

Oracle® Retail Macro Space Management
Report Designer User Guide
Release 14.1

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Contents

Send Us Your Comments	vii
Preface	ix
Documentation Accessibility	ix
Related Documents	ix
Customer Support	ix
Review Patch Documentation	x
Improved Process for Oracle Retail Documentation Corrections	x
Oracle Retail Documentation on the Oracle Technology Network	x
Conventions.....	xi
1 Logging in to Report Designer	1
Logging into Report Designer	1
Connection Details	1
Where Access to Report Designer is Configured.....	2
2 Overview of Report Designer	3
Overview of Report Designer.....	3
Where Report Designer Reports are Selected	5
Administration Module.....	5
Planner and Merchandiser	6
In-Store Space Collaboration	8
Opening Window	9
Menu Options	10
Toolbar	11
3 Creating a New Report Template	13
Creating a New Report	13
Renaming, Copying and Deleting Reports	14
Renaming a Report.....	14
Copying a Report.....	14
Deleting a Report	14
Report Design Dialogue Box.....	14
Page Set Up Options	15
4 Commands	17
Commands	17
General Commands	17
Toolbar Only Commands	17
Menus and Toolbars	17
5 Commands common to Menu Bar and Toolbar	19
File	19
Edit	20
View	21

Insert	21
Window	22
Help	23
6 Toolbar Only Commands	25
Views	25
Text Justification	25
Text Style	25
7 Designing the Report Template.....	27
Overview of Designing the Report	27
Insert	28
Adding a Label	29
Adding a Field	31
Adding an Image	33
Adding a Line	35
Adding a Rectangle.....	37
Adding a View	39
Controlling What Appears in the View	42
Adding a Table	42
8 Other Design Options	47
Using Snap to Neatly Align Items	47
Changing Label and Field Text via Toolbar	47
Using the Clipboard	48
Selecting Multiple Items	48
Using Grouping	49
Turning Grouping On or Off	49
Grouping Items	49
Ungrouping Items	50
Bring to Front or Send to Back	50
9 Opening an Existing Report Template	53
Opening an Existing Report Template	53
10 Printing the Report.....	55
Print Preview	55
Printing.....	56

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Oracle Retail Macro Space Management, Report Designer User Guide, Release 14.1

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Preface

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

interface. **Audience**

This User Guide is for users and administrators of Oracle Retail Macro Space Management.

This includes merchandisers, buyers, business analysts, and administrative personnel.

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Related Documents

For more information, see the following documents:

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

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When contacting Customer Support, please provide the following:

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

Review Patch Documentation

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

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

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

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

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

Oracle Retail Documentation on the Oracle Technology Network

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

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

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

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

Conventions

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

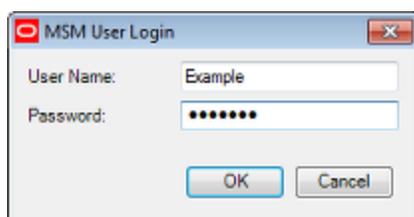
This is a code sample

It is used to display examples of code

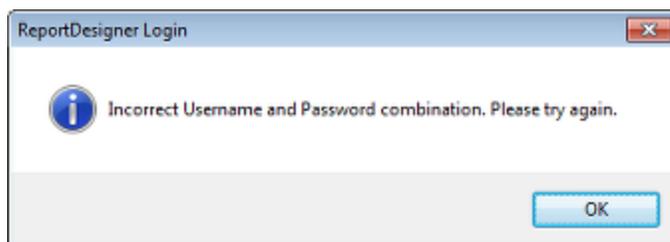
Logging in to Report Designer

Logging into Report Designer

When a user first attempts to access Report Designer, the **Log In dialog box** will appear.

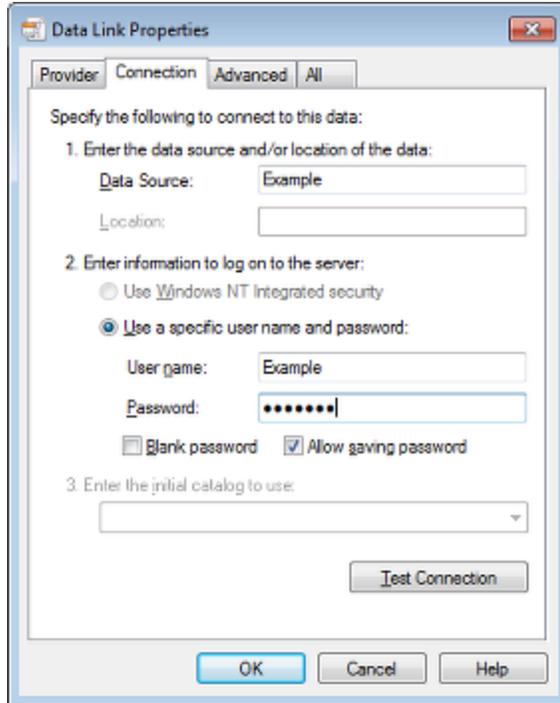


This requires the user to enter a User Name and Password. If these are correct, the user will be able to access the desired module. If the user enters an incorrect user name or password, a warning will result.



Connection Details

The connection details for other Macro Space Planning modules are configured when the application is installed. Connection details for Report Designer are configured by a UDL located in the C:\Oracle Retail\MSM\Common.Net directory.



This will normally be configured by the implementer during installation. The details should not normally be changed or connection to the Macro Space Planning database may be lost.

Where Access to Report Designer is Configured

Passwords and privileges are configured in Macro Space Management's Administration module. In order to get access to Report designer, you must first have been assigned those privileges in the 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.

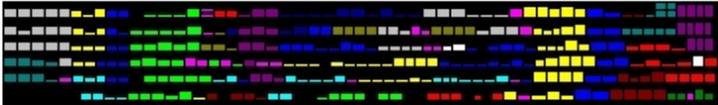
Overview of Report Designer

Overview of Report Designer

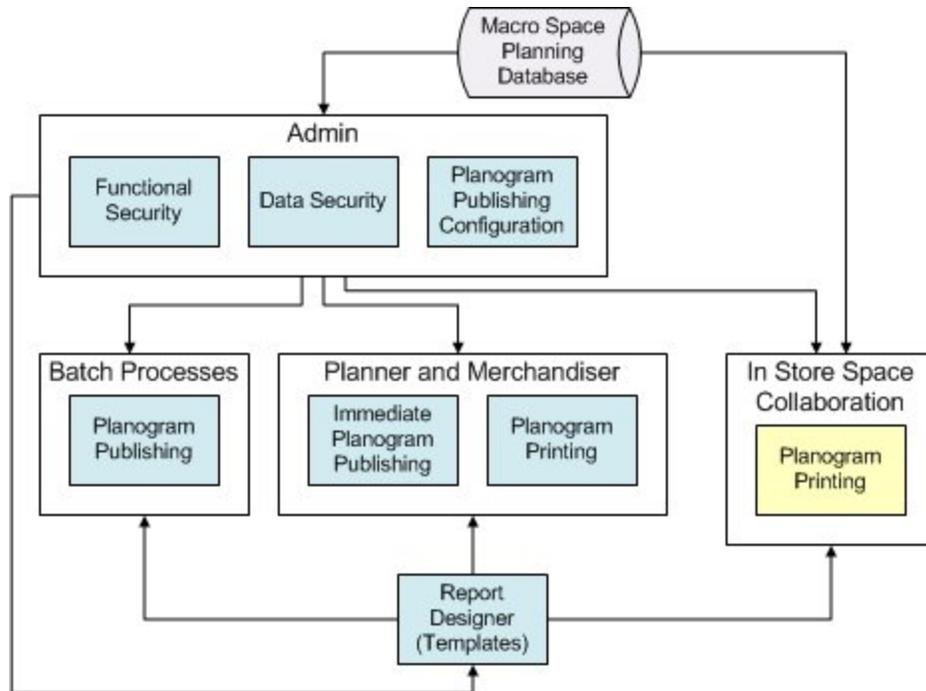
Report Designer allows the users to produce customized planogram report templates for use in Macro Space Management and In-Store Space Collaboration.

In the example below, the report template will result in a report outputting

- Planogram Name
- Front view of planogram
- Table of merchandise contained in the planogram.

15 DR FROZEN ENTREE/PREPARED				
				
Bay	Name	Description	Manufacturer	Qty
0	BANQUET	BANQUET SEL DNR CH	Generic Pro	216
0	BANQUET	BANQUET SEL DNR CH	Generic Pro	144
0	BANQUET	BANQUET SELECT ME	Generic Pro	216
0	BANQUET	BANQUET SELECT ME	Generic Pro	144
0	BANQUET	BANQUET DNR SEL YA	Generic Pro	216
0	BANQUET	BANQUET DNR SEL YA	Generic Pro	144
0	BANQUET	BANQUET CHICKEN FI	Generic Pro	216
0	BANQUET	BANQUET CHICKEN FI	Generic Pro	144
0	BANQUET	BANQUET ORIGINAL F	Generic Pro	132
0	BANQUET	BANQUET ORIGINAL F	Generic Pro	72
0	MICHELINA	MICHELINAS RAVIOLI A	Generic Pro	132
0	MICHELINA	MICHELINAS RAVIOLI A	Generic Pro	108
0	MICHELINA	MICHELINAS PENNE P	Generic Pro	132
0	MICHELINA	MICHELINAS PENNE P	Generic Pro	108
0	MICHELINA	MICHELINAS STUFFED	Generic Pro	132
0	MICHELINA	MICHELINAS STUFFED	Generic Pro	72
0	MICHELINA	MICHELINAS LEAN GO	Generic Pro	132
0	MICHELINA	MICHELINAS LEAN GO	Generic Pro	72
0	MICHELINA	MICHELINAS LEAN GO	Generic Pro	132
0	MICHELINA	MICHELINAS LEAN GO	Generic Pro	72
0	HLTHY CH	HLTHY CHC DU SALISB	Generic Pro	156
0	HLTHY CH	HLTHY CHC DU SALISB	Generic Pro	108
0	HLTHY CH	HLTHY CHC FRZ DNR B	Generic Pro	192

The general concept of using these templates is explained in the diagram below.



Macro Space Planning Database - this holds data in common between Macro Space Management and In-Store Space Collaboration.

Administration Module - this serves three purposes. Firstly permissions to access Report Designer and Planogram Publishing configuration are assigned in Functional Security. Next, the permissions for which planogram designs a user can publish or print are assigned in Data Security. Finally, the defaults for planogram publishing are assigned.

Batch Processes - planogram designs can be published using a batch process. Permissions must have previously been set in the Administration module. Planogram Publishing uses the default settings from the Planogram Publishing Configuration dialog box for the output of the published planograms.

Planner and Merchandiser modules - any user of these MSM modules may use Planogram Printing. Users with the appropriate permissions may use Immediate Planogram Publishing.

In-Store Space Collaboration - any user of this application may use Planogram Printing

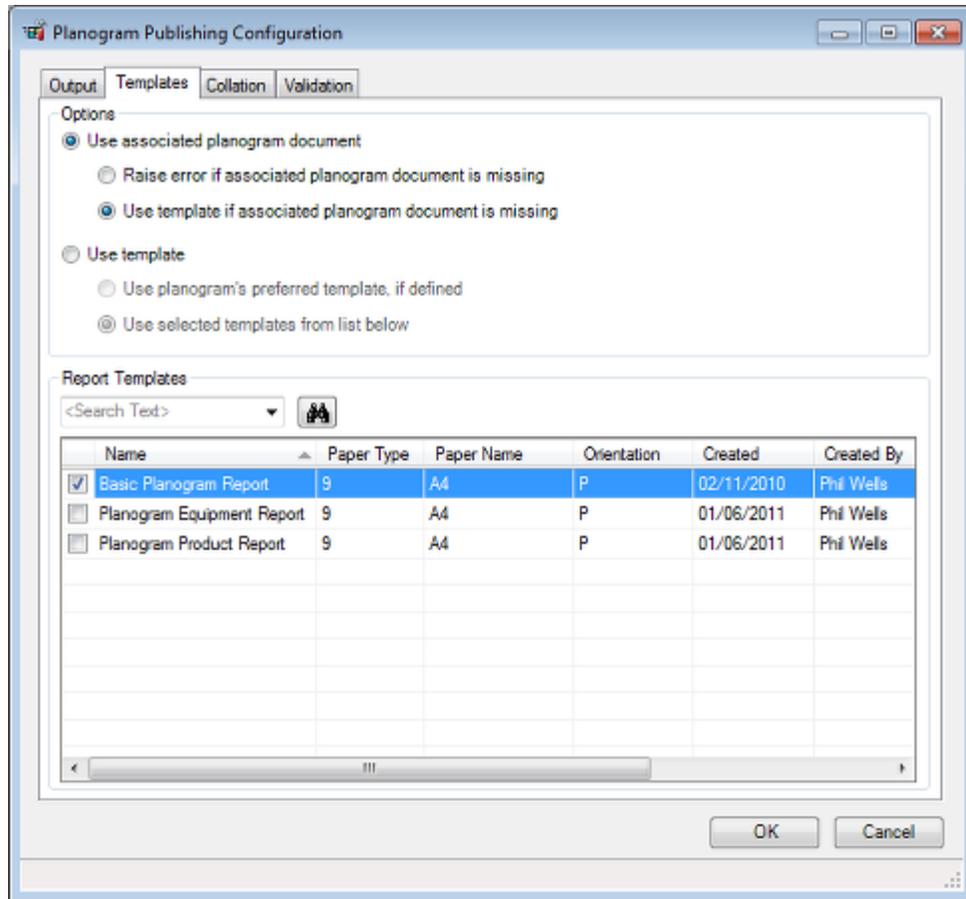
Report Designer - this MSM module allows users to configure Planogram Design Reports. These reports may subsequently be used to print or publish planograms in the Planner and Merchandiser modules and in In-Store Space Collaboration.

Where Report Designer Reports are Selected

Report Designer Reports can be used in the following locations.

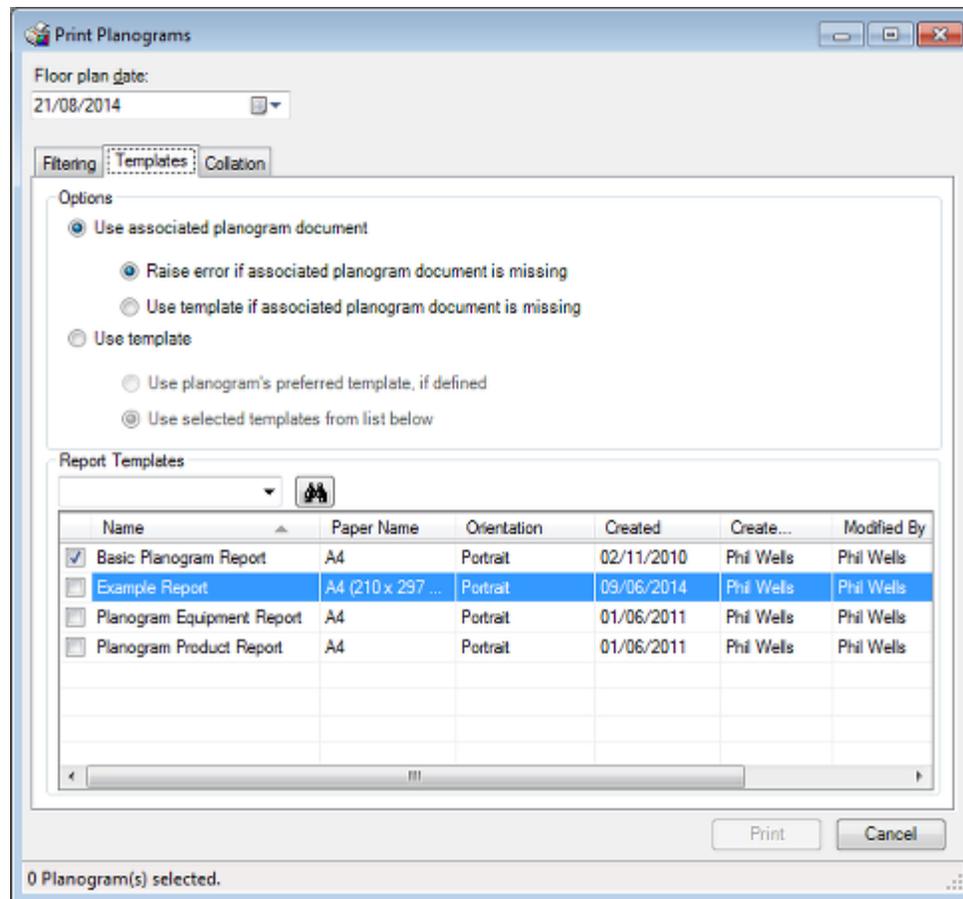
Administration Module

The Administration module can be used to set which of the previously configured reports from Report Designer is used for Batch Planogram Publishing and as the default for Immediate Planogram Publishing and Planogram Printing.



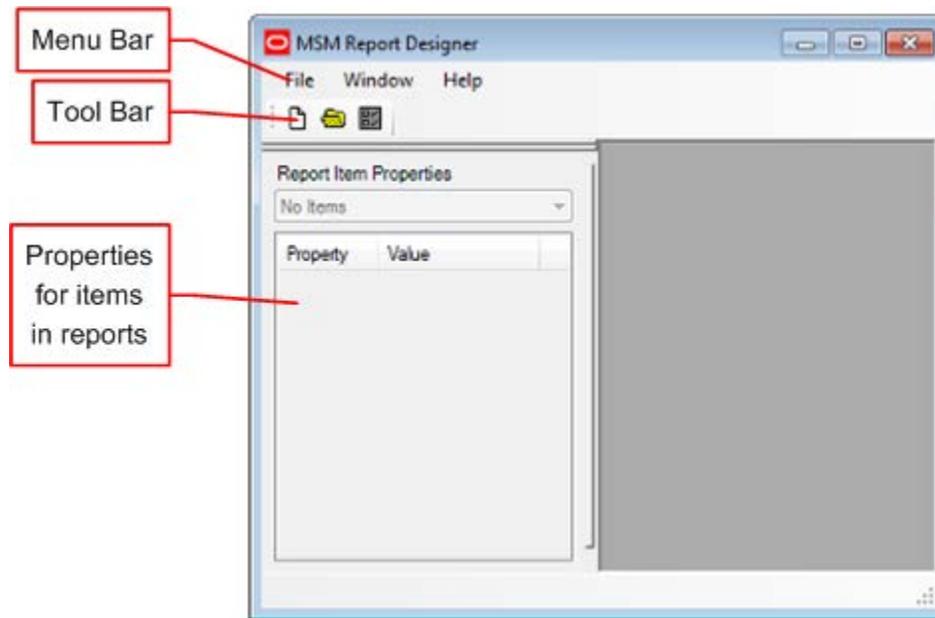
Planner and Merchandiser

Both the Planner and Merchandiser modules have the ability to publish or print planograms. These options can be accessed from the **File** menu. The settings for Immediate Planogram Publishing are set in the dialog box - the default settings being picked up from the Planogram Publishing Configuration dialog box in the Administration module.



Opening Window

Report Designer will open in a blank screen.

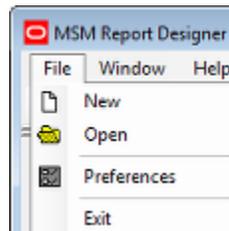


The Menu Bar gives access to some basic options. The Toolbar gives access to similar options. The section of the window for report items is not active at this stage.

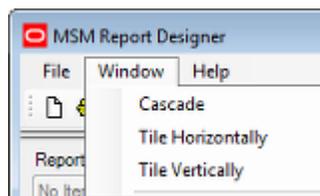
Menu Options

Note: These options are a basic set of options used to create new reports. Once a report is open, more options become available.

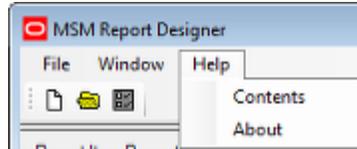
The File pull down menu allows users to create a new report, open an existing one, set some basic preferences or exit the program.



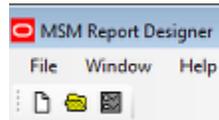
The Window pull down menu allows users to tile multiple reports, either horizontally, vertically or in a cascade.



The Help pull down menu allows users to access this help file, or to get information on the version of the software.



Toolbar

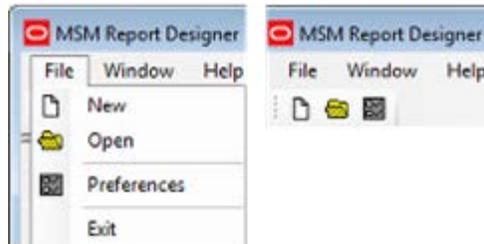


The Toolbar allows users to create a new report, open an existing one or set preferences.

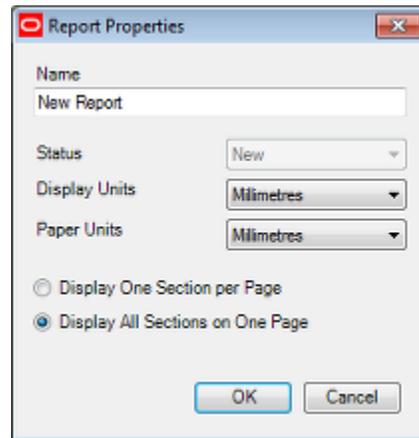
Creating a New Report Template

Creating a New Report

To **Create a New Report**, select the **New** option from the File pull down menu or select **New** from the toolbar.



This will bring up the New Report dialogue box.

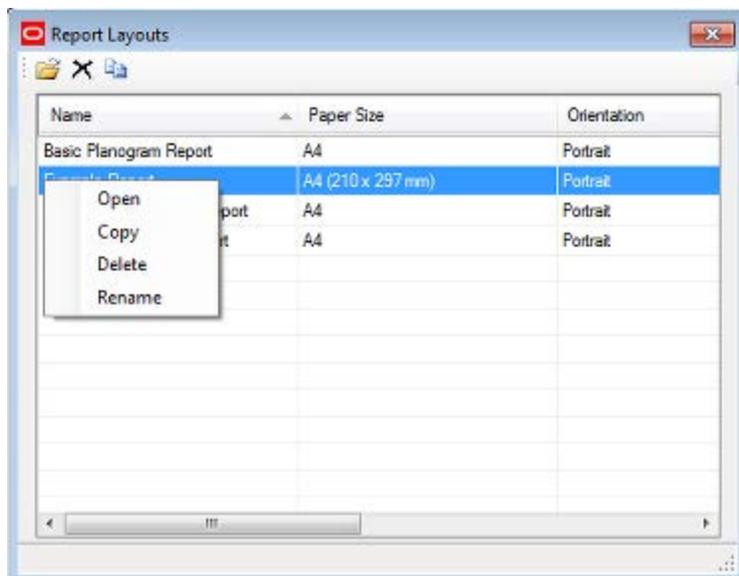


Option	Description
Name	The text entered here will be the name for the report.
Status	This will be the eventual status for the report. When a report is first created this will be grayed out and unavailable.
Display Units	These are the units shown to indicate the size of objects in the planogram. This will display a choice of inches or mm.
Paper Units	These are the units for defining the size of the paper and the positions of objects on the paper. This will display a choice of inches or mm.
Sections per Page	This determines whether the report will generate a separate page for each section/profile in the planogram, or whether all sections will be shown on a single page.

To complete the initial creation process, click on the **OK** button. This will cause a Report Design dialogue box to appear.

Renaming, Copying and Deleting Reports

Once a report has been created, it can be renamed, copied or deleted. This is done by opening the Report Layouts dialog box (**Open** option from File menu or toolbar). The options on the toolbar or from the right click menu can then be used as required.



Renaming a Report

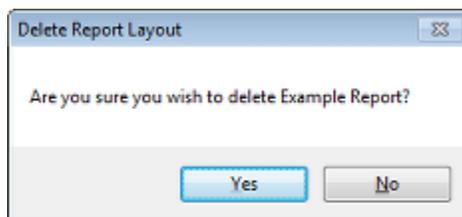
To rename a report, highlight the name of the report and select **Rename** from the right click menu. Rename the report then click in another row to write the change to the database.

Copying a Report

To copy a report, highlight the name of the report and select the **Copy** option from the toolbar or right click menu. A copy of the report will then be created. It can then be renamed as required.

Deleting a Report

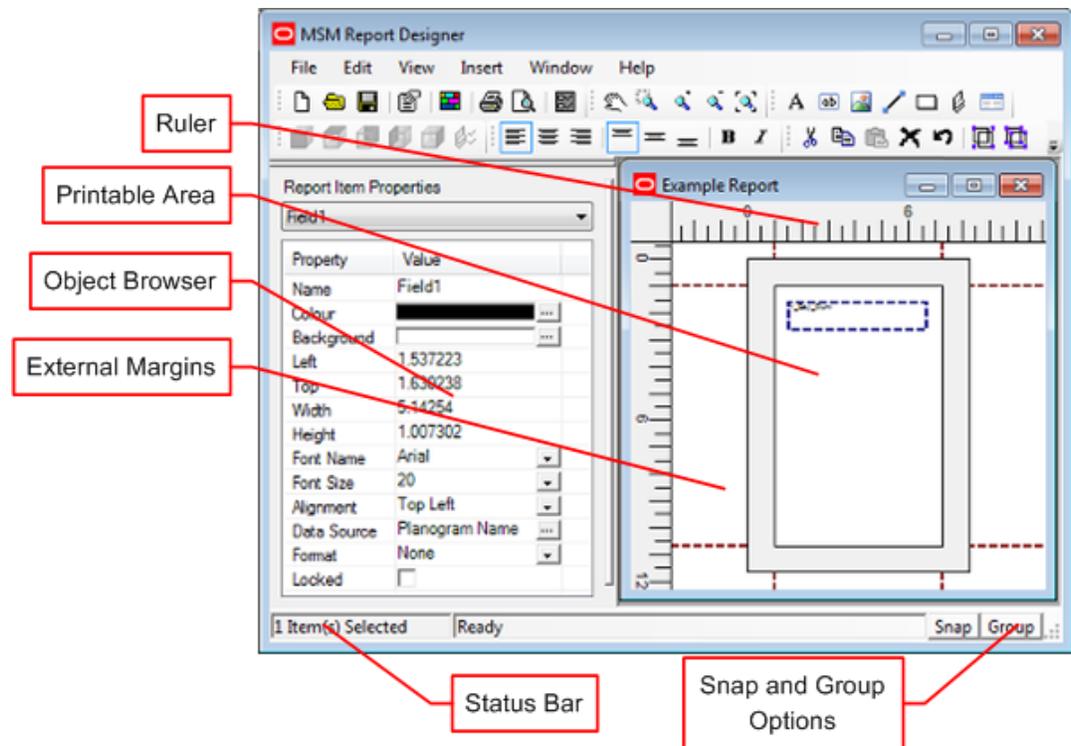
To delete a report, highlight the name of the report and select the **Delete** option from the toolbar or right click menu. A confirmatory dialog box will appear.



On clicking Yes the report will be deleted.

Report Design Dialogue Box

The **Report Design dialogue box** appears within the main Report designer screen.

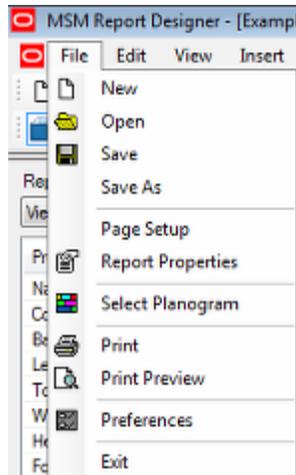


Option	Description
Ruler	These show the dimensions in the selected units. The units for the rulers will be determined by the Paper Units for the current user. The origin for the rulers will be the top left corner of the page. The rulers will be updated as the page is panned or zoomed.
Printable Area	This is the area inside the thick grey border. This is the area that will print when the report is generated. Objects outside of this border may not print in their entirety.
External Margins	These are areas outside the area that will be printed. They can be used to hold data not intended for the printed output.
Object Browser	This contains information on the currently selected object in the printable area.
Status Bar	This contains information on the number of objects selected in the printable area.
Snap and Group Options	These are concerned with manipulating information in the printable area.

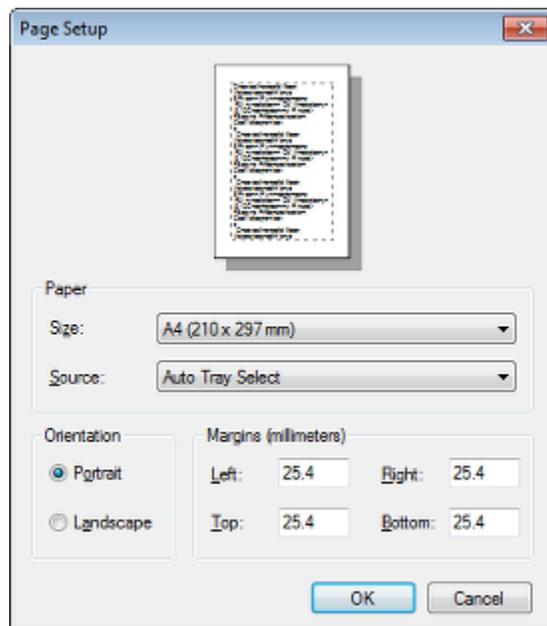
Page Set Up Options

Note: The file menu has more options than when creating a new report.

The **Page Set Up** for printing can be activated from the File pull down menu.



This will bring up the Page Set up dialogue box which allows the page set up to be configured before printing.



All page setup values will be stored with the report layout, except the *Source* (e.g. Tray). The default values will where possible be derived from the settings for the default printer. Click **OK** once all details have been configured.

Commands

Commands

General Commands

The majority of the commands that can be activated by the user are accessible from both the standard menus and from the toolbar. In all cases the operation of the command is identical regardless of how the user activates it. For all commands, if the current state of the editing environment prevents the operation of that command, it will be disabled. For example, if no items are selected, the Cut or Copy commands will be disabled. Some commands will also change display state to indicate if they are currently in effect or to indicate an item in an operational state. In all cases, selecting a command before a previous command has completed will cancel the prior command.

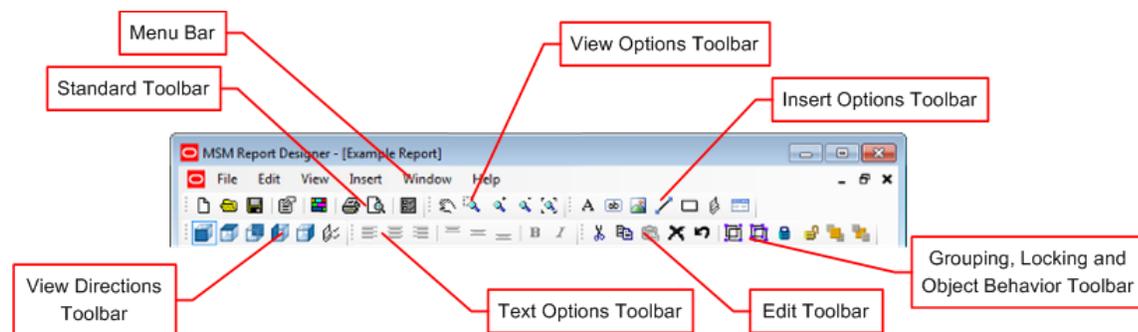
Toolbar Only Commands

These commands are only available from the main toolbar and provide quick access to several of the properties for the reporting items. All of these commands will also indicate the current state of the property by displaying the relevant button in a pressed state. The commands only available on the toolbar include:

- Views
- Text Justification
- Text Style

Menus and Toolbars

The full menus and toolbars will appear when a report has been created, or is opened for editing.



Option	Description
Menu Bar	This gives access to the varying menus. These menus contain more options than when a new report is being created from the opening dialog box.
Standard Toolbar	This contains options for creating new reports, opening existing ones and so on.
View Options Toolbar	This allows users to move about in the report being designed, change the zoom and so on.

Option	Description
Insert Options Toolbar	This allows the user to insert options such as text, lines and views into the planogram report design.
View Directions Toolbar.	If a view of the planogram is included in the report being designed, this toolbar allows the perspective from which the planogram is being viewed to be changed.
Text Options Toolbar	This toolbar contains options affecting text such as justification, bold and italic options.
Edit Toolbar	This allows users to cut, copy and paste objects.
Grouping, Locking and Object Behavior toolbar	This allows users to make groups of objects and manipulate them.

Commands common to Menu Bar and Toolbar

File

The **File commands** allow the user to manipulate report layout documents. Also provided are commands to adjust user preferences and to exit the designer.

Menu	Toolbar	Description
New		This will create a new empty layout document and display the <i>Report Properties</i> dialog where initial parameters can be defined.
Open		This will display the <i>Report Layouts</i> dialog allowing a layout to be opened for viewing or editing. If a layout is opened that has a read-only status, then all editing functionality will be disabled. Multiple Report Layouts can be open at any one time and each will be contained in a separate document window.
Save		This will save the layout, either updating the existing definition or adding a new one if this is a new layout.
Save As	None	This will display the <i>Report Properties</i> dialog, where the user can enter a new name. It will then be saved as a new layout.
Page Setup	None	This will display the <i>Page Setup</i> dialogue. This will allow the report page dimensions and related options to be defined.
Report Properties		This will display the <i>Report Properties</i> dialogue which allows report specific information to be viewed or edited.
Select Planogram		This will display the <i>Select Planogram</i> dialog; this will allow the designer to test the report using real data. If a planogram is loaded like this, it will be used by the editor to represent an example of the planogram during editing. An option will also be provided to load a test planogram, this will be the default planogram when a layout is loaded and will contain generic test data. The <i>Print</i> command will also allow planograms to be loaded.
Print		This will display the <i>Print</i> dialogue to allow the current layout to be printed. The <i>Select Planogram</i> dialog will also be displayed allowing the user to select what to print.
Print Preview		This will display the <i>Print Preview</i> dialogue; this shows an example of the printed report. The report will preview using the currently loaded planogram (see <i>Select Planogram</i>).
User Preferences		Displays the <i>Options</i> dialog, this allows the user to configure certain aspects of the design environment to their own personal preference.
Exit	None	This will close the application. It will prompt the user to save any pending changes.

Edit

The **Edit commands** allow the user to manipulate the individual items on a report layout.

Menu	Toolbar	Description
Cut		Copies the selected items to the clipboard and removes them from the layout. Any items already on the clipboard will be lost.
Copy		Copies the selected items to the clipboard. Any items already on the clipboard will be lost.
Paste		<p>Copies all items on the clipboard to the current layout. The items will be retained on the clipboard for further use.</p> <p>When items are pasted, they will be placed on the layout at the nearest point to the top left corner of the editing area but will retain their positions relative to each other. All the pasted items will be selected so that they can easily be relocated to the correct position on the layout. Any currently selected items will be automatically de-selected.</p> <p>Note that the clipboard is shared by all open layouts.</p>
Delete		Deletes the selected items from the current document, the items will not be placed on the clipboard.
Undo		<p>Undoes the last change in the current layout document.</p> <p>The undo stack is held per document but can only contain a limited number of undoes. The stack is lost when that layout is closed and is cleared when the layout is saved.</p>
Group		<p>This will group selected objects, giving them a common group.</p> <p>If items are grouped then, provided GROUP option is enabled in the status bar, all items will be selected if just one item in the group is picked.</p> <p>This will enable users to move sections of the report around more easily, by treating them as a single object.</p> <p>Turning the GROUP function off in the status bar will then allow objects to be manipulated singly.</p>
Ungroup		This will ungroup selected objects; reverting them back to independent items.
Lock		<p>This will lock the selected items to prevent them from being edited or deleted. Locked items can still be selected, have their properties inspected and can still be copied to the clipboard.</p> <p>Note that locked items placed on the clipboard will not retain their locked status.</p>
Unlock		This will unlock the selected items, allowing them to be once again moved or deleted
Bring To Front		This will change the display order of the selected items and bring them to the front so that they are not obscured. The selected items will retain their relative display order.
Send to Back		This will change the display order of the selected items and place them behind all other objects. The selected items will retain their relative display order.

View

The **View commands** are used to affect the view of the layout document.

Menu	Toolbar	Description
Pan		This will switch to pan mode. In this mode, clicking and dragging over the editing area will cause the view to scroll with the mouse. Note that this mode will stay active until it is manually deactivated.
Zoom Window		This will prompt the user to zoom into an area of the document defined by a rectangle drawn with the mouse. The area within the rectangle will be magnified to fill the editing area.
Zoom In		This will increase the magnification of the design view by a factor when the mouse is clicked in the design area. The magnification will be centered at the position of the mouse. Note that this mode will stay active until it is manually deactivated.
Zoom Out		This will decrease the magnification of the design view by a factor when the mouse is clicked in the design area. The magnification will be centered at the position of the mouse. Note that this mode will stay active until it is manually deactivated.
Zoom Extents		This will make the entire layout document page fit into the design area. If any parts of the layout are off the actual page area, these will be included. An extra padding margin will also be included to aid visual clarity.

Insert

The **Insert commands** are used to add the reporting items to the layout.

Menu	Toolbar	Description
Label		This will add a text label object to the current document, the cursor will be changed and the user prompted to mark out the bounds of the label. The label when added will contain a default text string that is the same as the control name.
Field ...		This will add a field object to the current document, the cursor will be changed and the user prompted to mark out the bounds of the field. A dialog will then be displayed allowing the user to select the data source (held in the database) for the field.

Menu	Toolbar	Description
Image ...		<p>This will add an image object to the current document, the cursor will be changed and the user prompted to mark out the bounds of the image. A dialog will then be displayed allowing the user to select the source for the image. The image can be any of the following formats: BMP, GIF, PNG, JPEG.</p> <p>The image will be scaled to fit the bounds but will not maintain its aspect ratio.</p> <p>Note that the image must reside on a network accessible path that can be resolved by the server for the client versions.</p>
Line		This will add a line object to the current document, the cursor will be changed and the user prompted to mark out the line.
Rectangle		This will add a rectangle object to the current document, the cursor will be changed and the user prompted to mark out the bounds of the rectangle.
View		<p>This will add a planogram view diagram to the document, the cursor will be changed and the user prompted to mark out the bounds of the view.</p> <p>The diagram will default to a front view, but the user can change the view direction by pressing the appropriate button on the toolbar, or selecting the required option from the drop down list in the Properties panel.</p> <p>By default a new view item will not include any extra information, to configure the view, use <i>the Planogram View Properties</i>.</p>
Table ...		<p>This will add a data table item to the current document, the cursor will be changed and the user prompted to mark out the bounds of the table. Once the table bounds have been defined, the table data dialogue will be displayed where the user can define the source for the data and how it is represented.</p>

Window

The **Window menu** is used to alter the way in which the document windows are arranged in the main editing area.

Menu	Toolbar	Description
Tile Horizontally	None	This will tile the open document windows vertically down the editing area. Each window will be stretched to fill the full width of the area.
Tile Vertically	None	This will tile the open document windows horizontally across the editing area. Each window will be stretched to fill the full height of the area.
Cascade	None	This will cascade the open document windows within the editing area. Each window will be positioned slightly down and to the right of the top-left corner of the previous one.

Menu	Toolbar	Description
Document 1	None	A menu item will be included in the Window menu for each open document. This actual menu item text will be the name of the document contained in that window; this will also be used for the title of the window. Selecting the menu option will select that document. This will make it the currently active one and display it on top of other document windows. The main designer window will also include the title of the active document within its title bar.

Help

The **Help menu** provides information about the software.

Menu	Toolbar	Description
Contents	None	This will display the help contents page for the report designer.
About...	None	This will display the <i>About</i> dialog. This contains the software version as well as some other items of information.

Toolbar Only Commands

Views

These toolbar buttons will only be enabled if a Planogram View item is selected. They allow the view direction and properties of a planogram diagram to be changed.

Toolbar	Description
	Views the planogram from the Top.
	Views the planogram from the Front.
	Views the planogram from the Back.
	Views the planogram from the Left.
	Views the planogram from the Right.
	Opens the <i>Planogram View</i> dialog allowing the view properties to be edited.

Text Justification

These toolbar buttons will only be enabled if one or more Label or Field items are selected. The buttons will act as radio buttons, split into two groups: horizontal and vertical.

Toolbar	Description
	Aligns text to the left.
	Aligns text to the horizontal center.
	Aligns text to the right.
	Aligns text to the top.
	Aligns text to the vertical center (Middle).
	Aligns text to the bottom.

Text Style

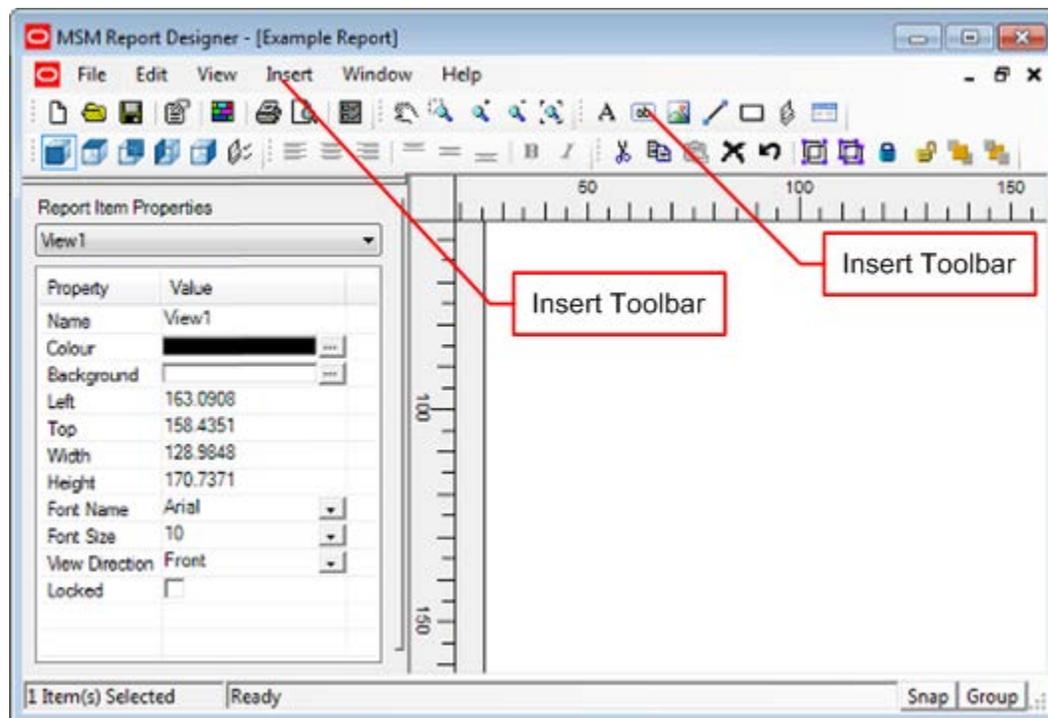
These toolbar commands are used to change the text style of Label and Field items.

Toolbar	Description
B	Toggles the Bold text style on and off.
<i>I</i>	Toggles the Italic text style on and off.

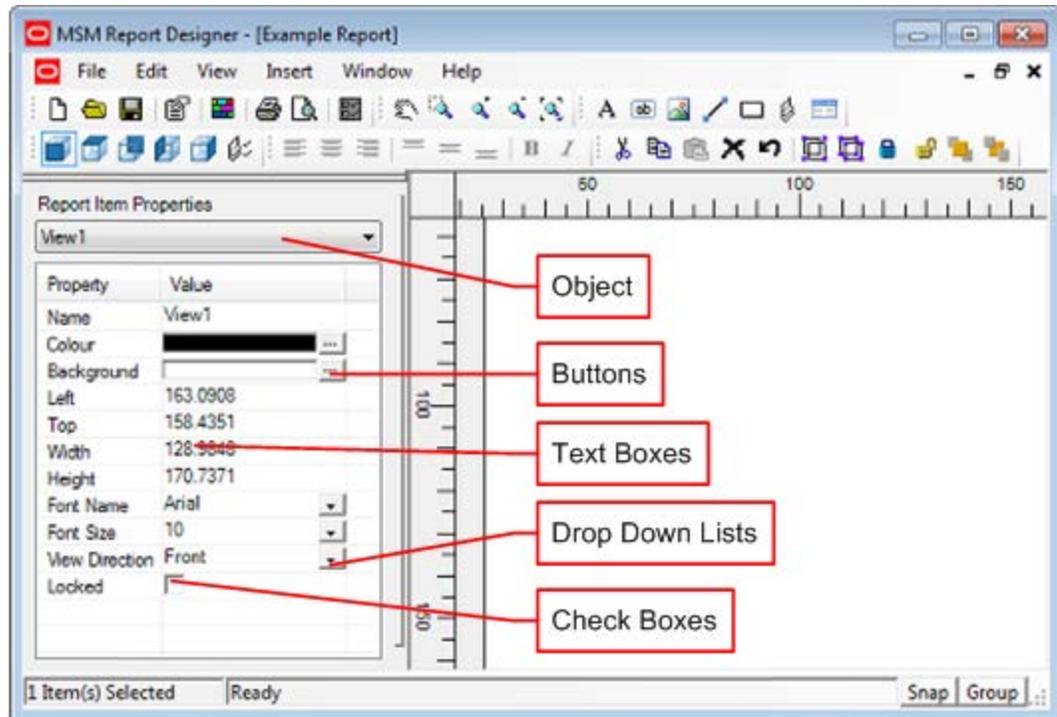
Designing the Report Template

Overview of Designing the Report

There are seven types of objects that can be added to the report being designed. These are selected from the Insert pull down menu or from the Insert toolbar. Both sets of options work in an identical manner.



Report Item Properties will be found on the left of the screen. It allows any of the seven types of object that can be placed in the report to be customized.



- The Object to be edited can be selected from a drop down list
- Buttons give access to some editing options
- Typing into Text Boxes allows other options to be customized.
- Drop down lists allow other options to be customized.
- Check boxes allow options to be turned on or off.

Insert

The **Insert** commands are used to add the reporting items to the layout.

Menu	Toolbar	Description
Label		This will add a text label object to the current document, the cursor will be changed and the user prompted to mark out the bounds of the label. The label when added will contain a default text string that is the same as the control name.
Field ...		This will add a field object to the current document, the cursor will be changed and the user prompted to mark out the bounds of the field. A dialog will then be displayed allowing the user to select the data source for the field.

Menu	Toolbar	Description
Image ...		<p>This will add an image object to the current document, the cursor will be changed and the user prompted to mark out the bounds of the image.</p> <p>A dialog will then be displayed allowing the user to select the source for the image. The image can be any of the following formats: BMP, GIF, PNG, JPEG.</p> <p>The image will be scaled to fit the bounds but will not maintain its aspect ratio.</p> <p>Note that the image must reside on a network accessible path that can be resolved by the server for the client versions.</p>
Line		<p>This will add a line object to the current document, the cursor will be changed and the user prompted to mark out the line.</p>
Rectangle		<p>This will add a rectangle object to the current document, the cursor will be changed and the user prompted to mark out the bounds of the rectangle.</p>
View		<p>This will add a planogram view diagram to the document, the cursor will be changed and the user prompted to mark out the bounds of the view.</p> <p>The diagram will default to a front view, but the user can change the view direction by pressing the appropriate button on the toolbar, or selecting the required option from the drop down list in the Properties panel.</p> <p>By default a new view item will not include any extra information, to configure the view, use <i>the Planogram View Properties</i>.</p>
Table ...		<p>This will add a data table item to the current document, the cursor will be changed and the user prompted to mark out the bounds of the table.</p> <p>Once the table bounds have been defined, the table data dialogue will be displayed where the user can define the source for the data and how it is represented.</p>

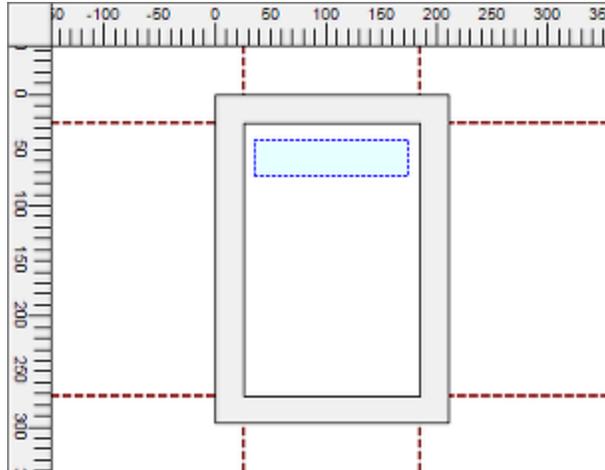
(See topics below for examples of these objects).

Adding a Label

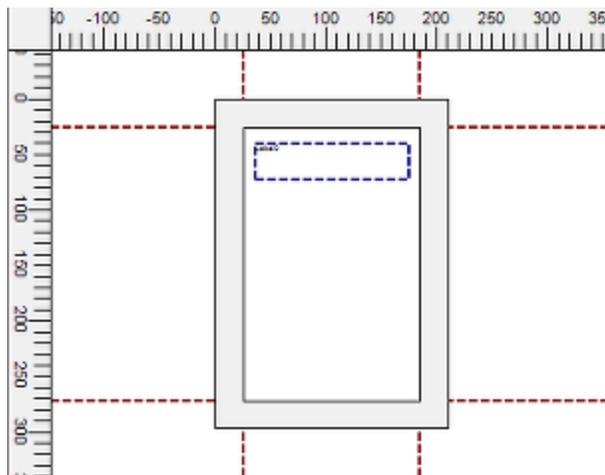
To **Add a Label** to the report, click on the **Label** icon on the insert toolbar. (Alternatively, select the Label option from the Insert pull down menu).



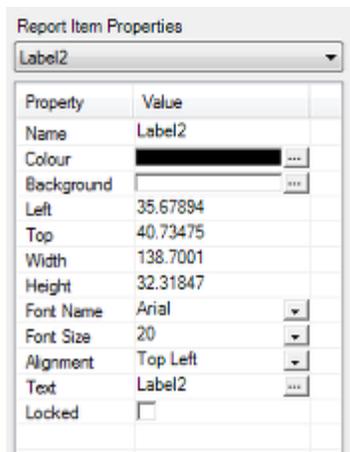
To add a label, move the cursor to the required start position in the Report Layout Designer. Hold down the left mouse button and drag to form a rectangle.



When the left hand mouse button is released, a rectangle will be drawn containing the initial name of the label. If selected for editing (as in the example below) it will be enclosed in a dotted border.



If selected for editing, the varying properties of the Label can then be edited in the Report Item Properties Object Browser.



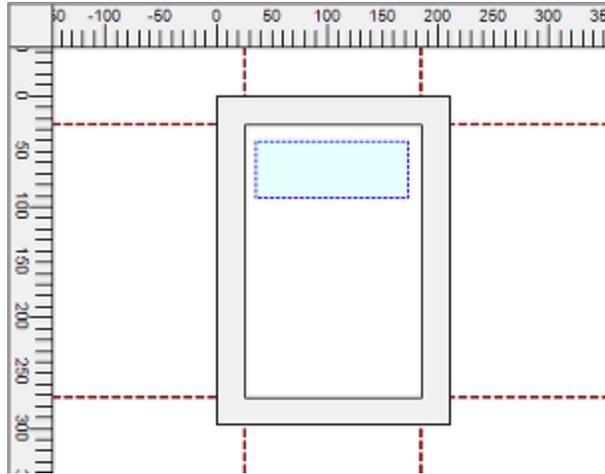
Option	Description
Name	This is what the label is called in the drop down list. It can be edited by typing in a different value, or the default value can be used.
Color	This is the color of the border of the label. It can be changed by clicking on the button and selecting a new color from the pallet that appears.
Background	This is the color of the background of the label. It can be changed by clicking on the button and selecting a new color from the pallet that appears.
Left, Top, Width and Height	These values allow the position and size of the rectangle containing the label to be changed. They can be edited by typing in different values.
Font Name and Font Size	These can be changed by selecting new values from the drop down list.
Alignment	This can be changed from the drop down list. Alternatively, it can be changed using the alignment options on the toolbar.
Text	This is the text that will be displayed in the printed report. This must be set at design time.
Locked	Checking Locked means this item cannot be moved or deleted.

Adding a Field

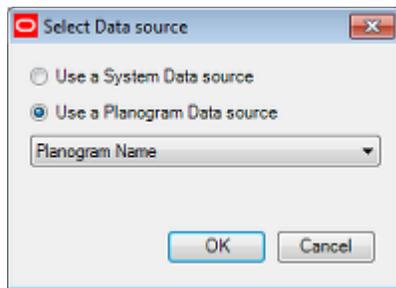
To **Add a Field** to the report, click on the Label icon on the insert toolbar. (Alternatively, select the Field option from the Insert pull down menu).



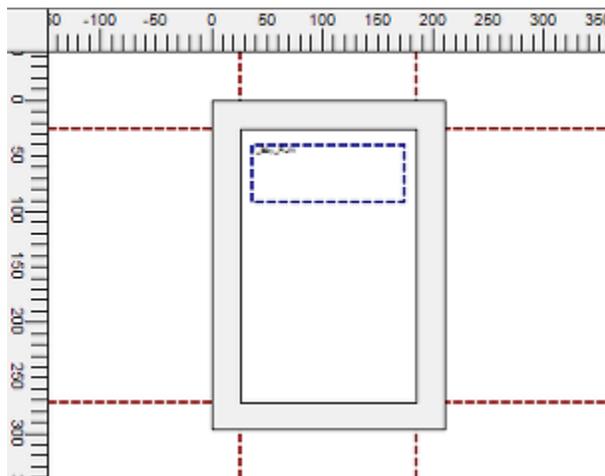
To add a field, move the cursor to the required start position in the Report Layout Designer. Hold down the left mouse button and drag to form a rectangle.



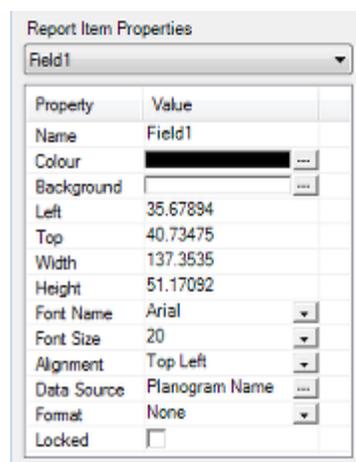
When the left hand mouse button is released, the Select Data Source dialogue box will appear.



Select the name of the required field by means of the radio button and drop down lists. If selected for editing (as in the example below) it will be enclosed in a dotted border.



If selected for editing, the varying properties of the Field can then be edited in the Report Item Properties Object Browser.



Option	Description
Name	This is what the label is called in the drop down list. It can be edited by typing in a different value, or the default value can be used.
Color	This is the color of the border of the label. It can be changed by clicking on the button and selecting a new color from the pallet that appears.
Background	This is the color of the background of the label. It can be changed by clicking on the button and selecting a new color from the pallet that appears.
Left, Top, Width and Height	These values allow the position and size of the rectangle containing the label to be changed. They can be edited by typing in different values.
Font Name and Font Size	These can be changed by selecting new values from the drop down list.
Alignment	This can be changed from the drop down list. Alternatively, it can be changed using the alignment options on the toolbar.
Data Source	The data source can be changed by clicking on the button. It allows the label selected in the Select Data Source dialogue box to be changed.
Format	This allows the form of the selected field to be changed. For example, Planogram Names could be changed from capitalized to uppercase.
Locked	Checking Locked means this item cannot be moved or deleted.

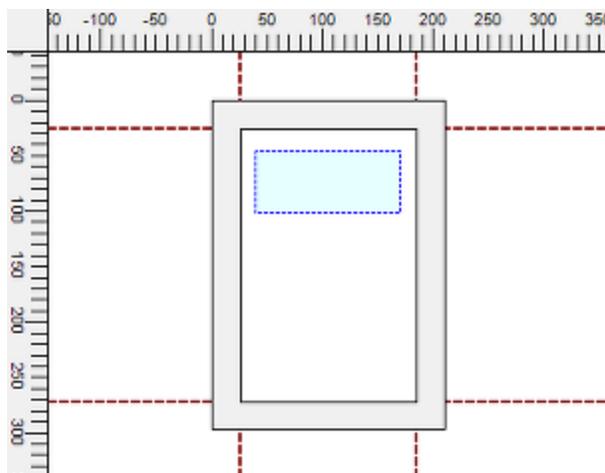
Adding an Image

Note: Images can only be selected from the folders at the location specified by the RPTDSG_IMAGEBASE system variable. This is set in the System Variables dialog box accessed from the **General** menu in the Administration module. Selecting an image from another location will result in a message saying the image cannot be used.

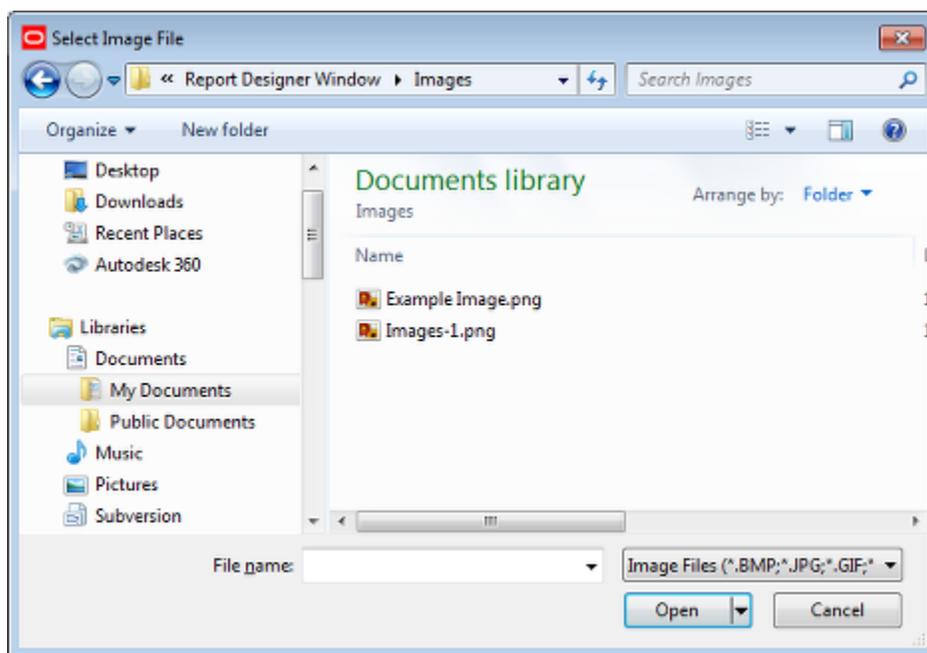
To **Add an Image** to the report, click on the **Image icon** on the insert toolbar.



(Alternatively, select the Image option from the Insert pull down menu).



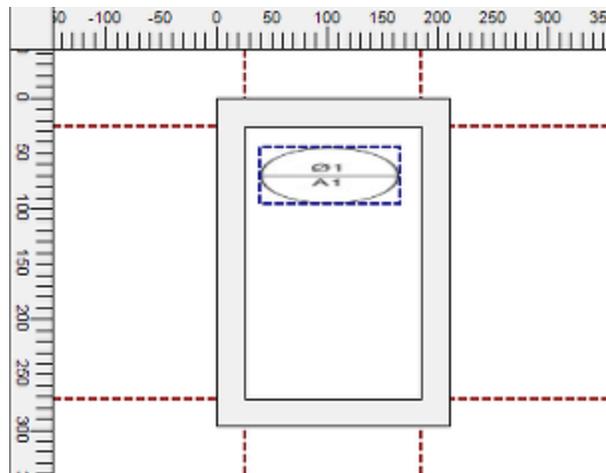
To add an image, move the cursor to the required start position in the Report Layout Designer. Hold down the left mouse button and drag to form a rectangle. When the left hand mouse button is released, the Select Image File dialogue box will appear.



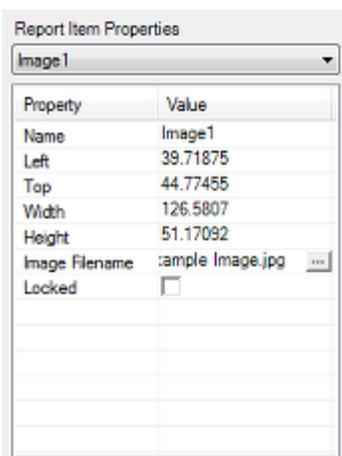
Select the required image and click **Open**.

Note: The image must reside on a network accessible path that can be resolved by the server for the client versions.

On selecting the image, it will be added to the report being designed. If selected for editing (as in the example below) it will be enclosed in a dotted border.



The selected Image will then appear in the report. It will be scaled to fit the bounds but will not maintain its aspect ratio. If selected for editing, the varying properties of the Image can then be edited in the Report Item Properties Object Browser.



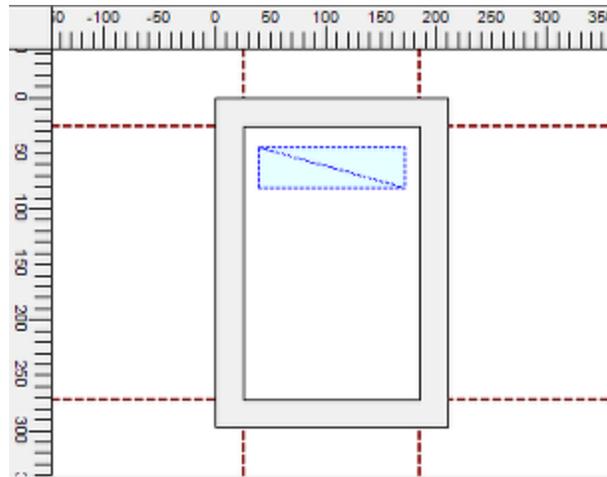
Option	Description
Name	This is what the image is called in the drop down list. It can be edited by typing in a different value, or the default value can be used.
Left, Top, Width and Height	These values allow the position and size of the rectangle containing the image to be changed. They can be edited by typing in different values.
Image Filename	This is the path to and name of the image file in use. Clicking the button to the right allows an alternative image to be selected.
Locked	Checking Locked means this item cannot be moved or deleted.

Adding a Line

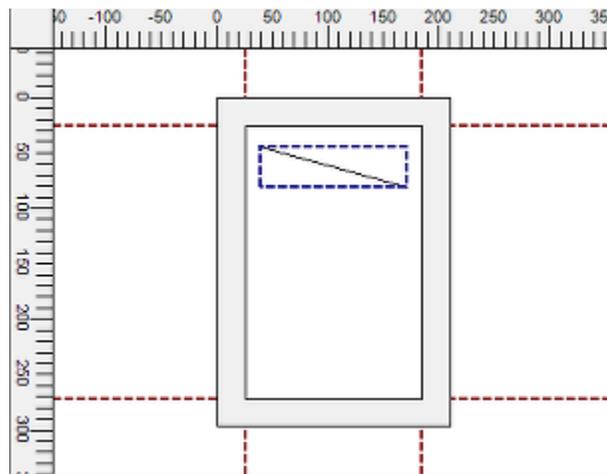
To **Add a Line** to the report, click on the Line icon on the insert toolbar. (Alternatively, select the Line option from the Insert pull down menu).



To add a Line, move the cursor to the required start position in the Report Layout Designer. Hold down the left mouse button and drag to form a rectangle.



When the left hand mouse button is released, a line will be drawn from the first corner to the opposite corner of the rectangle. If selected for editing (as in the example below) it will be enclosed in a dotted border.



(If a horizontal or vertical line is drawn, no rectangle will appear). If selected for editing, the varying properties of the line can then be edited in the Report Item Properties Object Browser.

Property	Value
Name	Line1
Colour	...
Left	39.71875
Top	44.77455
Width	131.9671
Height	36.35828
Thickness	1.00
Locked	<input type="checkbox"/>

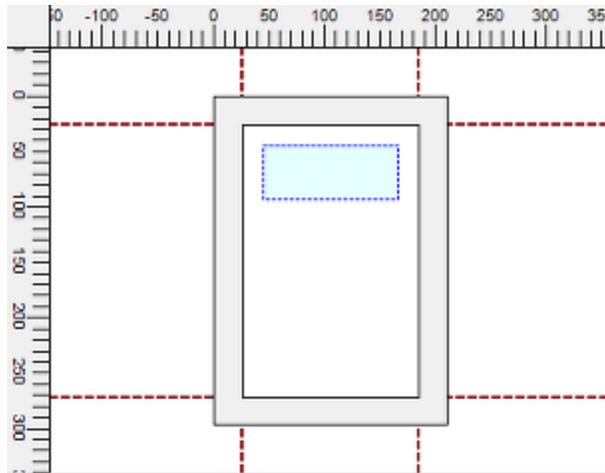
Option	Description
Name	This is what the line is called in the drop down list. It can be edited by typing in a different value, or the default value can be used.
Color	This is the color of the line. It can be changed by clicking on the button and selecting a new color from the pallet that appears.
Left, Top, Width and Height	These values allow the position and size of the line to be changed. They can be edited by typing in different values.
Thickness	This is the thickness of the line as drawn. It can be changed by selecting from the drop down list.
Locked	Checking Locked means this item cannot be moved or deleted.

Adding a Rectangle

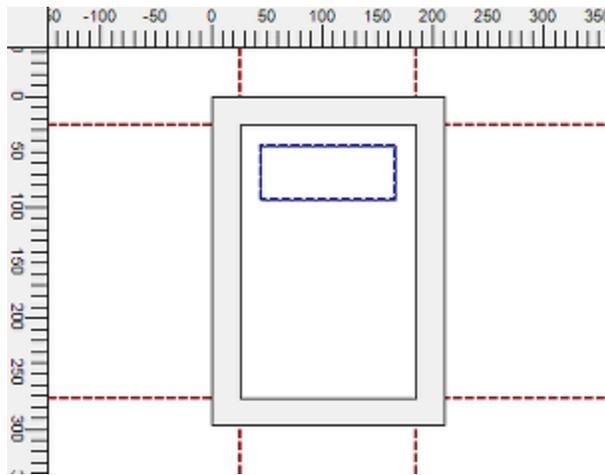
To **Add a Rectangle** to the report, click on the Rectangle icon on the insert toolbar. (Alternatively, select the Rectangle option from the Insert pull down menu).



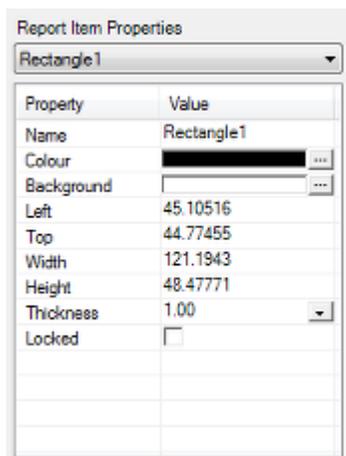
To add a Rectangle, move the cursor to the required start position in the Report Layout Designer. Hold down the left mouse button and drag to form a rectangle.



When the left hand mouse button is released, a rectangle will be drawn. If selected for editing (as in the example below) it will be enclosed in a dotted border.



If selected for editing, the varying properties of the Rectangle can then be edited in the Report Item Properties Object Browser.



Option	Description
Name	This is what the rectangle is called in the drop down list. It can be edited by typing in a different value, or

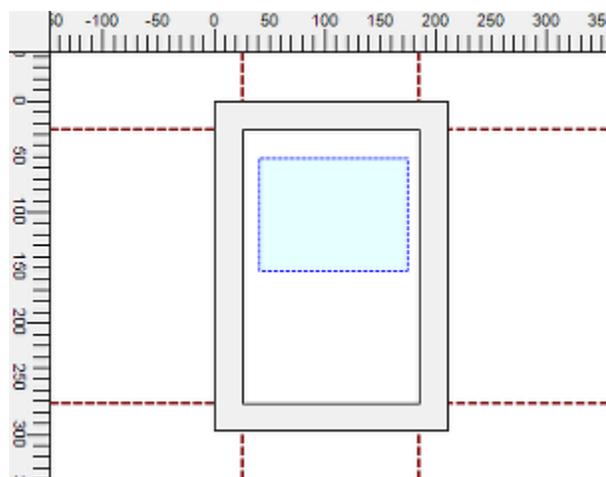
	the default value can be used.
Color	This is the color of the border of the rectangle. It can be changed by clicking on the button and selecting a new color from the pallet that appears.
Background	This is the color of the background of the Rectangle. It can be changed by clicking on the button and selecting a new color from the pallet that appears.
Left, Top, Width and Height	These values allow the position and size of the rectangle containing the label to be changed. They can be edited by typing in different values.
Thickness	This is the thickness of the line bordering the rectangle as drawn. It can be changed by selecting from the drop down list.
Locked	Checking Locked means this item cannot be moved or deleted.

Adding a View

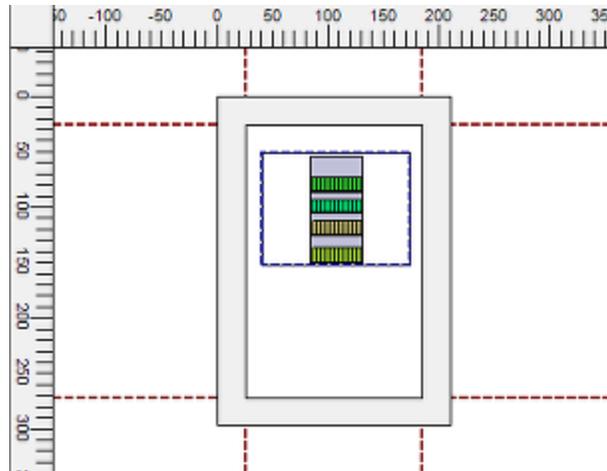
To **Add a View** to the report, click on the View icon on the insert toolbar. (Alternatively, select the View option from the Insert pull down menu).



To add a View, move the cursor to the required start position in the Report Layout Designer. Hold down the left mouse button and drag to form a View.



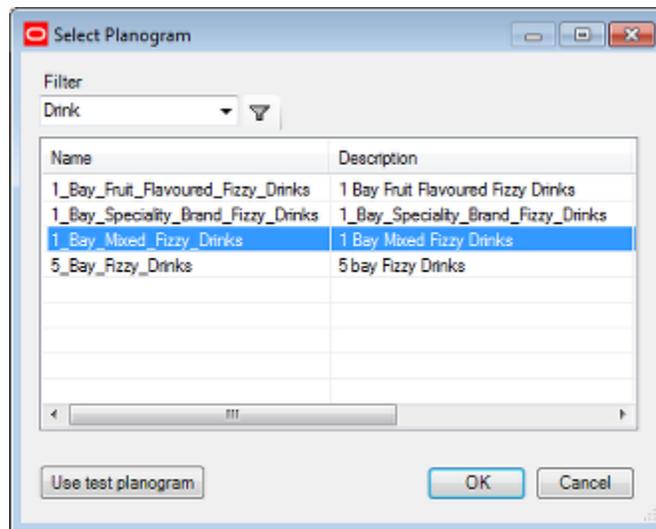
When the left hand mouse button is released, a View will be drawn. If selected for editing (as in the example below) it will be enclosed in a dotted border.



This view contains a dummy image. To review the report design using an actual planogram from the Macro Space Planning database, click on the Select Planogram option in the Standard toolbar.



This will bring up the Select Planogram dialogue box.

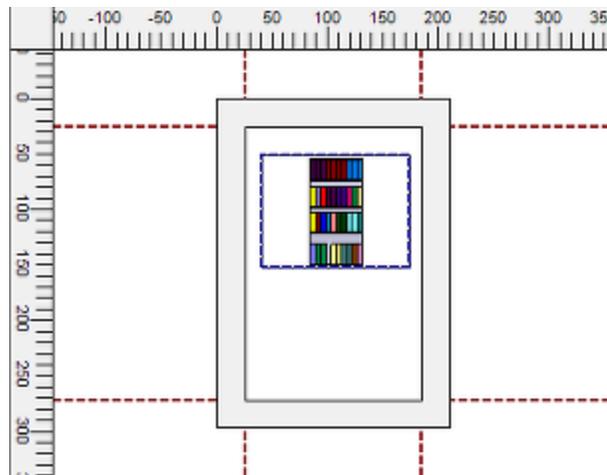


There are two options:

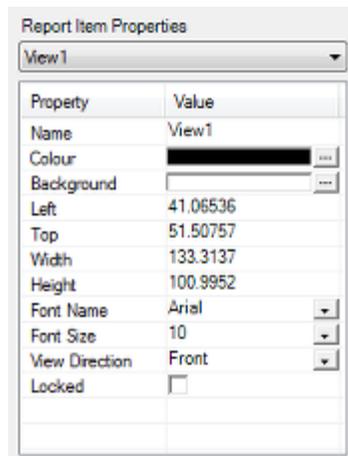
- Select a planogram from the list of a available planograms. - this will print the report using the selected planogram
- Click Use test planogram: this will use a predefined planogram to test the report.

Note: Ensure the filter is set before clicking the **Filter** button. If there is no filter criteria set, then all available planograms will be displayed in the list. If there is a large number of planograms in the database, the software may stop responding.

Set the filter criteria, click on the filter icon, then highlight a planogram in the list of those available. Click **OK** and the planogram will be added to the view.



If selected for editing, the varying properties of the View can then be edited in the Report Item Properties Object Browser.



If selected for editing, the varying properties of the View can then be edited in the Report Item Properties Object Browser.

Option	Description
Name	This is what the view is called in the drop down list. It can be edited by typing in a different value, or the default value can be used.
Color	This is the color of the border of the view. It can be changed by clicking on the button and selecting a new color from the pallet that appears.
Background	This is the color of the background of the view. It can be changed by clicking on the button and selecting a new color from the pallet that appears.
Left, Top, Width and Height	These values allow the position and size of the rectangle containing the view to be changed. They can be edited by typing in different values.
Font Name and Font Size	These can be changed by selecting new values from the drop down list.
View Direction	The view direction is the direction the diagram of the planogram is to be viewed fro. This can be changed by means of the drop down list.
Locked	Checking Locked means this item cannot be moved or deleted.

Controlling What Appears in the View

View Directions

The direction the planogram is viewed from can be modified by using the options in the view menu.

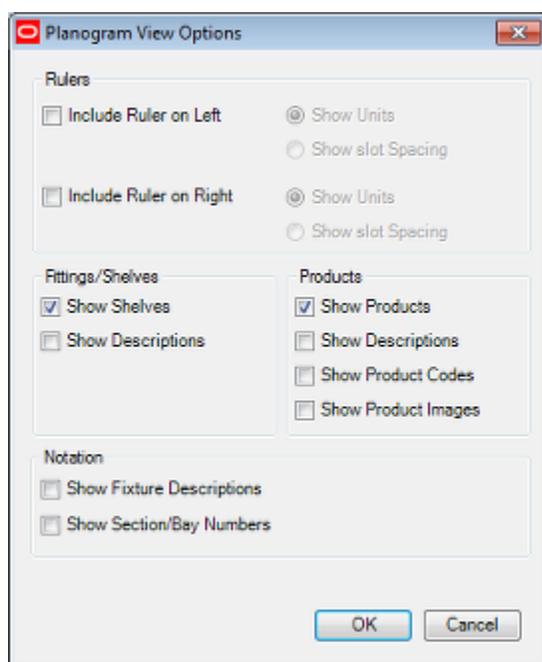


View Options

Precisely what is shown in the View itself is controlled in the **Planogram View Options** dialog box accessed from the View toolbar.



This gives rise to a range of options.



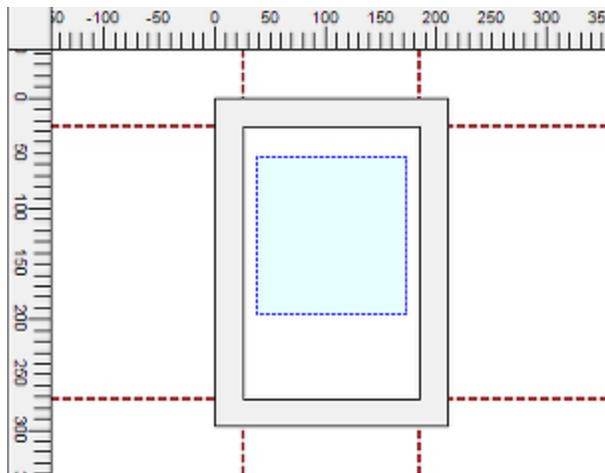
Note: The colors of the Fixtures in the view can be changed by going to Fixture Studio and changing the Print Material for the fixture. The colors of the Products in the view can be changed by going to Product Studio and changing the default color of the product. This will affect all instances of those fixtures or products. (See Fixture Studio and Product Studio help files for more information).

Adding a Table

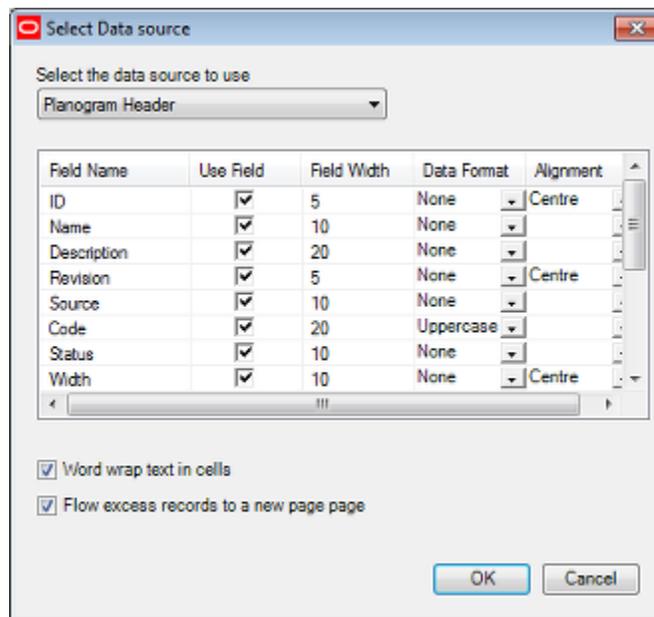
To Add a Table to the report, click on the Table icon on the insert toolbar. (Alternatively, select the Table option from the Insert pull down menu).



To add a Table, move the cursor to the required start position in the Report Layout Designer. Hold down the left mouse button and drag to form a rectangle.



When the left hand mouse button is released, the Select Data Source dialogue box will appear. This allows the table to be customized.



Option	Description
--------	-------------

Field Name	This cannot be altered.
------------	-------------------------

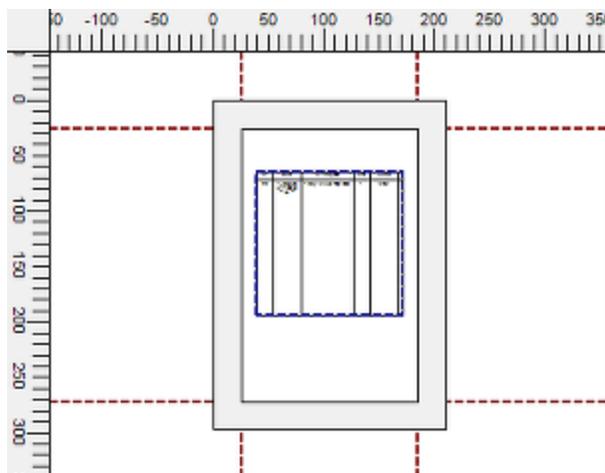
Use Field	If the Use Field check box is ticked, the data will be included in the table.
-----------	--

Field Width	Field Width can be changed by typing in an alternative value.
-------------	---

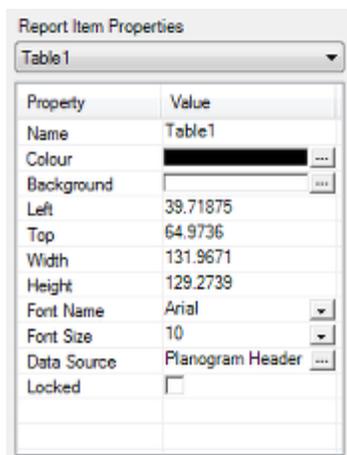
Date Format	This is the form the date is presented in. It can be changed to alternative forms by means of the drop down list.
-------------	---

Data Alignment	This determines whether data is aligned left, centre or right in the cell it is displayed in. It can be changed to alternative alignments by means of the drop down list.
----------------	---

When the **OK** button is clicked, the table will appear. If selected for editing (as in the example below) it will be enclosed in a dotted border.



The varying properties of the Table can then be edited in the Report Item Properties Object Browser.



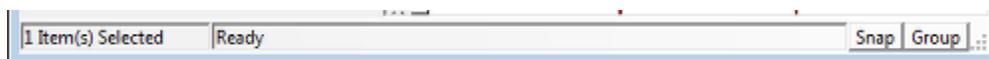
Option	Description
Name	This is what the table is called in the drop down list. It can be edited by typing in a different value, or the default value can be used.
Color	This is the color of the border of the table, together with the color of the lines and the text. It can be changed by clicking on the button and selecting a new color from the pallet that appears.
Background	This is the color of the background of the table. It can be changed by clicking on the button and selecting a new color from the pallet that appears.
Left, Top, Width and Height	These values allow the position and size of the rectangle containing the table to be changed. They can be edited by typing in different values.
Font Name and Font Size	These can be changed by selecting new values from the drop down list.
Data Source	This is the source of data for the table. There are several options including Planogram Header, Planogram Equipment and Planogram Products.
Locked	Checking Locked means this item cannot be moved or deleted.

Other Design Options

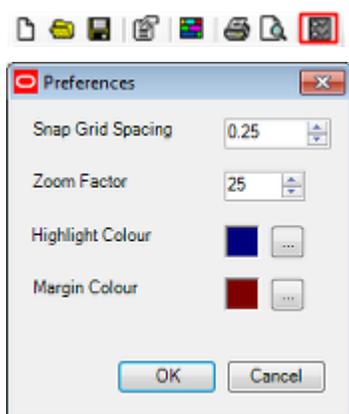
Using Snap to Neatly Align Items

The **Snap Option** allows users to align objects to an invisible grid.

Snap is turned on via the button on the Status bar.



The Snap Grid settings are set using the Preferences option called via the Preferences icon on the standard toolbar.



The Snap Grid spacing can then be set using the spin controls.

Note: To see the effect of the Snap Grid for the first time, it is recommended that the value be set to a fairly large one. Useful values are 25 mm for metric settings and 0.25" for imperial settings. This setting can be changes to a smaller one for laying out actual reports.

When the Snap option is selected objects can only be moved about in the design window to locations determined by the snap grid. When the Snap option is turned off, objects can be moved to any location.

Changing Label and Field Text via Toolbar

The appearance of label and field text can be changed via the options on the text toolbar. These options are grayed out until a label or field is selected to edit.



When a label or field within the report design is selected to edit, they become active.



Text can be justified Left, Center or Right, and Top, Middle or Bottom. It can also be changed to Bold or Italic. The currently elected options are highlighted in the toolbar.

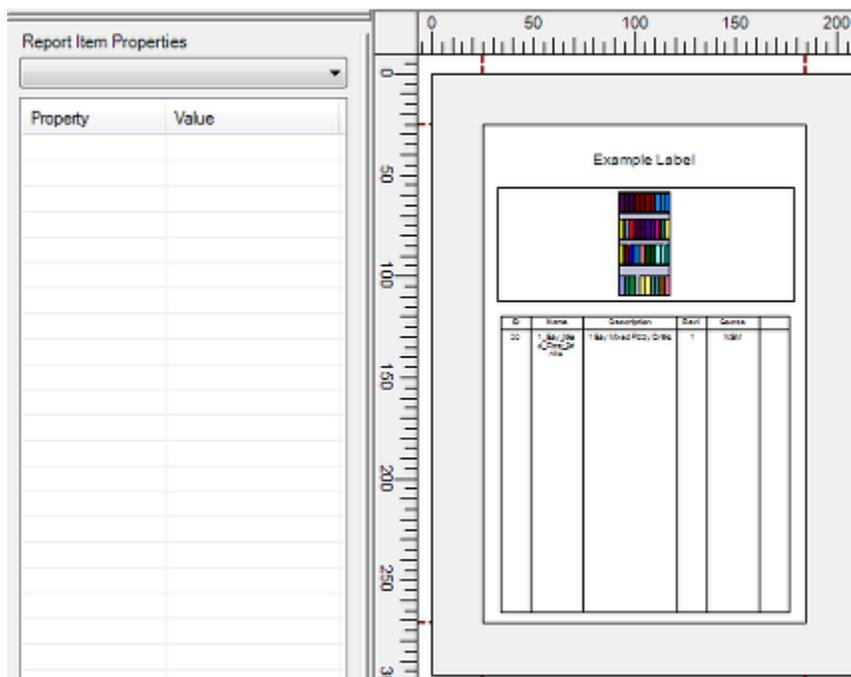
Using the Clipboard

The **Cut**, **Copy** and **Paste** options can be used to move items from one report to another.

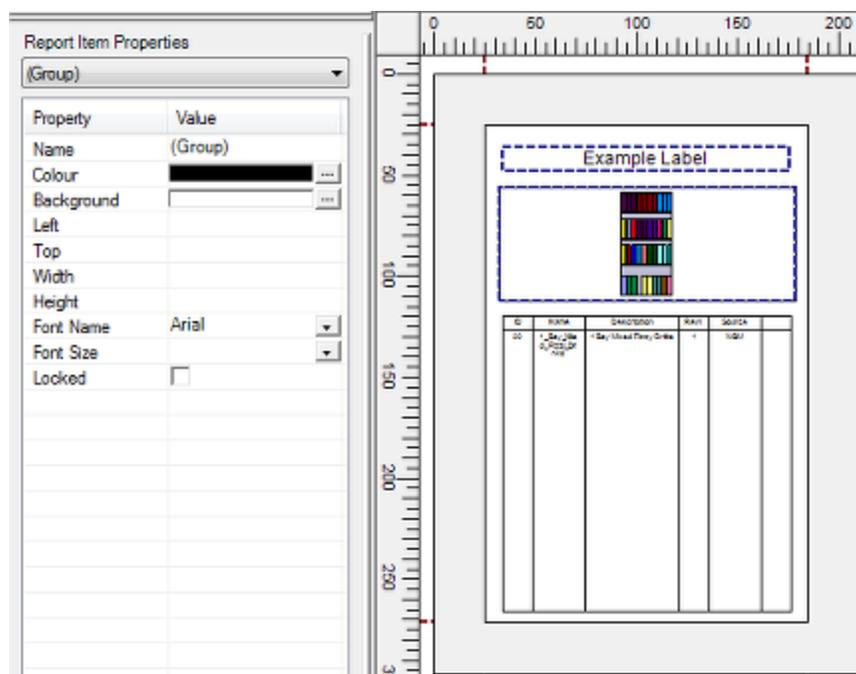
Menu	Toolbar	Description
Cut		Copies the selected items to the clipboard and removes them from the layout. Any items already on the clipboard will be lost.
Copy		Copies the selected items to the clipboard. Any items already on the clipboard will be lost.
Paste		Copies all items on the clipboard to the current layout. The items will be retained on the clipboard for further use. When items are pasted, they will be placed on the layout at the nearest point to the top left corner of the editing area but will retain their positions relative to each other. All the pasted items will be selected so that they can easily be relocated to the correct position on the layout. Any currently selected items will be automatically de-selected. Note that the clipboard is shared by all open layouts.
Delete		Deletes the selected items from the current document, the items will not be placed on the clipboard.
Undo		Undoes the last change in the current layout document. The undo stack is held per document but can only contain a limited number of undoes. The stack is lost when that layout is closed and is cleared when the layout is saved.

Selecting Multiple Items

Multiple Items can be selected by holding down the shift key while left clicking on the required objects. In the example below no items are currently selected.



Two items have now been selected.



Note that the Report Properties Object Browser now shows a Group of items have been selected. Only items that can be collectively edited are available in the display. If they cannot be collectively edited, that section of the display is blank. In the example on the left, the Left, Top, Width and Height values cannot be added while multiple objects are selected.

Using Grouping

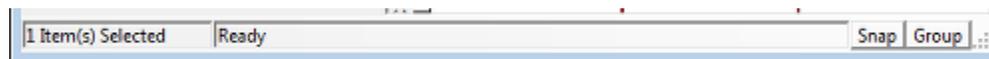
Grouping allows objects in a report to be associated with each other and collectively manipulated. This is done by:

1. **Forming objects into groups**
2. **Whether the groups of objects behave collectively or as single items depends on there the Grouping option is turned On or Off in the status bar.**

An example of using grouping would be to make a set of labels, images and tables into a group, select them and collectively change their position in the report design.

Turning Grouping On or Off

Whether items in a group act singly or together depend on whether the Grouping option is turned on or off. This is done by means of the **Group** button in the status bar.



1. If Grouping is On (button depressed) when one item in a group of objects is selected, all objects in the group will be selected.
2. If Grouping is Off (button raised) clicking on a member of a group will only select that item. All other members of the group will remain unselected.

Grouping Items

To form items into a group:

1. Hold down the shift key and left click on the required objects to select the members of the group.
2. Click the Group option on the Grouping, Locking and Object Behavior toolbar.



3. When Grouping is turned On in the status bar, selecting any single member of the group will select all members.

To Group items, ensure Group is selected on the Status bar. Multi-select the required items then click on the Group icon. Selecting any one of the grouped items will then select the others.

Ungrouping Items

To remove items from a group:

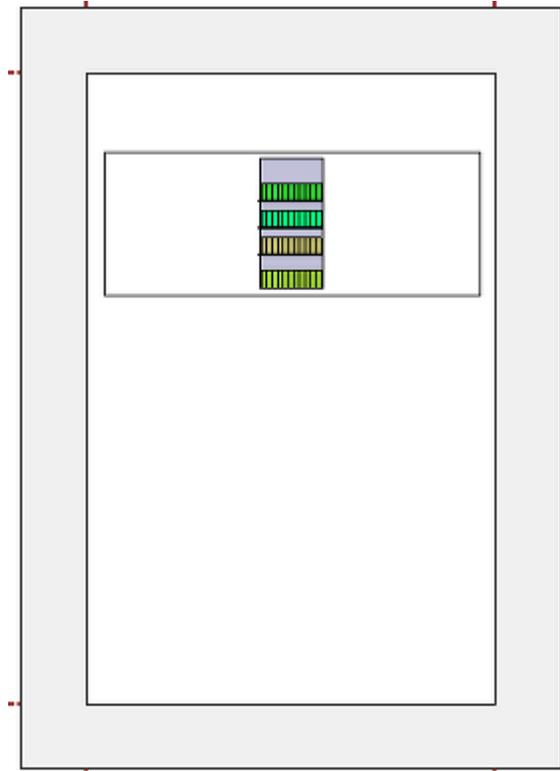
1. Turn Grouping On in the toolbar.
2. Click on an object in the group. All objects will then be selected.
3. Click the Ungroup option on the Grouping, Locking and Object Behavior toolbar.



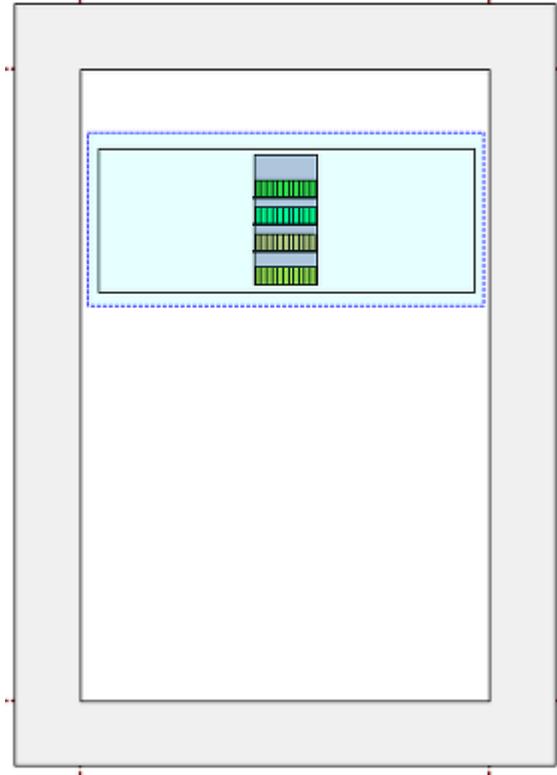
4. The objects will be removed from the group and will behave as individual objects, even with Grouping turned on.

Bring to Front or Send to Back

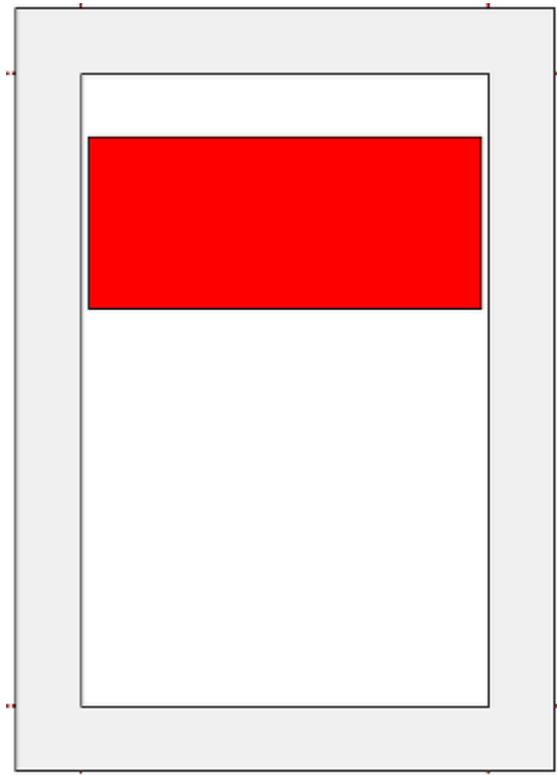
Bring to Front or **Send to Back** can be used to change the order of objects. This is often required because objects are displayed in the order they are drawn. As an example, suppose it is desired to give a view a red border.



A rectangle can be drawn using the **Rectangle** option on the **Insert Options** toolbar.



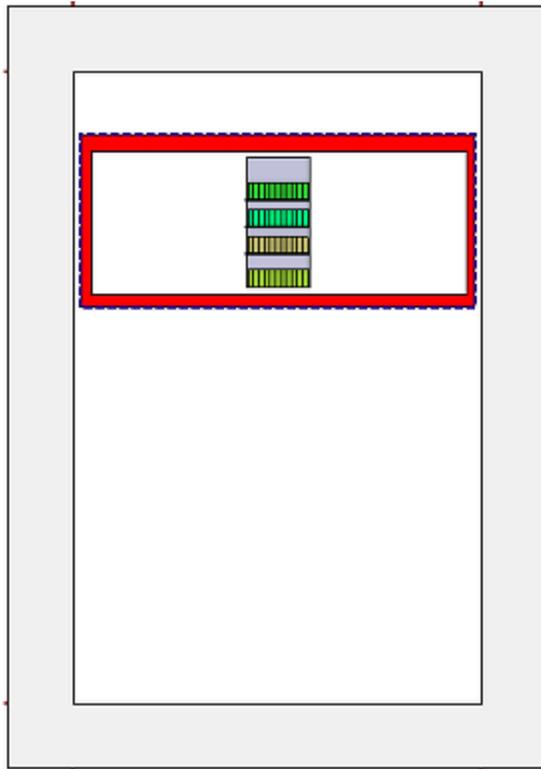
However as soon as this is colored red, it obscures the view.



The rectangle can be selected and **Send to Back** selected on the Grouping, Locking and Object Behavior toolbar.



The rectangle is then sent behind the View, giving the required effect of a red border.



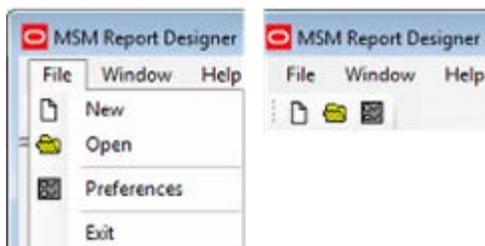
The process can be reversed by using the **Bring to Front** command.



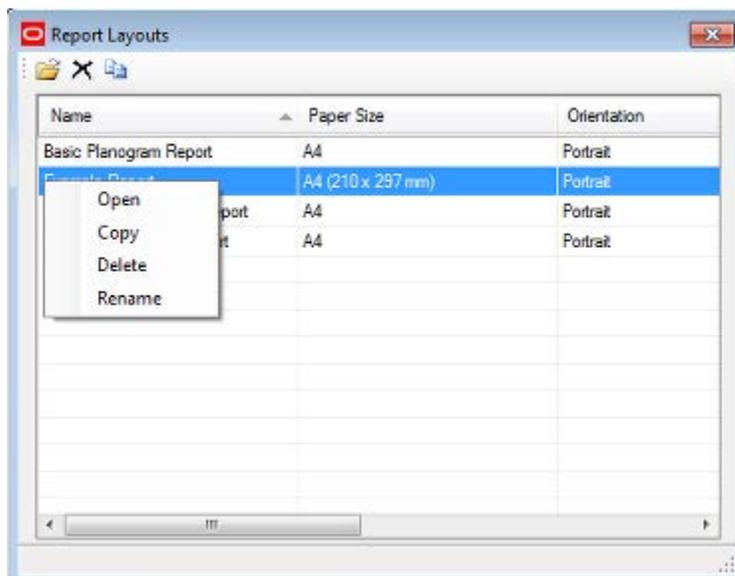
Opening an Existing Report Template

Opening an Existing Report Template

To open an existing report design template click on the **Open** option in the File pull down or in the toolbar



This will bring up the Report Layouts dialogue box.

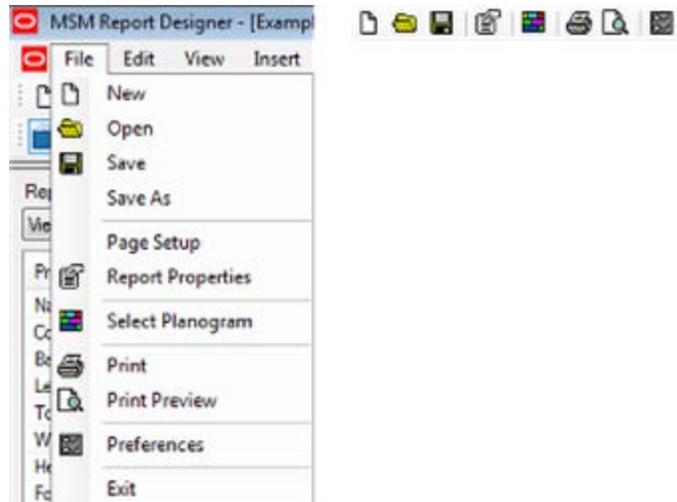


Select a report design template and click on OK to open it. Alternatively, highlight it and use the right click menu. The report design template can then be edited, or used to product reports.

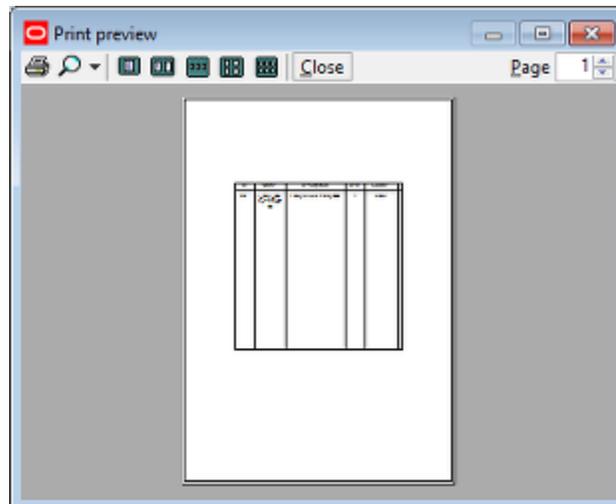
Printing the Report

Print Preview

Print Preview can be selected from the File pull down menu or from the standard toolbar.



This will bring up the Print Preview dialogue box.



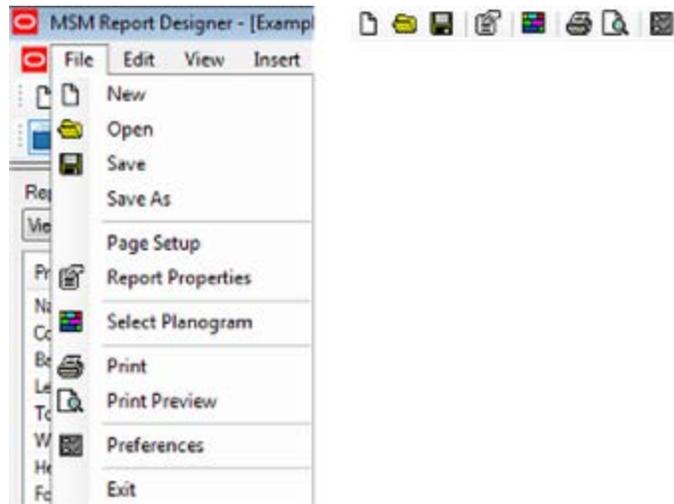
The icons at the top allow the user to print, zoom in or zoom out, or see multiple pages.

Note: The print preview does not print information for a specific planogram - it just allows the user to confirm that the format of the printed report is correct. Using the print button from the print preview will send the current preview to the default printer. To print a planogram specific report, use the print option.

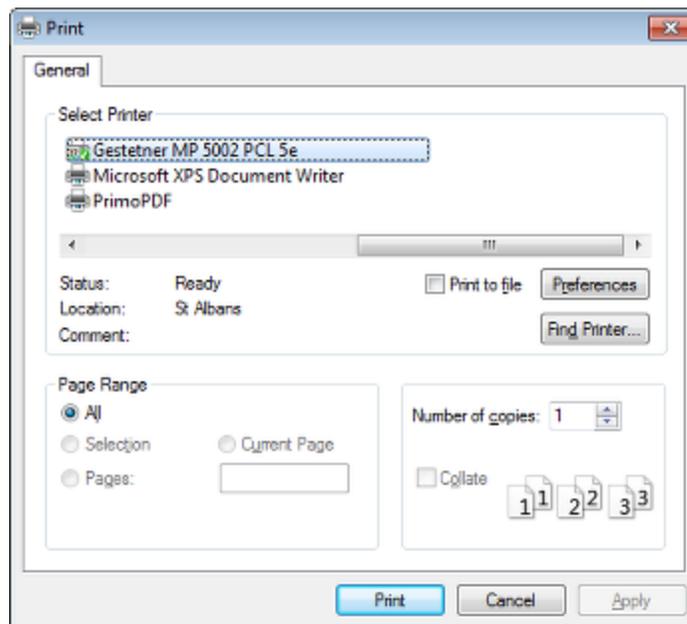
Printing

Printing can be initiated from the Print options on the on the File pull down menu (or the toolbar) once a Report Design Template is open.

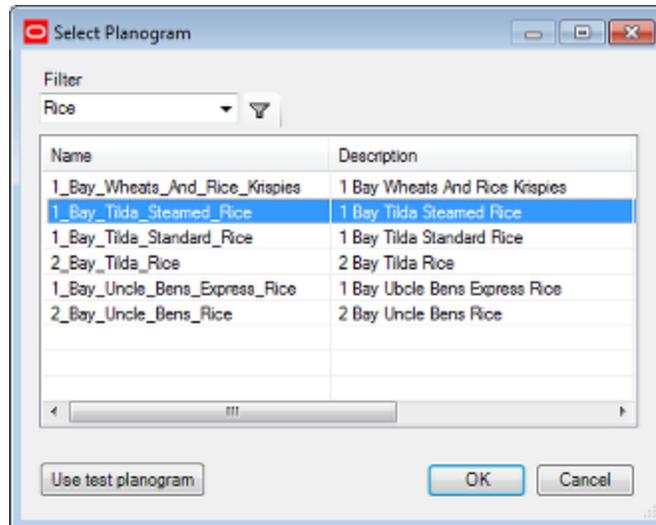
(Print Preview only allows test printing of a generic report. Reports on specific planograms must be initiated through the print option).



This will bring up the Print dialogue box.



The Page Range option will be disabled, as will the Collate option. However, the user will be able to select the printer and set its preferences, as well as being able to set the number of copies that are printed. When the options have been set, click **OK** to print. This will bring up the Select Planogram dialogue box.



Select the required planogram (using the filter to reduce the number of planograms displayed). Click **OK**. The report on the selected planogram will then print.