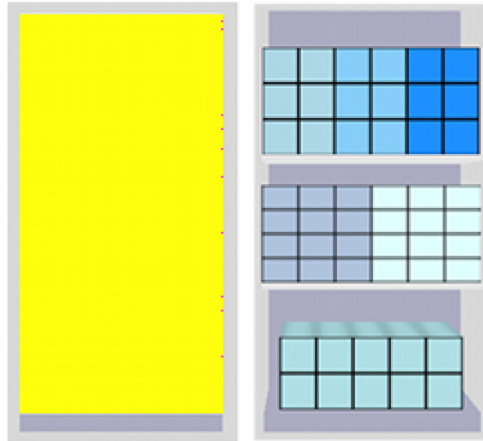
Face Plane Technicalities

System Variables Affecting Face Plane Calculations

There is no system variable connected with the Face Plane calculations.

Imploded and Exploded Planograms

Planograms can exist in two forms: 2D (imploded) and 3D (exploded).



The example planogram on the left is imploded (2D) and takes the form of a product block occupying the volume of the planogram. There is no information on the shelves and individual products present. The planogram on the right has been exploded to 3D form and contains information on both shelves and individual products.

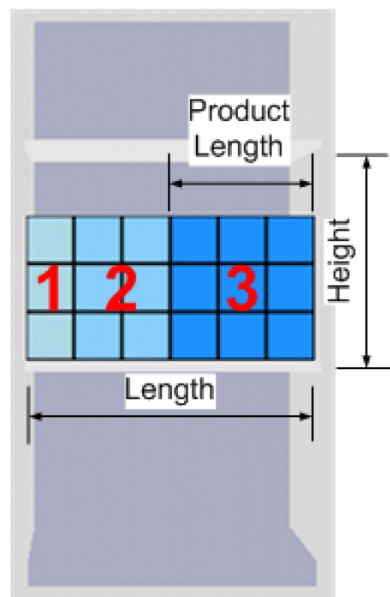
Planograms can be changed between the imploded and exploded form in the Merchandiser module. The Face Plane calculation will only return meaningful results for planograms in 3D (exploded) form that contain Display Styles.

Display Styles

Display Styles are the lowest level in the MSP Product hierarchy. Each display style is associated with a specific SKU and contains information on product dimensions. When the Face Plane calculation is run, results are aggregated up to the parent SKU.

Calculation Method

The calculation method is as follows:



1. The total frontal area is found by multiplying the length of the shelf (or fixture) by the available height.
2. The frontage product occupies on the shelf is determined - for example Product 3 in the above example occupies 50% of the shelf.

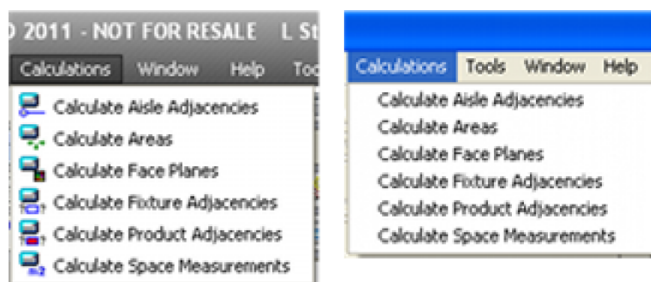
- The total frontal area is proportioned among the products according to the frontage they occupy.

| Product | Total Area | Frontage | Face Plane |
|---------|-------------------|----------|----------------------|
| 1 | 4 ft ² | 50% | 2 ft ² |
| 2 | 4 ft ² | 35% | 1.4 ft ² |
| 3 | 4 ft ² | 15% | 0.06 ft ² |

Using the Face Plane Calculations

Running the Face Plane Calculation

The Face Plan calculations can be run from the Calculations menu in either Planner or Merchandiser.



Face Plane Results

Face Plane results are stored in the AVTTB_FACE_PLANE table.

| COLUMN_NAME | DATA_TYPE |
|---------------|--------------|
| FIL_ID | NUMBER(10,0) |
| PRD_ID | NUMBER(10,0) |
| FIX_ID | NUMBER(10,0) |
| SHF_ID | NUMBER(10,0) |
| MER_ID | NUMBER(10,0) |
| FPC_FACE_AREA | FLOAT |

Using the Face Plane Results

There are a number of potential ways of using the face plane results.

- By linking to individual planograms placed in a floor plan (AVTTB_PLANO table) to generate area based performance metrics.
- By linking to the aisle adjacency table (AVTTB_AISLE_ADJACENCY table) to generate area based performance metrics for that aisle.
- By linking to the product hierarchy (AVTTB_PRODUCT_DEF table) and the products placed in a floor plan (AVTTB_PRODUCT table) to generate area based performance metrics for entire categories, segments or sub-segments in a floor plan.

Space Measurements

Principles of Space Measurements

Space Measurements are used for calculating linear dimensions and volumes associated with planograms in a floor plan. These can then be combined with EPOS data for reporting purposes. For the full set of information in Space Measurements, the allocated area calculation must first have been run. In addition, the planogram must be in Exploded (3D) form - if not, the shelf linear figure will be inaccurate.

Products will be aggregated up to sub-class (sub-category or sub-segment) level.

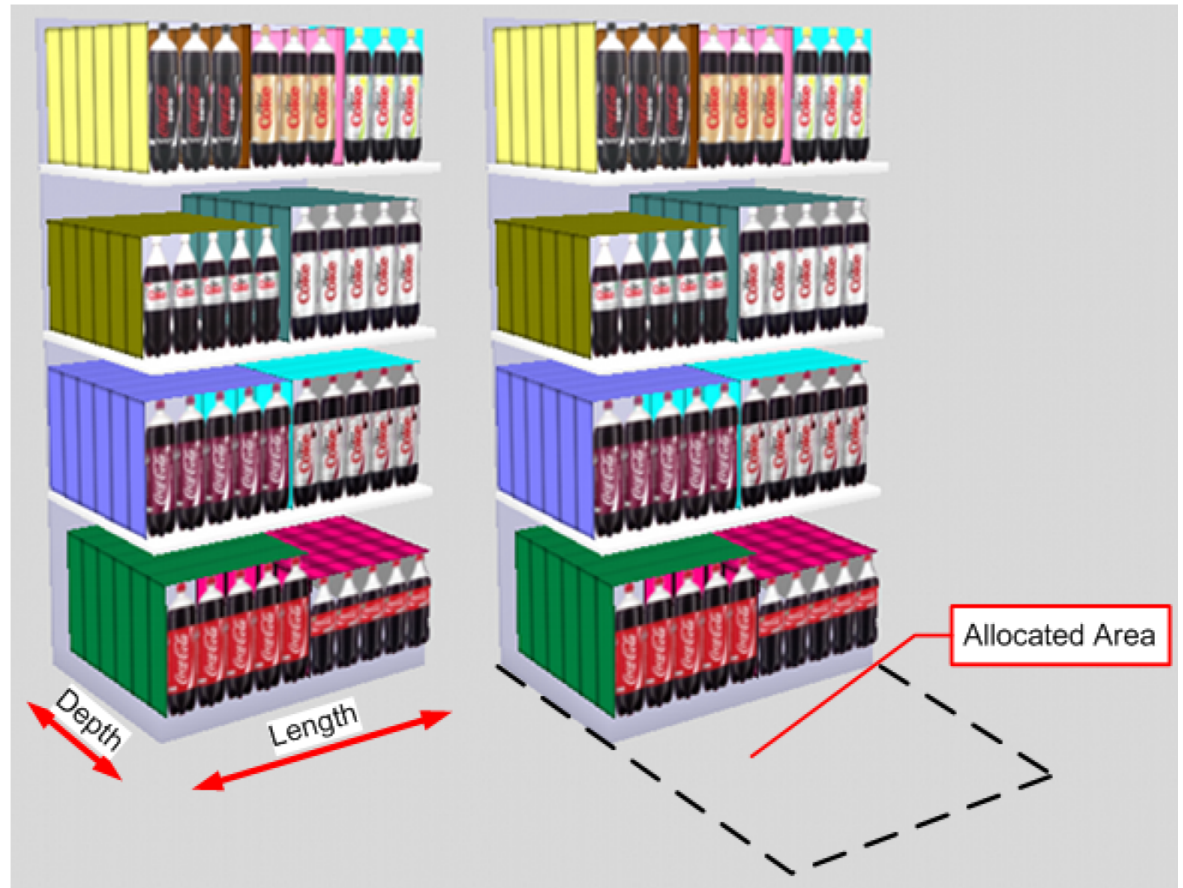
The Space Measurement calculation provides the following information:

Base Linear and Shelf Linear



- Base Linear is the length of the fixture.
- Shelf Linear is the cumulative length of the shelves on the fixture.

Footprint and Allocated Area



- Footprint is the physical space the fixture occupies on the floor. It is calculated by multiplying the fixture length and depth.
- Allocated Area is the space the fixture occupies on the floor when any associated areas of its aisle have been apportioned to it.

Display Volume, Nominal Volume and Allocated Volume

These provide different volumes for calculation purposes:

- Display Volume is the actual volume occupied by the products. This will be less than the maximum volume of the parent fixtures because of finger gaps, unused spaces, etc.
- Nominal Volume is the Base Linear value for the parent fixtures, multiplied by the values of the CALC_STND_DEPTH and CALC_STND_HEIGHT system variables. This provides a nominal volume for the fixtures that is purely dependent on the Base Linear values.
- Allocated Volume is the Allocated Area for the parent fixtures multiplied by the value of the CALC_STND_HEIGHT system variable. It gives a volume within the floor plan for reporting purposes that takes into account any aisle space associated with the fixtures but which is not dependent on the height of the fixtures.

Space Measurement Technicalities

System Variables Affecting Space Measurement

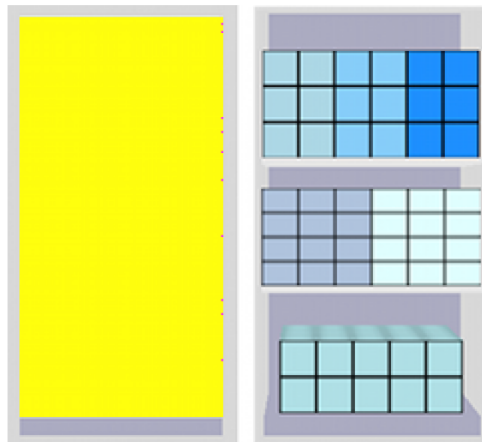
The following system variables affect the Space Measurement calculation:

- CALC_STND_DEPTH
- CAL_STD_HEIGHT

These system variables are set in the Administration Module - see the *Administration Module User Guide* for more information.

Imploded and Exploded Planograms

Planograms can exist in two forms: 2D (imploded) and 3D (exploded).



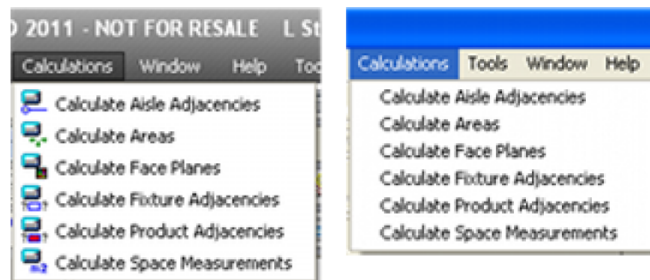
The example planogram on the left is imploded (2D) and takes the form of a product block occupying the volume of the planogram. There is no information on the shelves and individual products present. The planogram on the right has been exploded to 3D form and contains information on both shelves and individual products.

Planograms can be changed between the imploded and exploded form in the Merchandiser module. The Space Measurement calculation will only return meaningful results for planograms in 3D (exploded) form that contain Display Styles.

Using Space Measurements

Running the Space Measurement Calculation

The Space Measurement calculations can be run from the Calculations menu in either Planner or Merchandiser.



Space Measurement Results

Space Measurement results are stored in the AVTTB_PRODUCT_MEASUREMENT table.

| COLUMN_NAME | DATA_TYPE |
|----------------------|--------------|
| FIL_ID | NUMBER(10,0) |
| PRD_ID | NUMBER(19,0) |
| PRM_BASE_LINEAR | FLOAT |
| PRM_SHELF_LINEAR | FLOAT |
| PRM_ALLOCATED_AREA | FLOAT |
| PRM_FOOTPRINT | FLOAT |
| PRM_DISPLAY_VOLUME | FLOAT |
| PRM_NOMINAL_VOLUME | FLOAT |
| PRM_ALLOCATED_VOLUME | FLOAT |

Reporting Using Space Measurements

The default database supplied with Macro Space Planning does not contain any KPIs or Reports that use the results of Space Measurement calculations. These will have to be configured by the user; possibly using EPOS data. Results will be aggregated up to sub-class (sub-category / sub-segment) level.

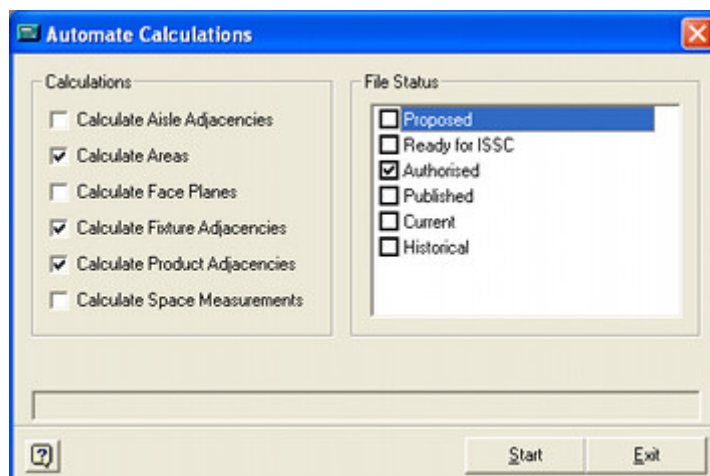
Possible reports include:

- Products at subclass level expressed as feet of shelf length (base linear plus shelf linear).
- Sales turnover for products at subclass level expressed as turnover per foot of shelf length (base linear plus shelf linear).
- Profit for products at subclass level expressed as profit per foot of shelf length (base linear plus shelf linear).
- Products at subclass level expressed as square feet of floor area (based on allocated area).
- Sales turnover for products at subclass level expressed as turnover per square feet of floor area (based on allocated area).
- Profit for products at subclass level expressed as profit per square feet of floor area (based on allocated area).
- Products at subclass level expressed as a cumulative volume (based on display, nominal or allocated volumes).
- Sales turnover for products at subclass level expressed as a turnover per unit volume (based on display, nominal or allocated volumes).
- Profit for products at subclass level expressed as profit per unit volume (based on display, nominal or allocated volumes).

Automated Calculations

Automated Calculations

Automated Calculations are used to ensure the information held in the database has been updated for reporting purposes. It provides an alternative to some of the options in batch floor plan processing or the options in the pre-processing tab of the **Floor Plan Publishing Configuration dialog box** in the Administration module.



Automated Calculations can be run manually from the dialog box accessed from the provided shortcuts or run directly from the *C:\Program Files\Oracle Retail\MSM\Common* folder. They can also be run from the command lobe using the following syntax:

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

An example would be:

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

Command Line Options

Path and File Name

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

/Silent

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

/Options

This is a bitwise value specifying the selected options.

| Value | Calculation |
|-------|--------------|
| 0 | No selection |

| Value | Calculation |
|-------|---------------------|
| 1 | Aisle Adjacency |
| 2 | Allocated Areas |
| 4 | Face Planes |
| 8 | Fixture Adjacencies |
| 16 | Product Adjacencies |
| 32 | Space Measurements |

/Status

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

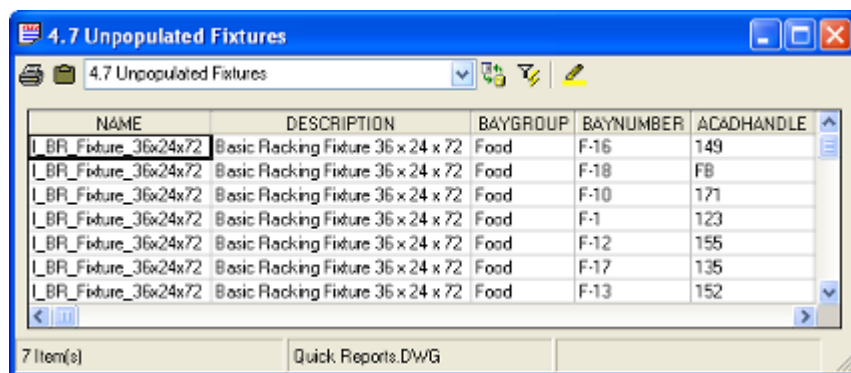
/Files

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

Quick Reports

About Quick Reports

Quick Reports can be called from the View menu in the Planner and Merchandiser modules. Because each retailer will have a different slant on the information they wish to see during store planning, Quick Reports can be customized to user requirements. They are used to provide information on specific aspects of the currently active floor plan.



The screenshot shows a window titled '4.7 Unpopulated Fixtures'. Inside, there is a table with the following columns: NAME, DESCRIPTION, BAYGROUP, BAYNUMBER, and ACADHANDLE. The table contains 7 rows of data, all representing 'Basic Racking Fixture 36 x 24 x 72' in the 'Food' bay group. The bay numbers are F-16, F-18, F-10, F-1, F-12, F-17, and F-13. The ACADHANDLE values are 149, FB, 171, 123, 155, 135, and 152. At the bottom of the window, it says '7 Item(s)' and 'Quick Reports.DWG'.

| NAME | DESCRIPTION | BAYGROUP | BAYNUMBER | ACADHANDLE |
|-----------------------|------------------------------------|----------|-----------|------------|
| L_BR_Fixture_36x24x72 | Basic Racking Fixture 36 x 24 x 72 | Food | F-16 | 149 |
| L_BR_Fixture_36x24x72 | Basic Racking Fixture 36 x 24 x 72 | Food | F-18 | FB |
| L_BR_Fixture_36x24x72 | Basic Racking Fixture 36 x 24 x 72 | Food | F-10 | 171 |
| L_BR_Fixture_36x24x72 | Basic Racking Fixture 36 x 24 x 72 | Food | F-1 | 123 |
| L_BR_Fixture_36x24x72 | Basic Racking Fixture 36 x 24 x 72 | Food | F-12 | 155 |
| L_BR_Fixture_36x24x72 | Basic Racking Fixture 36 x 24 x 72 | Food | F-17 | 135 |
| L_BR_Fixture_36x24x72 | Basic Racking Fixture 36 x 24 x 72 | Food | F-13 | 152 |

In the example above, a Quick Report has been configured to show all unpopulated fixtures in a floor plan. The store planner can then use the bay number or the highlight button on the toolbar to identify the fixtures.

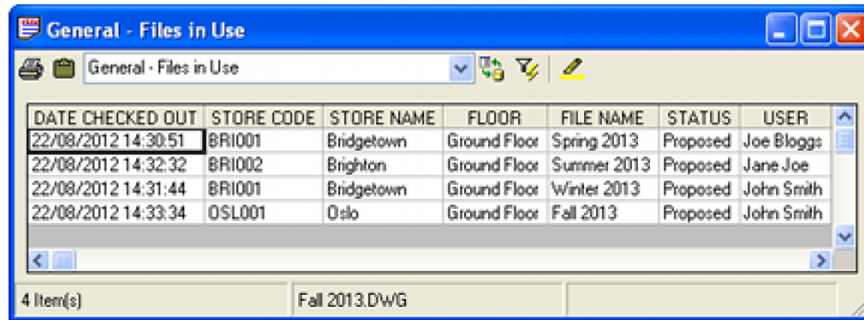
Note: The above example uses Bay Numbering. Bay Numbers can only be assigned in the Planner module. Once assigned, they can be seen in the planner module - for example in Quick Reports or in Fixture Notation.

Forms of Quick Reports

Quick Reports are of three broad types:

General Reports

These are reports that give general information from the database without being dependent on a floor plan or planogram being open. The example below shows a Quick Report developed to show which floor plans are currently checked out.



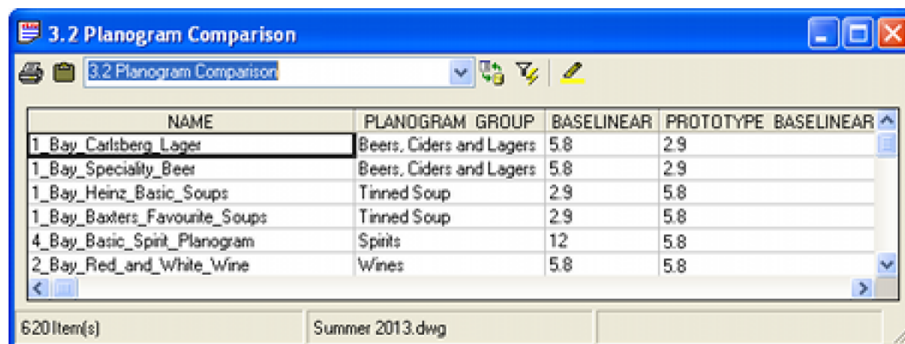
General - Files in Use

| DATE CHECKED OUT | STORE CODE | STORE NAME | FLOOR | FILE NAME | STATUS | USER |
|---------------------|------------|------------|--------------|-------------|----------|------------|
| 22/08/2012 14:30:51 | BR1001 | Bridgetown | Ground Floor | Spring 2013 | Proposed | Joe Bloggs |
| 22/08/2012 14:32:32 | BR1002 | Brighton | Ground Floor | Summer 2013 | Proposed | Jane Joe |
| 22/08/2012 14:31:44 | BR1001 | Bridgetown | Ground Floor | Winter 2013 | Proposed | John Smith |
| 22/08/2012 14:33:34 | OSL001 | Oslo | Ground Floor | Fall 2013 | Proposed | John Smith |

4 Item(s) Fall 2013.DWG

Floor Plans

These are reports that give information on the currently active floor plan. The example below shows a comparison between planograms placed in the currently active floor plan and the designated prototype store.



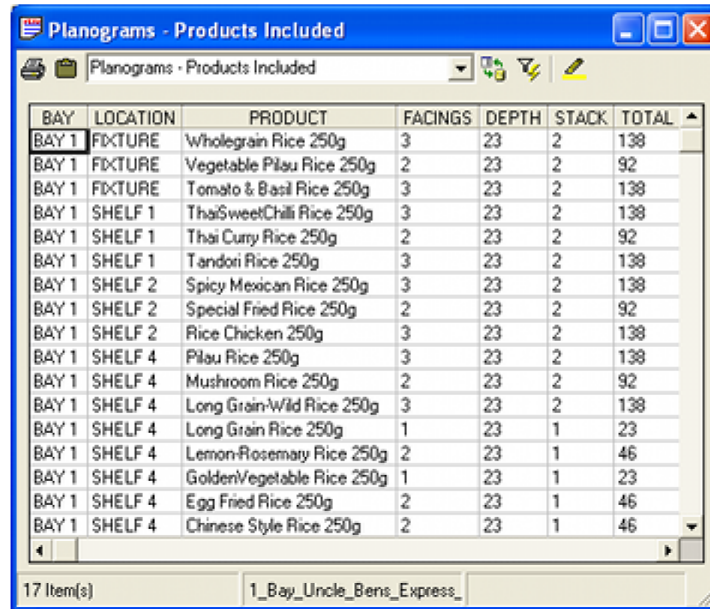
3.2 Planogram Comparison

| NAME | PLANOGRAM GROUP | BASELINEAR | PROTOTYPE BASELINEAR |
|-------------------------------|--------------------------|------------|----------------------|
| 1_Bay_Carlsberg_Lager | Beers, Ciders and Lagers | 5.8 | 2.9 |
| 1_Bay_Specialty_Beer | Beers, Ciders and Lagers | 5.8 | 2.9 |
| 1_Bay_Heinz_Basic_Soups | Tinned Soup | 2.9 | 5.8 |
| 1_Bay_Baxters_Favourite_Soups | Tinned Soup | 2.9 | 5.8 |
| 4_Bay_Basic_Spirit_Planogram | Spirits | 12 | 5.8 |
| 2_Bay_Red_and_White_Wine | Wines | 5.8 | 5.8 |

620 Item(s) Summer 2013.dwg

Planograms

Quick Reports for Planograms can only be accessed when a planogram design is open for review in the Merchandiser Module. This form of Quick Report cannot be accessed from the Planner Module. In the example below, a simple Quick Report has been developed to list what products are present on what shelves in each planogram bay.



The screenshot shows a software window titled "Planograms - Products Included". Inside, there is a table with the following columns: BAY, LOCATION, PRODUCT, FACINGS, DEPTH, STACK, and TOTAL. The table lists various rice products for BAY 1, categorized by location (FIXTURE or SHELF). The status bar at the bottom indicates "17 Item(s)" and "1_Bay_Uncle_Bens_Express_".

| BAY | LOCATION | PRODUCT | FACINGS | DEPTH | STACK | TOTAL |
|-------|----------|----------------------------|---------|-------|-------|-------|
| BAY 1 | FIXTURE | Wholegrain Rice 250g | 3 | 23 | 2 | 138 |
| BAY 1 | FIXTURE | Vegetable Pilau Rice 250g | 2 | 23 | 2 | 92 |
| BAY 1 | FIXTURE | Tomato & Basil Rice 250g | 3 | 23 | 2 | 138 |
| BAY 1 | SHELF 1 | Thai Sweet Chili Rice 250g | 3 | 23 | 2 | 138 |
| BAY 1 | SHELF 1 | Thai Curry Rice 250g | 2 | 23 | 2 | 92 |
| BAY 1 | SHELF 1 | Tandoori Rice 250g | 3 | 23 | 2 | 138 |
| BAY 1 | SHELF 2 | Spicy Mexican Rice 250g | 3 | 23 | 2 | 138 |
| BAY 1 | SHELF 2 | Special Fried Rice 250g | 2 | 23 | 2 | 92 |
| BAY 1 | SHELF 2 | Rice Chicken 250g | 3 | 23 | 2 | 138 |
| BAY 1 | SHELF 4 | Pilau Rice 250g | 3 | 23 | 2 | 138 |
| BAY 1 | SHELF 4 | Mushroom Rice 250g | 2 | 23 | 2 | 92 |
| BAY 1 | SHELF 4 | Long Grain Wild Rice 250g | 3 | 23 | 2 | 138 |
| BAY 1 | SHELF 4 | Long Grain Rice 250g | 1 | 23 | 1 | 23 |
| BAY 1 | SHELF 4 | Lemon-Rosemary Rice 250g | 2 | 23 | 1 | 46 |
| BAY 1 | SHELF 4 | Golden Vegetable Rice 250g | 1 | 23 | 1 | 23 |
| BAY 1 | SHELF 4 | Egg Fried Rice 250g | 2 | 23 | 1 | 46 |
| BAY 1 | SHELF 4 | Chinese Style Rice 250g | 2 | 23 | 1 | 46 |

Quick Reports and KPI's

Quick Reports and KPIs complement each other. KPIs can be used to visually display the same information that a Quick Report can display in tabular form. The two can therefore be used to supplement each other with the Quick Report providing more detailed information than the color codes in the KPI.

In the above example, the financial performance of a pair of gondolas is being examined. Fixtures generating high levels of sales can be seen at a glance - as can poorly performing ones. As the KPI shows performance data in bands, it could be complemented by a Quick Report showing detailed information for each fixture.

Configuring Quick Reports

Quick Reports are completely configurable by implementers or administrators with access to the Macro Space Planning (MSP) Database. Information on how to carry out this configuration is included with the *Oracle Retail Macro Space Planning Data Model*. Anyone wishing to configure will need a good working knowledge of SQL and a detailed knowledge of the database schema.

What Quick Reports Can Be Used For

Quick Reports can be used to display any information in the database pertinent to store planning tasks. Some examples of potential uses:

Compliance

Compliance is verifying that the floor plan does not contain errors that may prevent the floor plan being correctly implemented when the floor plan is published and put into service. Example Quick Reports that are possible include:

Aisles

- Planograms that have a flow direction not appropriate for the aisles they have been placed in.

Equipment

- Items of equipment that are not due to come into service or will be taken out of service when the floor plan is implemented.
- Fixtures that have not been populated with merchandise or which have multi-placed planograms.

Merchandise

- Planograms on inappropriate fixtures; for example fixtures of the wrong size or wrong temperature range.
- Multi-placed planograms that require correction.

Zones

- Merchandise that is not appropriate for that zone - for example clothing in a Food and Drink zone.

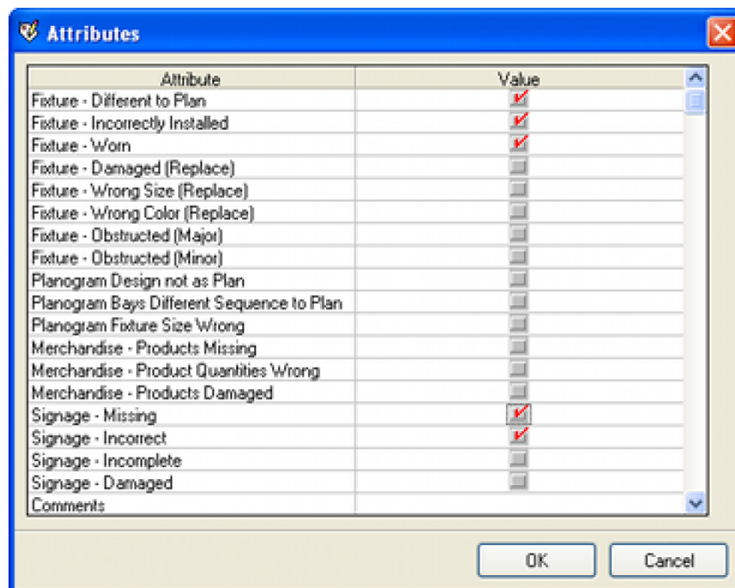
External Information

External information can be used as a basis for planning the currently active floor plan. Examples of such information include:

- Product Targets: information from an external application such as Category Management as to the types and quantities of merchandise that are recommended for placement in the floor plan.
- Comparison with Prototype Store: If a prototype store has been assigned, reports could compare the zones, fixtures, merchandise and financial performance of the currently active floor plan to its prototype.

Fixture Attributes

Customizable Fixture Attributes can be assigned to fixtures in a floor plan. This is done using the Fixture Attributes option in the Fixturing toolbar on the Object Browser.



These attributes can then be inspected on a 'fixture by fixture' basis in the floor plan by another store planner. It may be more convenient to create a quick report summarizing the information in the floor plan.

Performance Metrics

After Point of Sale data has been imported into the MSP database, this information can be used to give a variety of tabulated reports on performance of the currently active floor plan. Examples of such performance metrics include:

- Sales and profit by zone (department).
- Cumulative sales volume for a fixture.
- Cumulative sales volume for a fixture expressed relative to the area occupied by the fixture and the area of aisle allocated to it.
- Cumulative profit for a fixture.
- Cumulative profit for a fixture expressed relative to the area occupied by the fixture and the area of the aisle allocated to it.
- Best and worst performing products in the floor plan.

Planogram Substitutions

MSP can automatically substitute planograms in an existing floor plan and then publish that floor plan for implementation. Quick Reports could include:

Planograms that were substituted and their bay numbers.

Signage that will require changing as a result of the substitutions.

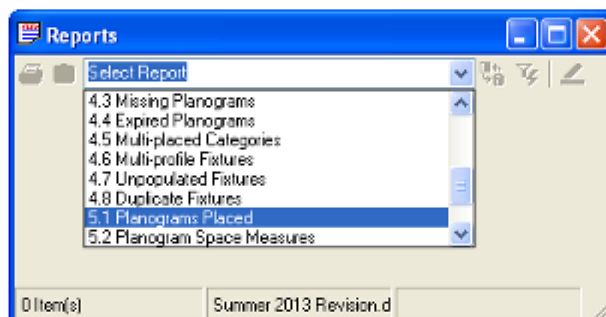
Promotional Fixtures

Promotional fixtures are fixtures that have been flagged in the MSP database as being in a position will generate high sales volumes. Examples include end caps, free standing bins for special offers and checkouts holding merchandise designed to induce impulse buys. It is possible to generate Quick Reports specific to these promotional fixtures

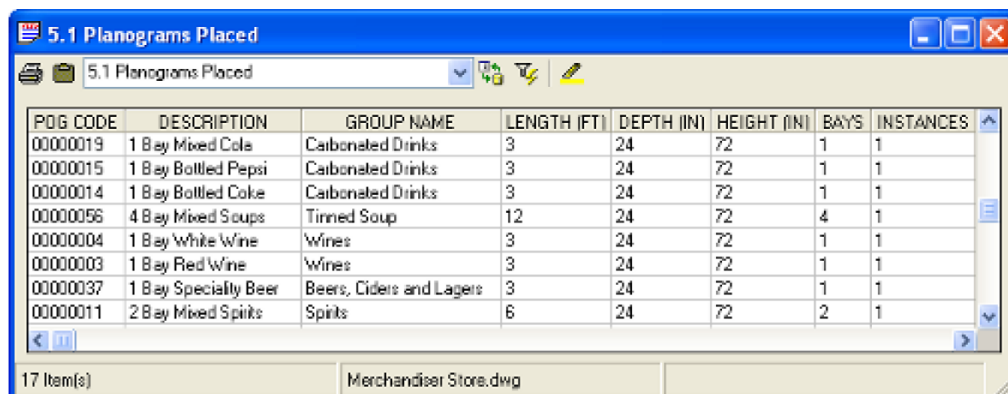
Note: The above list is not exhaustive. Any information in the database can potentially be used to give information on the currently active floor plan and hence improve some aspect of that floor plan.

Using Quick Reports

To open a Quick Report, select the **Report** option from the **View** menu. This will bring up the Quick Reports dialog box. The required report can be selected from the drop down list.



On clicking the selected report, it will open.



The screenshot shows a window titled "5.1 Planograms Placed" with a toolbar containing icons for print, copy, select report, and refresh. Below the toolbar is a table with the following data:

| POG CODE | DESCRIPTION | GROUP NAME | LENGTH (FT) | DEPTH (IN) | HEIGHT (IN) | BAYS | INSTANCES |
|----------|----------------------|--------------------------|-------------|------------|-------------|------|-----------|
| 00000019 | 1 Bay Mixed Cola | Carbonated Drinks | 3 | 24 | 72 | 1 | 1 |
| 00000015 | 1 Bay Bottled Pepsi | Carbonated Drinks | 3 | 24 | 72 | 1 | 1 |
| 00000014 | 1 Bay Bottled Coke | Carbonated Drinks | 3 | 24 | 72 | 1 | 1 |
| 00000056 | 4 Bay Mixed Soups | Tinned Soup | 12 | 24 | 72 | 4 | 1 |
| 00000004 | 1 Bay White Wine | Wines | 3 | 24 | 72 | 1 | 1 |
| 00000003 | 1 Bay Red Wine | Wines | 3 | 24 | 72 | 1 | 1 |
| 00000037 | 1 Bay Specialty Beer | Beers, Ciders and Lagers | 3 | 24 | 72 | 1 | 1 |
| 00000011 | 2 Bay Mixed Spirits | Spirits | 6 | 24 | 72 | 2 | 1 |

At the bottom of the window, it says "17 Item(s)" and "Merchandise Store.dwg".

Multiple reports can be open at one time by revisiting the view menu and selecting additional reports.

Dynamically Updating





Quick Reports do not dynamically update so, once opened, they will progressively lose accuracy as changes are made in the floor plan. To overcome this, Quick Reports can be instantly updated by clicking **Refresh** in the toolbar.



Synchronization

Quick Reports are based on information currently held in the database. They will not be accurate if differences exist between the currently open floor plan and the database. Examples of this include changes made to zones with AutoCAD tools and changes made to the database with Batch tools. If in any doubt, the Synchronize option should be used to ensure the information in the current Planner floor plan and the database is identical.

Quick Reports Toolbar

The Quick Reports toolbar has the following options:

| Icon | Description Comment | |
|---|---------------------|--|
|  | Print | This option will print the current contents of the quick report to the default printer for the computer MSM is being run on. |
|  | Copy to Clipboard | This option will copy the current contents of the report to the Windows clipboard. From there it can be pasted into other applications like Excel. |
|  | Select report | This option allows a user to select an alternative Quick Report without closing the dialog box. |
|  | Refresh | This option refreshes the quick report with the latest data held in the database. It also clears any filters that have been set. |

| Icon | Description Comment | |
|---|-------------------------|--|
|  | Filter | This filters the data in the report to match the data in the currently highlighted cell. Multiple filters can be used, each refining the data. |
|  | Highlight in Floor Plan | This option causes the selected object to highlight in the floor plan. For this to work in Planner the Quick report must contain the AutoCAD handle. |

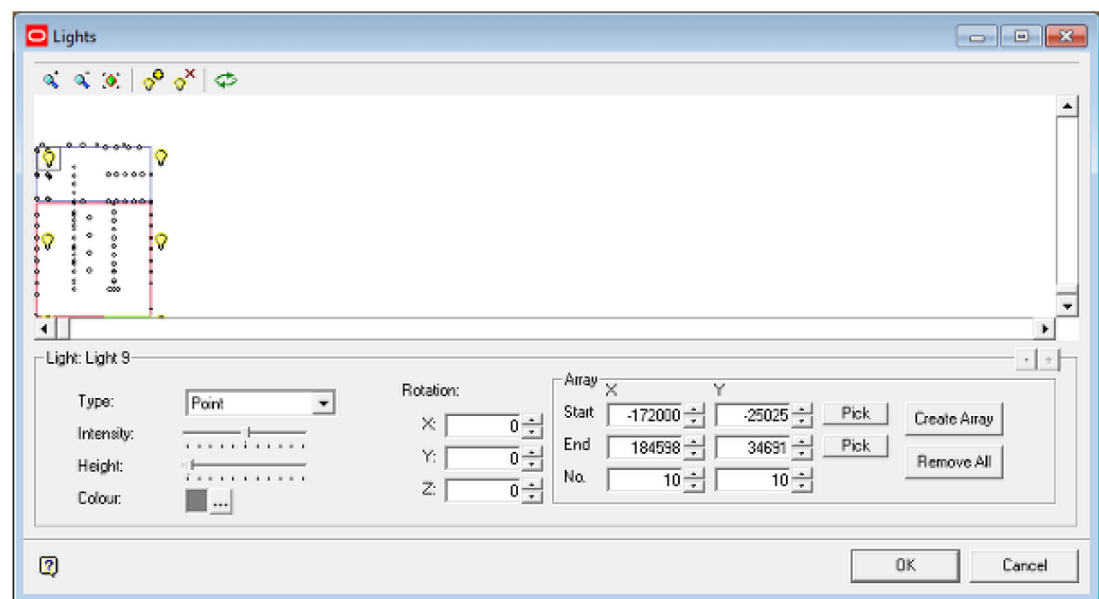
Other Options

Using the Lights Option

Users have the option of adding lights to a floor plan. This can often throw equipment and merchandise into relief and make them appear more realistic.

The Lights Dialog Box

The lights in a specific floor plan can be configured by selecting the **Edit** option from the **Lights** menu. This will bring up the Lights dialog box.




It contains a toolbar, controls for individual lights and for creating a grid of lights and a schematic floor plan that can be used to see where lights are being positioned.

The Lights Toolbar

The Lights Toolbar has the following options.

| Icon | Option | Description |
|------|---------------------|--|
| | Zoom In | Zoom in on the floor plan overview |
| | Zoom Out | Zoom out from the floor plan overview |
| | Zoom Extents | zoom to the extents of the floor plan overview (show every object) |
| | Add Light Source | Manually add a light source |
| | Delete Light Source | Manually delete a light source |

| Icon | Option | Description |
|---|---------------------------|---|
|  | Refresh Light Information | Update the current arrangement of lights with the informational currently held in the database. |

Individual Light Options

Once placed in the floor plan, the properties of individual lights can be customized.

- Type can be set to one of three options: Directional, Point or Spot.
- Intensity controls how bright that individual light is.
- Height controls how high the light source is above the floor.
- Color determines what color the light shows as when it reflects off objects in the floor plan.
- Rotation controls the direction the light points if it is a Directional or Spot type.

Adding Lights to a Floor Plan

There are two ways of adding lights to a floor plan; manually and in the form of a grid.

Adding Lights Manually

To add lights manually, use the following steps.

1. Click the add light icon on the toolbar - a light will appear in the top left of the dialog box.
2. Drag the light to the required position in the floor plan.
3. Set the Type, Intensity, Height, Color and Rotation as required.

These steps can be repeated until the required number of lights is in the floor plan.

Adding a Grid of Lights

To add a grid of lights, use the following steps.

1. Set the Start coordinates of the grid of lights. This will define the first corner of a rectangle. This may either be done by typing the datum in or my using the Pick button to pick a point in the schematic floor plan.
2. Set the End coordinates of the grid of lights. This will define the diagonally opposite corner of a rectangle. This may either be done by typing the datum in or my using the Pick button to pick a point in the schematic floor plan.
3. Set the required number of lights as X (across the floor plan) and Y (up and down the floor plan) values.
4. Click Create Array.

Editing Placed Lights

Any placed lights can be individually selected. They can then be dragged to a new position. Alternatively properties such **Type**, **Intensity**, **Height**, **Color** and **Rotation** can be edited as required.

Adding the Information to the Database

Information will not be written back to the database (and hence lights will not be used in the floor plan) until the **OK** button is clicked to confirm.

Deleting Lights from a Floor Plan

There are two ways of deleting lights from a floor plan:

- Selecting individual lights and clicking the Delete Light icon on the toolbar.
- Clicking the Remove All button.

The deletions must be confirmed by clicking the OK button.

Using Lights in the Main Floor Plan

Once lights have been configured in the Lights dialog box, they have to be activated in the floor plan. They can be toggled on or off by means of the icon in the lights toolbar.



The general intensity of lighting can then be adjusted by means of the **Light Intensity** slider on the View toolbar.

Using the Animation Option

The **Animation** options allow a user to take an AVI movie of a specific part of a floor plan. There are two ways of doing this:

- Use the movement controls to create a path to be followed in the store. This can then be replayed for when the AVI starts recording.
- Start recording the AVI and use the movement controls directly.




One use of such AVIs is to distribute them to non-Macro Space Management users so they can review aspects of floor plans. Another is to distribute them to a store so they can see what a proposed reset looks like.

The Animation Toolbar

Controls for creating movies are on the Animation toolbar.



| Icon | Option | Description |
|------|----------------------|---|
| | Start Recording AVI | Commence recording the AVI, either following a pre-recorded path or following input from the movement controls. |
| | Stop Recording AVI | Stop Recording the AVI. |
| | Play Recorded AVI | Play the last recorded AVI. (It is only valid for this session). |
| | Start Recording Path | Start recording a path for an AVI to follow. |
| | Stop Recording Path | Stop recording the path. |

| Icon | Option | Description |
|---|--------------------------|---|
|  | Replay Path | Replay the path for review for when recording an AVI. |
|  | Delete Path | Delete a selected path |
|  | Available Recorded Paths | This drop down list enables users to select a previously recorded path. The number will increment by one every time a new path is recorded. |

Working with Paths

Recording a Path

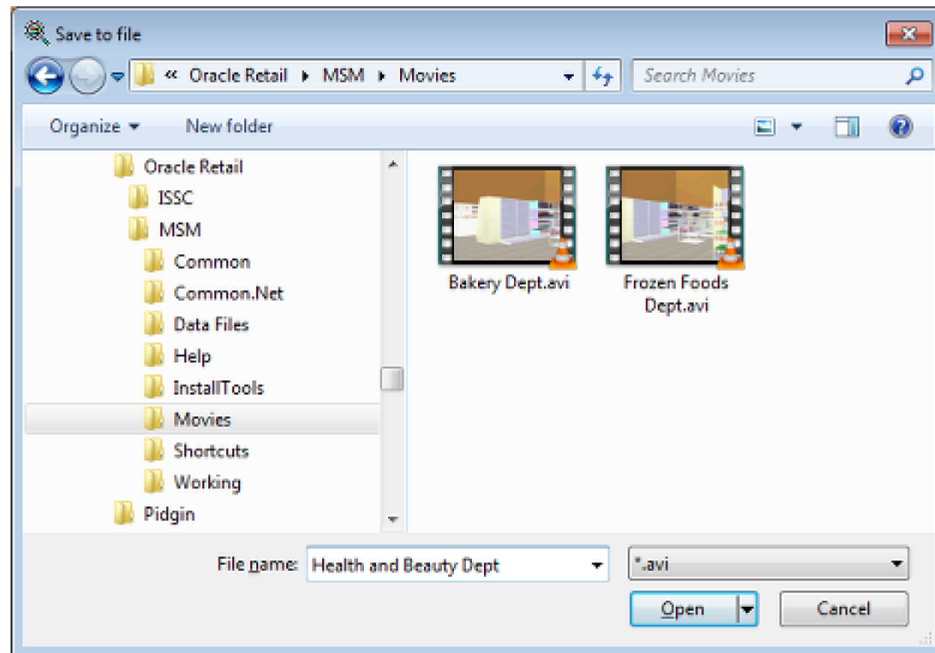
Paths can be pre-recorded for movies to follow. This enables the user to get the precise path correct before an AVI movie is recorded. The procedure is as follows:

1. Click Start Recording Path.
2. Use mouse controls to navigate the required path through the floor plan.
3. When the path is complete, click Stop Recording AVI.
4. If necessary, review the path by clicking Replay Path. The recorded path will then replay from start to finish.
5. If the path is unsatisfactory, select the required path from the drop down list and click Delete Path.

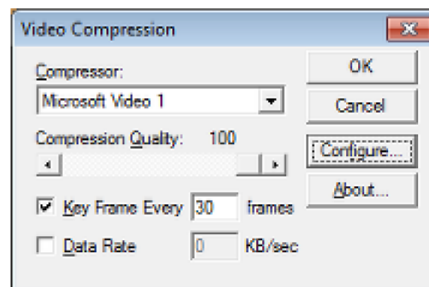
Recording an AVI Movie

AVI movies can be recorded in one of two ways: directly by steering through the store with the movement controls or by following a pre-recorded path. This section describes the method for following a pre-recorded path. The method can readily be adapted to create a movie by using the movement controls directly. The procedure is as follows:

1. Ensure the path that the movie will follow is selected in the Available Recorded Paths drop down list.
2. Click Start Recording AVI. This will bring up the Save to File dialog box.



- a. Navigate to the required folder.
 - b. Enter the name of the AVI.
 - c. Click Open.
3. The Video Compression dialog box will appear. Setting in here will affect the size of the resulting AVI file. Make the required settings and click OK. The AVI recording will now start and the user will be returned to the floor plan.



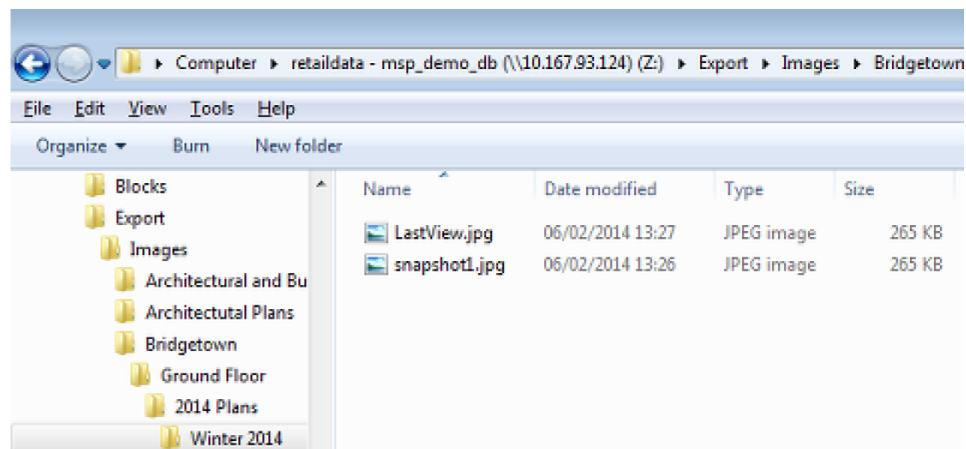
4. Click Replay Path on the toolbar. The movie recording will then start to follow the previously recorded path.
5. When the end of the path has been reached click Stop Recording AVI.
6. Review the recorded AVI by clicking Play Recorded AVI.
7. The recorded AVI can then be manually deleted or distributed by navigating to the folder in which it was stored.

Taking Snapshots

The user has the option of taking a screen shot of the currently active floor plan. This can be done in one of three ways:

- Clicking Snapshot on the View Directions and Product Text toolbar.
- Pressing F12.
- Selecting Take Snapshot Image on the View menu.

The resulting jpg file will be saved to an Images sub-folder of the Export folder specified in the Directories tab of the Configuration Module.



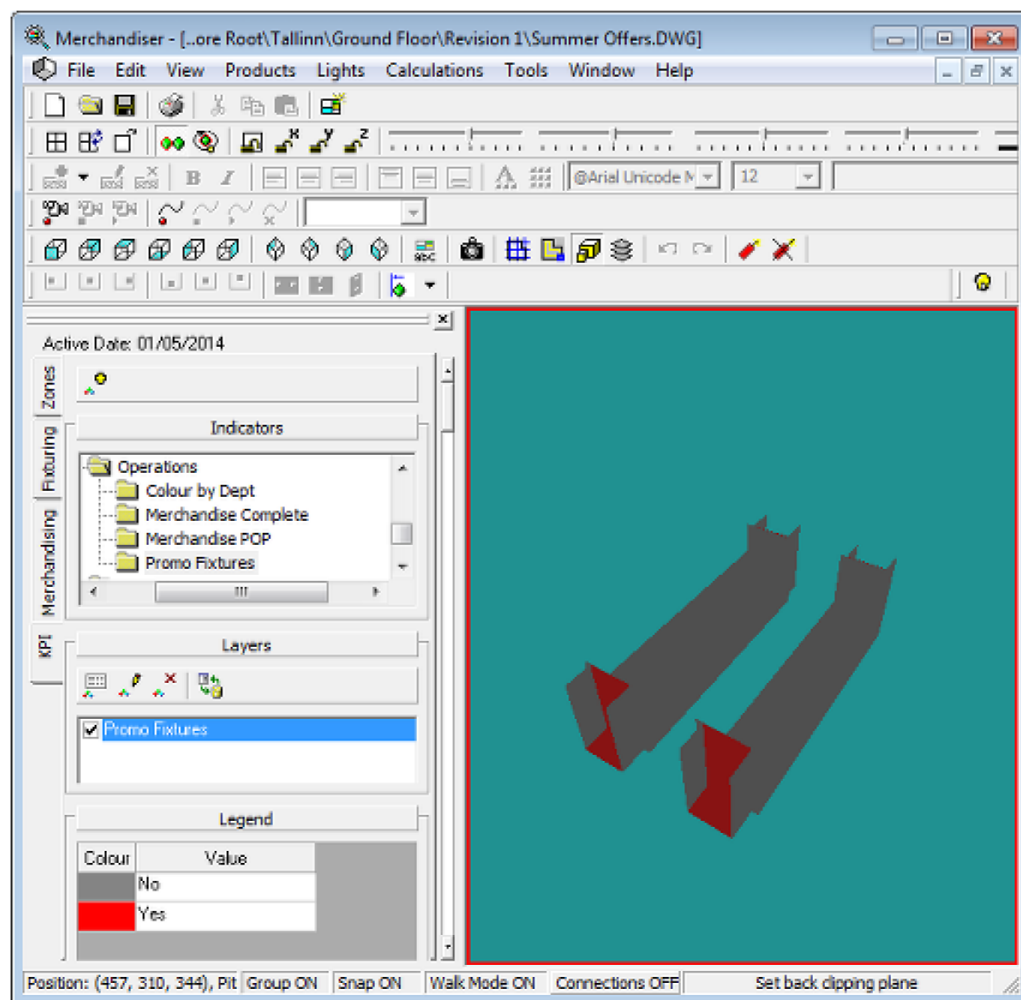
Folders below the image folder are arranged by alphabetical store name. Folders for each store follow the Store Manager hierarchy of Floor/Revision/File.

Key Performance Indicators

Overview of Key Performance Indicators

Overview of KPIs

Key Performance Indicators (KPIs) are used in parallel with Quick Reports and BI Publisher reports to give information on the currently active floor plan. Quick Reports and BI Publisher reports give tabulated information; KPIs are used to color code the floor plan with performance related criteria.



The above example from the Merchiser module shows fixtures color coded as to whether they are designated as promotional fixtures or not.

Data Sources

The following data sources can be used for KPIs:

SQL Statements

SQL statement can be used for simple KPIs. For example a SQL statement could be used to return a list of promotional fixtures or a list of unpopulated fixtures.

Stored Procedures

Stored Procedures are recommended for more complex KPI's. This is because they are more efficient at processing large volumes of data. A stored procedure might be used to generate data for a KPI giving the cumulative profit for the products on a fixture while taking into account the amount of aisle space allocated to it.

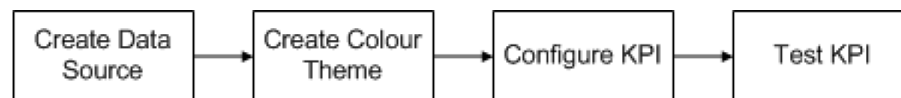
Views

There are a number of views included with the database. Existing KPI's can reference those views for data. This facility has been removed for new KPI's.

Note: Providing the appropriate permissions exist, it is possible to create data sources for KPIs that reference multiple schemas. For example data in the Macro Space Planning Database could be combined with data from other databases to create a KPI referencing (for example) extended product attributes.

Overview of Creating KPIs

KPI's can only be created (or edited) in the Administration module. KPI's are created as follows:

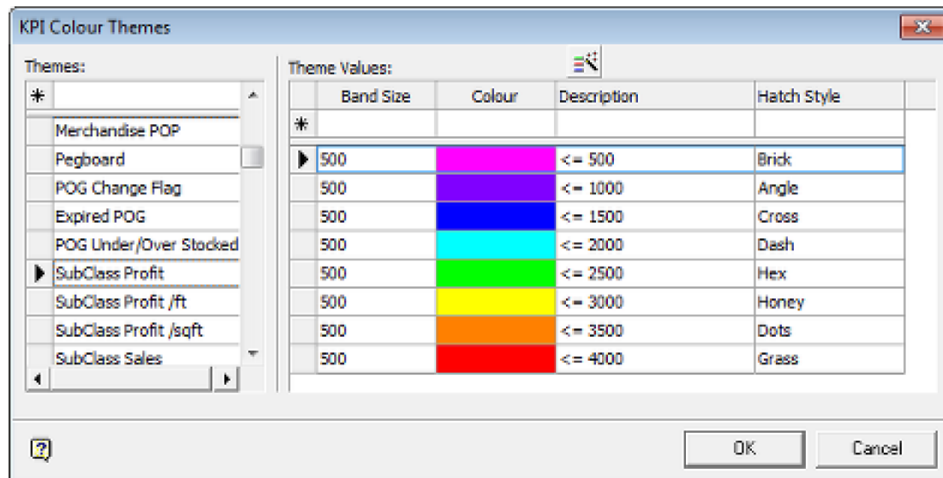


Create Data Source

The data source is created. Typically this will be a SQL statement or a stored procedure.

Create Color Theme

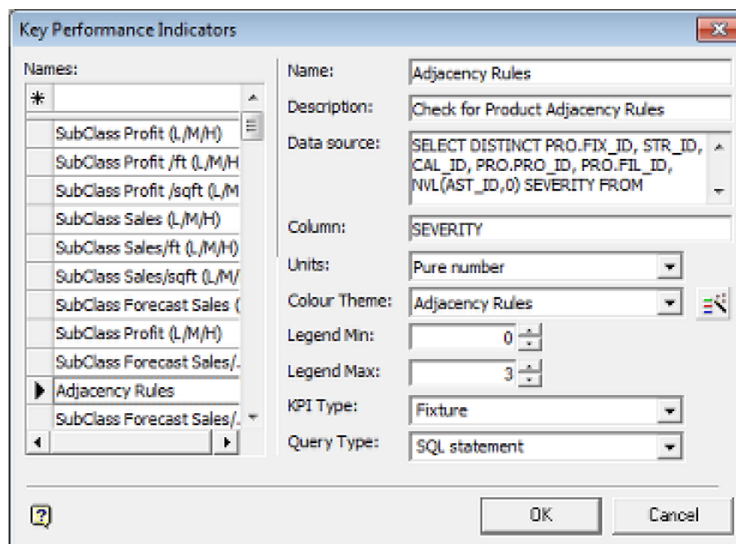
The next stage is to create a Color Theme to determine how the objects in the KPI will be colored. The simple example below show how objects can be coded red or gray according to whether a database flag is set or not. Any example of this is color coding fixtures as to whether they have been designated **Promotional Fixtures** or not.



Color Themes can be edited or created using the KPI Color Themes dialog box accessed from the toolbar in the KPI tab of the Object Browser in either the Planner or Merchandiser Modules.

Configure KPI

KPIs are configured using the Key Performance Indicators dialog box accessed from the toolbar in the KPI tab of the Object Browser in either the Planner or Merchandiser Modules.



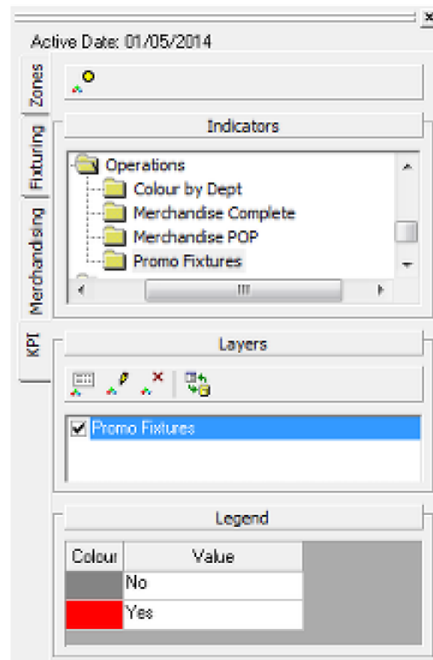
This enables the KPI Name, Data Source, Color Theme and other parameters to be configured.

Test KPI

After the KPI has been configured it should be tested against a set of verified data to ensure that objects are color coding as required.

Overview of Running KPI's

KPI's are run from the toolbars on the KPI tab of the Object Browser.



The upper toolbar give users the option to add a KPI to the currently active floor plan. The lower toolbar allows users to see the data being used for the KPI, edit the KPI parameters, remove the KPI from use in the floor plan and refresh the KPI if the data it references has been updated since the KPI was first run.

Types of KPI

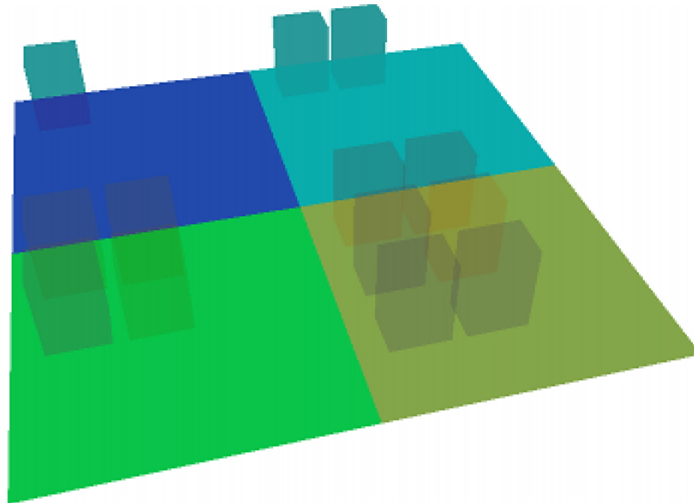
There are four types of object that can be color coded using KPI's.

- Zones
- Fixtures
- Shelves
- Products

Zones

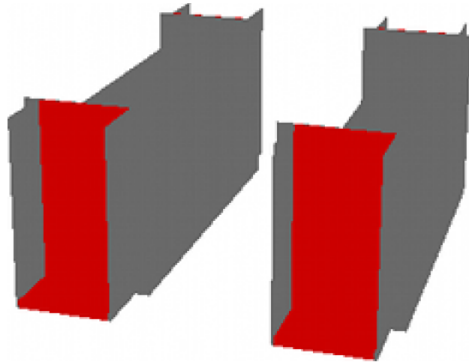
Zones can be color coded according to performance criteria. In the example below, the zones in Merchandiser have been color coded according to the percentage of the available area taken up by equipment. As the number of fixtures in a zone increases, the color coding of a zone changes to reflect the increasing amount of floor area taken up by equipment.

KPIs in the Merchandiser module will display in a semi-transparent form. In the example below, the fixtures have been turned semi-opaque.



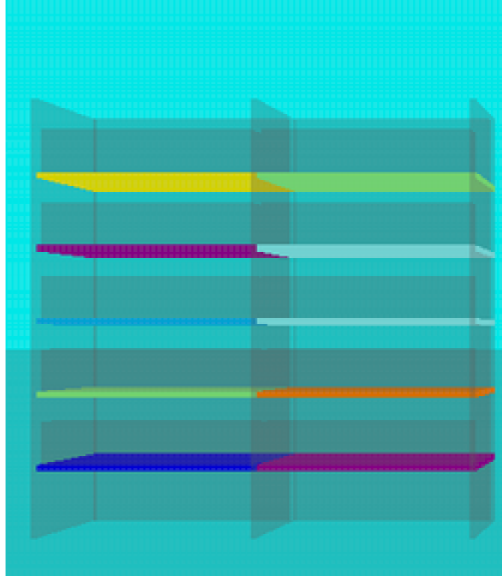
Fixtures

Fixtures can also be color coded by performance criteria. In the example below, fixtures designated as promotional fixtures have been color coded differently to standard fixtures



Shelves

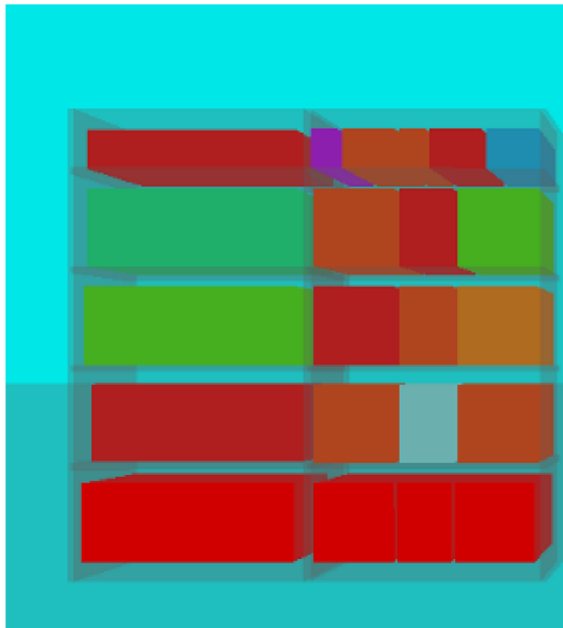
Shelf KPI's are generally only used in the Merchandiser module. In this example the shelves on the fixtures have been color coded according to their performance. Objects not specific to the KPI will display in a semi-transparent form. In the example below, the fixtures have been turned semi-opaque.



An example of a Shelf KPI might be a book shop giving the performance of the genre of books each shelf contains.

Products

Product KPI's can only be used in the Merchandiser module. In this example the products on the shelves and fixtures have been color coded according to their performance. Objects not specific to the KPI will display in a semi-transparent form. In the example below, the fixtures and shelves have been turned semi-opaque.



Applying the KPI

This section shows how to run a KPI.

General Information on Using KPIs

KPIs are controlled from the upper and lower Toolbar on the KPI tab of the Object Browser.

Upper Toolbar

| Icon | Description |
|------|-------------|
| | Add KPI |

Note: The Edit Indicator functionality allows the user to specify the data returned for KPIs using SQL statements and stored procedures. The functionality has been disabled by default. Please refer to the Functional Security section in the Administration Module User Guide for information on how to give access to this functionality.

Lower Toolbar

| Icon | Description |
|------|--|
| | View Data |
| | Edit KPI in list of those displaying |
| | Delete KPI from list of those displaying |
| | Refresh All |

These commands are user to alter the list of those KPI's current displayed in the ViewPorts.

Starting a KPI

To start a KPI, highlight the required KPI in the hierarchy on the Object Browser then click Add KPI on the toolbar. Initiating the KPI will bring up the Key Performance Indicator dialog box. This has three tabs.

Note: For the Planner module, generally only zone and fixture KPIs are appropriate. It is not generally possible to display meaningful KPIs or shelves or products at display style level.

Details Tab

The **Details tab** allows the user to override the default name for the KPI by typing their own variant into the **Name** text box. An additional feature in Merchandiser is the ability to apply the KPI to a specific viewport if multiple viewports are in use.

The screenshot shows the 'Key Performance Indicator' dialog box with the 'Details' tab selected. The 'Name' field contains 'Promo Fixtures'. The 'Group By' dropdown is set to 'Fixture'. The checkbox 'Refresh KPI after adding new item?' is checked. Under the 'Views' section, there are four checkboxes: 'View 1', 'View 2', 'View 3', and 'View 4', all of which are checked. At the bottom, there are 'OK' and 'Cancel' buttons.

Stores Tab

The **Stores Tab** allows the user to select data from another store and overlay that on the current store. It is activated by unchecking the Current Store check box and highlighting the required store.

The screenshot shows the 'Key Performance Indicator' dialog box with the 'Stores' tab selected. The 'Current Store' checkbox is unchecked. Below it is a table with two columns: 'Store Code' and 'Store Name'. The table contains the following data:

| Store Code | Store Name |
|------------|----------------------|
| AP001 | Architectural and... |
| BER001 | Berlin |
| BRI001 | Bridgetown |
| CAI001 | Cairo |
| CAN001 | Canberra |
| FL001 | Fixture Library |
| PS-3 | Large Prototype ... |
| LON001 | London |

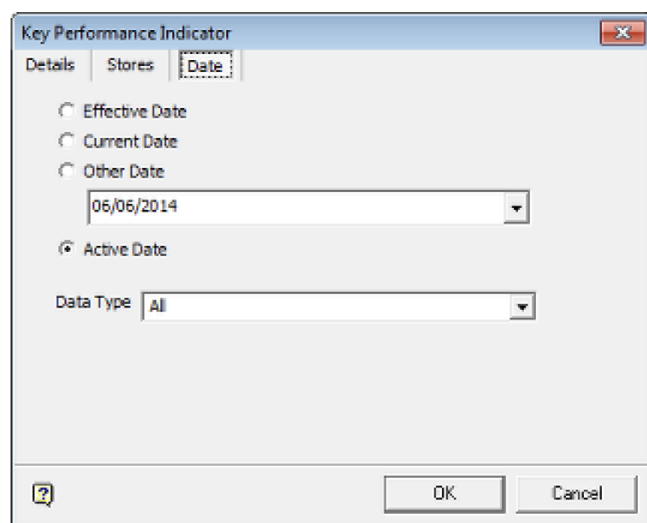
The 'CAI001' row is highlighted in blue. At the bottom, there are 'OK' and 'Cancel' buttons.

In order to use this functionality, the query that powers the KPI must have been configured accordingly. Typically, data used will be general performance data associated with (for example) planograms. This data can be associated with the planograms physically placed in a new iteration of the floor plan to predict financial performance. This requires the SQL statement or stored procedure associated with the KPI to have been configured to use this planogram performance data. Selecting a store in the Stores tab is therefore only likely to be used for KPIs set up for very specific purposes by individual retail chains.

Note: As an example of the problems associated with suing data from specified stores, KPI's based on Fixture IDs (FIX_ID) will not generally work. This is because fixtures in different drawings will not have comparable fixture IDs. However, planogram performance data can often be used because this can be related to the parent fixtures in the two different floor plans involved.

Date Tab

The **Date Tab** allows the user to select the date range for time sensitive data. The date ranges are linked to those specified in the Calendars option in the Administration module.



Date Options

- Effective Date sets the date to be used in the query to the Effective Date set for the floor plan (if previously defined). The Effective Date is set in the File Properties dialog box in Store Manager and will be available if the floor plan is at Authorized status or later.
- Current Date sets the date to be used in the query to the date the floor plan was made current. This is applicable if the floor plan is at Current status.
- Other Date enables the user to set a date using the calendar control activated from the drop down list.
- Active Date sets the date to be used in the query to the Active Date set for on the Object Browser (if previously defined).

Data Type

Data type specifies the date range the selected date is applicable to. The options are:

- All dates (no date range specified).
- Year
- Season
- Quarter
- Month
- Week

- Day

Using the Date Options and Data Type

The date options and data type are used in combination to find the data range required or the data. The date is the starting point. This can then be related to a specific calendar period containing that date. If for example, the date type is set to Month and the selected date is 14th March 2014, the query will return a specific Calendar ID (CAL_ID) from the database that can be used to select other data associated with that CAL_ID - for example performance data.

| CAL_ID | CAL_PID | CAL_DESC | CAL_START_DATE | CAL_END_DATE | CAT_ID | ICO_ID | CAL_CODE |
|--------|---------|----------|----------------|--------------|--------|---------|----------|
| 83 | 25 2013 | Dec | 08-DEC-13 | 05-JAN-14 | 4 | 48 2013 | Dec |
| 84 | 26 2014 | Jan | 12-JAN-14 | 02-FEB-14 | 4 | 48 2014 | Jan |
| 85 | 26 2014 | Feb | 09-FEB-14 | 02-MAR-14 | 4 | 48 2014 | Feb |
| 86 | 26 2014 | Mar | 09-MAR-14 | 30-MAR-14 | 4 | 48 2014 | Mar |

How the date options and data type are used depends on the sophistication of the query used

- Simpler queries (generally SQL statements) can be written for specific time periods - for example months. If the query is given a title such as Financial Performance (Month), the user will know to select Month in the data type drop down list in order for the KPI to work correctly.
- More complex procedures (generally stored procedures) can be written to select the calendar period based on the selection made in the data type drop down list. So (for example) if the user selected Quarter, the query would look for a CAL_ID in the database specifying the Quarter containing the required date. Conversely, if the user selected Month, the query would look for a CAL_ID in the database specifying the required Month

Availability of Date Related Data


KPIs based on dates will only work if the correct data is present in, or has been imported into the database. For example queries on financial performance will only execute correctly if point of sale data aggregated to the correct time periods has first been imported into the appropriate tables referenced by the query.

Starting the KPI

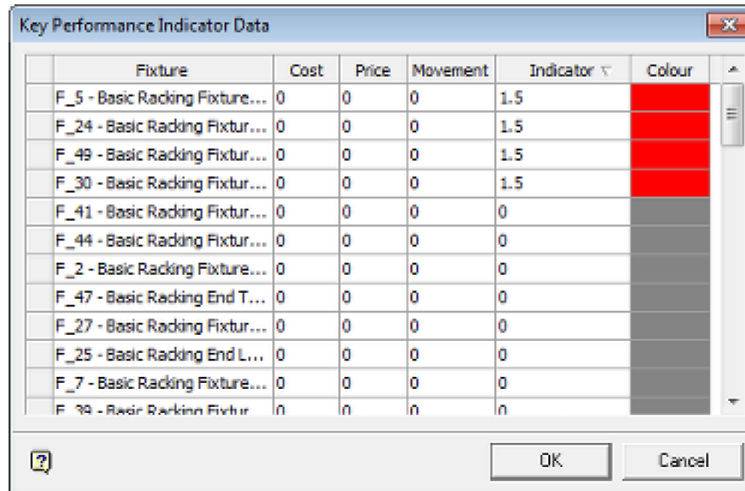
After the appropriate selections have been made in the Key Performance Indicator dialog box, click **OK**. The KPI will start.

Viewing the Data

The Data for the currently active KPI can be viewed by clicking View Data on the lower Object Browser toolbar.

| Icon | Description |
|---|-------------|
|  | View Data |

This will bring up the **Key Performance Indicator Data** dialog box. This contains the data used to color code the objects in the floor plan.



| Fixture | Cost | Price | Movement | Indicator | Colour |
|--------------------------------|------|-------|----------|-----------|--------|
| F_5 - Basic Racking Fixture... | 0 | 0 | 0 | 1.5 | |
| F_24 - Basic Racking Fixtur... | 0 | 0 | 0 | 1.5 | |
| F_49 - Basic Racking Fixtur... | 0 | 0 | 0 | 1.5 | |
| F_30 - Basic Racking Fixtur... | 0 | 0 | 0 | 1.5 | |
| F_41 - Basic Racking Fixtur... | 0 | 0 | 0 | 0 | |
| F_44 - Basic Racking Fixtur... | 0 | 0 | 0 | 0 | |
| F_2 - Basic Racking Fixture... | 0 | 0 | 0 | 0 | |
| F_47 - Basic Racking End T... | 0 | 0 | 0 | 0 | |
| F_27 - Basic Racking Fixtur... | 0 | 0 | 0 | 0 | |
| F_25 - Basic Racking End L... | 0 | 0 | 0 | 0 | |
| F_7 - Basic Racking Fixture... | 0 | 0 | 0 | 0 | |
| F_39 - Basic Racking Fixtur... | 0 | 0 | 0 | 0 | |

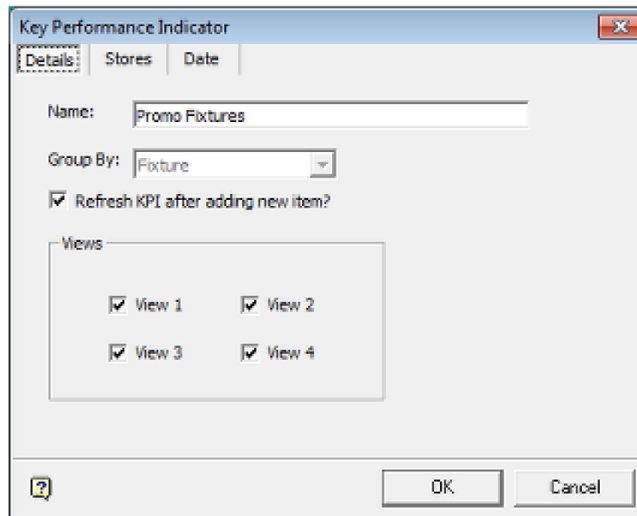
- The initial column will have an identifier for the object being colored. this will generally be a zone, fixture, shelf or product ID.
- Cost, Price and Movement are not currently enabled.
- Indicator is the value being used to decide the applicable band that a specific object falls into. This may either be a value determined directly from the database or a value calculated from a number of database values.
- Color is the color the object will be color coded relative to the value of the indicator.

Editing, Refreshing and Deleting the KPI

KPIs can be edited, refreshed and deleted.

Editing the KPI

To edit the KPI, click **Edit KPI** on the toolbar of the KPI tab of the Object Browser. This will bring up the **Key Performance Indicator** dialog Box. This enables the user to modify the options selected when the KPI was initiated. (See the section on adding a KPI for more information).



Key Performance Indicator

Details | Stores | Date

Name:

Group By:

☒ Refresh KPI after adding new item?

Views

☒ View 1 ☒ View 2

☒ View 3 ☒ View 4

OK Cancel

This enables the user to modify the store or date being used to select the data.

Refreshing the KPI

To refresh the values displayed in the KPI, click **Refresh KPI** on the toolbar of the KPI tab of the Object Browser. This will refresh the KPI with the latest values in the database. KPIs would normally be refreshed if dates or other data has been changed when the KPI was edited.




Deleting the KPI

To delete the KPI, click **Delete KPI** on the toolbar of the KPI tab of the Object Browser. The KPI will be removed without further confirmation.

KPI's and using Multiple ViewPorts

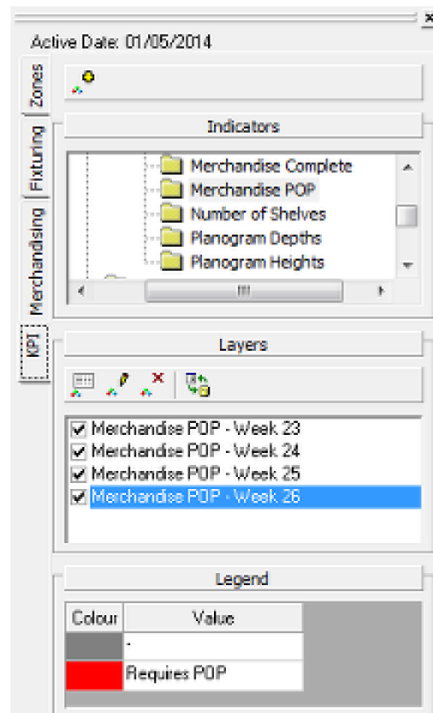
It is possible to use ViewPorts to display one or more KPIs simultaneously. This could be a single KPI reporting on data over different date ranges or it could be different KPIs showing different aspects of the performance of the store.



| Icon | Description |
|---|----------------------------------|
|  | Toggle between 1 and 4 ViewPorts |
|  | Synchronize |
|  | Next view |

- Either one or four viewports can be in use. Users can Toggle between the two options using the Toggle option in the view toolbar.
- Synchronize results in all four viewports showing the same view in the store. Changing the objects being viewed in one viewport means all viewports will change to show that view.
- Next View makes the next viewport in sequence active.

In the example below, four viewports have been set up. Each shows which Point of Purchase advertising material will change for a specific week.

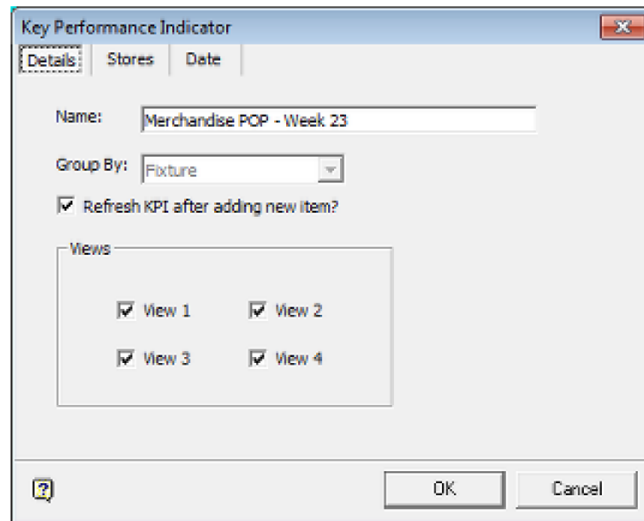


In the above example the Weekly Sales KPI has been set to show in four different ViewPorts, each showing date for a different week.

Using Multiple Viewports

To use KPIs in multiple viewports:

1. Select the multiple viewport option on the View toolbar.
2. Select the Synchronize option on the View toolbar.
3. Select the active viewport. This will have a red border.
4. Click Add KPI on the Object Browser toolbar.
5. When the Key Performance Indicator dialog box appears, edit the name appropriately. This is because active KPIs must have a unique name.



6. Click OK. The KPI will become active.
 7. Click in another viewport to make it active.
 8. Apply a KPI as above, ensuring the name is unique.
- Repeat until all required viewports have a KPI assigned.