

Oracle® Retail In-Store Space Collaboration
Mobile User Guide
Release 14.1

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Oracle Retail In-Store Space Collaboration, Mobile User Guide, Release 14.1

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Preface

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

Audience

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

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Related Documents

For more information, see the following documents:

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

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- 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.

Improved Process for Oracle Retail Documentation Corrections

To more quickly address critical corrections to Oracle Retail documentation content, Oracle Retail documentation may be republished whenever a critical correction is needed. For critical corrections, the republication of an Oracle Retail document may at times **not** be attached to a numbered software release; instead, the Oracle Retail document will simply be replaced on the Oracle Technology Network Web site, or, in the case of Data Models, to the applicable My Oracle Support Documentation container where they reside.

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

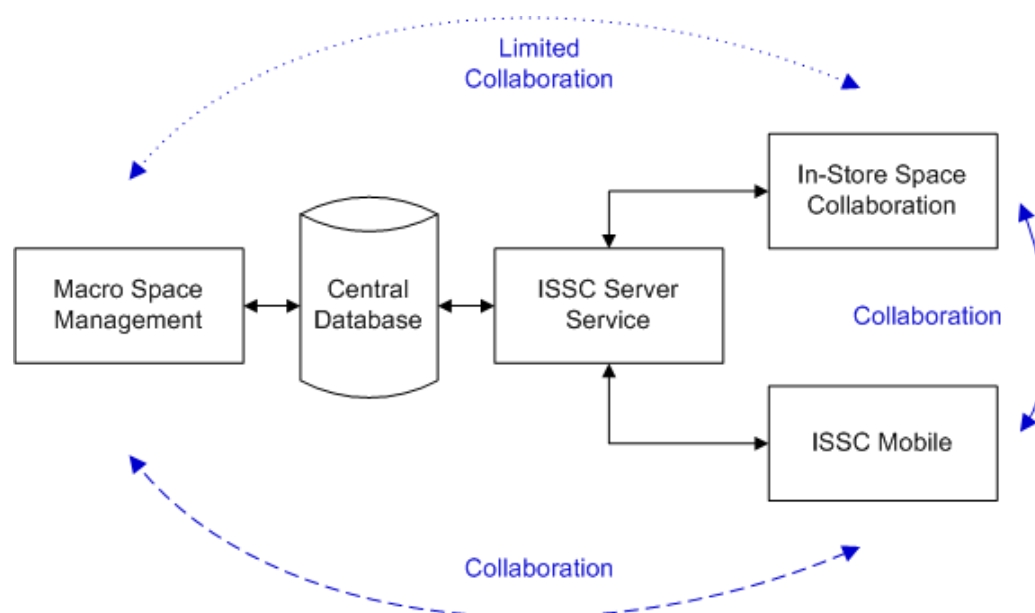
It is used to display examples of code

ISSC Mobile

ISSC Mobile Overview

Description of ISSC Mobile

ISSC Mobile is an extension of In-Store Space Collaboration (ISSC). The two applications are part of a larger suite called Macro Space Planning. ISSC Mobile allows a user to see the arrangement of zones, fixtures and merchandise in a specific store. ISSC Mobile can run on specified mobile devices such as tablets and mobile phones that can establish a WiFi connection to the server containing information on the store. The entire suite can be visualized as follows:



- **Macro Space Management**
Macro Space Management (MSM) is an application typically used at a retailer's headquarters for detailed store planning.
- **In-Store Space Collaboration**
In-Store Space Collaboration (ISSC) is a portable application with more restricted store planning capabilities. It might be used by a district manager reviewing the storey they are responsible for. Or it might be used by a store manager looking at the detail of what is going on in the store they are responsible for.
- **ISSC Mobile**
ISSC Mobile allows someone - typically a store associate - to rapidly identify where changes have occurred within and to exchange information with other users in any of the applications.
- **Central Database**
All the applications use a central database. MSM and ISSC read and write to that database. ISSC Mobile largely reads information - the only information it can write back is notes.

- **ISSC Server Service**

The ISSC Server service is the application server for ISSC. It communicates with the clients and connects to the database. ISSC Mobile will be configured to connect to the ISSC Server.

- **Collaboration**

MSM, ISSC and ISSC Mobile can all communicate with each other via notes. This ability is strongest between ISSC and ISSC mobile. It is at its most limited between MSM and ISSC.

Note: Strictly speaking ISSC mobile is an extension of ISSC. ISSC, ISSC Mobile and the ISSC Server Service could therefore be considered to be a single application.

Connecting to the Central Macro Space Planning Database

Before ISSC Mobile can be used on your mobile device, the following must be carried out:

- The ISSC Server Service is installed on a remote server. It allows ISSC Mobile to communicate with the Macro Space Planning database. As it is an application server it imposes business logic on what actions a user can carry out.
- The ISSC Mobile application has been rolled out to your mobile device.
- Access privileges to ISSC mobile must be granted for your log in. These privileges are assigned in the Administration Module of Macro Space Management and are not normally accessible to ISSC Mobile users.
- Access rights must be defined for a single store. This store must only have a single floor and that floor must contain a floor plan at Current status. If these conditions are not met, an error message will be displayed at the log in to ISSC Mobile.

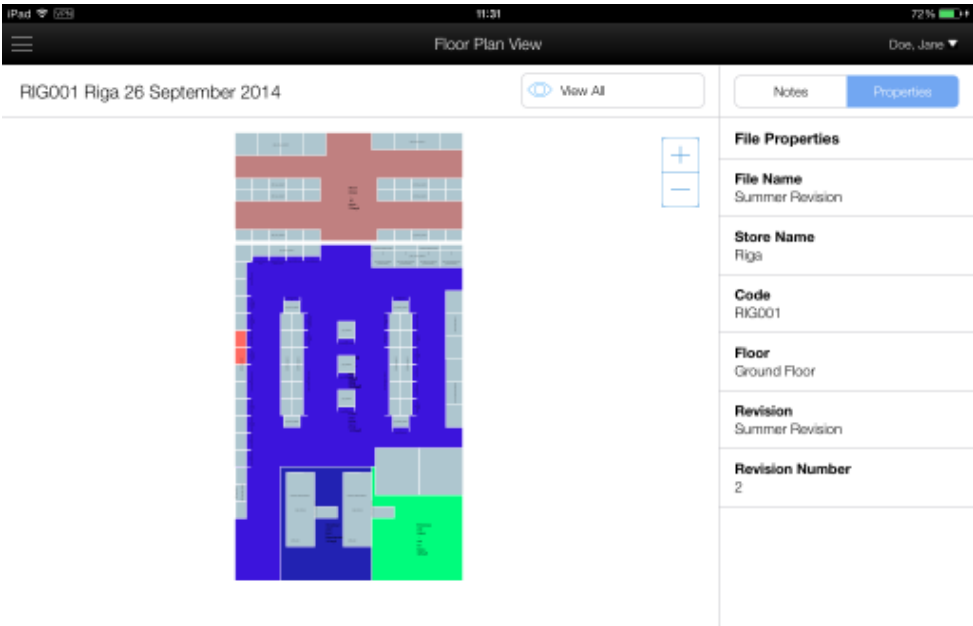
Note: Refer to the *Macro Space Planning Installation Guide* for information on how to configure ISSC Server and the mobile device.

ISSC Mobile Layouts

The layout of the screen depends on what device ISSC Mobile has been installed on. It also depends on the orientation of the device. There are two basic options: for tablets and for mobile phones. Because of the larger size and higher resolution of a tablet device the screen can generally display more information. The same information is available on mobile phones but may have to be accessed via menus.

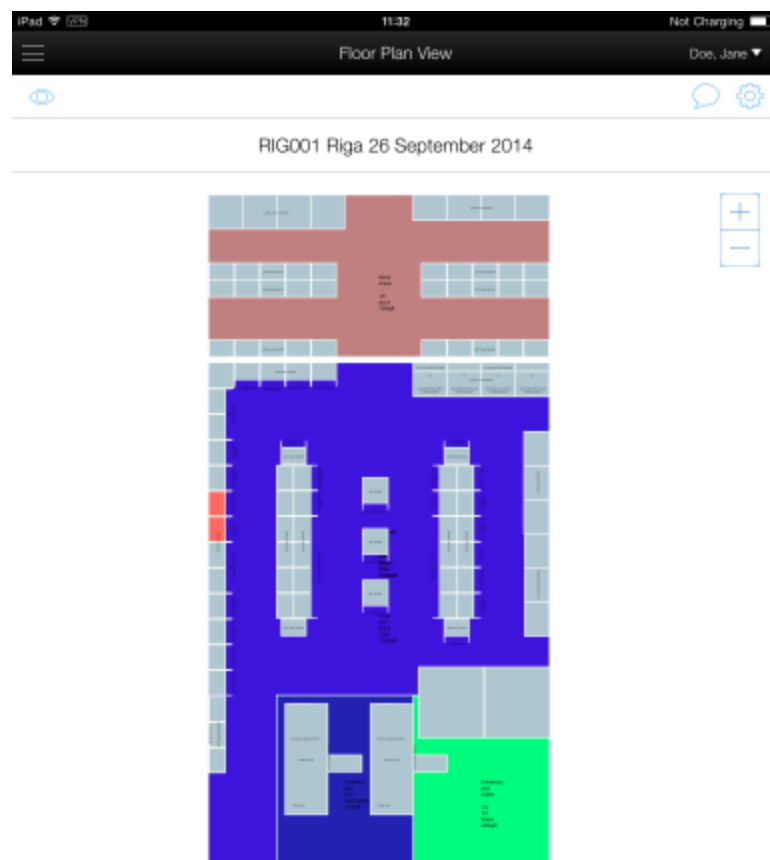
Tablet Layout

Tablet Layout shows either a floor plan or a planogram design. It will also contain information on the floor plan or planogram to the right of the screen.



Mobile Phone Layout

Smart Phone View shows the same information as tablet view. However, because of the more restricted screen size, the properties and views controls have been moved to a separate strip at the top of the screen. Using these control results in the information appearing in an additional screen.



Configuring ISSC Mobile

This section is primarily for administrators. ISSC mobile users only need read it if they are interested in what can be configured. For full details see the section on configuring ISSC mobile in the *Oracle Retail Macro Space Management Administration User Guide*.

Configuring Access Privileges for ISSC Mobile

Configuring access privileges for ISSC mobile is done in the **Administration module** of MSM. A separate login should be created for each user. There are two reasons for this:

- Only one user can log in at any one time for a specific user name. If a second person logs in using the same user name, the first user will be logged out.
- Many actions are logged in the database against user names. Having a separate log in for each user enables actions to be traced accurately.

Setting Automatic Time Out

Automatic time out is a security feature that automatically logs the user out if the device is left inactive for a specified period. This is controlled by a system variable set in the **Administration module** of MSM. By default this is set to 1200 seconds (20 minutes).

Configuring Properties

Users can display the properties of specified objects. These objects are zones, fixtures, parent fixtures for planograms, planogram shelves and planogram products. ISSC Mobile comes with default properties for these objects. If required, these properties can be configured to a retailer's specific requirements in the **Administration module** of MSM.

Annotation

The annotation in both Floor Plan View and Planogram View can be customized to suit an individual retailer's requirements. Again, this is done in the **Administration module** of MSM.

KPIs

Key Performance Indicators are used to indicate changes to fixtures in Floor Plan View and to shelves and products in Planogram View. The application comes with default KPI's for this purpose. These KPI's can be configured to suit specific retailer requirements in the **Administration module** of MSM.

Logging into ISSC Mobile

In order to log into ISSC mobile, a user must:

- Have a unique User Name and Password assigned in Macro Space Management's Administration module.
- Be assigned to a User Group that has ISSC Mobile privileges
- The User Group must have access rights to one store and one store only.
- That store must only contain one floor - the current functionality does not cater to stores with multiple floors.
- The floor must have a floor plan at Current status. (Statuses indicate where a floor plan is in its business life cycle).
- ISSC mobile must also have a connection to the Macro Space Planning database.

It is important that each user has a unique login.

- Only one user can log in at any one time for a specific user name. If a second person logs in using the same user name, the first user will be logged out.
- Many actions are logged in the database against usernames. Having a separate log in for each user enables actions to be traced accurately.

Starting the Application

To start the application, select the ISSC Mobile icon on your device.



This will bring up the sign in screen. Enter the username and password you have been provided with.

Example

••••••••

Sign In

New users may find their password has been set to expire as a security measure. This will force an immediate password change.

New Password

Confirm Password

Change Password

Your password has expired. Please type a replacement.

The new password can be configured by typing in two identical passwords and tapping Change Password. This password must meet a number of criteria. These are set in the Security Options dialog box of the Administration module of MSM and will vary to meet the individual security policies of each retailer. If the modified password does not meet these criteria, a warning message will result. Users will need to select a password that meets these criteria.

••••••

••••••

Change Password

This password does not meet the security options.
The following rules apply to the passwords:

- Between 7 and 30 characters
- A minimum of 1 upper case characters
- A minimum of 1 lower case characters
- A minimum of 1 numeric characters
- Cannot match the last 4 passwords
- Cannot match passwords created in the last 7 days
- Cannot contain excluded password text

Changing Password

The user can change their password at any time by selecting the **Change Password** option from the drop down list on the right of the screen.

Not Charging 🔌

Doe, Jane ▶

Notes Change Password

Fixture Pro Sign out

Bay
P-16

This will bring up a screen allowing the user to change their password.

After entering the required details, tap **Done**.

Error Messages

If the access to ISSC Mobile has not been correctly configured for a specific user, an error message will result on log in.

Cannot open a floor plan. Permissions granted to more than one store.

These error messages are as follows:

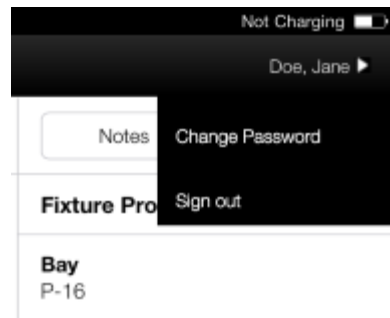
Message	Possible reason
Unable to open ISSC Mobile.	The user does not have the appropriate permissions to log into ISSC mobile.
Incorrect Username and Password Combination. Please try again.	The user name is invalid, the password is invalid or both are invalid.
Cannot open a floor plan. Permissions granted to more than one store.	The User Group the user belongs to has been given permission for more than one store.
Cannot open a floor plan. Insufficient store privileges.	The User Group the user belongs to does not have access rights to the store or to the status the store is at.
Cannot open a floor plan. The store has no floors.	The store the user has been given access to has no associated floor in the database.
Cannot open a floor plan. The store has more than one floor.	The store the user has been given access to has more than one floor in the database. ISSC Mobile is only designed for stores with a single floor.
No Current file available to view.	The store the user has privileges for does not have a floor plan at current status. No floor plan can be displayed.
Cannot open a floor plan. The store has more than one current file.	The application selects a floor plan at Current status to display. If there are multiple floor plans at current status it cannot select the correct one to display.

Message	Possible reason
Cannot open a floor plan. Floor plan does not have any zones.	Zones must be drawn in the floor plan in MSM's Planner module before the floor plan will display in ISSC Mobile.

Logging out

Logging Out Manually

The user can log out of ISSC mobile by selecting the **Logout** option from the drop down list on the right of the screen.



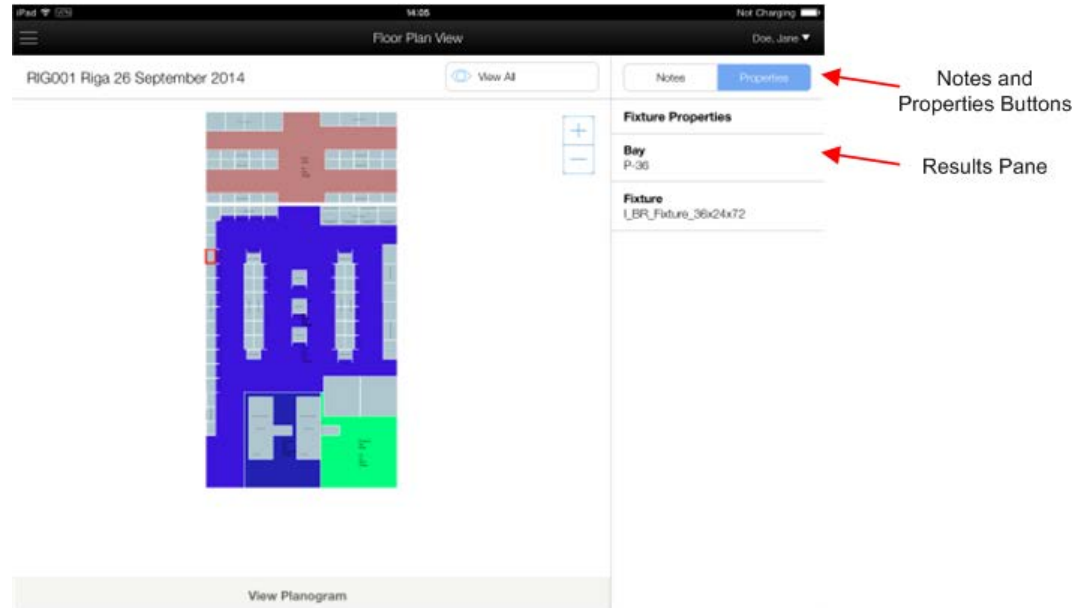
Click **OK** on the confirmatory dialog to exit the application.

Time Out

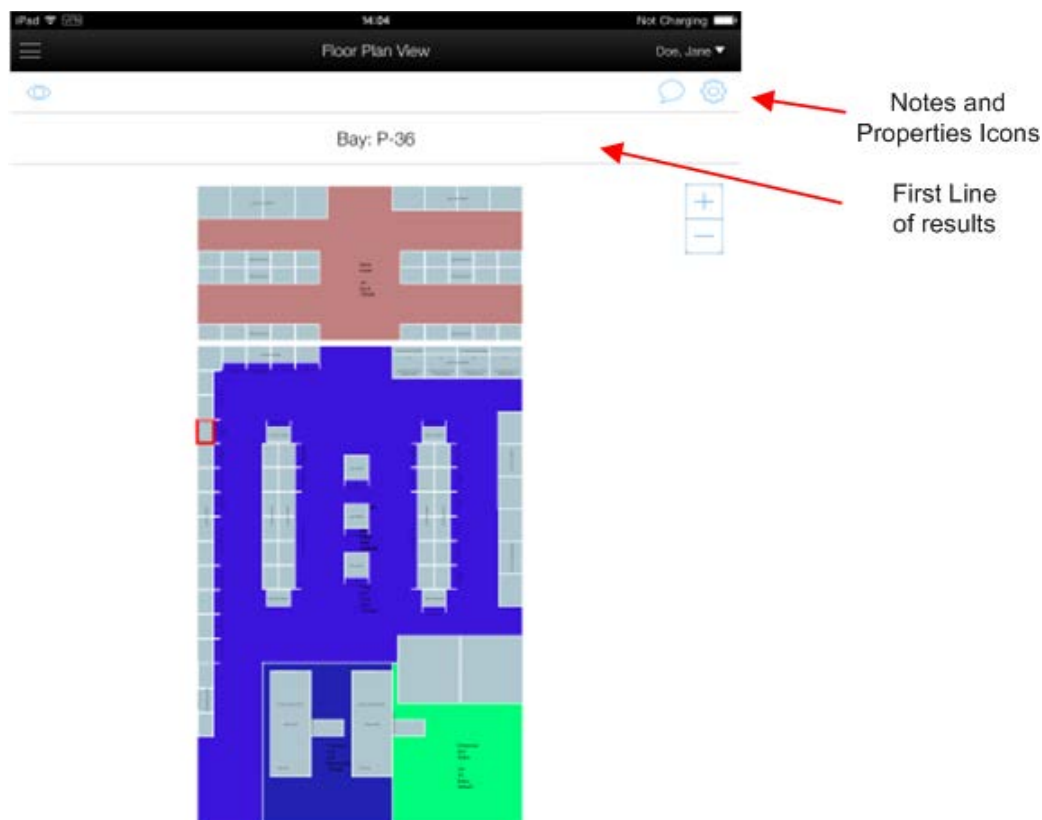
Users will be automatically logged out of ISSC mobile after a specified period of inactivity. This time period is specified by a system variable in the MSM Administration module and cannot be changed by ISSC Mobile users.

Tablet and Mobile Phone Layout Differences

The main difference between a tablet and a mobile phone version of ISSC Mobile is in the controls. There is less space on a mobile phone screen so things are arranged a little differently.

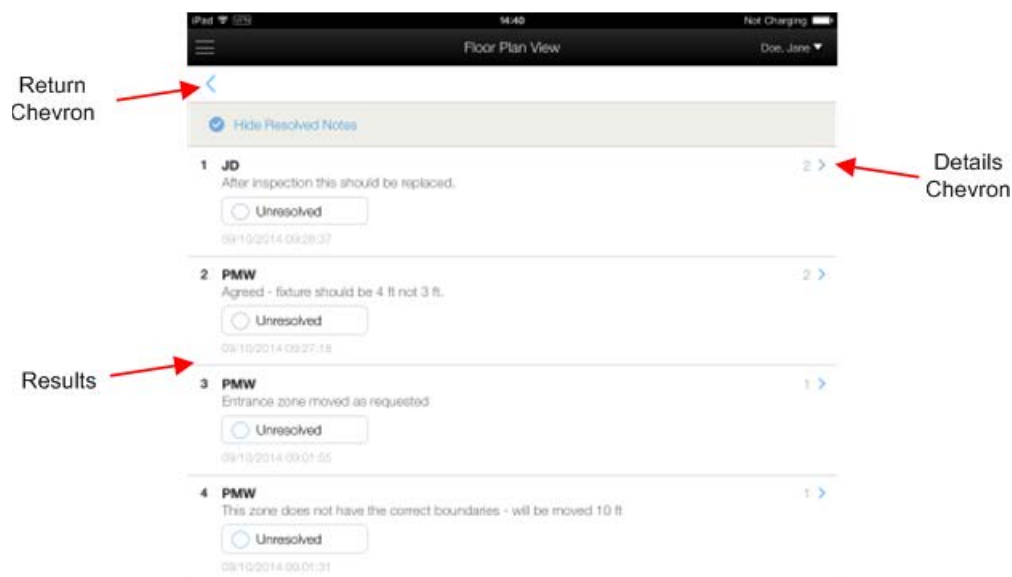


For ISSC Mobile on a tablet, there are **Notes** and **Properties** buttons. There is a results pane under those buttons to show the pertinent information.



View Planogram

For ISSC Mobile on a smart phone, there are Notes and Properties Icons instead of buttons. Because of the lack of space, only the first line of results is shown at the top of the screen. To see more of the results tap the note or Properties icon. This will bring up a second screen.



This has the same information as in the results pane of ISSC mobile on a tablet.

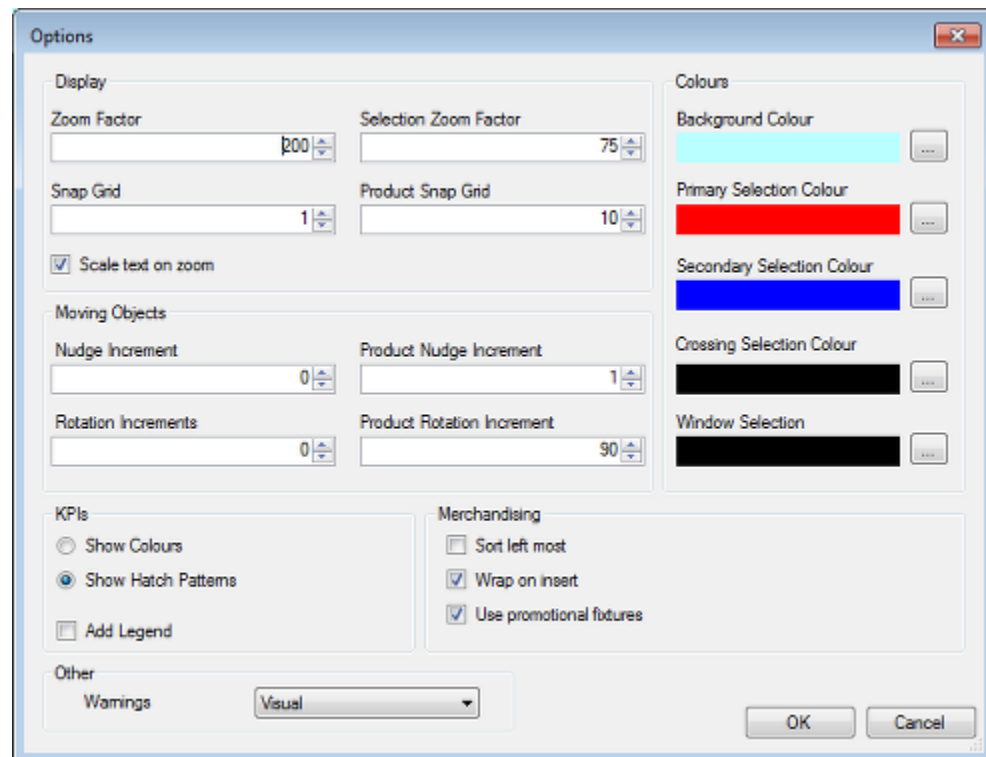
- Tap the Details Chevron to see the details for any item where there is more information.
- Tap the Return Chevron to return to the previous page.

All functionality works in the same way as described for the tablet view.

Customizing the Appearance of ISSC Mobile

ISSC Options Dialog Box

Three user specific settings can be made if an ISSC Mobile user can also log into ISSC and access the **Options dialog box**. This allows a user to set their personal preferences. These will be remembered and used on each successive login to ISSC Mobile.



The three options that can be changed are:

- Background Color: This changes the background color around the floor plans or planogram bays that are being displayed.
- Primary Selection Color: This changes the color of the outline showing selected objects in ISSC mobile.
- Primary Selection Color: This also changes the color of the selection dot used to show which zone has been selected to display properties or where a zone note is positioned.

These settings are user specific and will not affect other users.

Fixture and Product Colors

Fixtures and products color according to the colors selected for KPI. If these colors are modified (using the Color Theme dialog box in MSM's Administration module) the colors chosen should be suitable for visually impaired users.

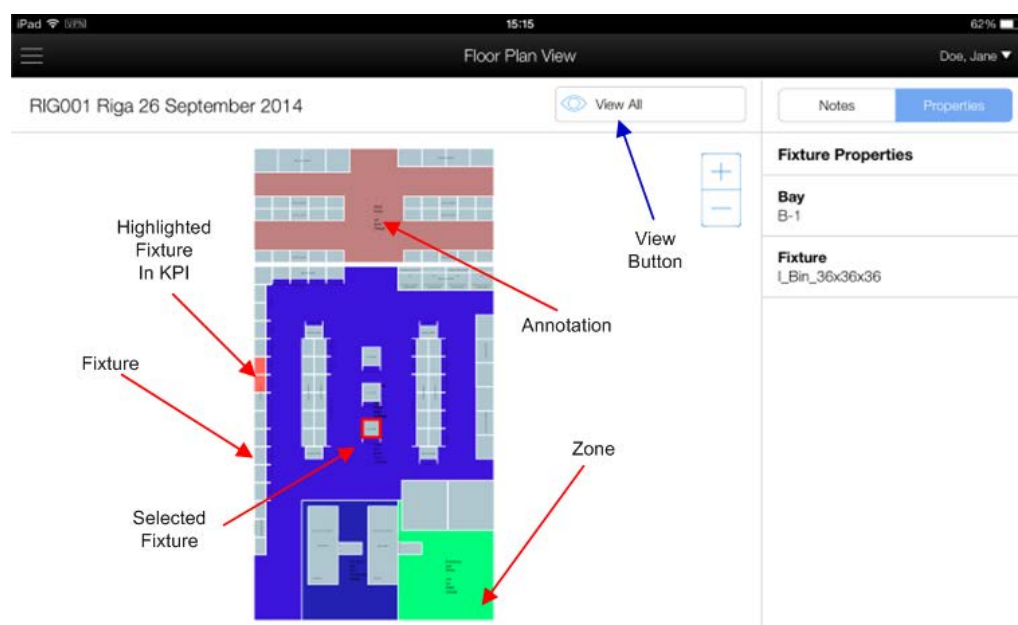
Basic Concepts

This section of help explains some basic concepts that may be of use to ISSC Mobile users not familiar with store planning. It will help you get started.

Floor Plan

Floor plan is sometimes used as another term for store plan. For a supermarket with a single floor the terms are the same - the floor plan is identical to the store plan. Some types of retail outlets have multiple floors - an example would be a department store with a basement, ground and first floor. In this case the store will be described by three separate floor plans.

Note: At present ISSC Mobile can only display stores with one floor.



The floor plan shows five things:

Zones

Zones are the name used in ISSC for the departments in a store. They are color coded so the different zones (department) in a floor plan can be seen. In this example floor plan there are several zones, shown by the different color codes for the floor area. ISSC Mobile only shows two types of zones:

- **Internal Area:** This is the total area used for retail purposes. It will generally include the area in the store used for sales to customers, plus the back room areas such as stock rooms, staff canteens and so on.

- **Department Zone:** These are the major departments in the store. Sub-departments are not shown. So if there is a Clothing department with Men's, Women's and Children's sub-departments, the Clothing zone will be visible in the floor plan; the sub-departments will not.

Fixtures

Fixtures are a name for the different types of equipment in a store. Racking, chiller units and freezers are all types of fixtures. Each type of fixture is represented by a rectangular outline in the floor plan. Even if a fixture is round in real life - like a spinner holding greetings cards - it will still be shown as rectangular in the floor plan.

Selected Fixture

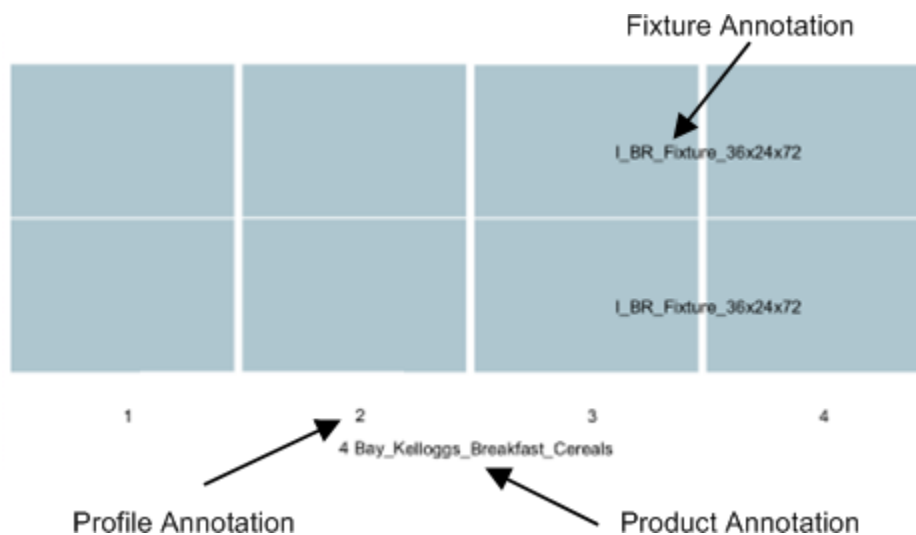
If a fixture has a planogram on it, it can be selected to view the planogram in detail. Only one fixture can be selected at a time by tapping on it. The selected fixture will have a bold outline around it.

Highlighted Fixture in KPI

KPI stands for Key Performance Indicator. Fixtures that have been associated with some sort of change in a specified time period will be highlighted in a different color to fixtures that are not. In the above example two fixtures have been highlighted. The default time period is a week - this value is customizable so a different period may be in use at a retailer.

Annotation

Objects in the floor plan are often annotated with text to show what they are. It is often too small to see when the application is fully zoomed out, but if you zoom in it will be readable. There are several types of annotation. The example below shows the annotation for Floor Plan View:



- **Zone Annotation:** Describes the type of zone (Department). Not shown in the above screenshot.
- **Fixture Annotation:** Describes the type of fixture.
- **Profile Annotation:** For planograms. This number identifies the profile (bay) number for the fixtures a planogram is placed on. In the above example, the four bay planogram has bay 1, 2, 3 and 4.
- **Product Annotation:** this gives the name of the product or planogram on a fixture.

In Planogram View the products in the planogram are annotated.

Note: The annotation can be configured to appear in slightly different ways using system variables in MSM's Administration module. Users may therefore see a slightly different form of annotation to that in this help file.

View Button

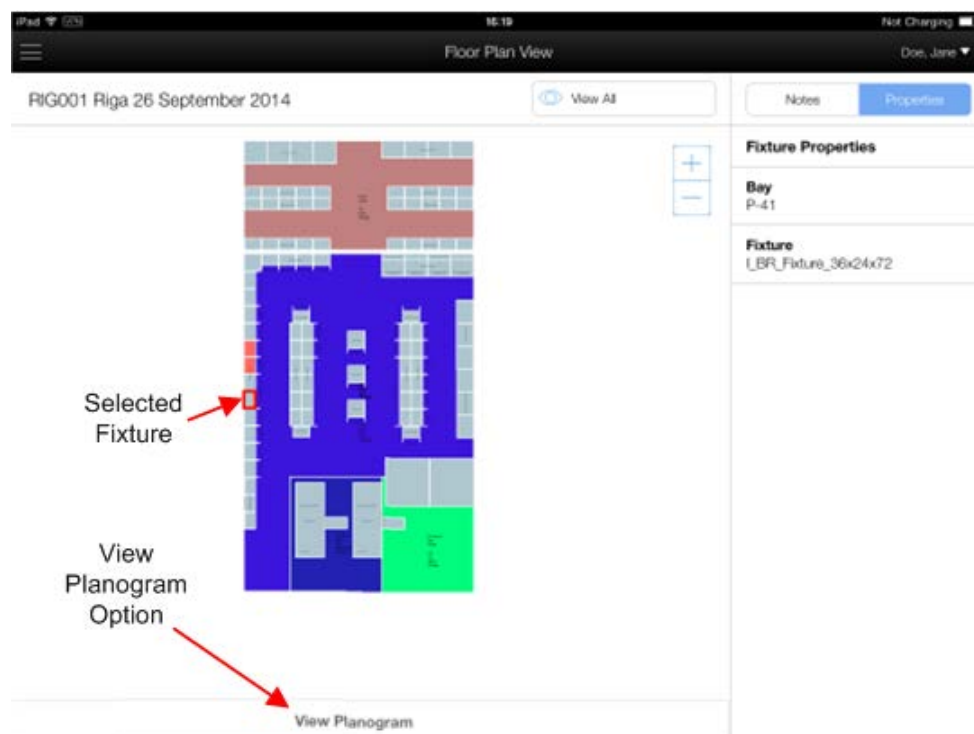
This is at the top of the floor plan. It gives the user the option of deciding what to view. The options are:

- View All - this will show everything in the floor plan.
- View Zones - this will show zones and their annotation with fixtures and their annotation hidden.
- View Fixtures - this will show fixtures and their annotation with zones and their annotation hidden.

Planogram View

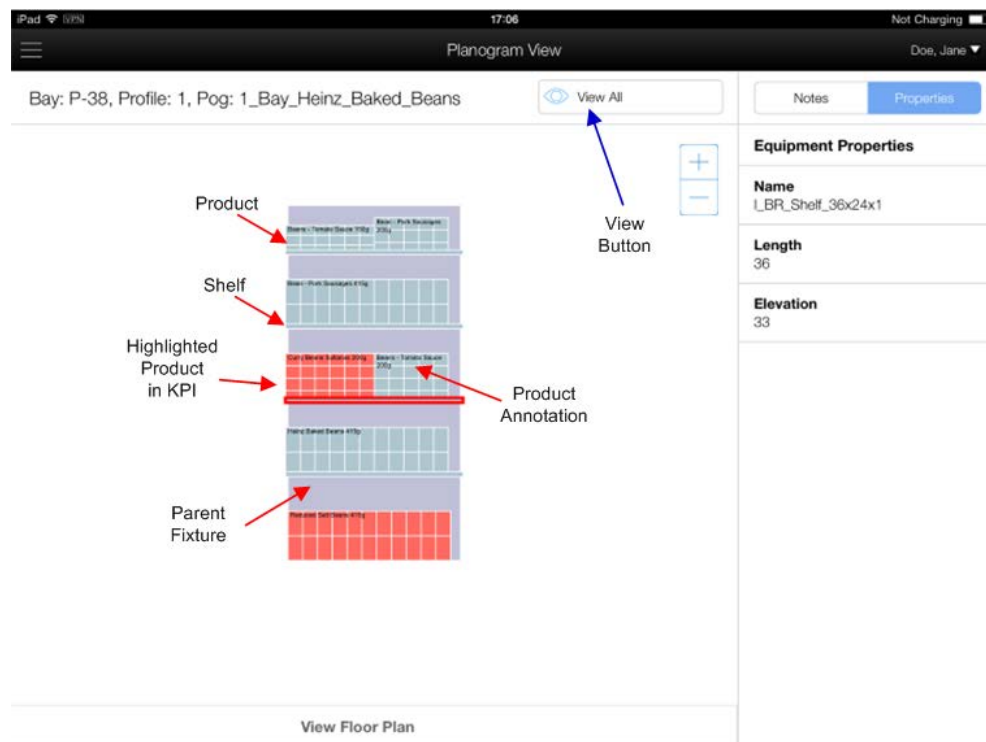
To see a planogram users must swap to planogram view. To do this highlight a fixture containing a planogram and tap the **View Planogram** option at the bottom of the screen.

Note: Planogram view only works for fixtures holding a planogram. If there is only a product on the fixture - for example a washing machine being displayed on a podium - Planogram view will not be operative.



Note: To select the fixture, you must tap inside it. You may have to zoom in to the floor plan to tap accurately enough to do this.

The planogram view will show one bay of a planogram. To see the other bays, or the planogram to the left or right of the selected fixture, swipe to the left or right with a finger.



The planogram view shows five things:

Parent Fixture

This represents the fixture the planogram has been placed on. It can hold products.

Shelf

This is an item of equipment that rests on the parent fixture. It can also hold products.

Products

Products can sit on either the parent fixture or on shelves.

Product Annotation

The type of product can be identified by the annotation. The annotation may be too small to read at some levels of zoom, but users can zoom in as needed.

Highlighted Product in KPI

Products that have been associated with some sort of change in a specified time period (typically a week) will be highlighted in a different color to products that are not. In the above example two products have been highlighted. The time period for highlighting changes is customizable and may vary at a specific retailer.

View Button

This is at the top of the planogram view. It gives the user the option of deciding what to view. The options are:

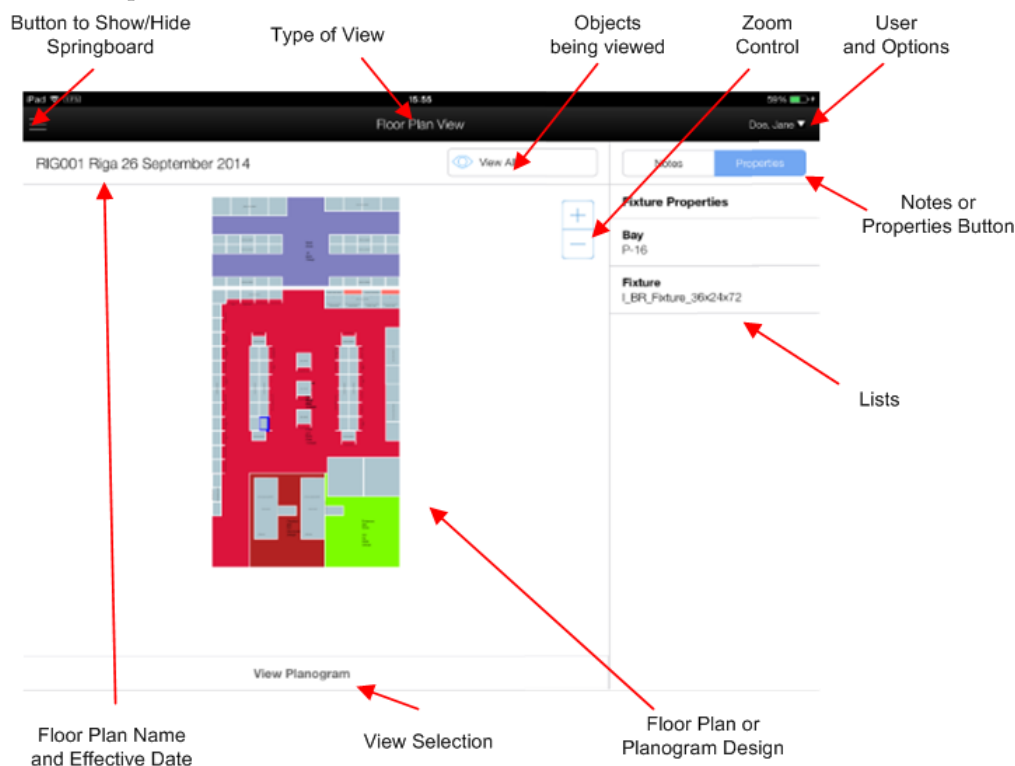
- View All - this will show everything in the planogram view.
- View Products - this will show products and their annotation with shelves hidden.
- View Shelves - this will show shelves and their annotation with products hidden.

Overview of Controls

The controls vary slightly depending on what platform ISSC Mobile is being used on. Tablet screens have more space, so (for example) a number of lines of information are shown in the information bar. With the more restricted space on a smart phone, only the first line is shown, with the rest accessed via a menu option.

Tablet

The main parts of the screen are as follows:



Springboard

The slide out springboard holds a list of the applications that the user can swap to. At present the only option is ISSC Mobile. To see it click on the springboard button.

Type of View

This indicates whether the user is viewing a floor plan or a planogram.

Objects Being Viewed

This allows the user to select what they want to view.

- For a floor plan, the options are view all, view the fixtures or view the zones.
- For a planogram the options are to view all, view the products or view the shelves.

The current selected option is displayed in the control.

Zoom Control

Tapping the zoom control allows users to zoom in or out. A similar effect can be achieved with **pinch** or **stretch** finger gestures.

User and Options

This option shows the first and last name of the user. A drop down list allows users to change their password or log out of ISSC mobile.

Notes or Properties Button

The Notes or Properties button allows users to toggle the information shown in the Information Bar.

- Properties will show the properties of the selected object.
 - For a floor plan, this can be the properties of the floor plan, zone or fixture.
 - For a planogram this can be the properties of the bay, shelf or product.

Information Bar

Depending on what is selected for the **Notes or Properties button**, the information bar will display information on the currently selected object in the view or any notes associated with it. The information associated with an object is customizable during implementation so may vary slightly from retailer to retailer.

Floor Plan or Planogram Design

The main view will show either the floor plan or a planogram bay.

View Selection

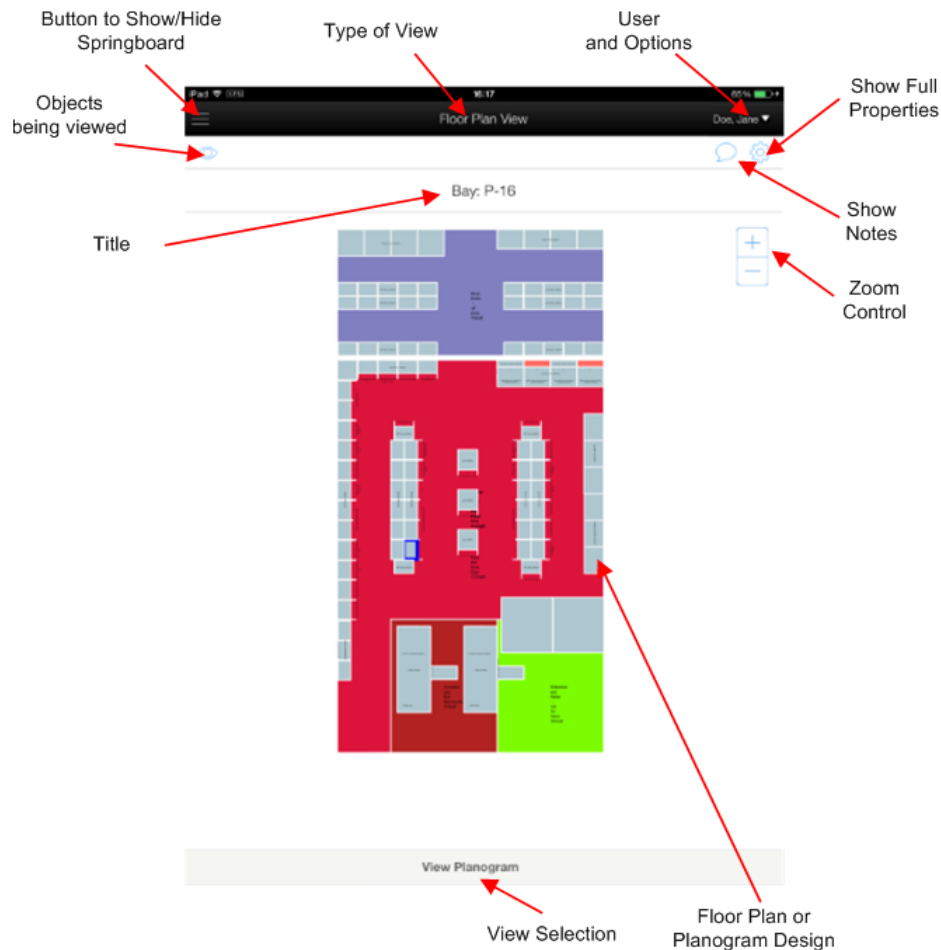
This part of the window is only active if a fixture is highlighted in the floor plan or if a planogram is being viewed. It allows the user to toggle between Floor Plan View and Planogram View as required.

Floor Plan Name and Effective Date

This part of the title bar will show the **Store Code** (if assigned), **Store Name** and the **Effective Date** (the date the floor plan became effective).

Smart Phone

The screen for the ISSC Mobile on a smart phone is basically similar to that for a tablet although some of the controls have been rearranged.



Springboard

The slide out springboard holds a list of the applications that the user can swap to. At present the only option is ISSC Mobile.

Type of View

This indicates whether the user is viewing a floor plan or a planogram.

User and Options

This option shows the first and last name of the user. A drop down list allows users to change their password or log out of ISSC mobile.

Show Properties

Tapping this button will toggle the screen to show the properties.

Show Notes

Tapping this button will toggle the screen to show the notes associated with any highlighted object.

Zoom Control

Tapping the zoom control allows users to zoom in or out. A similar effect can be achieved with **pinch** or **stretch** finger gestures.

Floor Plan or Planogram Design

The main view will show either the floor plan or a planogram bay.

View Selection

This part of the window is only active if a fixture is highlighted in the floor plan or if a planogram is being viewed. It allows the user to toggle between Floor Plan View and Planogram View as required.

Title

If there is nothing selected, the title shows the store code, store name and effective date of the floor plan. If an object is selected, it shows the first line of the properties for the selected object.

Objects Being Viewed

This allows the user to select what they want to view.

- For a floor plan, the options are view all, view the fixtures or view the zones.
- For a planogram the options are to view all, view the products or view the shelves.

Navigation

There are a number of ways to navigate the view based on standard gestures. Only a subset of the standard mobile device gestures are in use. Other gestures in use on mobile devices will have no effect. The gestures that can be used are:

Zooming in and Zooming Out

Zooming in or zooming out is done by pinching for stretching gestures.



- Stretching - placing two fingertips lightly on the screen and moving them apart - will result in the user zooming in to the selected part of the screen.
- Pinching - placing two fingertips on the screen and drawing them together - will result in zooming out and showing more of the screen.

Users can only zoom in or zoom out to preset limits.

Zooming to Extents

Zooming to extents shows the entire view for either a floor plan or a bay of a planogram.



It is executed by tapping the screen twice in quick succession. The screen will then show the selected floor plan or planogram with a 5% border around it. It is useful when a user has zoomed in to such an extent that they have lost track of exactly where they have navigated to. It is also a quick way to zoom out to the maximum extent.

Panning

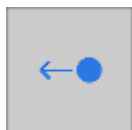
Panning allows the user to move around in the screen. For panning to work, the image on screen must have been zoomed in from its maximum extents.



To pan, first zoom in to a part of the screen. Then place a fingertip lightly on the screen and drag it. The field of view will move accordingly.

Swiping

Swiping allows a user to scroll from one planogram bay to another in Planogram View.



To swipe, make a quick, one-finger move (press, hold and move) to any direction.

Selecting Objects

To select an object lightly tap it once.

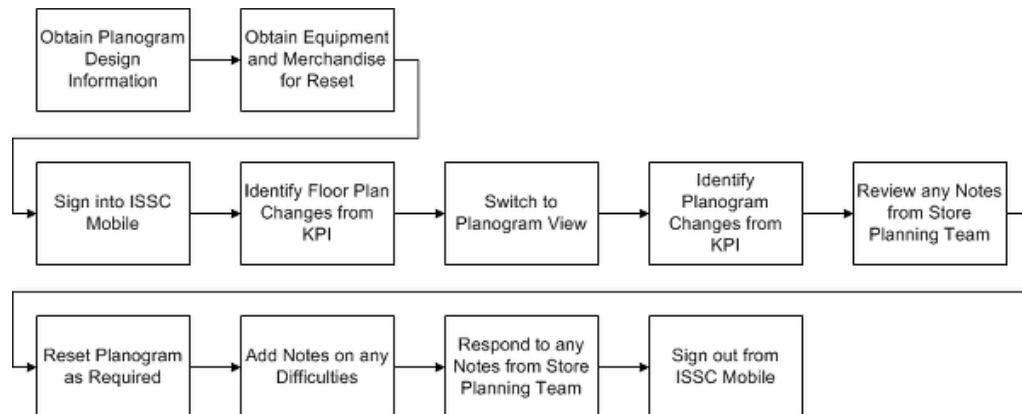


The border of the object - in this case a product in a planogram - will change to a thick line.



Example Use of ISSC Mobile

This section of help gives a simple example of how ISSC mobile can be used. It shows how it might be used to assist a planogram reset.



Preparation

Prior to signing into ISSC Mobile, the user would be assigned a planogram to reset. They would first collect the required documentation for the planogram reset. They would next collect the equipment, signage and merchandise required for the reset.

Review in ISSC Mobile

The user would then sign into ISSC Mobile. This would enable them to do the following:

Identify Floor Plan Changes from KPI

On signing in to ISSC Mobile, the user will automatically see the floor plan for the store they work in. This will be colored by a Key Performance Indicator (KPI) that will highlight any changes in the floor plan that have occurred within a specified time period - by default a week. This indicates to the user where they need to focus their attention.

Identify Planogram Changes from KPI

Having identified the fixtures they are interested in from the floor Plan KPI, the user can zoom in to one of those fixtures tap it to select it and select Planogram view at the bottom of the screen. This will bring up Planogram View with any changes highlighted in the Planogram KPI. This will show any products or shelves that have changed from the previous planogram design. The user can also review any notes from the store planning team.

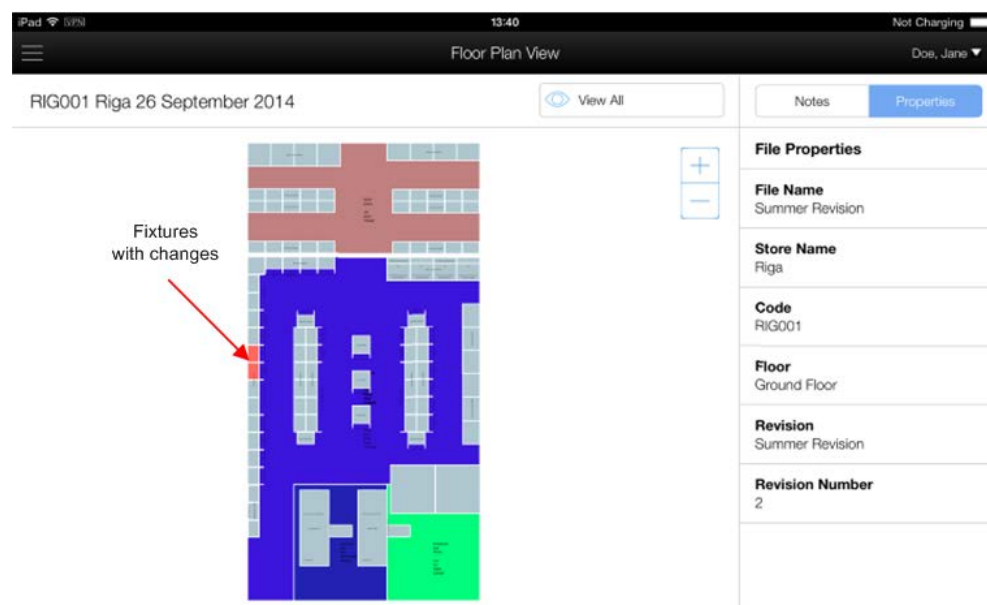
Execute Planogram Reset

The next stage is to execute the planogram reset. Equipment, signage and merchandise can be changed as required. If there are any problems, the user can create a note to start a conversation with the store planning team. Similarly, the user could respond to any existing notes from the store planning team by adding notes to an existing conversation. Finally, with their task accomplished, the user could sign out of ISSC Mobile.

Working with KPIs

Working with Floor Plan KPIs

A Key Performance Indicator (KPI) is a way of color coding the floor plan. Fixtures involved with some form of change are highlighted.



The KPI supplied with the application identifies the following changes that have occurred in the past seven days:

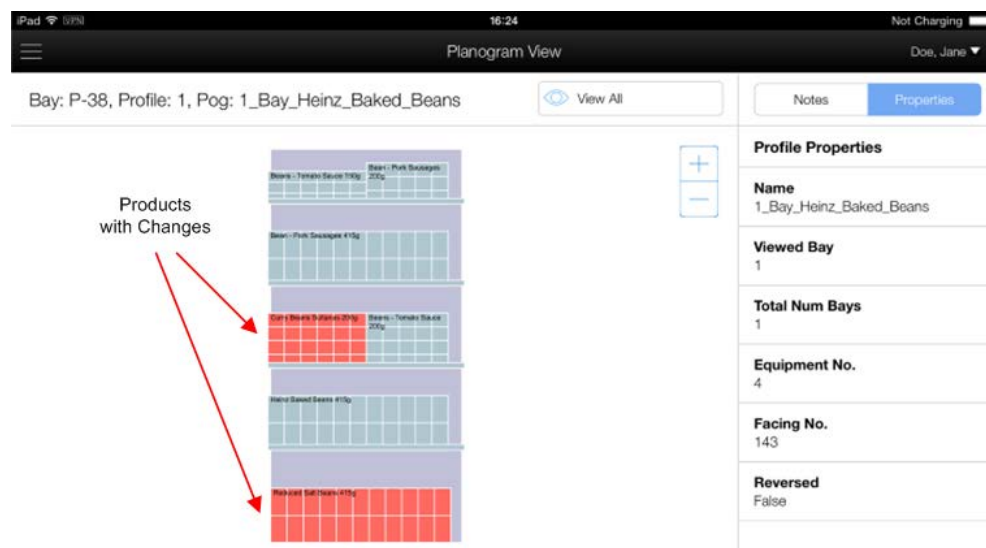
- Fixture added
- Fixture changed or swapped
- Fixture moved or rotated
- Merchandise added
- Merchandise deleted
- Merchandise changed
- New planogram revision

This KPI could be modified in MSM's Administration module to show different forms of change. It could also be modified to use a different time period - for example only changes in the last three days. The color theme that this KPI references only uses a single color to show a fixture with associated changes. It would be possible to modify the KPI and Color Theme to display a different color for each type of change.

One way of identifying the type of change is to select a fixture and switch to planogram view by clicking the option at the bottom of the screen. Planogram View also has a KPI to show changes. If this does not show changes, the changes are purely related to the fixture. If the Planogram View does show changes, either the details of the planogram have changed, or both the fixture and the planogram have changed.

Working with Planogram KPIs

A Key Performance Indicator (KPI) is a way of color coding the planogram view. Any of the equipment or products involved with some form of change is highlighted.



The KPI supplied with the application identifies the following changes that have occurred in the past seven days. Examples include:

- Equipment type changed
- Equipment position changed - for example elevation
- Product type changed
- Product quantity changed
- Product position changed

This KPI could be modified in MSM's Administration module to show different forms of change. It could also be modified to use a different time period - for example only changes in the last three days. The color theme that this KPI references only uses a single color to show changes. It is possible to modify the KPI and Color Theme to display a different color for each type of change.

Working with Properties

Working with Floor Plan Properties

Three types of floor plan properties can be displayed.

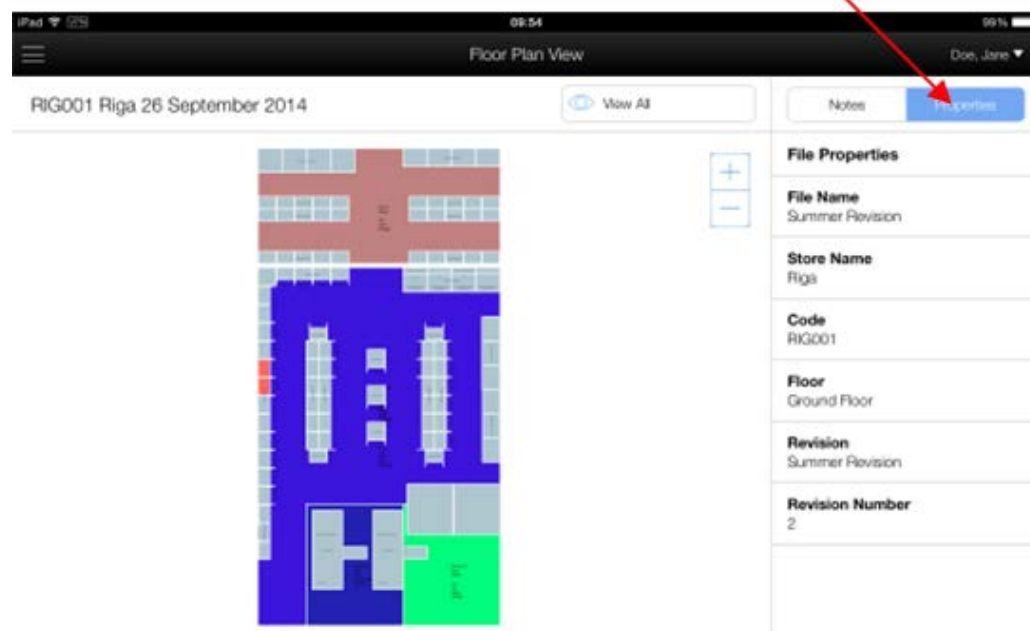
- Properties of the Floor Plan
- Properties of a Zone
- Properties of a Fixture

The floor plan properties will be displayed if no zone or fixture is selected.

Viewing Properties

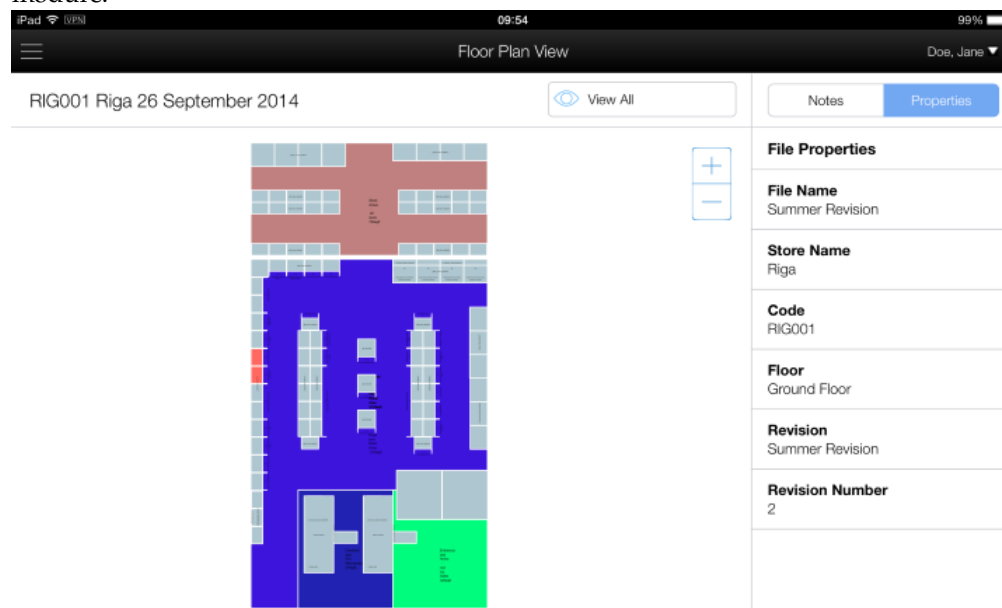
To view any of the properties in the floor plan, tap the **Properties** button to select it.

Properties Button



Floor Plan Properties

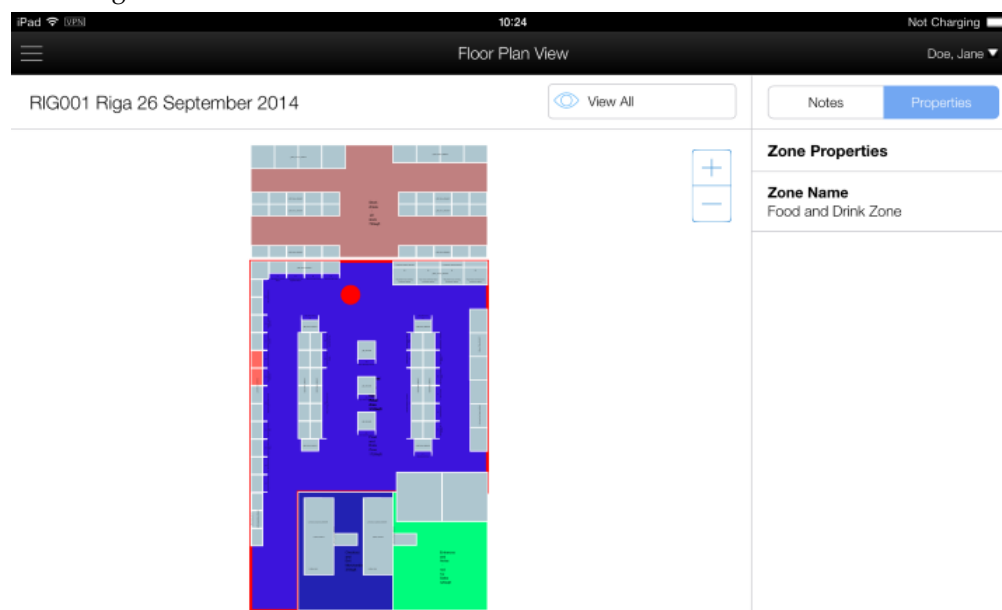
Floor Plan properties will show by default when no objects in the floor plan are selected. These properties are configurable in MSM's Administration module.



In the above example, the properties show the name of the file, store, the store code, the floor, the revision and the revision number.

Zone Properties

To display zone properties, tap once in the floor plan to select a zone (department). A small colored dot will appear indicating where the selection has been made and the zone will be given a bold outline. The zone properties will then be displayed. Zone properties are configurable in MSM's Administration module.

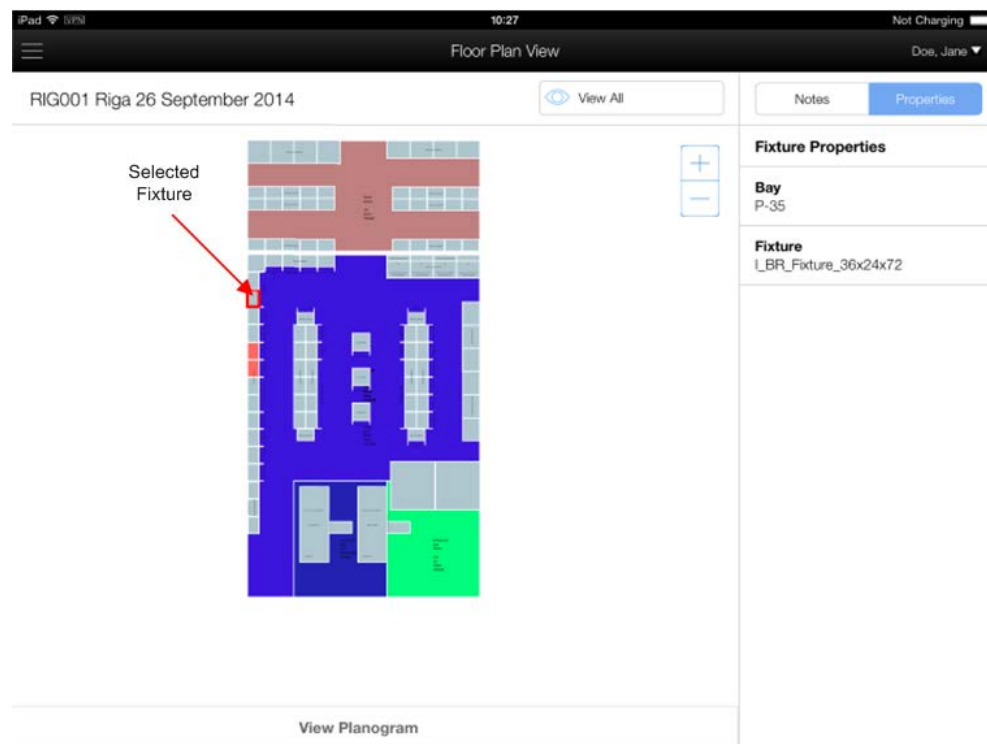


In this example only the Zone Name has been displayed, but other information could be included such as the area of the zone, number of fixtures and so on. To turn off the display of zone properties, tap the colored spot to return to floor plan properties or tap on the background outside of the floor plan departments. Alternatively, to switch to fixture properties, select a fixture.

Fixture Properties

To display fixture properties, tap once on a fixture to highlight it. The fixture will be given a bold outline to show it has been selected. The fixture properties will then be displayed. Fixture properties are configurable in MSM's Administration module.

Note: To select a fixture, users must tap inside it. It may be necessary to zoom into that part of the floor plan to tap accurately enough to do that.



In this example only the Bay Number and Fixture Name has been displayed, but other information could be included such as the dimensions of the fixture, number of shelves and so on. To turn off the display of fixture properties, tap inside a zone to display zone properties. Alternatively, tap on the fixture to deselect it. This will return the user to floor plan properties.

Note: As a fixture has been selected, the View Planogram option is now active at the bottom of the screen.

Working with Planogram Properties

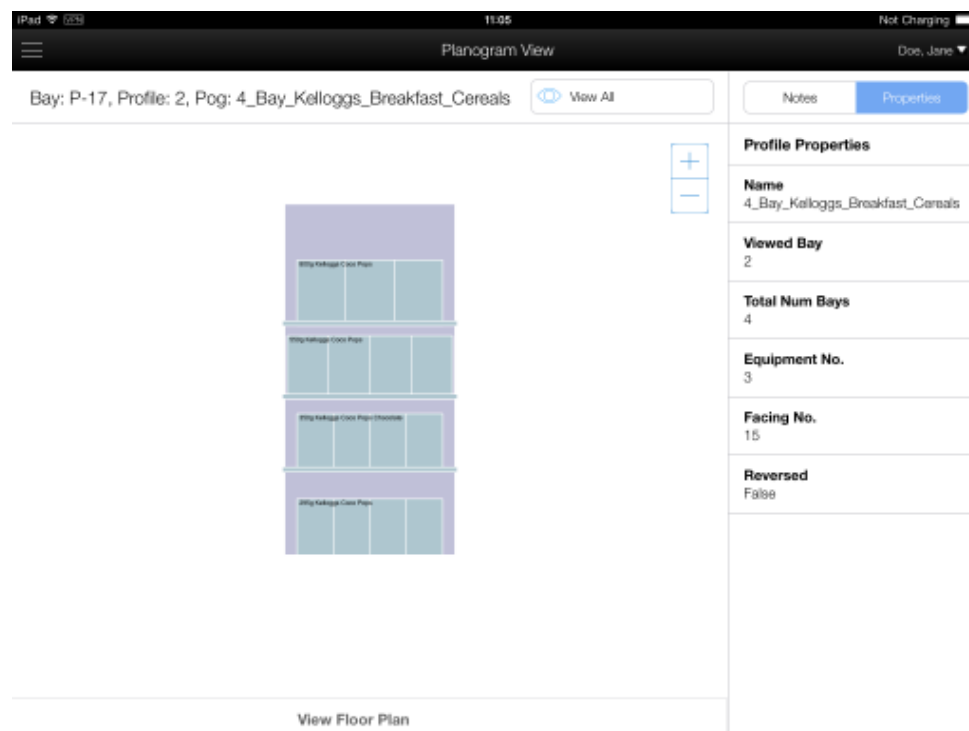
Four types of planogram properties can be displayed.

- General properties of the planogram bay.
- Properties of a parent fixture.
- Properties of a shelf.
- Properties of a product (SKU).

The planogram bay properties will display when no parent fixture, shelf or product is displayed.

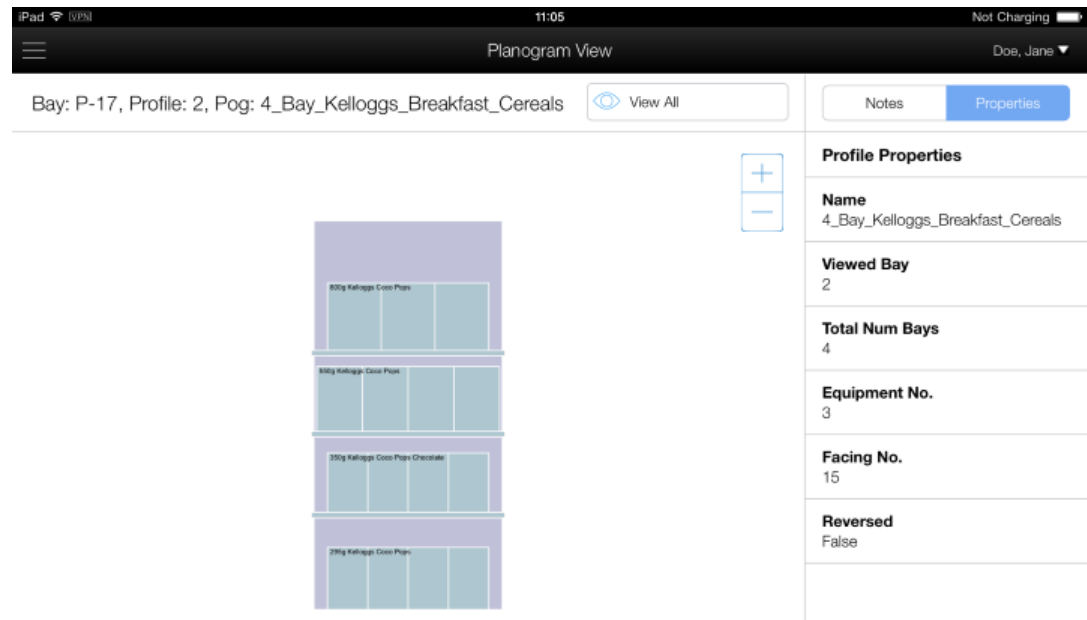
Viewing Properties

To view any of the properties in the planogram, tap the **Properties** button to select it.



Planogram Bay Properties

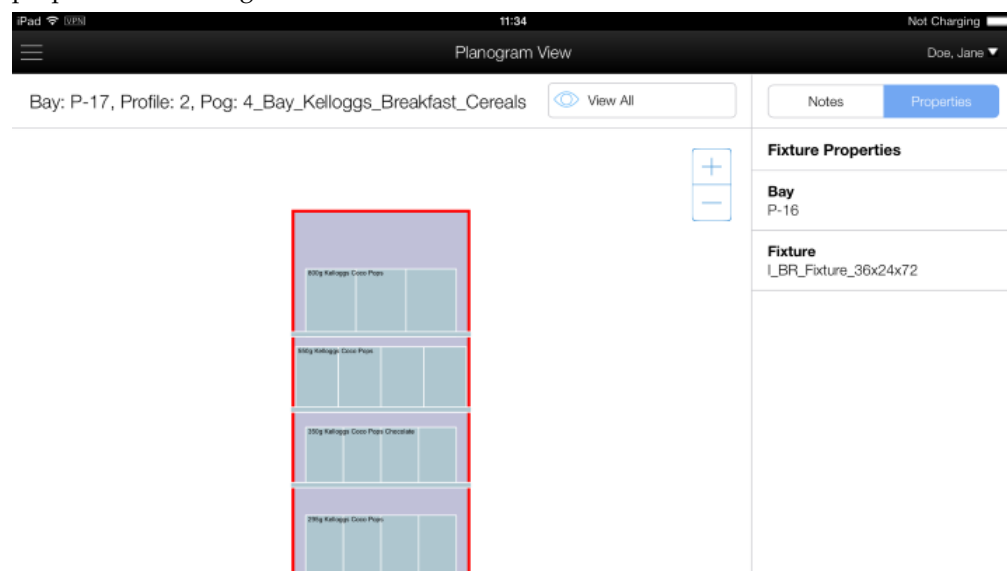
Planogram Bay properties will show by default when no objects in the planogram are selected. Planogram Bay properties are configurable in MSM's Administration module.



In the above example, the properties show the name of the planogram, which bay number is being viewed and the total number of bays. It also shows the total number of items of equipment on the parent fixture, the number of product facings and whether the planogram has been placed in normal or reversed sequence.

Fixture Properties

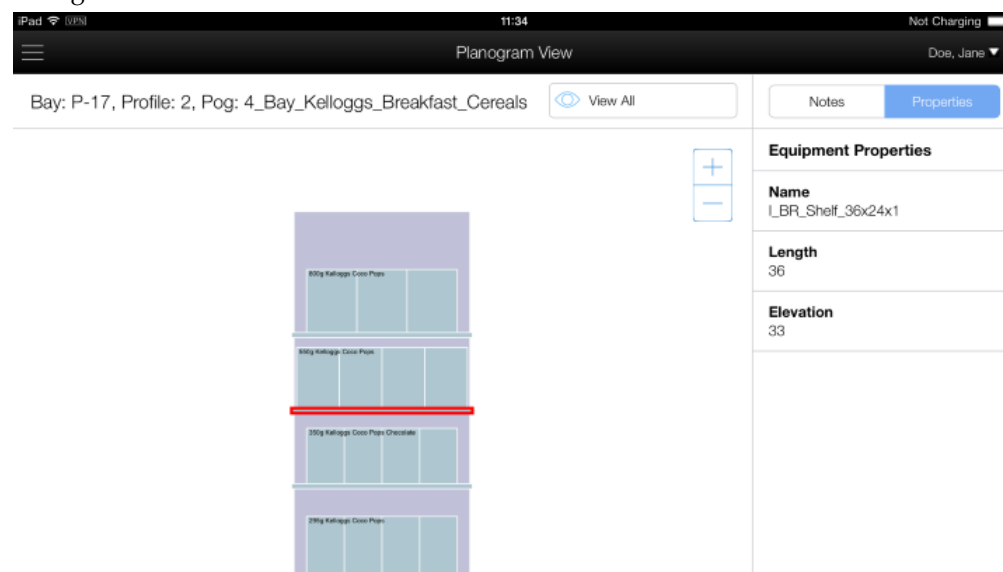
To display the properties for the parent fixture, tap once on the parent fixture. It will be shown with a bold outline. The fixture properties will then be displayed. Fixture properties are configurable in MSM's Administration module.



In this example only the Bay Number and Fixture Name has been displayed, but other information could be included such as the dimensions of the fixture and so on. To turn off the display of fixture properties, tap on the fixture to deselect it or tap on the background outside the planogram. This will return the user to floor plan properties. Alternatively tap on a shelf or product to display the properties for those objects.

Shelf Properties

To display the properties for a shelf in the planogram, tap once on it. It will be shown with a bold outline. The shelf properties will then be displayed. Shelf properties are configurable in MSM's Administration module.

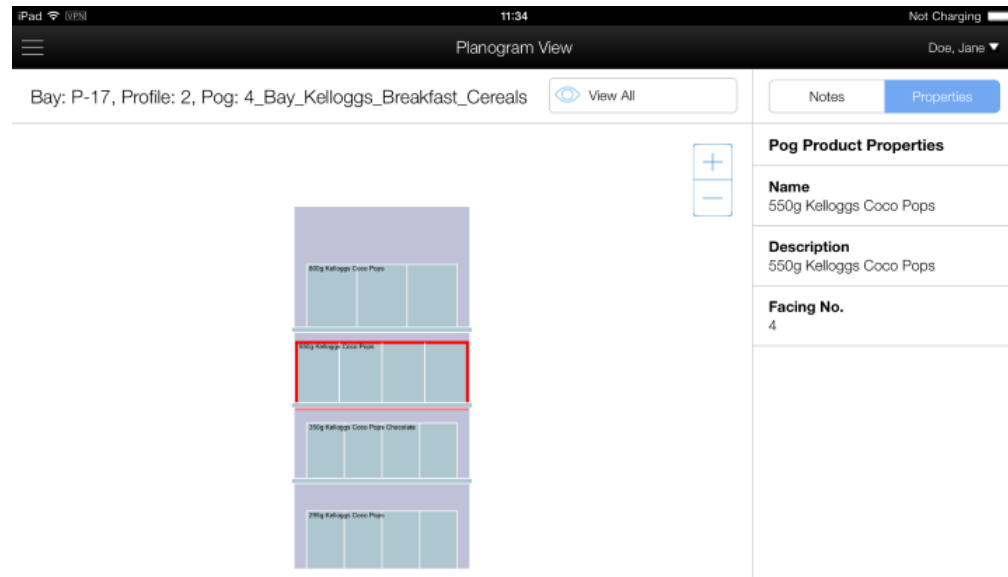


In this example only the name of the item of equipment has been displayed, together with its length and height above the floor. Other information could be included such as the dimensions of the shelf and so on. To turn off the display of equipment properties, tap on the item of equipment to deselect it. This will return the user to planogram properties. Alternatively tap on the parent fixture or product to display the properties for those objects.

Note: To select an item of equipment, users must tap inside it. It may be necessary to zoom into that part of the floor plan to tap accurately enough to do that.

Product Properties

To display the properties for a product in the planogram, tap once on it. It will be shown with a bold outline. The product properties will then be displayed.

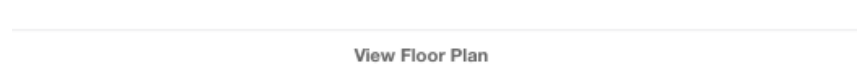


These properties are configurable in MSM's Administration module. In this example the name of the product, the description and number of facings have been displayed. Other information could be included such as the position of the product on the shelf and so on.

To turn off the display of product properties, tap on the product to deselect it. This will return the user to planogram properties. Alternatively tap on the parent fixture or an item of equipment to display the properties for those objects.

Returning to Floor Plan View

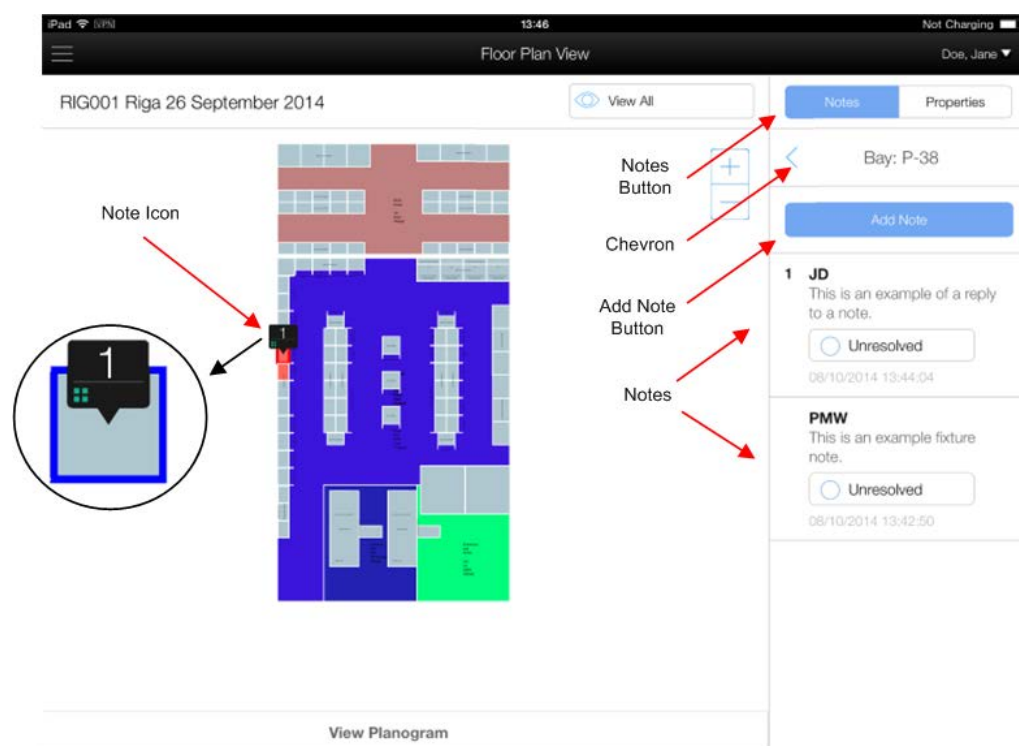
Users can return to the Floor Plan View at any time by tapping the option at the bottom of the screen.



Working with Notes

Overview of Notes

Notes enable users of Macro Space Management, In-Store Space Collaboration and ISSC mobile to communicate with each other. A note written in one application becomes visible in another. The notes can take the form of conversations, where different users can add successive comments, allowing ISSC Mobile users in a store to communicate with the store planning team or with other associates within the store. The main features of notes can be seen in the screenshot below.



Notes Options

Notes Button

The button can be changed from Note to Properties and back. For the note functionality to be active, the **Notes** option must be selected.

Add Note

Tapping this button will allow a new note to be added.

Chevron

There are two lists for notes. One shows a summary of all conversations and the other shows the details of a specific conversation. Depending on what list is selected and the chevron chosen, the user can see full details of a conversation or return to the summary list.

Notes

These are the notes for the selected conversation. The most recent note is at the top of the list. In the example above:

- The original note was created by user PMW and reads: **This is an example fixture note.**
- The reply was created by user JD and reads: **This is an example of a reply to a note.**

Where there is a note and a reply, this is known as a **conversation**. Conversations can have any number of notes in them.

Note Icon

Each object with associated notes has an icon displayed. The number on the icon is the number of the conversation. The most recent conversations have the lower numbers with the most recent conversation numbered '1'. The numbering is dynamic - if a new note/conversation is started, that will become number '1', with the previous note/conversation demoted to '2'. The icon also has a symbol on it identifying the type of object the note is associated with.

Note: Note Icons will only be visible when using the **Notes** option. If in the Properties pane, the icons will be hidden.

Types of Notes

Notes can be added to objects in both Floor Plan View and Planogram View. These are:

Floor Plan View

Notes can be added to:

- Zones (Departments)
- Fixtures

In addition, if a fixture has planogram notes associated with it, the product icon will appear. The equipment and product notes can only be accessed while in Planogram View.

Planogram View

Notes can be added to:

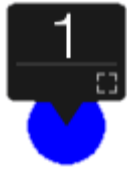
- Shelves
- Products

Note Icons

The type of note can be seen in the icon.

Zone Notes

Zone Notes are indicated by a small hollow square symbol within the Note icon.



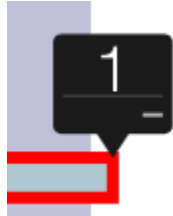
Fixture Notes

Fixture Notes are indicated by a small symbol containing four squares within the Note icon.



Shelf Notes

Shelf Notes are indicated by a small line symbol within the Note icon.



Product Notes

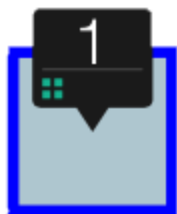
Product Notes are indicated by a filled square symbol within the Note icon.



Identifying Fixtures associated with Shelf or Product Notes

The note icon on a fixture in floor plan view can be used to determine whether there are any associated notes in planogram view.

- **Fixture Notes Only**
If there are only Fixture Notes associated with the fixture, only the Fixture Note symbol will appear in the note icon.



- **Planogram Notes Only**
If there are Shelf or Product Notes associated with the planogram on the fixture, but there are no Fixture notes, a square symbol will appear on the notes icon,



In order to see the Shelf or Product Note, the user will have to select the fixture and then switch to Planogram View.

- **Fixture Note and either Shelf or Product Note**
If the Fixture has Fixture Notes associated with it and the planogram associated with the fixture has a minimum of one Shelf Note or Product Note, two symbols will appear on the Note icon.



Conversations

Conversations are where one user replies to another via the medium of notes. Bringing up an existing note and tapping Add Note, allows a second associated note to be added.

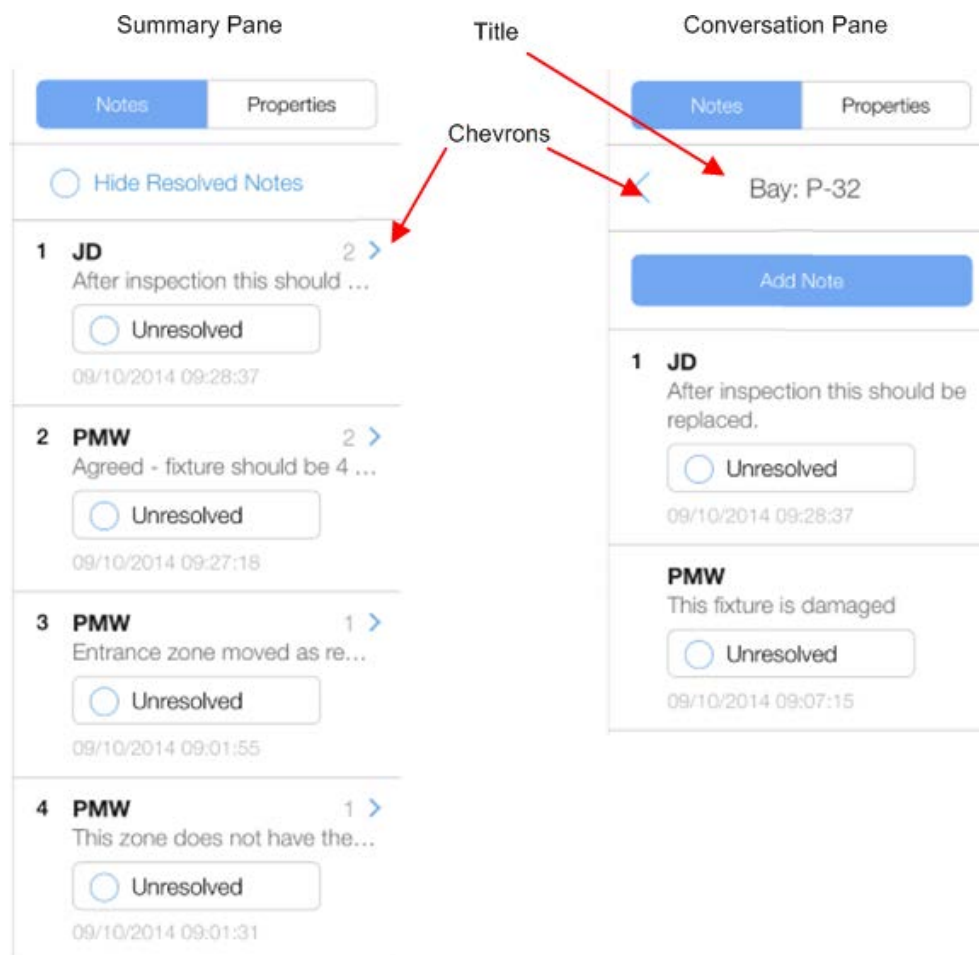


The most recent reply is always at the top. In this example User JD has replied to the note created by user PMW. The conversation can be continued until the matter raised in the note has been addressed. At that point the note can be marked as **Resolved**.

Note Lists

There are two lists for conversations: one holding a summary of all conversations and one with the details of a conversation. While in the summary list, the number by the small chevron shows the number of notes in a conversation. Users can swap between the two lists by using the chevrons.

- By tapping a chevron by a conversation in the summary list, users will be taken to the details of that conversation. If there are more notes than can be displayed on screen, the user can pan down to see them.
- By tapping the chevron in the conversation list, the user can return to the summary list.
- The title shows the selected object. The information that displays is customizable in the Customer Query dialog box in MSMs Administration module.



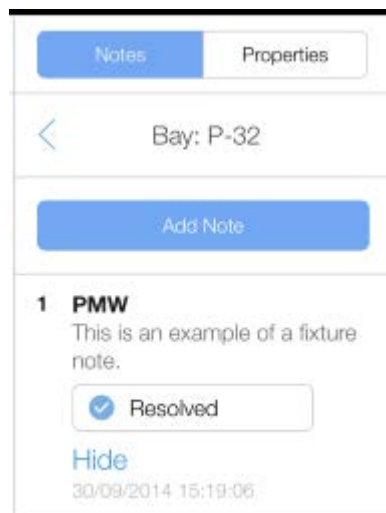
The **Summary List** has a list of all conversations. All that will be visible of each conversation is the first line of the most recent note in the conversation. The number by the chevron in each conversation is the number of notes in that conversation. Taping the chevron by any conversation will switch to the **Conversation List**. What is shown will depend on whether the **Hide Resolved Notes** option has been selected. If the option is active, only unresolved notes will be shown - otherwise all notes will be visible.

Resolving Notes

Once a note has been entered, a conversation can take place. When a satisfactory end note has been reached, the note can be marked as resolved. At the start of the process the **Unresolved** button will not be selected.



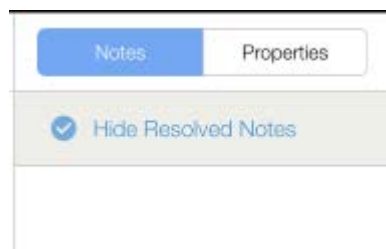
Once the matter raised in the notes has been addressed tapping the **Unresolved** button will change the note to **Resolved**. The option to **Hide** the note will also appear. Tapping Hide will hide the note if the **Hide Resolved Notes** option is active.



The note can be turned back to **Unresolved** by tapping the button again.

Revealing Hidden Notes

Once notes are hidden they can be revealed by tapping the back chevron on the Notes pane. (To the left of Bay: P-32 in the above example). This will change the pane to display an checkbox giving the option to reveal hidden notes.

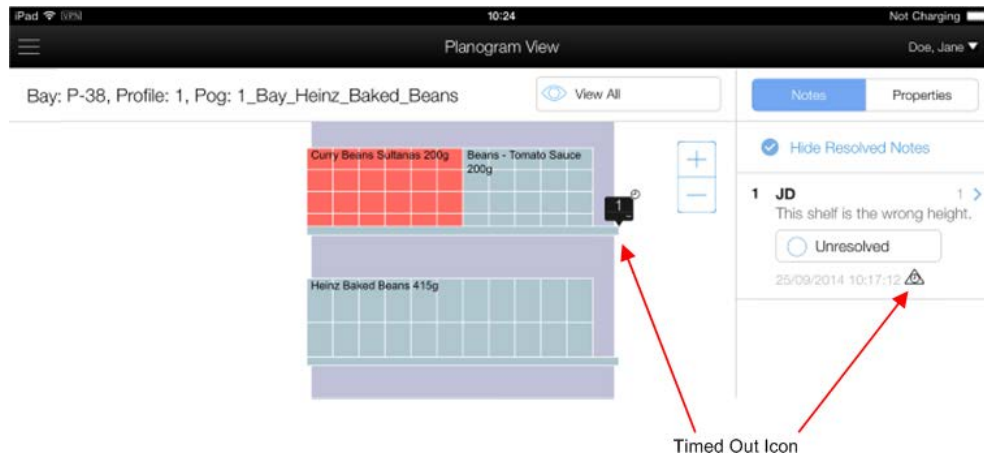


Tapping the button will reveal all hidden notes. Once the notes have been revealed, users can go back to the Notes pane by tapping the right arrow.



Timed Out Notes

Notes may be assigned in Planogram View. It is possible that changes may have been made to the planogram design since the note was created. Alternatively, the planogram could have been changed for another planogram. If this is the case, a **Timed Out** icon will appear on both the Note Icon and in the Notes Pane. The Timed Out icon will only be visible in Planogram View.



If this icon appears, the note should be investigated. If the original problem no longer exists, the note can be set to **Resolved** status to hide it.

Deleting Notes

Notes cannot be deleted in ISSC Mobile. This can only be done in Macro Space Management or In-Store Space Collaboration.

Working with Notes in Floor Plan View

Notes in floor plans are a way for different users in a retail organization to communicate with each other within the Macro Space Planning suite. As an example:

- A store planner at the retailer's headquarters might use Macro Space Management for store planning.
- A store manager might use In-Store Space Collaboration to monitor what changes are planned for their store.
- A store associate might use ISSC mobile to see that changes are outstanding in the aisle they work in.

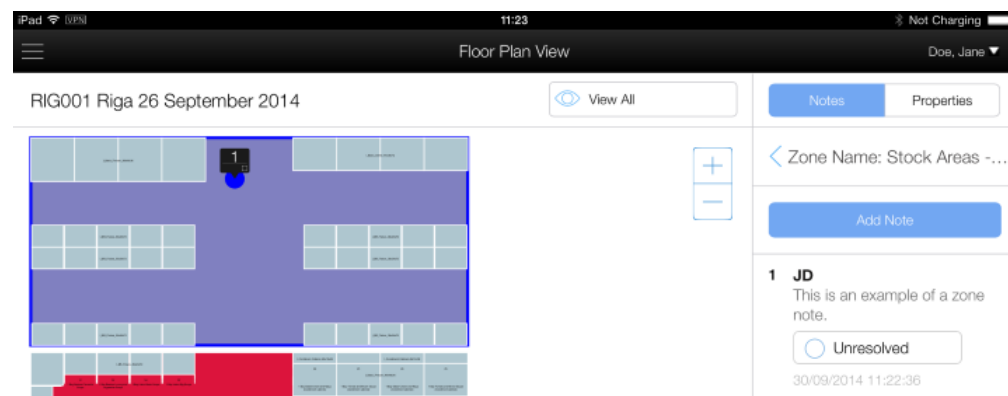
Each of those individuals can work with notes although what they can do varies from application to application.

- MSM users can add floor plan notes prior to the floor plan being at current status. While the floor plan is at current status MSM users can read but not edit or delete notes.
- ISSC users can add floor plan notes to the floor plan while it is at current status. They can also add a new note, edit existing notes and mark them as resolved. They cannot add notes to a conversation.
- ISSC Mobile users can add new notes, add notes to a conversation and mark them as resolved.

Types of Floor Plan Notes

Zone Notes

Zones is a term used in ISSC for the departments in a store - the ISSC Mobile Food and Drink zone is identical to the Food and Drink Department in a store. The area zones occupy is color coded - different zones generally have different colors. Zone Notes are indicated by a colored dot in the floor plan. The dot only appears when the associated note is selected in the notes list. It highlights the conversation selected within the zone, as a zone can contain multiple conversations in different positions. The icon by it indicates both the number of the note and the type of note. The number can be used to identify the note in the Notes pane. The Note itself contains the username of the person that created it, the text, the date and time when the note was added or last edited and a flag indicating whether the note has been resolved or not.

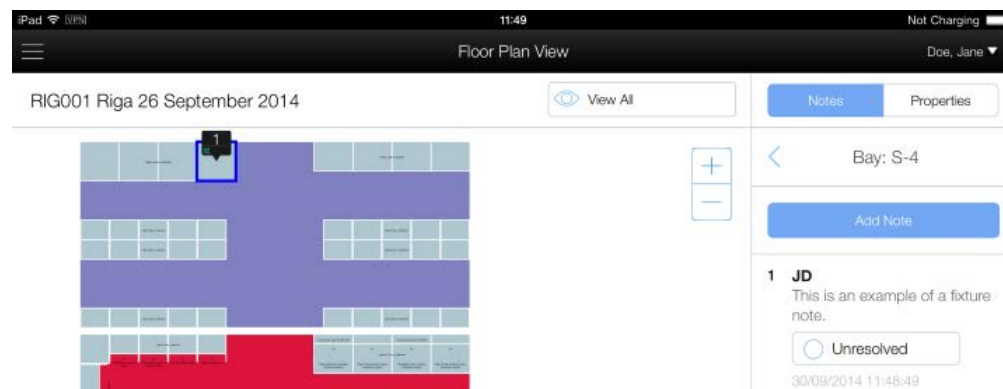


Zone notes can only be added in floor plan view. If a follow up note is to be added as part of a conversation, there are two ways to add this:

- Tapping the icon in the floor plan will automatically select the existing conversation so the note can be added.
- Selecting the conversation in the Notes Pane will activate the colored dot in the floor plan. It will also allow the user to add another note to the conversation.

Fixture Notes

Fixture Notes are indicated by an icon in the floor plan. The icon by it indicates both the number of the note and the type of note. The number can be used to identify the note in the Notes pane. The Note itself contains the username of the person that created it, the text, the date and time when the note was added or last edited and a flag indicating whether the note has been resolved or not.



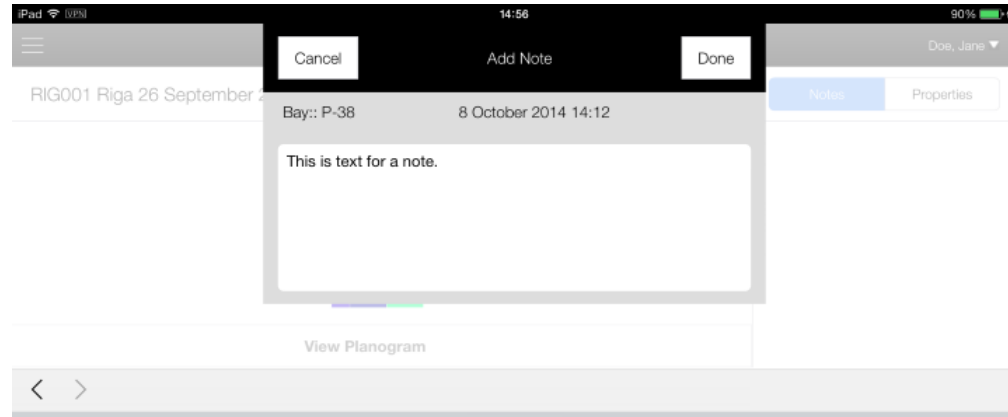
Fixture notes can only be added in floor plan view.

Planogram Notes

Product and Shelf notes can only be added while in Planogram View.

Adding a Note

To add a note, tap the **Add Note** option in the Note Pane. The **Add Note pop-up** will appear. Type in the required text and tap **Done**. The note will be added. Alternatively, tapping **Cancel** will return the user to Floor Plan View without adding the note. Alternatively, tapping **Cancel** will return the user to Planogram View without adding the note.



Working with Planogram View Notes

Planogram View notes are a way for different users in a retail organization to communicate with each other within the Macro Space Planning suite. As an example:

- A store planner at the retailer's headquarters might use Macro Space Management for store planning.
- A store manager might use In-Store Space Collaboration to monitor what changes are planned for their store.
- A store associate might use ISSC mobile to see that changes are outstanding in a specific planogram.

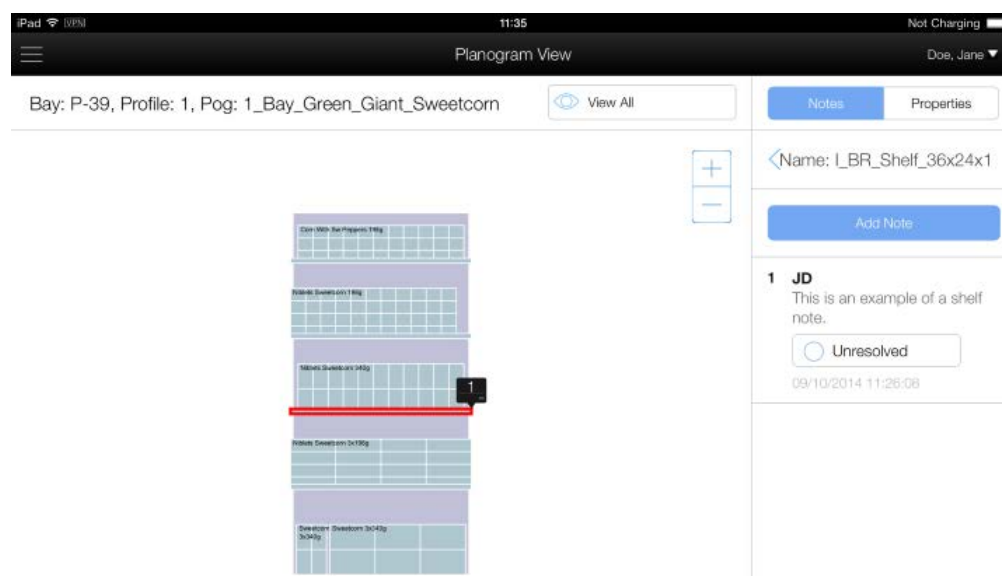
Each of those individuals can work with notes although what they can do varies from application to application.

- MSM users can add floor plan notes prior to the floor plan being at current status. While the floor plan is at current status MSM users can read but not edit or delete notes.
- ISSC users can add floor plan notes to the floor plan while it is at current status. They can also add a new note, edit existing notes and mark them as resolved. They cannot add notes to a conversation.
- ISSC Mobile users can add new notes, add notes to a conversation and mark them as resolved.

Types of Planogram View Notes

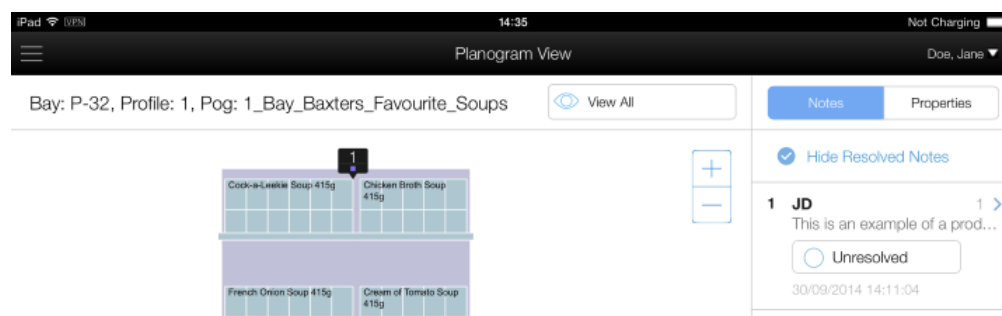
Shelf Notes

Shelf Notes are indicated by an icon in the planogram view. The icon by it indicates both the number of the note and the type of note. The number can be used to identify the note in the Notes pane. The Note itself contains the username of the person creating it, the text, the date and time when the note was added or last edited and a flag indicating whether the note has been resolved or not.



Product Notes

Product Notes are indicated by an icon in the planogram view. The icon by it indicates both the number of the note and the type of note. The number can be used to identify the note in the Notes pane. The Note itself contains the username of the person creating it, the text, the date and time when the note was added or last edited and a flag indicating whether the note has been resolved or not.



Zone and Fixture Notes

Zone and Fixture notes can only be added while in Floor Plan View.

Adding a Note

To add a note, tap the **Add Note** option in the Note Pane. The **Add Note pop-up** will appear. Type in the required text and tap **Done**. The note will be added.

