Oracle® Retail Macro Space Planning

Implementation Guide

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Preface

This Implementation Guide describes how to take an installed version of Macro Space Planning (MSP) and configure it so that a retailer can add additional information and put it into production.

Audience

This document is intended for System Implementers (SIs) and MSP Administrators.

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Related Documents

For more information, see the following documents. in the Oracle Retail Macro Space Management Release 14.1 and In-Store Space Collaboration documentation sets:

Macro Space Management

- *Oracle Retail Macro Space Planning Data Model*

- *Oracle Retail Macro Space Planning Security Guid*e

- *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 Merchandiser User Guide*

- Oracle Retail Macro Space Management Planner User Guide

- *Oracle Retail Macro Space Management Report Designer User Guide*

- *Oracle Retail Macro Space Management Release Notes*

In-Store Space Collaboration

- *Oracle Retail In-Store Space Collaboration User Guide*

- *Oracle Retail In-Store Space Collaboration Mobile (ISSC Mobile) User Guide*

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Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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1

Introduction

This chapter provides an overview of the implementation process. It is intended to give System Implementers (SIs) an introduction to the requirements. The following topics are covered:

- Overview of Implementation
- Information Sources
- Validation
- Starting Point
- Required Skills
- Concepts to Understand
- Points to Watch

Overview of Implementation

This implementation guide describes how to perform a basic implementation of Macro Space Planning (MSP). MSP consists of two applications:

- Macro Space Management (MSM). This is intended for use at headquarters.
- In-Store Space Collaboration (ISSC). This application (and its extension ISSC Mobile) provides compliance capabilities at the store and enables stores and corporate MSM users to collaborate.

Scope

This document provides the information to enable an SI, starting with an existing installation of the software, to take MSP to a position where the retailer can add in the detailed information required to take the software into production.

After the implementer has finished the actions specified in this guide, the retailer still has to carry out further data entry before the application is in a position where it can be put into production. Examples of this additional work are described in Chapter 13, "Follow Up Actions."

Structure of this Implementation Guide

The implementation is carried out in a series of stages. This guide is structured to follow this series of stages. Table 1–1 describes the stages.

Table 1–1   Implementation Sequence

Stage	Description	Notes
1	Security and Creating Access	Creating additional users in order to configure the system.
2	Base Data Configuration	Setting up fundamental data to enable further setup.
3	Data Import	Importing Store Hierarchy, Products, Planograms, and so on.
4	Initial Fixture Studio Setup	Carrying out basic configuration in Fixture Studio.
5	initial Planner Setup	Creating basic floor plans in Planner.
6	Planner Configuration	Configuring the Planner module.
7	Batch Processes	Setting up batch processes for data import, publishing, and so on.
8	ISSC Setup	Configuring ISSC.
9	ISSC Mobile	Configuring ISSC Mobile.
10	Configuring Reporting	configuring the necessary Custom Queries, Quick Reports, KPIs and external reports.
11	Follow Up Actions	Outline of how to integrate store planning into other retailer systems.
12	Validation Tasks	Check list of actions to verify the configured functionality is working as intended. This section is intended as a preliminary to full User Acceptance Testing.

Follow Up Work by Retailer

After the SI finishes the implementation process, further work is required by the retailer before the application can be put into production. Table 1–2 lists examples of the type of actions.

Table 1–2   Follow Up Work

Work	Description
Fixture and Gondola Library	The SI has created and configured example fixtures and gondolas. The retailer needs to create the full library of both.
Creating, Implementing, and Validating Floor Plans	The SI has created or imported a number of example floor plans. The retailer needs to create and validate the full range of required floor plans.
Integrating MSP	MSP needs to be integrated into the retailer's other systems, for example, publishing a floor plan requires the pertinent orders to be put into the retailer's supply chain so the floor plan changes can be made when the floor plan goes into service.
Additional Functionality Out of Scope for this Implementation Guide	This implementation guide describes how to configure the basic functionality required to enable a retailer to begin store planning. MSP contains additional, more complex functionality that a retailer may require, but which is not a prerequisite for implementation. For some examples, see Chapter 13, "Follow Up Actions.".

Information Sources

Appendix A, "Information Locations" provides lists of where more detailed information on specific aspects of MSP functionality can be found. In addition, a glossary provides a list of the more common MSP terms.

Validation

Chapter 14, "Validation Tasks" suggests steps to validate the installation. The steps help confirm that the functionality that has been configured is broadly working as intended. The suggested validation methods are not intended to test all aspects of the functionally, nor should they be regarded as a substitute for a full User Acceptance Test.

Starting Point

The starting point for the implementation is after the completion of the installation process. This requires the following:

- The template database is installed and awaiting configuration. Scripts are provided for both an imperial and a metric database.

- Database connection is established using the Database Configuration Tool (MSMDBConfigTool.exe)

- MSM is installed and the user is ready to log in using ADMINISTRATOR/ORMSM2011.

- ISSC is installed and awaiting configuration.

- ISSC Mobile is installed and awaiting configuration.

- Additional software, such as Oracle Data Integrator (ODI), is installed and awaiting configuration.

Required Skills

Table 1–3 and Table 1–4 list the skills required from the implementation team.

Table 1–3   Required MSP Skills

Skill	Description
Environment Skills	Macro Space Planning is installed in a series of different environments. For example, the database may be installed in a Linux environment, while MSM and ISSC must be installed in a Windows environment.
AutoCAD Skills	The implementation requires the creation of basic fixtures and floor plans. This requires the ability to create blocks in AutoCAD and to place and manipulate them in the Planner module. It also requires basic AutoCAD skills, such as, drawing shapes to represent aisles and zones.
Oracle 12c Database	Users should understand how to administer and manage an Oracle 12C database and its associated clients.
SQL Skills	Some implementation tasks involve direct modification of date in database tables. Other tasks involve writing SQL statements. If there are problems during implementation, diagnosis may involve looking at the content of database tables if granted access by the DBA.

Table 1–4   Knowledge of Other Software

Software	Description
ODI	ODI comes pre-configured for importing planogram definitions from an XML file. Implementers should be capable of: ■ Installing ODI and following the required steps to set up the planogram import scenarios. ■ Creating the XML file that is the required starting point for planogram import using ODI and its provided pre-configured scenarios.
SQL Developer	This is an Oracle tool useful for working with the content of databases.
BI Publisher	BI Publisher is the standard Oracle reporting tool. If used, SIs should be familiar with its installation and use.
Scheduling Tool	MSP requires a number of batch processes to be run at regular intervals. Implementers should be familiar with the scheduling tool in use at the retailer.

Basic Functionality in MSP

Implementers should understand the basic functionality within MSP so they can carry out the implementation tasks. Such functionality includes the lists in Table 1–5 and Table 1–6.

Table 1–5   MSM Knowledge Required

MSM Functionality	Description
Administration Module	How to configure users and user groups, data security, and system variables.
Data Importer	How data imports are executed and logged. How to create the CSV files that are the source for the import.
Fixture Studio	How to configure fixtures and gondolas.
Merchandiser Module	How to view the planogram hierarchy and associated planogram information. This enables the planogram imports to be validated.
Planner Module	How to create a basic floor plan, including using the functionality in the Object Browser and Object Grid.
Product Studio	How to view the product hierarchy and the associated products. This enables any products brought in during planogram import to be verified.
Report Designer	How to configure a basic planogram report.
Quick Reports and KPIs	How to configure Quick Reports and Key Performance Indicators.

Table 1–6   ISSC and ISSC Mobile Functionality

Functionality	Description
ISSC	How to place fixtures, product, and planograms. How to use KPIs.
ISSC Mobile	How to use notes and the predefined KPIs function.

Concepts to Understand

Table 1–7 list the concepts that the implementer should understand prior to beginning to configure the application.

Table 1–7   Concepts

Concept	Description
Architecture of MSP	How MSP is configured and sits on the varying platforms it is installed on. The SI should also understand any performance constraints imposed by the hardware chosen by the retailer.
Store Planning Process	SIs should understand the general principles of the store planning process. The process can vary from retailer to retailer, but involves the use of statuses to show where a floor plan is in its business life cycle, how to lay out zones, equipment, and merchandise and how to use the reporting tools to both validate the floor plan and report on results.
Integration of Store Planning Process	How the store planning process integrates into the other systems at the retailer, for example, the planogram design process and supply chain.

Points to Watch

This section describes a number of general points that affect implementation. SIs should bear them in mind during the implementation process.

Cached Values

Some MSP modules cache values when they are opened. This means that, for example, if changes are made to system variables in the Administration module, they may not take effect in other modules if those other modules are open. In this event, close and reopen the modules to get the changes to take effect.

Another example of caching values is the ISSC Server Service. In order for a number of changes to take effect, this must be stopped and restarted. (Stopping and restarting disconnects all current ISSC and ISSC Mobile users).

Custom SQL

Macro Space Planning uses Custom SQL. This is an extension of standard SQL that allows for the use for placeholders (denoted by the use of curly brackets). The functionality substitutes the pertinent value of the placeholder when it executes the SQL statement. Following is a simple example:

```
Select * from AVTTB_STORE where STR_ID = {STR_ID}
```

When the statement is executed, the code substitutes the actual STR_ID for the currently active floor plan for the {STR_ID} placeholder. The statement that is executed:

```
Select * from AVTTB_STORE where STR_ID = 123
```

This means implementers and administrators can write generic SQL statements that will execute against the currently active object in the application. Whether standard or custom SQL is in use in the application can be determined by looking at the default SQL provided; only custom SQL statements have placeholders. If modifying SQL statements, the correct type must be determined and used; either Standard SQL or Custom SQL.

Next ID

MSP keeps track on the next primary keys to be allocated using the AVTTB_NEXTID table. These are updated automatically when functionality is manually invoked, but are not necessarily updated by batch processes. If batch processes are in use, or if the SI has inserted data into the database using a SQL statement, the Next ID must be updated to avoid referential integrity problems. This can be done by several methods. One is manually by the **Update ID Table** option from the Tools menu of the Administration module. Another is to call the AVTSP_UPDATE_NEXT_IDS stored procedure.

2

Preparations

This chapter provides an overview of the preparatory work that must be done prior to beginning the implementation. Much of this information must be obtained from the retailer. The following topic is covered:

- Requirements Gathering

Requirements Gathering

Table 2–1 lists the information that the SI needs to determine from the retailer's requirements.

Table 2–1   Information on Retailer's Systems

Information	Description
Stores and Store Hierarchy	The SI should be aware of the retailer's store information and the clusters in which they are organized, together with the system this is imported from and the format the data is held in.
Zones and Zone Hierarchy	The SI should determine what departments (zones) the retailer uses and how they are organized in a hierarchy.
Fixture and Fixture Library	The SI should determine the list of required fixtures and how they are to be organized in a fixture hierarchy. The SI should also determine a suitable subset of the retailer's fixtures to use when creating an example store plan for the configuration tasks.
Gondolas and Gondola Hierarchy	The SI should determine what gondolas are required and how they are to be organized in the gondola hierarchy. The SI also should also determine a suitable example gondola to use when creating an example store plan for the configuration tasks
Products and Product Hierarchy	The SI should be aware of the retailer's product information and the hierarchy in which they are organized, together with the system this is imported from and the format the data is held in.
Planograms and Planogram Hierarchy	The SI should be aware of the retailer's planogram information and the hierarchy in which they are organized, together with the system this is imported from and the format the data is held in.
Planogram Substitutions	The SI should be aware of the retailer's method for specifying planogram substitutions and how to import the information into MSP. Although these substitutions can be manually configured in MSP, importing them may be a more efficient method of setting up large numbers.
	MSP also allows for planogram version change where the design of the planogram has been slightly modified, but where the scale of the change is not sufficient to define the planogram as a new design.

Table 2–1 (Cont.) Information on Retailer's Systems

Information	Description
Integration with Retailer's Systems	Some information may be exported from MSP. An example of this is the merchandise required to reset planograms when a floor plan goes into service. SIs should be aware of how this information is to be exported and the integration points into the retailer's other systems.
	The integration of MSP into the retailer's other systems is outside of the scope of this implementation guide and this requirement is purely for illustrative purposes.

Table 2–2 lists information that the SI should determine about the configuration required in MSP.

Table 2–2 Information on Required Configuration

Policy	Information
Password Security	The SI should determine the retailer's policies on password strength, number of permissible log in attempts, and so on.
User and User Groups	Access to the functionality in MSM and to stores in ISSC and ISSC mobile is determined by which User Groups a user belongs to. User Groups can also be used to control access to merchandise in ISSC. SIs should determine which User Groups are required to control access.
Data Importer Preparation	Data Importer can be used to import base data. The most likely imports are stores and their hierarchy, the fixture hierarchy, fixture information, and product hierarchy.
	Data Importer comes configured with these and other predefined imports. The data for those imports is required in CSV format. These CSV files are not provided. If data is to be imported using Data Importer, the format of the CSV files needs to be determined and the data prepared accordingly.
Batch Processes	Many operations are run as batch processes. Examples include running planogram substitutions and publishing floor plans and planograms. SIs should determine the batch processes required, sequence they need to be run in, time window available to run batch processes, and estimated time required to run each batch process.
Changes to Custom Queries	The Custom Queries govern how information appears in specific dialog boxes, for example, the Find dialog boxes. These should be reviewed and the retailer asked if they meet requirements.
Changes to Quick Reports	The Quick Reports are dialog boxes containing customizable information on objects in a floor plan or planogram. The retailer should be asked which ones should be deleted and which retained. They should also be asked if any additional Quick Reports are required.
Changes to KPIs	KPIs are ways of color coding floor plans and planograms to show validation or performance information. The retailer should be asked which ones should be deleted or retained. Any additional KPIs required should be determined.
Reporting Tools, such as, BI Publisher	The SI should know what reports are to be configured using a reporting tool such as BI Publisher. An example is creating reports to report on the content of the log tables in the database.

3

Security and Creating Access

This chapter covers the actions to set up the initial Macro Space Management (MSM) users and their privileges. It then explains more advanced configuration, especially for In-Store Space Collaboration (ISSC) and its extension ISSC Mobile. The following topics are covered:

- Overview
- Initial Log In
- Initial Actions in the Administration Module
- Creation of Additional User Groups
- ISSC User Groups
- Creation of Users and Associating with User Groups

Overview

When Macro Space Planning is first run, the database is populated with sufficient information for the application to open. This section describes how to set up the security options for initial users of MSM and more complex arrangements of users and user groups, primarily for ISSC.

For details on where to find detailed information on the actions in this chapter, see Appendix A, "Information Locations."

Initial Log In

The supplied template database comes with the following default user name and password:

- User Name: ADMINISTRATOR
- Password: ORMSM2011

The password is set to expire on the first login which requires that it be changed. Until additional users are created, this login is the only way of accessing the application. If this login is used during the installation process, the installation team should be asked for any modified user names or passwords.

Initial Actions in the Administration Module

The following actions are all carried out in the Administration module.

Set Security Options

Security options are used to set parameters such as password length and complexity, number of login attempts allowed, the interval at which passwords expire and require changing, and so on. These parameters are set in the Security Options dialog box accessed from the Security menu in the Administration module.

Some of the required settings cause all existing passwords, other than the currently logged in user, to expire. Accordingly, configuring the security options should be the first task carried out during implementation. Settings chosen should conform to the retailer's security policies.

Add Other MSM Administration Users

If multiple people are to help with the implementation, other users should be added to the Admin User Group in the User Groups tab of the Functional Security dialog box accessed from the Security menu in the Administration module. Members of this user group have access to all the functionality in MSM.

Associate MSM User Groups with Functionality

The application comes pre-configured with the user groups shown in Table 3–1.

Table 3–1   Pre-configured User Groups

User Groups	Description
Admin	Already configured with access to all MSM modules.
Floor Layout	Intended for planners laying out zones and equipment. Not yet associated with any MSM modules, so access has to be configured in the Group relationships tab of the Functional Security dialog box in the Administration module.
In-Store	Gives access to the ISSC toolbar. Not yet associated with any stores, file statuses, or products, so access has to configured. For information on how to configure access to these, see "ISSC User Groups."
Merchandiser	Intended for planners laying out products and planograms. Not yet associated with any MSM modules, so access has to be configured in the Group relationships tab of the Functional Security dialog box in the Administration module.

The Floor Layout and Merchandiser User Groups are adequate for this level of implementation in MSM, although the SI could add additional ones if required. The SI must then associate those user groups with the pertinent functionality on the Group Relationships tab of the Functional Security dialog box accessed from the Security menu.

Floor Layout User Group

The Floor Layout User Group could be given access to Fixture Studio to allow fixtures and gondolas to be configured, together with access to the Planner module to allow the users to lay out zones, fixtures, and gondolas.

Table 3–2   Command Groups for the Floor Layout User Group

Command Group	Description
Planner	Access to the Planner module.

Table 3–2   (Cont.) Command Groups for the Floor Layout User Group

Command Group	Description
Planogram Studio	Access to the Merchandiser module.

Merchandiser User Group

The Merchandiser User Group could have access to Planner to allow a floor plan to be merchandised, access to the Merchandiser module to see planogram designs, and access to Product Studio to see products and their hierarchy.

Table 3–3   Command Groups for the Merchandiser User Group

Command Group	Description
Planner	Access to the Planner module.
Planogram Studio	Access to the Merchandiser module.
Product Studio	Access to the Product Studio module.

It is also important to ensure that any user groups associated with the Planner Command Group in the Group Relationships tab of the Functional Security dialog box have a minimum of Read permission. This is to ensure that members of the user group have access to the Find and Open, Search and Print, and Automated Processing dialog boxes.

To set these permissions:

1. Open the Function Security dialog box and select the Group Relationships tab.

2. Highlight the pertinent User Group, right click, and select **Edit Permissions**.

3. In the Edit Permissions dialog box, ensure that a minimum of Read permissions are checked and click **OK**.

Finally, The Merchandiser User Group will need access to the pertinent planogram user groups in the Data Security dialog box. This allows them to select planograms for planogram substitution and for immediate planogram publishing.

Add Other MSM Users

If some users are to carry out some of the implementation tasks in MSM without getting access to the Administration module, the users should be created and added to the Floor Layout and Merchandiser User Groups.

Creation of Additional User Groups

Additional User Groups may be required dependent on the business requirements.

MSM User Groups

It may be useful to create MSM user groups for specific purposes. Three examples are given below. Many others are possible.

Batch Processes

One such user group (and user) would be used for running batch processes. Running batch processes using the command line requires a valid MSM user name and password. These processes then run unattended using this log in. The Batch Process

User Group needs access to the Command Groups listed in Table 3–4.

Table 3–4   Command Groups for the Batch Process User Group

Command Group	Description
Automation	Membership in this group allows access to the Automated Calculation, Floor Plan Automated Processing, Floor Plan Publishing, Planogram Publishing, and Update Status functionality.
Data Importer	Gives access to the Data Importer module.
Planogram Substitution	Gives access to the Planogram Substitution functionality.

It is not anticipated that anyone logging in using the Batch Process User Group needs to manually run functionality. Accordingly, no access is required to modules such as Administration and Planner.

The other batch processes are invoked using BatchRunner. For more information, see Chapter 9, "Batch Processes.". This requires a valid MSM login and access to any required Command Groups - for example the Floor Plan Publishing Command Group.

Once created, the Batch Process User Group needs a single user associated with it for login purposes when batch processes are run.From a security perspective, a set of log in credentials for MSP is exposed within any associated batch files. Therefore this user should have the minimum privileges required to run batch processes. It should not have wider credentials to - for example - the Administration module.

Merchandise Manager

Another potential user group is that for Merchandise Managers. These would have privileges additional to merchandiser planners. An example of the functionality they might be given access to is given in Table 3–5.

Table 3–5   Command Groups for the Merchandise Manager User Group

Command Group	Description
Planogram Publishing (Child of the Automation Command Group)	Gives access to configuring and running planogram publishing as a batch process.
Planner	Access to the Planner module.
Planogram Studio	Access to the Merchandiser module.
Planogram Substitution	Access to the Planogram Substitution module - able to configure substitutions.
Product Studio	Access to the Product Studio module.
Report Designer	Access to the Report Designer module - able to configure planogram reports.

ISSC User Groups

ISSC and ISSC Mobile may require the creation of a large number of User Groups. The basic concepts are covered in the following sections. In some cases, it may be preferable to use a SQL script instead of manually creating User Groups manually in the Administration module.

Preparatory work

Before starting to implement in ISSC, some preliminary analysis is required.

Decide on User Group Strategy

One of the key decisions is the user group strategy for ISSC. User groups control access to stores, file status, and products. Some of these ISSC user groups can also be used in common with ISSC Mobile. ISSC Mobile requires one user group per store, so these user groups could also be used for the lowest level of granularity in ISSC. For maximum granularity of access, three types of user group roles are required for ISSC. The user group roles are listed in Table 3–6.

Table 3–6   ISSC User Group Roles

Purpose	Description	Type of Security
Access to functionality	This controls access to what functionality can be used on the toolbar. It should also be used to grant access to floor plan (file) statuses. For information on setting up files statuses see Setting up Statuses for the ISSC Workflow in the chapter on Setting up ISSC.	Functional
Access to stores and file statuses	This controls access to stores.	Data
Access to product hierarchy	This controls access to the product hierarchy at the Department level.	Data

Typically, a user is given access to a minimum of one of each type of user group. The three user groups in combination determine the access a user has. Following is an example for a store planner:

- The store planner is a member of the *In-Store* user group that gives access to most of the functionality on the toolbar. Access will have also have been granted for specific file statuses - floor plans outside of these statuses cannot be seen in ISSC.

- The store planner is a member of the *North West* user group, that gives them access to the twelve stores they have planning responsibility for.-

- The store planner is a member of the *Food and Drink* user group, that gives access to the products in the Food and Drink department (zone) for product placement purposes.

If less granularity of access is required, the number of user groups could be reduced. For example, a user group could be created that allows access to both a specific set of stores and the required file statuses.

For more detail on these user groups types, see "Functionality Type User Groups.".

Business Processes

It is possible to configure ISSC to cater to different business roles. Table 3–7 lists examples.

Table 3–7   Configurable Business Processes

Business Role	Description
Changing Floor Plan Status	The Save dialog boxes are used for this process. They enable the status of the floor plan to be changed to signify approval or rejection at the current stage in its business life cycle.
	A floor planner might have the Save dialog box with the Submit button, allowing them to change the status to one requiring managerial approval. A manager might have the Save dialog box with the Accept and Reject buttons, allowing them to return the floor plan to an earlier status for correction or set it to approval to go into service.
District Manager Button	This button allows bulk acceptance or rejection of floor plans with the corresponding changes in status. This button has to be enabled for specific user groups before it becomes available. All floor plans at a specific status can then be made visible in the ISSC Store selection dialog box. This allows the manager to select each in turn and change the status without opening the floor plan.

Functionality Type User Groups

The only user group in the predefined user groups to get access to the ISSC toolbar is the In-Store User Group, supplied as a default. This user group gives access to all the functionality except the District Manager button.

Creating a User Group with Access to the Toolbar

To create another user group with access to the ISSC toolbar, create the user group in the User Groups tab of the Functional Security dialog box accessed from the Security menu in the MSM Administration module:

- This newly created user group will not have access to the toolbar.

- Which toolbar buttons are visible to a user group are set up directly in the database through the AVTTB_MESSAGE_USER_GROUP_LINK table. The MUG_PERMISSION mask must be set to 1 for a toolbar button to be visible. The list of MSC_IDs used in the ISSC toolbar can be copied from one user group to another with a simple SQL statement:

```
INSERT INTO AVTTB_MESSAGE_USER_GROUP_LINK
SELECT [User Group ID], MSC_ID, MUG_PERMISSION_MASK
FROM AVTTB_MESSAGE_USER_GROUP_LINK WHERE USG_ID = 4
```

  The [User Group ID] should be the user group to which access to the ISSC Toolbar is to be given. This is the USG_ID from the AVTTB_USER_GROUP table. USG_ID = 4 is the existing user group with access to the toolbar. The SQL statement copies the permissions from that user group into the new one.

- The User Group should also be given access to the ISSC Command Group in the Group Relationships tab of the Functional Security dialog box. Without access to this command group, users are not able to access functionality in ISSC.

Creating a User Group with Access to Toolbar and District Manager Button

Follow the steps in the previous section to create a user group with access to the toolbar. By default, the District Manager button in the toolbar is turned off. To turn it on, use the following simple SQL statement:

```
UPDATE AVTTB_MESSAGE_USER_GROUP_LINK
SET MUG_PERMISSION_MASK = 1 WHERE MSC_ID = 7243 AND USG_ID = [User Group ID]
```

The [User Group ID] should be the user group to which access to the District Manager button is to be given. This is the USG_ID from the AVTTB_USER_GROUP table.

> **Note:** Additional configuration is required in the Status dialog box accessed from the General menu in the Administration module. For more information, see "Store and File Status User Group."

Making a User a Member of a User Group

To give users access to the Functionality User Groups, use the User Groups tab of the of the Functional Security dialog box accessed from the Security menu in the MSM Administration module.

Membership of a user group can also be configured directly in the database by using a SQL script. This can be used to add entries to the AVTTB_USER_GROUP_LINK table. It is used to connect the list of users in the AVTTB_USER table and list of user groups in the AVTTB_USER_GROUP table.

Store and File Status User Group

This user group controls access to the stores and file statuses for all users who are members of it. This type of user group can be configured with different levels of granularity. At the lowest level of granularity (one store per user group), it can be used to control access to both ISSC and ISSC Mobile. At the opposite end of the spectrum, it would be possible to configure a single user group with access to all stores. Intermediate between the two would be a user group giving access to all stores within a cluster:

- Those that are members only of the Store and File Status user group are able to access the store in ISSC Mobile, but not access the toolbar in ISSC.

- Members of this user group that also have access to the ISSC toolbar (for example by being a member of the In-Store User Group) are also able to log in to ISSC.

ISSC users thus need access to both the functionality and the store.

Manually Creating and Configuring the User Group

To create and configure this type of user group:

1. Create an appropriately named User Group in the User Groups tab of the Functional Security dialog box accessed from the Security menu in the MSM Administration module. Close this dialog box.

2. Associate the User Group with the pertinent store in the Store tab of the Data Security dialog box accessed from the Security menu in the MSM Administration module. For ISSC Mobile, you must also have permission for the status that particular store is at.

3. Associate the User Group with the pertinent file statuses in the Status tab of the Data Security dialog box accessed from the Security menu in the MSM Administration module. Permission for File statuses in not required for ISSC Mobile users. They can only see files at Current status.

4. ISSC Mobile users must also have their User Group associated with the ISSC Mobile command Group in the Group Relationships tab of the Functional Security dialog box in the Administration module.

The floor plans that will be visible need to have permissions for both the parent store for the floor plan and the status the floor plan is currently at.

> **Note:** If the permissions are not present, the floor plans will not be visible

Scripting and Configuring the User Group

The data for creating user groups and assigning those user groups to stores is held in the tables listed in Table 3–8.

Table 3–8   Tables for Assigning User Groups to Stores

Table	Description
AVTTB_CLUMP	Holds a list of clusters with CLU_ID as the primary key. The CLU_ID can be used to assign the a specific user group to all stores in that cluster.
	The CLT_ID identifies the cluster type. This can be used in conjunction with the CLU_ID to give more flexibility in how user groups are assigned to stores.
AVTTB_STORE	Holds a list of stores with STR_ID as the primary key.
AVTTB_STORE_CLUMP_LINK	Links the AVTTB_CLUMP and AVTTB_STORE tables.
AVTTB_USER_GROUP	Holds a list of user groups with USG_ID as the primary key.
AVTTB_USER_STORE_GROUP_LINK	Links the AVTTB_STORE and AVTTB_USER_GROUP tables.

Creating the User Groups

The simplest way of creating the user groups at the lowest level of granularity is to use a SQL insert statement to add a user group named after a store or store code. This gives one user group per store the level of granularity required for store-specific user groups. To create user groups at a higher level of granularity, it is possible to use an insert statement to add a user group named after a cluster. This approach would typically be used for user groups associated with district managers or other staff with responsibilities for groups of stores.

An example of a SQL statement is:

```
INSERT INTO AVTTB_USER_GROUP (USG_ID, USG_PID, USG_NAME, USG_DESC, USG_MANDATORY,
ICO_ID, USG_LIC, USG_CODE, UGT_ID)
SELECT
(SELECT MAX(USG_ID) FROM AVTTB_USER_GROUP) + ROWNUM AS USG_ID,
(SELECT USG_ID FROM AVTTB_USER_GROUP WHERE UGT_ID=0 AND USG_PID IS NULL AND
ROWNUM=1) AS USG_PID,
'Store ' || STR_CODE AS USG_NAME,
'Store ' || STR_CODE AS USG_DESC,
0 AS USG_MANDATORY, 45 AS ICO_ID,NULL AS USG_LIC,
'ST' || STR_CODE AS USG_CODE, 0 AS UGT_ID
FROM AVTTB_STORE
```

This statement may need to be adapted to suit a retailer's specific requirements.

Associating the User Group with the Store

To associate the user group with the store at the lowest level of granularity, use a simple insert statement to populate the STR_ID and USG_UD fields in the AVTTB_

STORE_USER_GROUP_LINK table. The UTL_PERMISSION_MASK can be set to a value of fifteen - this will give all permission.

For a higher level of granularity, that associated with clusters, use a select statement to select all stores associated with a specific cluster in the store hierarchy and insert them into the AVTTB_STORE_USER_GROUP_LINK table.

Associating the User Group with the Status

The data for creating user groups and assigning those user groups to files is held in the tables listed in Table 3–9.

Table 3–9   Tables for Assigning User Groups to Stores

Table	Description
AVTTB_STATUS	Holds a list of statuses with STA_ID as the primary key. File statuses have a status type (STT_ID) of 7.
AVTTB_USER_GROUP	Holds a list of user groups with USG_ID as the primary key.
AVTTB_USER_GROUP_STATUS_LINK	Links the AVTTB_STATUS and AVTTB_USER_GROUP tables.

Insert statements can be used to populate these tables in the same manner as described in the previous section.

Product Hierarchy User Groups

This is the final type of user group used to control access to the product hierarchy at the highest level in the hierarchy. In the Data Security dialog box, the only level that is visible is Department level. If imported or manually configured, the product hierarchy may contain levels above Department. Products from the specified nodes can be placed up to sub-class level in Top Graphical view and Display Style level in Front Graphical view.

Manually Creating and Configuring the User Group

To create and configure this type of user group:

1. Create an appropriately named User Group in the User Groups tab of the Functional Security dialog box accessed from the Security menu in the MSM Administration module. Close this dialog box.

2. Associate the User Group with the pertinent department in the Products tab of the Data Security dialog box accessed from the Security menu in the MSM Administration module. Users will then have access to all products that are children of that department.

This method works if the product hierarchy contains Department as the top level in the product hierarchy. If the product hierarchy contains nodes above this level, for example at Division, Group, or Company level, access to the product hierarchy can only be configured directly in the database by inserting data into the AVTTB_USER_GROUP_PRODUCT_LINK table.

Scripting and Configuring the User Group

The data for creating user groups and assigning those user groups to stores is held in the tables listed in Table 3–10.

Table 3–10   Tables for assigning User Groups to stores

Table	Description
AVTTB_PRODUCT_DEF	Holds details of the product hierarchy with PRD_ID as the primary key.
AVTTB_USER_GROUP	Holds a list of user groups with USG_ID as the primary key.
AVTTB_USER_GROUP_PRODUCT_LINK	Links the AVTTB_STORE and AVTTB_USER_GROUP tables.

Creating the User Groups

The simplest way of creating the user groups is to use a SQL insert statement to add a user group for each node at the highest level in the product hierarchy.

Associating the User Group with the Department

To associate the user group with the department, use a simple insert statement to populate the PRD_ID and USG_UD fields in the AVTTB_PRODUCT_USER_GROUP_LINK table. The UPL_PERMISSION_MASK can be set to a value of one.

Creation of Users and Associating with User Groups

One way of creating users is manually. Once created, they have to be associated with the pertinent user groups.

> **Note:**   This section is equally pertinent for ISSC and ISSC Mobile.

Manually Creating Users

Creating the User

Users are manually created in the User Groups tab of the Functional Security dialog box accessed from the security menu in the Administration module. In order to create a user, first select a parent User Group. The newly created user will then be a member of that user group. It is recommended that the Expiry Date for each user be set to a date in the past. This forces a password change the first time the user logs on.

Manually Associating the User with Multiple User Groups

To manually associate the user with multiple user groups, copy and paste the user into multiple groups in the User Groups tab of the Functional Security dialog box.

Scripting and Configuring the User Group

The data for creating users and assigning those users to user groups is held in the tables listed in Table 3–11.

Table 3–11   Tables for Assigning User Groups to Stores

Table	Description
AVTTB_USER	Holds details of the users with URD_ID as the primary key.
AVTTB_USER_GROUP	Holds a list of User Groups with USG_ID as the primary key.

Table 3–11   (Cont.) Tables for Assigning User Groups to Stores

Table	Description
AVTTB_USER_GROUP_LINK	Links the AVTTB_USER and AVTTB_USER_GROUP tables.

Creating the Users

Users should be created by a method conforming to the retailer's security policies.

Associating the User with the Required User Groups

To associate the user with the department, use a simple insert statement to populate the USR_ID and USG_UD fields in the AVTTB_USER_GROUP_LINK table.

Required User Groups

A summary of the required user groups for MSM and ISSC and ISSC Mobile is listed in Table 3–12 and Table 3–13.

Table 3–12   MSM User Groups

MSM User Group	Description
Admin	Already configured with access for all modules.
Floor Layout	Pre-existing user group intended for users laying out zones and fixtures. Access to modules needs to be configured.
Merchandiser	Pre-existing user group intended for users laying out products and planograms. Access to modules needs to be configured.
Batch Process	Suggested new user group (and user) useful in running batch processes.

Table 3–13   Required ISSC and ISSC Mobile User Groups

Application	Required User Groups
ISSC	For the most simple form of access, a single user group can be created with all the required privileges. A member of that user group will have access to the toolbar, all stores and floor plans at the required status, and all products in the product hierarchy. For maximum granularity, membership to a minimum of three types of user group is required: ■ Functional type user group for access to the toolbar. ■ Store and file status type user group to allow the user to open a floor plan. ■ Product type user group to allow the user to place products.
ISSC Mobile	Membership of a user group that allows the user access to a single store and store status.

4

Basic Data Configuration

Basic data configuration is data that is entered manually into the Administration and Configuration modules to allow for the import of more complex or higher volume data in a subsequent stage. The following topics are covered:

- Configuration Module
- Administration Module

Configuration Module

The Configuration module can be accessed from the File menu of the Administration Module. Before doing so, all other dialog boxes must be closed. When opened from here, SIs can access more tabs than when opened from the other MSM modules.

Two of these tabs are required for implementation purposes. Changes made in these tabs will have a global effect. Accordingly, all modules other than the Administration module must first be closed.

For details of where to find detailed information on the actions in this chapter, see Appendix A, "Information Locations."

Options Tab

The radio button for units should be set to the same units (either metric or imperial) as for the template database created when installing the application.

Directories Tab

The Directories tab is used to specify the location of folders used to hold physical files. These paths are best specified as UNC paths as using mapped drives is more complex and may cause difficulties for some users. Table 4–1 lists the locations.

Table 4–1   Folder Locations

Location	Description
Common on File Server	These files are accessible by all users. Two examples are the folders holding the AutoCAD drawing (DWG) files used for floor plans and the folders holding the DWG files (Fixture Library) used to represent fixtures in the Planner module. It is suggested a UNC path be used as this is simpler than mapping a drive on every user's computer.
Local on User's Computer	These are files specific to the user. An example is the help files which must be stored locally.

> **Note:** Local files must be in the same physical location on each user's computer because the database only holds a single path to each local file. When MSM is installed, a standard set of folders are installed at the same time.

To set the location of the folders:

1. Create any physical Windows folders required on the file server.

2. Map to those and the local directories from the Directories tab.

Table 4–2 lists the common directories.

Table 4–2   Common Folders on File Server

Folder/Directory	Description
Archived Files	The directory that the imported files are moved to if the archiving option is in use. Required by Data Importer.
Export Files	The location where the files are exported to, for example, images from the Snapshot option in the Merchandiser module.
Floor Plan Publish	Directory which acts as the root for the location to which the floor plans are published.
Image Capture	Directory for images that will be imported into the software, for example, images for association with products. Image capture could also be a local directory, but it is generally simpler to have a single, common directory on the file server.
Image Label	Directory for images that can be added to the labels associated with fixtures in the Merchandiser environment.
Image Root	This is the root directory for images used for photo-realistic representations of products (product images). As product images are added, the hierarchy below the image root is modified.
Import Files	Location from which files are imported. Data Importer looks for the files it reads in this location.
MSM	Directory that holds standard blocks used by Oracle Retail Macro Space Management.
RF Bin	This holds files that have been marked for deletion in Store Manager and moved from the Store Root directory.
Planogram Publish	Directory which acts as the root for the location to which planograms are published.
Planogram Root	Root directory for planograms imported from third-party software. It is no longer in use. The location is now specified by the DEFAULT_IMPORT_DIR system variable.
Sounds	Directory for .wav files that are used to generate warning or alert sounds used in ISSC.
Store Root	Root directory for the directories and files that make up the hierarchy specified in Store Manager. Clusters are containers for stores sharing a common characteristic. They exist only in the database and are not associated with any child directories below the store root.
Textures	Directory for Textures. Used for specifying the textures for walls, ceilings, and so on, in Merchandiser.

In addition, some custom directories need to be created on the file server. These include folders for the fixture drawing file libraries, Planner prototype AutoCAD DWG drawing, and any title blocks. These are copied locally when MSM is installed. Moving them to a central location ensures that updating them only has to be done once.

Table 4–3 lists the folders that need to be local.

Table 4–3   Folders on the Local Machine

Folder	Description
BMP	This directory is used for the AutoCAD toolbar button bitmaps that appear in the toolbars in the Planner environment.
Help	Folder for the help files used by MSM. Must be local for them to work.
Log files	Log files created by the application to record events and issues. It should not be a network directory due to potential file locking issues.
Root	Root directory for the local application folders.
Working	Directory for temporary files, including temporary graphics images, created in Merchandiser.

As well as the standard folders, others may need to be created. For example, parent and child folders may be needed to hold the different sort of fixture blocks created in Fixture studio. These should also be created on the file server and the pertinent paths assigned in the Directories tab. These directories then become available in the Category tab of the block Details dialog box in Fixture Studio.

In addition to those blocks, some blocks installed locally with each MSM installation are also best moved to the file server. These blocks are discussed in "Move Information to the File Server."

Move Information to the File Server

Some files are initially installed locally. Although the application will work satisfactorily, moving a set to a location on the file server means that upgrading the application becomes simpler. Table 4–4 lists the files.

Table 4–4   File Server Information

Data	Description
Files in the MSM Blocks directory	When MSM is installed, it includes blocks used for system purposes such as bay numbering and aisle annotation. These can be found as children of the **C:\Oracle Retail\MSM\MSMBlocks** directory; one folder holding the blocks required for an imperial database and one for a metric. The pertinent set should be copied over to the File Server.
Prototype Drawing	This is a DWG file used to create blank floor plans in Planner. It is installed in the **C:\Oracle Retail\MSM\Data Files** directory. There are two DWG files, one for a metric database and one for an imperial one. The pertinent prototype drawing should be copied over to the File Server.
	The prototype drawing defines the default settings for a blank floor plan including the snap and grid settings together with the default text and dimension styles.

Table 4–4   (Cont.) File Server Information

Data	Description
Title Blocks	When MSM is installed, default title blocks are provided. These can be found as children of the **C:\Oracle Retail\MSM\MSMBlocks** directory; one folder holding the title blocks required for an imperial database and one for a metric. The pertinent set should be copied over to the File Server.

The Windows folders for these on the file server should be created with an identical name to the original. The new path can then be mapped in the Directories tab of the Configuration module. Using this method avoids the need to individually remap each block to the new directory. A set of files can then be pasted into the pertinent folders. Table 4–5 lists the actions that are required after moving the files.

Table 4–5   Actions Required after Moving Files

Data	Description
Files in the MSM Blocks directory	The original path for the MSM directory will be a local drive. This should be changed to that on the file server.
Prototype Drawing	Open the Configuration module. In the Files tab, set the path to the folder on the file server.
Title Blocks	The original path for the default title blocks will be a local drive. This should be changed to that on the file server.

The precise directory the MSM blocks and default title blocks will be held in depends if they are metric or imperial. A directory for each type can be found as a child of the MSM Blocks directory.

> **Note:**   When upgrading, carry out a difference check between the blocks supplied with the upgrade and the existing blocks to see if any have changed.

The Profiles Tab

The profiles tab enables users to switch between profiles. Each profile holds a specific collection of settings in the Configuration module. Each profile can be exported. clicking the Export button will write files containing the current profile into the Export directory specified in the Directories tab of the Configuration module.

Some of the settings in the Configuration module are written to the database - for example the names of and paths to the specified directories. Other settings are written to the registry on each computer. An example of this is the path to the AutoCAD prototype drawing used to create blank floor plans in the Planner module.

It is suggested that one computer is configured with the appropriate settings in the Files, Zones, Fixturing, Merchandising and Merchandiser tabs. Many of these settings can then be added to other MSM computers by:

1. Clicking Export on the Profiles tab of the Configuration module. This will write two .reg files to the specified export directory.

2. Copying the .reg files to the computer it is desired to import the settings into.

3. Double clicking the .reg files to write the contents to the registry on that computer.

Administration Module

The remaining basic data configuration is carried out in the Administration Module.

Calendar Data

The Calendar allows data to be associated with specific time periods. An example of this is the import of financial data for KPIs. Calendar data can be added or modified by one of three means:

- Manual entry in the Calendar dialog box accessed from the General menu.

- Data import. This requires configuring an import.

- Add the data directly to the database using a SQL insert statement.

As some functionality (such as KPIs) reference the AVTTB_CALENDAR table, a minimum of one entry is required in the table. This is the period ALL covering 1st January 2000 to 31st December 2099.

> **Note:** The default calendar provided refers to historical dates. This can be deleted.

Zone Definitions

Zones are used to describe the physical part of a store allocated for particular retail purposes. (An alternative name for zones is departments). Zones are of three general types. These types are defined in the Zone Types dialog box accessed from the Planning menu. In the database this is the ZNT_ID in the AVTTB)ZONE_TYPE table. Table 4–6 lists the zone types.

Table 4–6   Zone Types

Zone Type	Description
Internal Area	There can only be one zone of type **Internal Area**. This is used to determine the total area used for retailing for reporting purposes.
Department	These are the best zones to be used for reporting purposes as fixtures are only ever allocated to one **Department** level zone.
Other	Zones of type **Other** serve two broad purposes: as containers in the hierarchy for placeable zones, for example, Sales/Non-Sales and as sub-departments within departments for finer granularity of reporting.

> **Note:** ISSC floor plans require zones of type **Department** to be present before they can be opened. More specifically, the ZNT_ID must be 0 for the zone to be recognized in ISSC

Factors to consider in Setting up Zones

There are a number of factors to consider before setting up zones. Table 4–7 lists the factors.

Table 4–7   Factors when Configuring Zones

Factor	Description
Layers	Clash functionality identifies if zones of the same general type (for example, Department zones) are overlapping. This is to prevent double counting of the floor area in a store. The clash functionality only works for zones on the same layer. Default layers are provided for the zone types in the template database.
	If additional types are created, for example, for non-sales areas such as the space allocated to aisles, more layers need to be created for the new zone types to go on. Creating those additional zone types and requisite layers is outside the scope of this implementation guide.
Colors and Hatch Patterns	Zones can be assigned both a color and a hatch pattern. These can be used to distinguish one zone from another.
Zone Codes	Zone codes are unique codes primarily used for importing and updating zone definitions. If associated with formation from another database, they can be used as look-ups to create primary keys in MSP.

Creating a Zone Definition

To manually create a zone definition:

1. Open the Zone Definitions dialog box from the Planning menu.

2. Highlight the node in the zone hierarchy that will be the parent for the zone about to be created.

3. Click **Add Zone** on the toolbar. This brings up the Add Zone Description dialog box. Add the following information:

   - Zone name and description.

   - Zone type from the drop-down list.

   - Hatch style and color.

   - Icon from the drop-down list.

   - Zone code (if required).

5

Initial Fixture Studio Setup

This chapter describes the preliminary setup in Future studio. It enables users to place and test fixtures and gondolas, but not to plan a full store. The following topics are covered:

- Initial Configuration
- Remap System Blocks
- Create Fixture Hierarchy
- Create Example Fixtures
- Create Gondola Hierarchy
- Create Example Gondolas

For details of where to find detailed information on the actions in this chapter, see Appendix A, "Information Locations."

Initial Configuration

By default, Fixture Studio does not load block information automatically on startup. To load the blocks automatically on a specific machine, open the Options dialog box from the View menu, check the **Automatically read blocks on start** option, and click **OK**. The blocks will then load automatically the next time Fixture Studio is started.

Remap System Blocks

Chapter 4, "Basic Data Configuration" covered moving the system blocks to a location on the File Server. This makes them available to all users from a common location and thus facilitates updating. In the template database, these blocks are mapped to the directory on every user's local drive.

The simplest way to remap the system blocks is to create an identically named Windows folder on the file server as exists on the local drive. After copying the files, open the configuration module from the Administration module and reset the directory path to the folder in the Directories tab.

Create Fixture Hierarchy

The aim of the fixture hierarchy is to provide a framework for arranging the substantial number of fixtures required for store planning in a logical manner so they can readily be located in the Object Browser. This hierarchy can be brought in using the pre-configured import in the Data Importer module.

It can also be created manually in Fixture Studio. To do this, highlight the required parent group in the fixture hierarchy and click **Add Group** on the toolbar. In the Group dialog box, enter the Description and select an appropriate icon from the drop-down list. Click **OK**. Continue until all the required fixture groups have been added.

Create Example Fixtures

The SI will have to create a number of fixtures. These will normally be a subset of the retailer's fixtures suitable for creating a gondola. The fixtures and gondola are required to create a floor plan for further implementation tasks.

To create the fixtures:

1. Create the block in the Planner module (if not preexisting as a raw AutocAD block).

2. Read the AutoCAD block into the Fixture Studio module.

3. Assign MSM properties and save the block in Fixture Studio. These MSM properties are a series of settings assigned to the block that determine how it behaves when inserted into a floor plan. These settings may also determine other facets of behavior - such as if the block can accept merchandise or not.

    An alternative to assigning MSM properties manually in Fixture Studio is to import the properties directly into the database using the Fixtures predefined import in the Data Importer module.

4. Save the block. This must be done in a specific way.

    -   Fixture Studio must be connected to the Planner drawing containing the AutoCAD block for the fixture.

    -   In the Save dialog box both the drawing and the database must be selected as destinations.

    This will result in the following:

    -   The data for the fixture will be written back to the database. (Until then it is only saved locally in Fixture Studio).

    -   XData is written from fixture studio into the raw AutoCAD block. This data is used by Planner and is not accessible to users.

    -   A copy of the block containing the XData is written into the directory specified in the Category tab of the Block Details dialog box in Fixture Studio. This copy of the block will be used every time the block is placed in a floor plan.

Naming Conventions

Some operations (such as creating gondolas) are only possible if a naming convention is used for blocks. An example of a naming convention is:

```
Block_Type_LengthxDepthXHeight
```

This gives a family of blocks of different sizes names in a logical way. Following is an example showing three blocks with names according to a naming convention:

```
Chiller_36x24x73
Chiller_48x24x72
Chiller_48x24x96
```

Creating the Block in the Planner Module

These steps are for a single block. The process can be carried out in bulk if required.

To create the block in the Planner module, see the following sections:

Prepare the AutoCAD Drawing

To create blocks with 2D/3D functionality, two layers should be created in the drawing called **2D** and **3D**. These are in addition to the standard Layer 0.

Create the Fixture

To create the fixture, draw an outline representing the footprint of the fixture on Layer 0. Select the outline. Open the Properties dialog box and set the properties shown in Table 5–1.

Table 5–1   Basic Fixture Properties

Feature	Purpose
Change the layer to 2D	Required for the 2D/3D functionality to work.
Set the color to By Block	Required for KPIs to work.
Set the lineweight to By Block	Required for thicken as a highlighting option.

Draw the three dimensional representation of the fixture on Layer 0. Select the outline. Open the Properties dialog box and set the properties shown in Table 5–2.

Table 5–2   Basic Fixture Properties

Feature	Purpose
Change the layer to 3D	Required for the 2D/3D functionality to work.
Set the color to By Block	Required for KPIs to work.
Set the lineweight to By Block	Required for thicken as a highlighting option.

Select both the 2D and 3D parts of the fixture and turn it into a block using the AutoCAD **BLOCK** command. Enter a suitable block name for the Block Definition, specify the insertion point, and click **OK** to create the block.

Read the Block into Fixture Studio

To read the block into Fixture Studio, ensure the drawing containing the block is the active drawing in the Planner module. Select **Connect to AutoCAD** from the File menu in Fixture Studio. This links Fixture Studio to the active drawing in Planner. SIs should remain connected to AutoCAD while registering and saving blocks. Some of the requisite functionality is only available while connected.

Select **Read Blocks** from the File menu. This brings up the Read Block Definitions dialog box. Set the source to **Merge**. This reads in any block definitions from the Planner drawing that are not in the database. Click **OK** to read in the definitions. These appear in the Fixture Hierarchy.

Assign MSM Properties to the Block

The next step is to assign properties to the block. These are used by many pieces of MSP functionality during the store planning process:

1. Assign the fixture to the correct node in the Fixture Hierarchy.

2. Assign the MSM properties.

3. Save the Block within Fixture Studio.

Assign in the Fixture Hierarchy

When first read into Fixture Studio, the Blocks appear in the Fixture hierarchy. To assign them to a specific Fixture Group, highlight the fixture and then drag and drop it onto the icon representing the Fixture Group.

Assign MSM Properties

A range of MSM properties need to be assigned. Only the more important ones are described in the following tables. This is done in the Block Details dialog box brought up by right clicking on the block in the Fixture Hierarchy and selecting **Edit Block**. Some basic properties that can be assigned are listed in the following tables.

Table 5–3   Basic Settings for Categories Tab

Setting	Description
Retail Type	Typical values for equipment are Fixture, Fitting, or Shelf. If the SI is unfamiliar with the available types, they can use the provided wizard.
Can Populate with Display Style Can Populate with Placeholder Accepts Secondary Equipment	Set these checkboxes as appropriate for the type of equipment.
Directory	Set to the appropriate directory. The list of available directories is configured in the Directories Tab of the configuration module accessed from the File menu in the Administration module.
Status	Set as appropriate.
Effective Date Expiry Date	These are the dates the equipment is scheduled to come into and be withdrawn from service. Set as appropriate.
Area Calculation Directions	Set as appropriate for the equipment. These are used for reporting purposes.
Reporting Option Flags	Set as appropriate. If fixtures are to annotate in a floor plan, the **Include in Fixture Annotation** flag must be set.

> **Note:**   At present the expiry date defaults to 1899. This should be set to a date in the future - typically 31st December 2099.

Table 5–4   Basic Settings for Insertion Tab

Setting	Description
Layer	Select an appropriate layer for the block. The default layers provided are **FIXTURES**, **FITTINGS-FITTING**, and **SHELVES.**
Level	Select an appropriate level for the block. Fixtures typically go on **Floor** level, shelves on **Undefined**.
Insertion Position	This must exactly match the point chosen when the block was created with the BLOCK command in Planner.

Table 5–5   Basic Settings for Size Tab

Setting	Description
Dimensions	Set the dimensions for the block. As Fixture Studio is connected to the Planner drawing, this can be done by clicking **Calculate.**

Table 5–6   Basic Settings for Connections Tab

Setting	Description
Connections	Assign connection points to the block. The simplest way of doing this is to click **Wizard**.

Table 5–7   Basic Settings for Parts Tab

Setting
None required for basic implementation.

Table 5–8   Basic Settings for Fixture Tab

Setting	Description
Product Block	Select a product block. This is used to show the presence of merchandise in the Planner module. The default block provided for an imperial database is **I_PBASE__**. For a metric database the equivalent block is **P_BASE__**.

Table 5–9   Basic settings for UDA Tab

Setting
None required for basic implementation.

Table 5–10   Basic Settings for Fixture Tab

Setting	Description
Fixture	For a basic implementation, select the Fixture style.
Shelf	Equipment of type Shelf also requires a shelf style to be assigned.

Table 5–11   Basic Settings for Merchandisable Areas Tab

Setting	Description
Offset 1	This generally needs small X and Y offsets to allow for the thickness of the fixture.
Offset 1	This can generally be left at 0,0,0 for simple fixtures.

> **Note:**   The merchandisable area is the area taken up by a product on the fixture. It is defined by two offsets, one from the lower left corner of the fixture and one from the upper right corner.

Table 5–12   Basic Settings for Shelf Tab

Setting

None required for basic implementation.

Table 5–13   Basic Settings for Preview Tab

Setting

None required for basic implementation.

> **Note:**   No graphics will be visible unless a 3DS file has been created for the block. (From the File menu, select Create 3DS Files.)

Save the Block within Fixture Studio

To save the block within fixture Studio, click **OK** on the Block Details dialog box. The information is saved locally and not yet written back to the database.

Save the Data to the Database and AutoCAD Block

To save the block to the database and write MSM specific information to the DWG block, open the list of blocks and highlight the required fixture. At this stage, the icon should be red (showing that data has been changed) and it should have a negative ID (for example -1). Next, select **Save Blocks** from the File menu. This brings up the Save Block Definitions dialog box. Make the following selections:

- Set the destination to both **Database** and **Drawing**.

- Select the **Add New Definitions**, **Enforce Save**, **Only Save Selected Blocks**, and **Write Block Files** options.

On clicking **OK**, the data is permanently written to the database, xdata is embedded into the DWG file, a copy of the block is written to the directory specified in the Category tab of the Block Details dialog box, and a confirmatory dialog box appears. The icon for the block turns to green and the ID changes to a positive number. The block information has been written to the database.

> **Note:**   Multiple fixtures can be saved by using multi-select in the list of unsaved fixtures.

Create Gondola Hierarchy

The aim of the gondola hierarchy is to provide a framework for arranging the gondolas required for store planning in a logical manner so they can readily be located in the Object Browser.

It can be created manually in Fixture Studio. To do this, highlight the required parent group in the gondola hierarchy and click **Add Group** on the toolbar. In the Group dialog box, enter the Description and select an appropriate icon from the drop-down list. Click **OK**. Continue until all the required gondola groups have been added.

Create Example Gondolas

The SI will have to create an example gondola from the subset of the retailer's fixtures. This should be configured to represent a gondola in actual use by the retailer. This gondola is required to create a floor plan for further implementation tasks.

> **Note:** The *Fixture Studio User Guide* contains two worked examples on how to create a gondola.

6

Data Import

The chapter describes the import of bulk data from other systems. The following topics are covered:

- Overview
- Configuration in the Administration Module
- Importing the Store Hierarchy and Information
- Importing Products and Planograms
- Product and Planogram Import using ODI

Overview

This section covers configuring the bulk import of data into MSM. This is done by importing data from the retailer's other systems. Bringing in the data regularly when MSP is in service at the retailer is covered in Chapter 9, "Batch Processes.".

For details of where to find detailed information on the actions in this chapter, Appendix A, "Information Locations."

Data Import Tools

There are three basic forms of import tool.

Data Importer

Data Importer is an MSM module. It can be used to import the simpler forms of data during the implementation process. It is not efficient at importing large volumes of complex data and is thus not suitable for regular overnight batch processes.

Oracle Data Integrator (ODI)

This is Oracle's Extract-Transform-Load (ETL) tool. Scenarios are provided to assist in the import of planogram designs. In addition, SIs can configure ODI for other forms of data import.

Third Party ETL Tools

If the retailer already uses another ETL tool, it can be configured for import purposes. Configuring third-party software is outside the scope of this document.

Full or Delta Imports

There are two possible forms of imports: full or delta. Full imports bring in the entire set of data; delta imports just any changed data. Full imports are necessary to populate the MSP database when first importing information. After that, delta imports are the most efficient way of importing data within a restricted time window for large volumes of data.

Next IDs and the AVTTB_NEXTID Table

The database contains a table called AVTTB_NEXTID. This contains the primary key for the next entry in a number of tables and is used to help with multi-user access to the record of the next available primary key for those database tables. The AVTTB_ NEXTID table needs to be updated after each data import. There are several ways of doing this including the following:

- Manually from the Tools menu in the Administration module.

- By using the Post SQL option in Data Importer.

- By calling the AVTSP_UPDATE_NEXT_ID stored procedure.

Failure to update the AVTTB_NEXTID table can result in referential integrity problems when the functionality is next used.

CSV Files

In order to import using Data Importer, a CSV file containing the pertinent information must be created and placed in the Import Files folder specified in the Directories tab of the Configuration module. Data Importer does not come with example CSV files. The sequence of data for the columns of this CSV file can be determined from the Import Definition in Data Importer and an appropriate file created of data for import. The format of the file can be determined from the pre-configured import in the Data Importer module - further information is outside of the scope of this document.

Configuration in the Administration Module

Prior to importing planograms via the pre configured ODI scenarios or via a third party ETL tool, three things need to be configured in the Administration module:

- Mapping the fixture, shelf styles and product used in third-party planogram software to map the fixture, shelf and product styles used in MSM. For a basic implementation, these can be mapped to the default styles provided.

- Defining the default items of equipment if an item of equipment being imported in the planogram definition that does not exist in the MSP database. This may require creation of the required default items of equipment in Fixture Studio.

- Setting up the system variables described in Table 6–1.

Planogram Import Styles

The purpose is to map the fixture and shelf styles used by a third-party planograming tool to the fixture and shelf styles used by Macro Space Planning. This means MSP can use the style relationships from the third-party planograming tool to validate the placement of the shelf objects when they are placed onto the parent fixtures. For instance, a shelf may be identified in the other system using a code "1". MSM will then

map that to a particular style, and then identify a block that has that style and the specified size.

A default block is also assigned for each style, so that if the specific block in the planogram import does not exist in the MSP database, an alternative is assigned.

This data is configured in the Planogram Import Styles dialog box accessed from the Merchandising menu in the Administration module. To configure this information:

1. Enter the name of the third-party planogram software by selecting options from the tools menu. The requisite name can then be selected from a drop-down list.

2. Select the required default block of equipment from the drop-down list. These blocks must first have been created and defined in Fixture Studio:

   - If no block of the required type is available, the drop-down list is blank.

   - If no block is specified, during planogram import, the block defaults to that specified in the DEFAULT_IMPORT_FIXEL_BLK_ID or DEFAULT_IMPORT_FIXTURE_BLK_ID system variable.

   > **Note:** This may require creating the necessary default blocks in Fixture Studio first.

3. For each MSP style option, enter the corresponding style from the third-party planogram software. Each MSP option must have a corresponding style entered before the dialog box can be saved.

System Variables for Planogram import

There are a number of system variables that need to be configured prior to planogram import. These define the default items of equipment to be used if no default item of equipment has been defined in the Planogram Import styles dialog box. Before these system variables can be configured, the appropriate items of equipment must first be registered in Fixture Studio. The system variables are configured in the System variable dialog box accessed from the General menu in the Administration module.

Other system variables determine the default product blocks that are used if the information is not included in the import, together with other information such as the default material to assign.

Table 6–1 lists the system variables.

Table 6–1   System Variables for Planogram Import

System Variable	Description
DEFAULT_IMPORT_BLK_ID	Default product blocks.
DEFAULT_IMPORT_DIR	Default import directory.
DEFAULT_IMPORT_FIXEL_BLK_ID	Default shelf
DEFAULT_IMPORT_FIXEL_STYLE_ID	Default style assigned to the default shelf.
DEFAULT_IMPORT_FIXTURE_BLK_ID	Default fixture.
DEFAULT_IMPORT_MAT_ID	Default material to be assigned.
DEFAULT_IMPORT_PRODUCT_BLK_ID	Default product block for imported products.

Importing the Store Hierarchy and Information

The most efficient way of bringing store information is by importing data. The Data Importer module contains a predefined import for stores and their hierarchy. Alternatively, the SI can configure ETL tools (such as ODI) to import the information.

Overview of Importing Store Information using Data Importer

Data Importer comes with a pre-configured import for store information. This includes a store hierarchy and store information, such as address, and User Defined Attributes (UDA) information.

The store hierarchy (clusters) imports with the following structure:

- Business
- Continent
- Country
- Region
- District

Store level information that is imported includes address and UDA information. If UDAs are to be imported, these must first be configured in the Administration module. This is done using the User Defined Attributes dialog box accessed from the General menu.

> **Note:** For information on how to configure UDAs, see the *Oracle Retail Macro Space Management Administration Module User Guide*.

Running the Import via Data Importer

A CSV file containing the pertinent information must be created and placed in the Import Files folder specified in the Directories tab of the Configuration module accessed from the File menu of the Administration module. Once the CSV file is in the Import Files folder, the data import can be run by selecting the Stores option in Data Importer and clicking **Import Data**. After the import has run, the results can be seen by viewing Data Importer's Import Log and Import Error Log.

Actions after the Data Import

After the store hierarchy has been imported, the data exists in the database. However, physical files need to be created before the functionality can be used. Table 6–2 describes the required physical folders. These may well be created by using a tool such as a DOS batch script.

Table 6–2   Physical Folders Required

Hierarchy Object	Description
Clusters	Clusters exist only in the database as containers for stores sharing a common characteristic. As such, no Windows folders are required.
Stores	Each store requires a Windows folder underneath the Store Root defined in the Store Root directory specified in the Directories tab of the Configuration module accessed from the File menu of the Administration module. The path for each directory is specified in the AVTTB_STORES table in the database.

Table 6–2   (Cont.) Physical Folders Required

Hierarchy Object	Description
Floors and Revisions	When the store hierarchy has been imported, it is possible to create a default floor and revision for each store below the store root, the revision containing a blank DWG file. Alternatively, these can be manually created by floor planners using Store Manager.

> **Note:**   The DWG file is based on the Prototype Drawing specified in the Files tab of the Configuration module. This is accessed from the File menu in the Administration module. This setting is stored locally in the registry on each computer.

Importing Products and Planograms

The next stage is importing products and planograms. Typically, this is a three stage process:

1. The Product Hierarchy is imported using Data Importer. This hierarchy must be in place before planograms and their associated products can be imported.

2. The planograms designs (including their associated products) are exported to an XML file using an ETL tool.

3. The ODI (with its pre-configured scenarios) is used to import the planograms and their associated products.

> **Note:**   Data Importer contains a pre-configured import for SKUs and Display Styles. For implementation purposes, this provides an alternative to importing the products with the planogram design information.

Importing the Product Hierarchy

The product hierarchy is a prerequisite for importing planograms. The planogram designs only contain information on the SKUs they contain and not the hierarchy to which they belong. The product hierarchy has to be present so that imported products can be assigned to their correct node.

If the product hierarchy is imported using Data Importer, the pre-configured hierarchy is:

- Division
- Department
- Class
- Sub-Class
- Style
- Item

SKUs are added at the item level by the Planogram Import process, although this could be done by Data Importer for the initial import.

Running the Data Importer Import(s)

A CSV file containing the pertinent information must be created and placed in the **Import Files** folder specified in the Directories tab of the Configuration module accessed from the File menu of the Administration module. Once the CSV file is in the Import Files folder, the data import can be run by selecting the Product Hierarchy option in Data Importer and clicking **Import Data**. After the import has executed, the results can be seen by viewing Data Importer's **Import Log** and **Import Error** log.

Product and Planogram Import using ODI

Oracle provides a solution by configuring ODI to import planogram designs from a pre-defined XML file.

Data Import using ODI

ODI is configured to import planogram definitions from an XML file. This XML file is typically generated by an ETL tool. The SI has to perform two steps:

- Create the XML file (typically by use of an XML tool).

- Import the data in the XML file into the MSP database by using ODI and the pre-configured scenarios it is provided with.

Creating the XML File

Many planogram definitions are created in third-party software and imported into the MSP database. Full planogram designs contain information on parent fixtures, equipment (fixels), and products. Creation of this XML file is an SI responsibility. The structure of the XML file is described in an Oracle white paper called *Planogram Import* available from My Oracle Support.

Once generated, the XML file has to be placed into the directory designated as the source from which the XML file is imported.

Importing the XML File

The XML file can be imported into the MSP database using a pre-configured installation of ODI. The full details are covered in the *Oracle ODI Planogram Import User Guide, Volume 1*. Once configured, the initial import can be run manually. After the initial import has populated the database with the planogram information, it is generally only necessary to import information on new, modified or deleted planograms.

7

Initial Planner Setup

This chapter explains how to configure basic aspects of the Planner module. Once configured a basic floor plan can be created using

- System Variables
- Create Access for Architectural Plans
- Configuring Layers
- Creating a Temporary Floor Plan

For details of where to find detailed information on the actions in this chapter, see Appendix A, "Information Locations."

System Variables

The system variables are configured in the System Variable dialog box accessed from the General menu in the Administration module. Planner must be stopped and restarted before any changes in these system variables take effect.

Store Manager

There are two system variables that affect the default Publish Date and Effective Date provided when a floor plan is first set to Authorized status. These default dates can be modified by the floor planner if required. These Publish and Effective dates must be consistent with the retailers business processes and should be set after consulting the retailer about how fast the required actions can be executed within their organization.

- The Publish Date is when the floor plan will be distributed to the stores and the supply chain will be set in motion to provide the required items at the specific date.
- The effective date is when the floor plan will go into service at the store with planograms being replaced or reset and so on.

The System Variables are:

PUBLISH_DATE_LEAD_PERIOD

This system variable determines the default number of days from the current (today's) date the floor plan will be published. The system variable setting is currently 0 - it will default to today's date. A typical value might be between 14 - 28 days, resulting in the floor plan being published 2 or 4 weeks after it is authorised.

EFFECTIVE_DATE_LEAD_PERIOD

This system variable determines the default number of days from the Publish Date the floor plan will be made Current. The system variable setting is currently 0 - it will default to today's date. A typical value might be between 14 - 28 days, resulting in the floor plan being made effective 2 or 4 weeks after it is published.

> **Note:** The EFFECTIVE_DATE_LEAD_PERIOD system variable is cumulative with the PUBLISH_DATE_LEAD_PERIOD system variable. If both are set to 14 days, the Effective Date will be set to 28 days ahead of today's date.

Synchronisation

Planner holds floor plan information in an AutoCAD drawing. The information held in the database can differ from this drawing for a number of reasons including changes made in the MSM Merchandiser module and in ISSC. A series of system variable settings determine whether those changes are synchronised manually or largely automatically.

A set of default settings are provided which will suffice for most retailers. However, these can be modified to suit the requirements of a specific business process. When synchronisation has been configured, the SI should give the retailer pertinent notes so that the retailer can train its staff accordingly.

The system variables are:

AUTOSYNC

This system variable is used to specify whether a DWG floor plan is automatically synchronised when it is opened. The options are:

Table 7–1   AUTOSYNC System Variable Values

SV Value	Effect
0	Do not Auto-Synchronize.
1 [Default]	Prompt when Auto-synchronization is required.
2	Auto-Synchronize automatically when the floor plan is opened.

DYNAMIC_SYNC

This system variable determines whether changes made to a floor plan using AutoCAD commands (as opposed to MSM commands) are automatically written to the database. Leaving this set to On is preferable as it removes the need for a user to remember to manually synchronize the floor plan after making changes. It also ensures that summary views and reports are up to date.

Table 7–2   DYNAMIC_SYNC System Variable Values

SV Value	Effect
0	Off - manual synchronisation required.
1 [Default]	On - results of many AutoCAD commands written to the database.

SYNC_SETTINGS

This system variable determines whether to save user specific defaults for the synchronisation options or to use the default options. If the defaults are used, they can be specified in the **SYNC_DIRECTION** and **SYNC_OBJECTS** system variables. These them become the default options for the user when manual synchronization is used. The options for the SYNC_SETTINGS system variable are:

Table 7–3   SYNC_SETTING System Variable Values

SV Value	Effect
0	Use default options.
1 [Default]	Use user specific options

SYNC_DIRECTION and SYNC_OBJECTS

The **SYNC_DIRECTION** system variable holds the default direction for synchronisation in the Synchronisation dialog box accessed from the File men in the Planner module. This is set to a default of 0: Match the drawing.

The **SYNC_OBJECTS** system variable specifies the objects that are to be synchronised. It is a bitwise system variable set to a default of 29. This will synchronize fixtures, products, other blocks and zones.

Table 7–4   Bitwise Values for SYNC_OBJECTS System Variable

Bitwise Value	Description
0	No Defaults.
1	Synchronize Fixtures.
2	Synchronize Shelves.
4	Synchronize Products.
8	Synchronize Other Blocks.
16	Synchronize Zones.
32	Synchronize Views.
64	Synchronize Lights. (Not currently in use).
128	Synchronize Notes/Markups.
256	Synchronize Aisles.

The default value of 29 is made up of (1) Fixtures, (4) Products, (8) Other Blocks and (16) Zones.

Create Access for Architectural Plans

Architectural plans can be in two formats; DWG and DWF. MSP can use both formats, ISSC can only use DWF files. Architectural plans are used to show the position of physical structures such as walls services such as electrical power and lighting as an aid to store planning. The retailer may already have these architectural plans - they need to be made accessible to MSP. There are two ways this could be done:

■   Setting up a mechanism to publish architectural plans from Raw AutoCAD to a folder that MSM users have access to.

■ Giving MSM users access to the folders the architectural plans are currently published to.

If no existing architectural plan is available, then it is suggested one be created showing the basic building shell. This can then be used to ensure zones, equipment and signage are correctly located relative to doors, windows and walls.

The retailer will also need to have a method for identifying architectural plans that are updated - an architectural plan from before a store refurbishment may be different from the one after it.

Configuring Layers

When fixtures and fitting are placed, they initially take up the color of the layer they have been assigned to when they are configured in Fixture Studio. By default all these layers have the same initial color. It is useful for some of the layers to be given a different color so that the type of object on them can be easily identified. Three of the most common layers that have their color changed for this purpose are the **Fixtures** and **Fittings** layers. for equipment and the **Aisles** layer for aisles.

To change the color of a layer:

1. Select **Layer Aliases** from the Format menu.

2. Select a layer from the list. Click on the color for that layer to modify it. A color pallet will appear.

3. Select a color on the color pallet and click **OK**. The color for the layer will change.

4. After all the required colors have been changed, select **Exit** from the File menu.

5. Click **Yes** in the confirmatory dialog box to save the changes back to the database.

> **Note:** The color of text is controlled from the Text Styles dialog box in the Administration module. Changes in the Layer Aliases dialog box have no effect.

Layer Aliases

Layer Aliases map the AutoCAD layers in a Planner (AutoCAD) floor plan to the layers used in Merchandiser and in ISSC.

Layer Standards

Layer standards are where the layers used in Planner floor plans are named according to a pre-determined set of rules. The database allows layer names from several layer standards to be stored - although only one layer standard can be in use at one time. Each layer standard is thus a logical grouping of layer names.

■ Each Layer Alias must map to a Layer Name for each standard.

See the *Oracle Retail Macro Space Planning Data Model* for more information.

Layer Themes

Layer Themes are ways of setting a pre-configured set of rules for which layers are turned on or off, together with information on line weights, transparency and so on. These are then reference by the Printing and Publishing processes.

These are not fully configured in the template database and some work must be done during implementation.See the *Oracle Retail Macro Space Planning Data Model* for more information

Creating a Temporary Floor Plan

Creating a temporary floor plan is useful to configure some of the functionality in Planner and ISSC. As an alternative, one of the retailer's existing floor plans can be imported into MSM and used. Actions than can be carried out using it include:

- Completing the configuration of the default Title Blocks.

- Configuring Text Styles.

- Configuring Floor Plan Publishing.

- Manually Testing Floor Plan Publishing.

- Manually testing Update Status.

If a temporary floor plan is required, create it as follows:

Select Cluster and Store

The store hierarchy was imported as part of the data configuration process. This will have created entries for the store in the database. As a follow up to the data import process, physical windows folders should have been created under the store root for each store. Creating a temporary floor plan will not be possible if this Windows folder is absent.

1. Open Store Manager.

2. Select a cluster and a store in the store hierarchy.

3. Add a floor to the store.

4. Add a revision to the floor.

5. A folder structure is created below the store root on the file server.

6. Add a blank floor plan to the revision. (If the **Add Proposal Drawing** option is checked in the Add Revision dialog box, this will have been done when the revision was created).

> **Note:** Clusters will not have a physical folder created under the store root. Clusters are containers used to group together stores sharing a common characteristic.**:**

Associate an Architectural Plan

Associate an architectural plan with the store.

1. Navigate to the floor created for the store in Store Manager.

2. Use the **Associate Architectural Plan** option on the toolbar to add the architectural plan to the floor. This makes it available to all floor plans that are children of that floor.

3. Navigate to the revision and open the floor plan.

4. In Planner, use the **Add Architectural Plan** option from the Insert menu to add and architectural plan. The architectural plan should then appear as an underlay to the floor plan.

Lay out Zones

Lay out example zones to verify appearance.

From the Zones tab of the Object Browser in Planner:

1. Place an internal area zone Internal Area to delineate the maximum retail area.

2. Place Department type zones.

3. If other zone types have been created (for example sub-departments), place some of those.

> **Note:** A floor plan requires zones of type Department before it can be opened in ISSC.

Lay out Fixturing

The temporary floor plan does not require fixturing to the same standard as a real life floor plan. However, the floor planner should lay out arrays of fixtures and gondola runs in a way as to suggest a regular store layout.

- Placing fixtures can be accomplished from the Blocks sub tab of the Object Browser.

- Placing gondolas can be accomplished from the Gondolas sub tab of the Object Browser.

Draw Aisles

Aisles serve several purposes in MSM:

- They indicate the position of real aisles in a physical store.

- The direction in which they are drawn can be used to identify the main traffic direction in the aisle. This in turn can be used to determine whether planograms are placed in normal or reversed orientation.

- The Aisle Adjacency calculation associates fixtures with aisles. This information can then be used for reporting purposes.

A number of aisles can then be drawn between parallel gondolas runs to verify they place correctly.

Place Products

The product hierarchy and its associated products were imported at an earlier stage. Place products at different levels from the product hierarchy ranging from department level to SKU. These will later be used to check text styles, adjacency calculations and so on.

Place Planogram

The planogram hierarchy and its associated planograms were imported at an earlier stage. Place planograms on a range of fixtures. These will later be used to check text styles, adjacency calculations and so on.

8

Planner Configuration

The purpose of this stage of the implementation process is to configure aspects of Planner functionality. Some are concerned with the appearance of the floor plan - for example annotation and title blocks. Other actions are concerned with floor plan and planogram publishing. in preparation for setting up batch processes.

- Overview
- Text Styles
- Title Blocks
- Floor Plan Publishing
- Planogram Reports
- Planogram Publishing

Overview

Five things require to be configured: Text Styles, Title Blocks, Floor Plan Publishing, Planogram Reports and Planogram Publishing. This configuration can be done using the temporary floor plan created in the earlier stage.

For details of where to find detailed information on the actions in this chapter, see Appendix A, "Information Locations."

Text Styles

Text styles are used to annotate the floor plans in the Planner module in MSM and the product text in Schematic Preview in ISSC. The Text styles are:

Table 8–1   Text Styles in use in MSM

Text Style	Description
General	This text style is not in use.
Dept	User for zones of type **Department**.
Internal	Used for zones of type **Internal Area**.
Zones	Used for zones of type **Other.**
Product	Used for annotating product placeholders.
Planogram	Used for annotating planograms.
Profile	Used for annotating planogram bays (profiles).
Bay Numbering	Out of scope for this implementation.

Table 8–1 (Cont.) Text Styles in use in MSM

Text Style	Description
Fixture	Used for annotating fixtures.

Table 8–2 Text Styles in use in ISSC and ISSC Mobile

Text Style	Description
Product SKU	Annotation for products in Front Graphical and Planogram View.
Product Mobile SKU	Annotation for products in ISSC Mobile.

> **Note:** Only fixtures whose **Include Fixture Annotation** property is checked in Fixture Studio will be annotated. This is set in the Category tab of the Block Details dialog box in the Fixture Studio module.

Overview of Configuring Text Styles in MSM

This section discusses configuring text styles used to govern annotation in the MSM Planner module. Configuring text styles in ISSC and ISSC mobile will be discussed in the pertinent sections for those applications. Text styles are configured in the Text Styles dialog box from the Planner menu in the Administration module. They can be updated in the Planner module by opening a floor plan and using the Annotation dialog box (accessed from the Modify Menu or the Retail Toolbar). The method of working is as follows:

1. Update and save the text style in the Text Styles dialog box in the Administration module.

2. Close and reopen planner.

3. Using the temporary floor plan in the Planner module, open the Annotation dialog box. This can be accessed from the Retail toolbar.

4. Highlight the required style and click OK.

5. Repeat until the appearance of the text style matches the retailer's requirements.

The initial settings generally involve position, text size, color and offset. The offsets are normally chosen so that fixture, product, planogram and profile annotation do not overwrite each other. Once signed off by the customer, no further configuration of text styles is required.

Zone Annotation

There are three forms of zone annotation: for internal areas, department type zones and 'other' type zones. During the initial implementation the main things that are modified are the text size and color.

Fixture Annotation

Fixture annotation is used to label each fixture with its name. The initial settings generally involve position, text size, color and offset. For fixture annotation to be visible:

- The **Include in Fixture Annotation** check box must be checked in the Category Tab of the Block Details dialog box in Fixture Studio.

> **Note:** For gondolas, annotation can be simplified by having only the base fixtures annotate.

- Fixture annotation must be manually added using the Annotation dialog box accessed from the Retail toolbar in Planner. (Many other annotation styles are added automatically when an object is placed).

Merchandise Annotation

There are three forms of annotation for merchandise:

- Product Annotation - for when products placeholders are individually placed on a fixture.

- Planogram annotation - for when planograms are placed on fixtures.

- Profile annotation - used for showing the bay sequence for multi-bay planograms.

Practical Configuration of Text Styles

The configuration method set out below allows basic configuration of text styles. Parameters not specifically detailed for configuration should be left untouched.

> **Note:** More detailed configuration is possible - see the Administration module help file for more details.

Text Style Dialog Box

Set the following for each text style:

- Set the **Color** and **Dimension Color** to an appropriate value.

- Ensure the **Use Separate Text** checkbox is not selected. This will ensure (for example) that runs of fixtures are only annotated once - and not on every fixture. (The exception to this is profile text - this appears once per bay for a planogram).

Text Style Rules Dialog Box

This is accessed from the Text Style dialog box by double clicking a rule. Set the following:

- Set the **Field Index**. This is the field selected from the SQL in the Query tab of the Text Styles dialog box. The Field Index ignores the first two fields as these are required by the functionality to identify the parent object in the floor plan.

  Ensure the **Scale** and **Scale Offset** checkboxes are not checked. This will ensure the annotation remains a single fixed size irrespective of any scale that might be applied to the floor plan. It also makes configuration easier.

- Ensure the **Fit Within** checkbox is selected. In combination with deselecting the **Use Separate Text** checkbox this will keep the annotation within the bounds of the run of fixtures containing the object.

- Select the most appropriate option from the **Abbreviate, Truncate** or **Word Wrap** options to cater for the case that the text is too long for the parent fixture. Word Wrap is often the most effective option to select.

- Set the **Size** to an appropriate value. This determines the size of the text.

■ Set the **Offset** to a suitable value. This determines the placement relative to the parent fixture. This offset (together with the justification and position) should be different to those for other text styles.

Suggested Settings

Some suggested settings for text style rules are:

Table 8–3   MSM Text Styles

Text Style	Size	X Offset	Y Offset	Field Index
Internal Area Zone	20	0	0	1,2
Department Zone	15	0	0	1,2
Other Zone	10	0	0	1,2
Fixture	6	0	0	1
Product	6	0	-2	1
Profile	6	0	-9	1
Planogram	6	0	-16	3

> **Note:**   These setting may be combined with the Insertion and Justification options if required.

The above recommendations are for an Imperial database. For a metric one, multiply these values by 25.4.

Field Index

The Field index is selected from the Query tab of the Text Style dialog box. This Custom SQL statement can be modified to allow alternative information to be displayed. The Field Index - set in the **Text Style rule dialog box** - can be a list of comma separated values identifying the position of the field in the query to be displayed in the annotation.

Generally the first two values in the SQL Statement hold information allowing the object to be annotated to be identified in the Planner floor plan. these values are ignored by the code, so a field index of 1 typically refers to the third field in the SQL statement.

Title Blocks

Title blocks are used to frame the floor plan and to give information on it. The stages for configuring a title block from scratch are:

1. Create an AutoCAD block in the Planner module.

2. Register the title block in Fixture Studio.

3. If required configure the Custom SQL to populate the information into the Title block.

4. Define the Title Block and View Ports in the Administration module.

Default title blocks are provided with the application for printing or publishing those floor plans. These are:

- Imperial: ANSI D and ANSI E.

- Metric: A0 and A1.

These title blocks are installed in a local directory with each installation on MSM. Prior to configuring them, a copy should have been placed on the file server in an identically named directory to the local directory and the path to that directory modified accordingly in the Directories tab of the Configuration Module.

Title Blocks can be populated with custom information in text boxes. This information is read from the TITLEBLOCK_UPDATE Custom SQL in the AVTTB_CUSTOM_SQL table. The title blocks supplied with the application are already configured to read this information.

1. When the **Add Title Block** command is used from the Insert Menu in the Planner module for the first time, these text boxes will populate.

2. If the floor plan is modified, using the **Update Title Block** option from the Insert Menu in the Planner module will refresh the information. For this to work, the fields must contain AutocAD attribute definitions whose tag must match the pre configured names provided or a field name in the Custom SQL.

If the default title blocks are used, only two additional steps are required to install the title blocks. These are:

1. Reading the canonical media into the database.

2. Completing the configuration of the title blocks in the Administration module.

Reading in the Canonical Media

Before title blocks can be configured, details of the canonical media for the available printers and plotters must be read into the database. This only be needs to be done once and then the data will be available for all users of the MSP database. The steps to do this are:

1. Download the Microsoft® Visual Basic® for Applications (VBA) module from the Autodesk website. This add on enables scripts written in Visual Basic to be run from within AutoCAD.

2. Create a macro to read the canonical media and save it. The required information on this can be found on the AutoDesk website. The specific function name that has to be invoked is *GetCanonicalMediaNames()*.

3. Type VBARUN into the AutoCAD command line. This will bring up the Macros dialog box. See the AutoCAD help files for how to load macros into this dialog box and run them. Run the macro to import information into the AVTTB_ TITLEBLOCK_CANMEDIA table. An example of visual basic to do this is given below.

Example 8–1   Visual Basic to Read Canonical Media

```
Dim mvMediaNames as variant
Dim X as integer
mvMediaNames = Layout.GetCanonicalMediaNames()
For X = LBound(mvMediaNames) To UBound(mvMediaNames)
print mvMediaNames(X)
Next
```

4. The information will then be available for configuring title blocks.

Configuring in the Administration Module

These title blocks are provided in the MSM Block directory when MSM is installed., They are registered in Fixture Studio but require final configuration in the Administration module. To do this:

Table 8–4   Adding the Title Block in the Administration Module

Step	Action
1	Open the **Title Blocks** dialog box from the Planning menu.
2	Click **Add** on the toolbar to enter details of the title block.
	■ Enter an appropriate descriptive name for the title block - for example **A3 Title Block**.
	■ Select a Blockname from the drop down list. This will only show blocks with the title block type assigned in Fixture Studio.
	■ Enter the Width of the title block. This is the total width of the title block including the non-printable areas.
	■ Enter the Height of the title block. This is the total height of the title block including the non-printable areas.
	■ Enter the Width Offset - this allows for the non-printable margin of the paper.
	■ Enter the Height Offset - this allows for the non-printable margin of the paper.
	■ Enter the Default Scale - this is the scale the floor plan will print at. Title blocks are normally added in paperspace and printed at 1:1.
	■ Select the Canonical Media from the drop down list. This is the nominal paper size and must match the designed size of the title block.
	Select one of the values entered earlier and press Return to ensure the data is written to the database.
3	Highlight the recently added entry and click Edit on the toolbar. This will bring up the **Title Block** dialog box.
4	The Title Block dialog box is used to enter details of the viewports for the title block - these are the areas of the title block through which the floor plan will be visible. click Add on the toolbar to add details of the required viewports.
	■ Enter the Width of the viewport.
	■ Enter the Height of the viewport.
	■ Enter the Width Offset - this is the offset of the starting point of the viewport from the lower left corner of the title block.
	■ Enter the Height Offset - this is the offset of the starting point of the viewport from the lower left corner of the title block.
	■ Enter the Scale from the drop down list. This over-rides the general scale assigned to the title block.
	■ Enter the View from the drop down list. This is the perspective the floor plan will be viewed from.
	Select one of the values entered earlier and press Return to ensure the data is written to the database.

The Title Block will now be available to place from the Insert menu in the Planner module.

Floor Plan Publishing

Floor plan publishing is used to publish floor plans to a designated directory. The retailer then distributes those floor plans to the required recipients.

Floor Plan Publishing is configured in the Administration module - although normally run as a batch process, it can be manually run from the Planner module to test it. To configure floor plan publishing open the **Floor Plan Publishing Configuration dialog box** from the File menu in the Administration module. Make the following settings:

Table 8–5   Output Tab

Frame	Description
Directory Structure	Specify the directory (folder) structure that floor plans will be published to. The retailer will then need to distribute the plans within these folders to the pertinent destinations.
Format	Specify the forms the floor plans will be published in. This will generally be the electronic form most convenient to the retailer. An example of a possible format is PDF.
General	Specify the parameters that determine the time intervals used for floor plan publishing.
Filename Structure	Specify the form of the file name that will be generated when the floor plan is published. The format of this filename can be specified so as to include information that will assist its identification and dissemination.

Table 8–6   Rendering Tab

Frame	Description
Not named	Specify the visual appearance of the floor plan and whether a title block is required.

Table 8–7   Collation Tab

Frame	Description
Single Frame	Specifies the order electronic or hard copy versions of the floor plan will be published.

Table 8–8   Pre-Processing Tab

Frame	Description
Synchronize	Specify how the Planner DWG file is to be synchronized against the database and what objects are to be synchronized.
Restructure Drawing	Specify what aspects of the floor plan are to be reset to the defaults held in the database.
Annotation	Specify the annotation that is to be updated before the floor plan is published.
Calculations	Specify the calculations that are to be refreshed before the floor plan is published. This will ensure accurate reporting for the published floor plan.

Table 8–9   Validation Tab

Frame	Description
Single Frame	Specifies the checks that will be carried out before the floor plan will be published.

The following settings can be used as a default if the retailer does not have more specific requirements.

Table 8–10   Optional Default Settings for Floor Plan Publishing

Tab	Settings
Output Tab	■ **Create Store Subfolder** option. ■ **Create PDF** option. ■ **Include Store Code** in filename structure
Rendering Tab	Assume that the floor plan is in a suitable state for printing - no rendering options will be required.
Collation Tab	Collate by **Store Code**.
Pre-Processing	■ **Autosynchronize** option - select all items except shelves and views. ■ **Annotation** - select Products and Update Title block. ■ **Calculations** - select Recalculate Fixture Adjacencies and Recalculate Aisle Adjacencies
Validation	Select **Check for expired Planograms**.

Once configured, the output can be tested by running Floor Plan Publishing manually from the File Menu in Planner.

Planogram Reports

Planogram reports are configured in the Report Designer module. They are only required if planogram design documents are not imported for disseminating via the Planogram Publishing process. If MSP's planogram reports are required because planogram design documents are not being imported, they are created as below.

> **Note:** Even if external planogram design reports are imported for use in the Planogram Publishing process, it may still be useful to configure a MSM Planogram report. This is because the planogram publishing process has a setting allowing the MSM report to be used if the imported report is missing.

Setting up the System Variables

Two system variables require setting for the Report designer module. This is done in the System Variables dialog box accessed from the General Menu of the Administration module. The system variables are:

RPTDSG_TESTPOGID

This system variable holds the POG_ID from the AVTTB_PLANO table that identifies a planogram design that can be used for test purposes while configuring the report.

RPTDSG_IMAGE_BASE

The RPTDSG _IMAGE_BASE System variable holds the identity of the mapped drive or UNC path to a directory where any images associated with the report are held.

Setting up the Report

Setting up the report is done as follows:

1. Open the Report Designer module.

2. Select New from the File menu or toolbar. This will bring up the Report Properties dialog box.

3. Enter the name of the report, units and other required properties. Click **OK**.

4. Configure the new report as required with tables, views and so on.

5. Save the report.

6. Close and reopen the report. If should show data from the test planogram

7. Print the report to verify it prints correctly.

Planogram Publishing

Planogram publishing is used to publish planograms to a designated directory. The retailer then distributes those planograms to the required recipients. There are two basic options for the directory structure:

- **Publish by Store**: This option makes it easier for store managers as every planogram for the store is in a specific directory. However, this may result in each planogram being published multiple times.

- **Publish by Planogram Hierarchy**: Each planogram publishes to a directory mapped to a node in the planogram hierarchy. Each planogram is only published once, but collating a set of planograms for a specific store is more difficult.

Planogram Publishing is configured in the Administration module - it can then be manually run from the Planner module to test it. To configure planogram publishing open the **Planogram Publishing Configuration** dialog box from the File menu in the Administration module. Make the following settings:

Table 8–11　Output Tab

Frame	Description
Format	Specify the form in which planogram reports are to be output.
Directory Structure	Specify the directory (folder) structure that planogram designs will be published to. The retailer will then need to distribute the planogram designs within these folders to the pertinent destinations.
General	Specify the parameters that determine the time intervals used for floor plan publishing.
Filename Structure	Specify the form of the file name that will be generated when the planogram design is published. The format of this filename can be specified so as to include information that will assist its identification and dissemination.

Table 8–12　Templates Tab

Frame	Description
All options are contained in a single frame.	Specify the form in which planogram reports are to be output in. If the associated document option is chosen, this document must have been imported with the planogram definition.

Table 8–13   Collation Tab

Frame	Description
All options are contained in a single frame	Specifies the order electronic or hard copy versions of the floor plan will be published.

Table 8–14   Validation Tab

Frame	Description
All options are contained in a single frame	Specifies the checks that will be carried out before the planogram design is published.

The following settings can be used as a default if the retailer does not have more specific requirements.

Table 8–15   Suggested Options for Planogram Publishing

Tab	Settings
Output	**Format** - PDF File. **Organize by Planogram Hierarchy** - Dept. - Class. - Sub-class. **General** - Re-publish planograms if files are missing option. **Filename Structure** - Include Planogram Name.
Templates	**Use planograms preferred template, if defined.**
Collation	**Sort Order** - Department.
Validation	Assume that planograms were validated as imported - no validation required.

9

Batch Processes

This section describes the required batch processes.

- Introduction
- Batch Process Sequence
- Batch Process Descriptions

Introduction

This chapter describes setting up batch processes that require running on a regular basis, for example daily, weekly or monthly. Batch processes are normally run overnight to prevent impact on day-to-day performance.

Some of the tools discussed in this section may also be used for one off tasks during implementation at a retailer, but this is outside the scope of this chapter.

For details of where to find detailed information on the actions in this chapter, see Appendix A, "Information Locations."

Factors to take into Account

The following factors should be taken into account when setting up the batch processes.

Batch Processes

The batch processes have to be run in a specific sequence to achieve specific tasks. This sequence needs to be determined before the scheduling tool is configured.

Times used for Batch Processes

The time used for executing a batch process is based on the time on the database server.

Scheduling Tool

Macro Space Planning does not contain a scheduling tool. The retailer will need access to a suitable one.

Time Window

There will be specific time window to execute the batch processes. This is because batch processes are processor intensive. Scheduling should configured so as not to impair the activities of users carrying out normal manual tasks in the system.

Batch Process User Group

In the Security chapters the creation of a Batch Process User Group and associated user was suggested. The user name and password can then be used as a log in to run batch processes. Having a dedicated user for this purpose prevents batch processes relying on an administrator's log in that may be expired if that person leaves the retailer.

From a security perspective, a set of log in credentials for MSP is exposed within any associated batch files. Therefore this user should have the minimum privileges required to run batch processes. It should not have wider credentials to - for example - the Administration module.

Next IDs and the AVTTB_NEXTID Table

The database contains a table called AVTTB_NEXTID. This contains the primary key for the next entry in a number of tables. This table needs to be updated after each data import via a batch process. There are several ways of doing this. These include:

- Manually from the Tools menu in the Administration module.
- By using the Post SQL option in Data Importer.
- By calling the AVTSP_UPDATE_NEXT_ID stored procedure.

Failure to update the AVTTB_NEXTID table can result in referential integrity problems when the functionality is next used. SI's should select the most appropriate method for each import.

Batch Process Sequence

A typical batch process sequence is as follows:

Table 9–1   Batch Process Sequence

Order	Batch Process	Description
1	Floor Plan Automated Processing	Used to ensure the Planner (AutoCAD) floor plan and the database contain the same information. As an example, a prior batch operation may have altered information in the database without the corresponding information in the floor plan being updated.
2	Data Importer	Import of all data **except** products at SKU l and display Style level and planograms.
3	Planogram import	Imports both products and SKU and Display Style level and planograms
4	Adjacency calculations	Updates aisle, fixture and product adjacencies. Necessary for reporting and planogram substitution.
5	Planogram Substitution	Swaps one planogram for another retail chain wide according to pre-determined criteria.
6	Automated Calculations	Updates calculations such as Product Adjacencies and Space Measurements after POG substitution.
7	Publishing	Publishing of floor Plans and planograms
8	Update Status	Changes the status of floor plans and stores.

> **Note:** This sequence must be regarded as illustrative. Different sequences of batch operations may be required to meet a specific retailer's requirement.s

Batch Process Descriptions

The batch processes are as follows:

Floor Plan Automated Processing

Floor Plan Automated Processing allows operations that ensure that the information held in the Planner DWG file and the database is identical. A typical reason for this would be a batch process changing data in the database that needs to be reflected in the Planner DWG file. Floor Plan Automated Processing allows things like annotation to be updated.

If the Auto Sync option has seen set to On (see the section on Synchronization in the chapter on Initial Planner Setup), the floor plan will be automatically synchronised as appropriate when the user opens the floor plan. Synchronizing via a batch process avoids the wait to do that.

BatchRunner and the Command Line Switches

Batchrunner is a tool used to run some batch processes. It is a command line tool and does not have an associated dialog box. By default it can be found in the **C:\Oracle Retail\MSM\Common.Net** folder. An example of the syntax is as follows:

```
BatchRunner /substitution username/password /t
```

Full details of this syntax can be found in the Macro Space Management Administration Module User guide. Brief details are as follows:

Table 9–2 BatchRunner - Automated Floor Plan Processing Options

BatchRunner Option	Description
/processplans	Mandatory to identify the process as floor plan automated processing
Username/Password	Mandatory to access the database.
/t	Terminates execution of any currently running substitutions. It might be used to strop the batch process at the end of a time window, even if there are tasks remaining to be executed.
/c	Allows a comma separated list of store codes against which to run the automated processing.
/s	Allows a comma separated list of floor plan statuses codes against which to run the automated processing.
/OUTOFSYNC	Only process files where differences exist between the floor plan and the database.
/THEME	Causes the floor plans to be rendered with a specific layer theme. Layer Themes are configured in the Layers and aliases dialog box accessed from the Format menu in the Planner module.
/VISUAL	Causes the floor plan to be rendered with a specific AutoCAD visual style.

Table 9–2   (Cont.) BatchRunner - Automated Floor Plan Processing Options

BatchRunner Option	Description
/TITLEBLOCK	Causes a title block to be added.
/LAYOUT	Causes a specific layout tab on the Planner DWG file to be used.
/SYNC n, m	This option specifies the type of synchronization and the objects to be synchronised. The n options are: ■ 0 = None ■ 1 = Auto-Synchronize ■ 2 = Match Drawing ■ 3 = Match Database ■ 4 = Cross-Match The m options are a bitwise integer. They are: ■ 1 = Include Fixtures ■ 2 = Include Shelves ■ 4 = Include Products ■ 8 = Include Other Blocks ■ 16 = Include Zones ■ 32 = Include Views ■ 64 = Include Aisles ■ 128 =Include Mark-Ups
/RESTRUCTURE n	This option specifies which of the Restructure Drawing options to use. These are bitwise options as follows: ■ 1 = Redefine blocks from disc ■ 2 = Explode composite blocks ■ 4 = Reset Level ■ 8 = Reset color, line-type, lineweight to BYLAYER ■ 16 = Reset Layer
/ANNOTATE n	This option specifies which of the annotation options to use. These are bitwise options as follows: ■ 1 = Annotate Fixtures ■ 2 = Annotate Products ■ 4 = Annotate Zones ■ 16 = Update Title Block
/CALCULATE n	This option specifies which of the annotation options to use. These are bitwise options as follow: ■ 1 = Calculate Areas ■ 2 = Calculate Fixture Adjacencies ■ 4 = Calculate Product Adjacencies ■ 8 = Calculate Aisle Adjacencies ■ 16 = Calculate Space Measures ■ 32 = Calculate Face Planes

For full information on the options for these command line switches see the *Oracle Retail Macro Space Management Administration User Guide*.

Data Importer

Data Importer can be used for simple imports during the implementation process. It comes with several pre configured imports.

Table 9–3   Pre-configured Data Importer Import Definitions

Import	Description	Command Line Switch
Stores	Imports the store hierarchy and store information.	STORES
Product Hierarchy	Imports the Product Hierarchy down to **Item** level.	CATEGORIES
SKU	Imports SKU level information.	SKUS
Fixtures	Imports fixture information. This must be preceded by an import of the Fixture Hierarchy	FIXTURES
Fixture Hierarchy	Imports a pre-defined fixture hierarchy.	FIXGROUP
Sales	Imports POS information into the AVTTB_ EPOS table.	SALES

The syntax is:

```
AVT5DataImport /STORES /SKUS /SILENT
```

Where **"Path\DataImport"** is the path to and name of the executable file and the options following it are command line switches.

Command Line Switches

There are two options for command line switches:

Table 9–4   Data Importer - Command Line Switches

Command Line Switch	Description
/Import Type	This is a user assigned command line switch set up during the configuration of an import in Data Importer. An example of a pre-configured import provided in the template database is STORES.
/Silent	This switch disables any confirmatory dialog boxes.

Planogram Import using ODI

Planogram import occurs in two stages:

1. The creation of an XML file holding the planogram designs.

2. The import of that XML file into the Macro Space Planning database.

The first of these stages is an SI responsibility. The second stage is an Oracle Data Integrator scenario that is provided pre-configured with MSM.

> **Note:**   For products to be imported correctly, the product hierarchy must be up to date. This may require periodic imports for this purpose. This can be done using the preconfigured import in the Data Importer module.

Importing the XML File

The full details of importing the XML file are covered in the *Oracle ODI Planogram Import User Guide, Volume 1*. The two basic methods of running scheduled imports are as follows;

Run to a Schedule using ODI Studio and an Agent

Planogram imports can be scheduled at specific times using the scheduling tools within ODI studio and a local or standalone agent.

Run via the Command Line

Planogram imports can be run from the command line using a local or standalone agent and a scheduling tool. Using the pre configured scenarios delivered with ODI, the syntax is:

```
startcmd.bat OdiStartScen -SCEN_NAME= START_ODI_XML_IMPORT -SCEN_VERSION=001
-CONTEXT=GLOBAL -OverwriteFlag ='Yes
```

Adjacency Calculations

Adjacency Calculations are a subset of the options available in the Automated Calculations dialog box. It is useful to run the Fixture Adjacency and Product Adjacency calculations prior to planogram substitutions and so on. This is in case a store planner has forgotten to do it after manually editing the floor plan.

By default, the executable is found in the **C:\Oracle Retail\MSM\Common** folder. The syntax to run it is:

```
AVT5AutomatedCalcs.exe /Silent /Options /Status /Files
```

Where **"Path\AVT5AutomatedCalcs"** is the path to and name of the executable file and the options following it are command line switches.

> **Note:** Automated Calculations has a dialog box. An alternative is to run the commands manually.

Command Line Switches

A number of command line are provided. Parameters must be provided for the /Options, /Status and /Files switches.

Table 9–5   Automated Calculation - Command Line Switches

Command Line Switch	Description
/Silent	This switch disables any confirmatory dialog boxes.
/Options	This is a bitwise value specifying the selected options. The options are:
	■ 0 = No selection
	■ 1 = Aisle Adjacency
	■ 2 = Allocated Area
	■ 4 - Face Planes
	■ 8 = Fixture Adjacencies
	■ 16 = Product Adjacencies
	■ 32 = Space Measurements

Table 9–5 (Cont.) Automated Calculation - Command Line Switches

Command Line Switch	Description
/Status	This is a list of file statuses to process. It is in for form of a pipe delimited list of **Status Codes** from the **Status dialog box** accessed from the General Menu in the Administration module. These status codes must be defined in the Status dialog box before they are used in batch processes. An example would be PR|IS|AU.
/Files	This is a list of files to process. It is a pipe separated list of **FIL_ID**'s from the **AVTTB_FILE** table. An example would be 20|30|40.

Planogram Substitution

Planogram substitution is a method for automatically substituting one or more planograms for new planograms in a floor plan. It can be done in multiple stores. The process can be done manually. It is more usual for the required planogram substitutions to be imported into the database and then run as a batch process. A number of system variables affect the operation of planogram substitution.

Table 9–6 Planogram Substitution System Variables

System Variable	Description
PLANOGRAM_SUBSTITUTION_RUN_CALCS	Determines whether product adjacency calculations are run on a floor plan immediately prior to running a planogram substitution. 0 = No, 1 = Yes.
PLANOGRAM_SUBSTITUTION_PROCESS_EXPLODED	Planograms can exist in one of three forms: 2D, 2.5 D or 3D. this system variable determines which forms are processed. The options are: ■ 0 = Only substitute planograms in 2D form. Do not log 3D planograms that were not substituted. ■ 1 = Only substitute planograms in 2D form. Log 3D planograms that were not substituted. ■ 2 = Substitute planograms in all forms with 2D planograms. ■ 3 = Substitute planograms in all forms with 2D planograms and write information on the 2.5D and 3D planograms substituted into the planogram substitution log. ■ 4 = Substitute all planograms, placing the replacement planogram in the same form as the planogram that was substituted.
PLANOGRAM_SUBSTITUTION_LENGTH_TOLERANCE	Sets the default tolerances for planogram length when carrying out planogram substitutions. This value can be overwritten when configuring specific planogram substitutions.
PLANOGRAM_SUBSTITUTION_HEIGHT_TOLERANCE	Sets the default tolerances for planogram height when carrying out planogram substitutions. This value can be overwritten when configuring specific planogram substitutions
PLANOGRAM_SUBSTITUTION_HEIGHT_TOLERANCE	Sets the default tolerances for planogram depth when carrying out planogram substitutions. This value can be overwritten when configuring specific planogram substitutions

Table 9–6   (Cont.) Planogram Substitution System Variables

System Variable	Description
PLANOGRAM_ SUBSTITUTION_COPY_FILE	Determines if planogram substitutions can be carried out in floor plans of current status. If enabled, the substitutions will not be made in the Current file, but in any floor plan at Authorized status for that store. If a floor plan at Authorized status does not exist, a copy of the Current floor plan will be created and set to Authorised status. 0 = Off, 1 = On.

PLANOGRAM_SUBSTITUTION_PROCESS_EXPLODED System Variable

This system variable can be set to one of five values. The value selected will affect the form of planogram that is substituted. Planograms that are placed in planner will be of a 2D form - a placeholder. Planograms in the merchandiser module can adopt different form including 2.5D (planogram with shelves and product placeholders on the shelves) and 3D (planogram with full details).

Giving Access to the Planogram Substitution Functionality

Before the planogram substitution can be run either manually or via a batch process, the user invoking the functionality must be a member of a User Group with access to the Planogram Substitution command group in the Group Relationships tab of the Functional Security dialog box accessed from the Security menu in the Administration module.

Importing the Planogram Substitution Definitions

The planogram substitution definitions are held in four tables in the database. These are:

- AVTTB_POG_SUB_DEF

- AVTTB_POG_SUB_DEF_STATUS

- AVTTB_PG_SUB_DEF_STORE

- AVTTB_POG_SUB_DEF_ITEM

Full details of these tables can be found in the *Oracle Retail Macro Space Planning Data Model*.

In order to import planogram substitution definitions, the SI must set up the appropriate imports. This is done using an ETL tool such as Oracle Data Integrator (ODI). alternatively, it can be done using MSMs Data Importer module.

BatchRunner and the Command Line Switches

Batchrunner is a tool used as an entry point for some batch processes. By default it can be found in the **C:\Oracle Retail\MSM\Common.Net** folder. The syntax is as follows:

```
BatchRunner /substitution username/password [/t] [/p] [/e definition_name_1,
definition_name_2, …, definition_name_n] [/c code_1,code_2, …,code_n] [/s id_1,
id_2, …, id_n]
```

Full details of this syntax can be found in the *Oralce Retail Macro Space Management Administration Module User Guide*. Brief details are as follows:

Table 9–7   Batchrunner - Planogram Substitution Options

BatchRunner Option	Description
/Substitution	Mandatory to identify the process as planogram substitution
User name/Password	Mandatory to access the database.
/t	Terminates execution of any currently running substitutions.
/p	Pauses execution of any currently running substitutions.
/e	Allows a comma separated list of planogram substitutions to be executed.
/c	Allows a comma separated list of store codes against which to run the planogram substitutions to be defined.
/s	This is a list of file statuses codes to process. It is in for form of a pipe delimited list of **Status Codes** from the **Status dialog box** accessed from the General Menu in the Administration module. These status codes must be manually added to the Status dialog box before they are used in batch processes. An example would be PR|IS|AU.

Automated Calculations

Automated calculation can be used to update the Aisle Adjacency, Allocated Areas, Face Plane, Fixture Adjacency, Product Adjacency and Space Measurement calculations. This is generally done to ensure reporting is accurate after changes have been made to a floor plan. By default, it is found in the **C:\Oracle Retail\MSM\Common** folder. The syntax to run it is:

```
"Path\AVT5AutomatedCalcs.exe" /Silent /Options /Status /Files
```

Where **"Path\AVT5AutomatedCalcs.exe"** is the path to and name of the executable file and the options following it are command line switches.

> **Note:**   Automated Calculations has a dialog box. an alternative is to run the commands manually.

Command Line Switches

The command line switches are:

Table 9–8   Automated Calculation - Command Line Switches

Command Line Switch	Description
/Silent	This switch disables any confirmatory dialog boxes.
/Options	This is a bitwise value specifying the selected options.
/Status	This is a list of file statuses to process. It is in for form of a pipe delineated list of **Status Codes** from the **Status dialog box** accessed from the General Menu in the Administration module. These status codes must be manually added to the Status dialog box before they are used in batch processes. An example would be PR|IS|AU.
/Files	This is a list of files to process. It is a comma separated list of **FIL_ID**'s from the **AVTTB_FILE** table.

Floor Plan Publishing

Floor Plan publishing allows the automated publishing of floor plans to a designated directory. The configuration of floor plan publishing was covered in the chapter on Planner configuration. This section discusses how to run floor plan publishing as a batch process. This process will execute on all floor plans where the Publish Date has been met or exceeded.

Batch Runner and Command Line Switches

Batchrunner is a tool used as an entry point for some batch processes. By default it can be found in the **C:\Oracle Retail\MSM\Common.Net** folder. The syntax is as follows:

```
Path\BatchRunner /publishplans username/password /t

Path identifies the location where the Batchrunner.exe has been installed.
```

The command line switches are as follows:

Table 9–9   BatchRunner - Floor Plan Publishing Options

BatchRunner Option	Description
/publishplans	Mandatory to identify the process as floor plan publishing.
Username/Password	Mandatory to access the database.
/t	Terminates execution of floor plan publishing after publishing the currently active floor plan.

Planogram Publishing

Planogram publishing allows the automated publishing of planogram designs to a designated directory. The configuration of planogram publishing was covered in the chapter on Planner configuration. This section discusses how to run planogram publishing as a batch process. This process will execute on all planogram designs where the Publish Date has been met or exceeded.

Batch Runner and Command Line Switches

Batchrunner is a tool used as an entry point for some batch processes. By default it can be found in the **C:\Oracle Retail\MSM\Common.Net** folder. The syntax is as follows:

```
Path\BatchRunner /publishpogs username/password /t

Path identifies the location where the Batchrunner.exe has been installed.
```

The command line switches are as follows:

Table 9–10   BatchRunner - Floor Plan Publishing Options

BatchRunner Option	Description
/publishpogs	Mandatory to identify the process as planogram publishing.
Username/Password	Mandatory to access the database.
/t	Terminates execution of floor plan publishing after publishing the currently active floor plan.

Update Status

By default, Update Status is an executable found in the **C:\Oracle Retail\MSM\Common** folder. If invoked, it will change the status of files and stores.

The syntax to run it is:

```
\AVT5UpdateStatus.exe /Silent
```

Where **"Path\AVT5AutomatedCalcs.exe"** is the path to and name of the executable file and the option following it is a command line switch.

File Statuses

- Files of Published status will be changed to Current status if the Effective Date is met or exceeded. Any pre-existing Current file will be changed to historical status.

Stores

- Any store of Proposed Status will be set to Open status if the Opening date is met or exceeded.

- Any store of Open status will be set to Closed status if the Closing date is met of exceeded. All child objects will also have their expiry date set.

Command Line Switch

The command line switch is:

Table 9–11   Update Status - Command Line Switch

Command Line Switch	Description
/Silent	This switch disables any confirmatory dialog boxes.

10

ISSC Setup

This section describes the actions to implement ISSC.

- ISSC Server Service

- Preparatory Configuration

- Setting up Statuses for the ISSC Workflow

- Save Dialog Boxes

- District Manager Option

- Configuration in MSM Administration Module

For details of where to find detailed information on the actions in this chapter, see Appendix A, "Information Locations."

ISSC Server Service

Connection between the ISSC client and the MSP database is done via the ISSC Server Service. This caches values on startup. If parameters are changed, for example system variables, then the ISSC Server Service must be stopped and restarted in order to have the changes take effect in ISSC.

Restarting the ISSC Server Service will disconnect all current users. These should be notified accordingly before the restart.

> **Note:** Ensure the Web Services options are also turned on in the ISCC Server Service configuration file.

Preparatory Configuration

Before stating to implement in ISSC, the appropriate user groups and users should have been create. The SI doing the configuration should have access to a suitable subset of stores, floor plans and products. The floor plan should also have at least one zone of type Department in order for the floor plan to open.

Setting up Statuses for the ISSC Workflow

Implementing ISSC will mean the creation of additional statuses if the **Submit, Accept** and **Reject** buttons are to be used in the Save dialog boxes. Configuring these dialog boxes is described in a later section of this chanter. Similarly, those additional statuses will be required is the District Manager functionality is to be used. Configuring access to the District Manager button is described in the earlier chapter on Security.

Both of these options allow a business workflow to be used within ISSC. The status of a floor plan can be advanced if it meets specified criteria and it can be sent back to an earlier status if it does not.

Overview of Statuses

MSP comes with five pre-configured statuses. These are:

Table 10–1   Pre-configured Statuses

Status	Description
Proposed	Initial status of a floor plan - all new floor plans are set to this by default.
Authorised	Floor plan approved for going into service. Has Publish and Effective dates assigned.
Published	Floor plan that has been published as preparation for being put into service. Generally had status changed to this one by batch process when Publish Date was met or exceeded.
Current	floor plan that is in service. Generally had status changed to this one by batch process when Effective Date was met or exceeded.
Historical	Floor plan that has been superseded by a more recent one.

However, ISSC can be configured with three different forms of dialog box. These enable an appropriately authorised user to save the floor plan or to change the floor plan and simultaneously change the status (see next section for more details). For these dialog boxes to be effective, additional statuses are required. If store planners and managers are involved a typical business process in ISSC could be configured as follows with some statuses visible to a user in ISSC and some not.

Table 10–2   Additional Statuses in ISSC

Status	User	Save Dialog box	Description
ISSC	ISSC Store Planner	Submit	Status changes to ISSC Approval
ISSC Approval	ISSC Manager	Accept/Reject	Reject changes status back to ISSC. Accept changes status to Authorised.
Authorised	MSM	N/A	Status not visible in ISSC

This business process might work as follows:

1. MSM Planner creates basic floor plan and sets it to ISSC status. This makes it visible in ISSC.

2. The ISSC store planner puts the finishing touches to the store. They click the Submit button on his Save dialog box. This changes the status to ISSC approval.

3. The ISSC Manager has the Save dialog box with Accept and Reject options. Reject will set the status back to ISSC for the ISSC Store Planner to make further changes. Accept will set the status to Authorised when it will not longer be visible in ISSC.

Note: It is possible to set up many other business processes. this is a simple example.

Creating Additional Statuses

Each additional Status requires a corresponding Status Level. Statuses are added as follows

1. Create the required status levels.

2. Create and configure the required statuses.

Creating a Status Level

To create a Status Level access the **Status Level dialog box** from the General menu in the Administration module. In the dialog box, Click the **Add** icon on the toolbar. Type in the description of the new status level, for example ISSC and Press Return to write the data back to the database.

Creating a File status

To create a status access the **Status dialog box** from the General menu in the Administration module. Edit the **Order** of the existing File statuses to allow for the addition of the new status. This can be done by highlighting each value, editing it and pressing Return. click the Add icon on the toolbar of the dialog box and Enter the following information:

Table 10–3   File Status Options

Option	Description
Type	Set to File from the drop down list.
Level	Set to the recently created Status Level.
Description	Add an appropriate description.
Order	Type in an appropriate value for the order so that the new status takes it place in the required sequence.
Options	Decide where the status should be **Reversible**, **Read Only** or **Selectable**.
Accept	This is the status the file will change to if the Submit or Accept buttons are clicked in the Save dialog box. Type in the name of an appropriate status.
Reject	This is the status the file will change to if the Reject buttons are clicked in the Save dialog box. Type in the name of an appropriate status.
Approve	Select this checkbox if this file status is to be visible when the District Manager Button is clicked on the ISSC Store Selection dialog box toolbar.
Code	If data is to be imported using this status, enter a value. This will then be used as a Lookup by (for example) the Data Importer module. The status code is also used as a command line parameter by BatchRunner when batch processes are run.

After entering the pertinent information press Return to write the information back to the database.

> **Note:** For more information on the Accept and Reject options, see the section on the Save dialog box. For more information on the Approve option see the section on the District Manager option

Save Dialog Boxes

There are three Save dialog boxes available for ISSC. These will appear when the floor plan is closed with unsaved changes. These Save dialog boxes can be assigned to specific User Groups so that different user groups have different privileges. These dialog boxes are: identified by the PFO_ID field in the AVTTB_PROCESS_FLOW_ OPTION table in the database. The dialog boxes are:

Table 10–4   ISSC Save Dialog Boxes

Dialog Box	PFO ID	Option
Save/Cancel	PFO_ID = 1	This option will save changes to the ISSC floor plan but not change the status.
Save/Submit/Cancel	PFO_ID = 2	This option will save changes to the floor plan. The Submit option allows the present status of the floor plan to be changed to the one specified in the **Accept** column of the Status dialog box.
Save/Accept/Reject/Cancel	PFO_ID = 3	This option will save changes to the floor plan. The Reject option allows the present status of the floor plan to be changed o the one specified in the **Reject** column of the Status dialog box. The Accept option allows the present status of the floor plan to be changed to the one specified in the **Accept** column of the Status dialog box.

A minimum of one extra floor plan status is required for the dialog box options that allow ISSC users to change status. Configuration of these dialog boxes has to be done directly in the database in the AVTTB_PROCESS_FLOW table. This is configured directly in the database as follows:

Security and Creating Access

Table 10–5   Settings in AVTTB_PROCESS_FLOW table

Field	Setting
MSF_ID	Set to 3: this is a foreign key to the AVTTB_MESSAGE_FORM table.
PFL_ID	Set to 1.
STA_ID	Set to an appropriate STA_ID for a file status from the ABTTB_STATUS table. This determines the status floor plan will be at when the required Save dialog is shown.
USG_ID	Set to the USG_ID from the AVTTB_USER_GROUP table. This determines the user group the Save dialog box will be associated with.
PFO_ID	Set to 1, 2 or 3 depending on which Save dialog box is required. See the process flow options in the table above. Different user groups would have different work flows.

Once configured, clicking the Submit, Accept or Reject will result in the status of the floor plan changing.

District Manager Option

The District Manager button provides an alternative to using the Accept and Reject buttons on the Save dialog box. Access can be configured for specific user groups allowing them to bulk approve or reject the floor plans they have responsibility for.

Three criteria have to be satisfied for the District Manager function to be active.

Table 10–6   District Manager Rules

Rule	Description
Functionality User Group	The user must belong to a user group that has access configured to the district manager button. See the chapter Security and Creating Access for how to do this.
Correctly configured status	The floor plan status must have the approve checkbox selected and Accept and Reject statuses specified.
Store and File Status User Group	The user must belong to a a user group that has Data Security access configured to a file status that has the Approve checkbox selected and Accept and Reject statuses specified.

If all these criteria are satisfied, clicking the District Manager button in the Select Store dialog box will bring up a list of all floor plans at the appropriate status. The user can then use the Accept or Reject buttons on the toolbar to accept or reject those floor plans one by one without the need to open them.

Configuration in MSM Administration Module

A number of ISSC parameters can be configured in the MSM Administration module.

System Variables

A number of system variables affect the default behavior of ISSC. Full details can be found in the *Oracle Retail Macro Space Management Administration Module User Guide*.

General System Variables

Four general system variables need to be set. These affect the background behavior of ISSC.

Table 10–7   General System Variables

System Variable	Description
IN-STORE_TIMEOUT	This is the length of time the server service will attempt to communicate to the database before putting up an error message. Set to 180 seconds by default.
IN-STORE_HELP_LOCATION	Help is supplied as a set of WebHelp files. These will generally be installed in the file server so that updating the help only has to be done once. This system variable holds the path to the help.
MODULE_BLK_ID	This system variable references the I_Module block supplied with the default blocks. It is used for when products and planograms are dragged to the floor in ISSC.
SKIP_ZONE_SELECT	This system variable controls whether the zone selection dialog box appears when a store is selected. By default it appears, but it can be suppressed by setting the system variable to 0.

System Variables for Merchandising

These system variables affect how merchandise behaves.

Table 10–8   Merchandising System Variables

System Variable	Description
IN_STORE_DEFAULT_POG_FILTERS	This determines the initial settings in the **Planogram Filter dialog box**. These settings determine the default parameters that are checked when a planogram is placed. By default it is set to 0 - no checks. The bitwise options are: ■ 0: No Checks. ■ 1: Match Fixture Length. ■ 2: Match Fixture Height. ■ 4: Match Fixture Style. ■ 8: Match Temperature Range.
IN_STORE_PREVIEW_POG_REVISIONS	Determines whether different planogram revisions can be seen in Planogram Preview. By default it is set to 1: On.
MERCH_MULTI_PROFILE	This determines how merchandise populates. By default it is set to 0 which does not allow multiple products or planograms to be placed on a fixture.

System Variables for Annotation

These system variables control the appearance of the annotation for zones, fixtures, products and planograms. Some modification of the default values will be required to change the annotation to the appearance desired by the retailer.

Zones

There is a single system variable affecting zone annotation.

Table 10–9   System Variable for Zone Annotation

System Variable	Description
TEXT_ZONE_TEXTSIZE	Size of text for zone annotation.

Fixtures

There is two forms of annotation for fixtures; fixture annotation and bay numbering. There are a series of system variables controlling fixture annotation. The more important are:

Table 10–10   Main System Variables for Fixture Annotation

System Variable	Description
TEXT_FIXTURE_TEXTSIZE	Controls the size of the text for fixture annotation (and also for bay numbering).

Table 10–10   (Cont.) Main System Variables for Fixture Annotation

System Variable	Description
TEXT_FIXTURE_OPTIONS	Bitwise variable that controls the items of text that appear. The options are: ■ 1 = Turn Fixture Text on. ■ 2 = Scale Size - not currently enabled. ■ 4 = Scale Offset - not currently enabled ■ 8 = Reduce Text Size to Fit - not currently enabled. ■ 16 = Reduce Text width to Fit - not currently enabled. ■ 32 = Change Text to Multiline Fit - not currently enabled. ■ 64 = Narrow Fixture Check - not currently enabled. ■ 128 = Display Major Units - not currently enabled. ■ 256 - Not currently in use. ■ 512 = Include Block Name. ■ 1024 = Include Block Description. ■ 2048 = Include Block Length. ■ 4096 = Include Block Depth. ■ 8192 = Include Block Height. ■ 16384 = Separate. Used for Gondolas. If selected annotation will appear once per fixture. If not annotation will appear once per gondola.
TEXT_FIXTURE_INSERTION TEXT_FIXTURE_JUSTIFICATION	These two system variables control the general position of the fixture annotation.
TEXT_FIXTURE_X_OFFSET TEXT_FIXTURE_Y_OFFSET	These two system variables can be used to fine tune the position of the annotation. In particular they can be used to ensure that the fixture annotation is not in the same position as profile or product annotation.

There is a single system variable for bay numbering.

Table 10–11   System Variable for Bay Numbering.

System Variable	Description
ISSC_BAY_ANNOTATION	This controls the type of annotation in use: Depending on the setting it can be either the same bay numbering applied in the Planner module, the Fixture ID from the AVTTB_FIXTURE table of a value imported into the FIX_TAG field in the AVTTB_FIXTURE table. The options are: ■ 0 = Use Bay Number Prefix and Bay Number from AVTTB_FIXTURE table. ■ 1 = Use FIX_TAG from AVTTB_FIXTURE table. this value can only be populated by import. ■ 2 = Use FIX_ID from the AVTTB_FIXTURE table.

Profile

Profile annotation carries information on the individual bay within a planogram. The most important system variables controlling it are:

Table 10–12   Main System Variables for Profile Annotation

System Variable	Description
TEXT_PROFILE_TEXTSIZE	Controls the size of the text for profile annotation.
TEXT_PROFILE_OPTIONS	Bitwise variable that controls the items of text that appear. The options are: ■ 1 = Turn Profile Text On. ■ 2 = Scale Size - not currently enabled. ■ 4 = Scale Offset - not currently enabled. ■ 8 = Reduce Text Size to Fit - not currently enabled. ■ 16 = Reduce Text Width to Fit - not currently enabled. ■ 32 = Change Text to Multiline to Fit - not currently enabled. ■ 64 = Narrow Fixture Check - not currently enabled ■ 128 = Include Planogram Number (POG_ID from the AVTTB_PLANO table. ■ 256= Separate. If selected, the planogram description will appear on every bay. If not selected the planogram description will appear once per planogram. ■ 512= This option has no effect other than a 1 appearing in front of each bay. ■ 1024 = Not used. ■ 2048 = Not used. ■ 4096 = Include assortment code. ■ 8192 = Include Product count - this has no effect except to put a single digit number in front of each fixture. ■ 16384 = Include Bay Sequence number.
TEXT_PROFILE_INSERTION TEXT_PROFILE_JUSTIFICATION	These two system variables control the general position of the profile annotation.
TEXT_FIXTURE_X_OFFSET TEXT_FIXTURE_Y_OFFSET	These two system variables can be used to fine tune the position of the annotation. In particular they can be used to ensure that the profile annotation is not in the same position as fixture or product annotation.

Product

Product information identifies the product or planogram on a fixture. The most important system variables controlling it are:

Table 10–13   Main System Variables for Product Annotation

System Variable	Description
TEXT_PRODUCT_TEXTSIZE	Controls the size of the text for profile annotation.

Table 10–13   (Cont.) Main System Variables for Product Annotation

System Variable	Description
TEXT_PRODUCT_OPTIONS	Bitwise variable that controls the items of text that appear. The options are: ■ 1 = Turn Product Text On. ■ 2 = Scale Size - not currently enabled. ■ 4 = Scale Offset - not currently enabled. ■ 8 = Reduce Text Size to Fit - not currently enabled. ■ 16 = Reduce Text Width to Fit - not currently enabled. ■ 32 = Change Text to Multiline to Fit - not currently enabled. ■ 64 = Narrow Fixture Check - not currently enabled. ■ 128 = Major display units - not currently enabled. ■ 256= Show flow direction - not currently enabled. ■ 512= Show Planogram description. Not currently enabled - planogram description will show automatically. ■ 1024 = Show Number of Bays. This option will be preceded with an M. ■ 2048 = Display total Length of Fixtures. ■ 4096. Use Alternative Units. Not currently enabled.
TEXT_PRODUCT_INSERTION TEXT_PRODUCT_JUSTIFICATION	These two system variables control the general position of the product annotation.
TEXT_PRODUCT_X_OFFSET TEXT_PRODUCT_Y_OFFSET	These two system variables can be used to fine tune the position of the annotation. In particular they can be used to ensure that the profile annotation is not in the same position as fixture or profile annotation.

System Variables for Mark-ups and Notes

Markups are freehand lines and clouds that can be drawn in a floor plan to call attention to specific areas. Notes can be placed on specific features in a floor plan to add a short text comment.

Markups

There are two system variables for markups.

Table 10–14   System Variables for Mark-ups

System Variable	Description
IN-STORE_MARKUP_LINEWIDTHMIN	Controls the line width drawn when the left mouse button is held down.
IN-STORE_MARKUP_LINEWIDTHMAX	Controls the line width drawn when the right mouse button is held down.
REVISION_CLOUD_ARC_DISTANCE	Specifies the length of arc used when a revision cloud is drawn.

Notes

There are two system variables for Notes.

Table 10–15   System Variables for Notes

System Variable	Description
NOTE_FONT	The font used for the notes.
NOTE_FONT_SIZE	The size of the font used for the notes.

System Variables for Dimensions

Dimensions can be used to illustrate the width of aisles, lengths off fixtures and so on. There are three system variables for annotation.

Table 10–16   System Variables for Dimensions

System Variable	Description
IN-STORE_MARKUP_TEXT_FACE	The font used for both dimensions and markups.
IN-STORE_MARKUP_TEXT_SIZE	The size of the font used for both dimensions and markups.
IN-STORE_DIMENSION_STYLE	Specifies which of the three possible type of arrows used for the dimensions is to be used. These are: ■ 0 = No ticks or arrows ■ 1 = ticks ■ 2 = Arrow heads

Duplicating Floor Plans

ISSC has the facility to duplicate floor plans. A system variable determines what status the copy of the floor plan will be set to.

Table 10–17   System Variable for Copied Floor Plan Status

System Variable	Description
DUPLICATE_FLOOR_PLAN_STATUS_LEVEL	References a STA_ID in the AVTTB_STATUS table. Must be a file status.

11

ISSC Mobile Setup

This section covers the configuration of ISSC Mobile.

- Overview
- ISSC Server Service
- Users and User Groups
- MSM Administration

Overview

ISSC Mobile is an extension of ISSC. It allows a store associate to see changes in equipment and merchandise. It also allows store associates to communicate information via the medium of notes.

For details of where to find detailed information on the actions in this chapter, Appendix A, "Information Locations."

ISSC Server Service

Connection between the ISSC Mobile client and the MSP database is done via the ISSC Server Service. This caches values on startup. If parameters are changed, for example the Custom SQL controlling annotation, then the ISSC Server Service must be stopped and restarted in order to have the changes take effect in ISSC.

Restarting the ISSC Server Service will disconnect all current users. These should be notified accordingly before the restart.

Users and User Groups

The detailed configuration of Users and User Groups is covered in the chapter on Setting Up ISSC. The main criteria are as follows:

- A User Group can only access one store. That store must have a single floor and that floor must be at current status. The User Group must also have Read permissions to the store and floor status.
- The User Group must be assigned to the ISSC Mobile Command Group in the Functional Security dialog box.
- Each store associate must have their own log in. If two people try and use the same user name the first person will be logged out as the second logs on.

MSM Administration

Several settings affecting the operation of ISSC Mobile can be changed in the MSM Administration module.

System Variables

Two system variables affect ISSC mobile. These are configured in the **System Variables dialog box** accessed from the General menu.

Table 11–1   System Variables affecting ISSC Mobile

System Variable	Description
MOBILE_USER_TIMEOUT	This is the time in seconds that ISSC Mobile can remain inactive before automatically logging the user out. By default it is set to 1,200 seconds (20 minutes).
MOBILE_ABSOLUTE_USER_TIMEOUT	The maximum time in seconds a user can remain logged in and active without being automatically logged out by the software. By default it is set to 43,200 seconds (12 hours).

Custom Queries (Optional)

The Custom Queries dialog box (accessed from the General menu) allows a SI to modify what ISSC Mobile displays in the properties pane. These custom queries come with defaults, but if it is necessary to modify them the method is described in the section on Configuring Reporting.

Table 11–2   ISSC Mobile Custom Queries

Custom Query	Description
ISSC Mobile File Properties	The general properties displayed for a floor plan.
ISSC Mobile Fixel Properties	The properties displayed for an item of planogram equipment.
ISSC Mobile Fixture Properties	The properties displayed for an item of equipment.
ISSC Mobile POG Product Properties	The properties displayed for a product in a planogram.
ISSC Mobile Profile Properties	The properties displayed for a profile (bay) in a planogram.
ISSC Mobile Profile Properties 2	Continuation of the SQL for the displayed for a profile (bay) in a planogram.
ISSC Mobile Zone Properties	The properties displayed for a zone.

12

Configuring Reporting

This section describes how to configure the reporting methods used in Macro Space Planning. Reporting can be used for a variety of purposes including assisting with store planning, validating floor plans after they have been designed and reporting on performance.

- Introduction
- Custom Queries
- Quick Reports
- KPIs (Key Performance Indicators)
- External Reporting Tools

Introduction

There are four basic forms of reporting.

- Custom Queries
- Quick Reports
- KPIs
- External Reports

MSP comes with pre-configured Custom Queries, Quick Reports and KPIs. These can be used unmodified. Alternatively, retailer specific ones can be configured.

External reports are not included in the MSP package. Instead, an external reporting tools - for example Oracle's BI Publisher - has to be configured to generate reports from the database.

For details of where to find detailed information on the actions in this chapter, Appendix A, "Information Locations."

Custom SQL

Custom Queries and Quick Reports use Custom SQL. The SQL statements using this are stored in the AVTTB_CUSTOM_SQL table. Custom SQL is an extension of standard SQL. It allows the use for placeholders (denoted by the use of curly brackets). The functionality will substitute the pertinent value of the placeholder when it executes the SQL statement. A simple example would be as follows:

```
Select * from AVTTB_STORE where STR_ID = {STR_ID}
```

When the statement is executed, the code will substitute the STR_ID for the currently active floor plan. The statement that will execute will thus be:

```
Select * from AVTTB_STORE where STR_ID = 123
```

This means implementers and administrators can write generic SQL statements that will execute against the currently active object in the application.

The best way to develop a Custom SQL statement is to write it in standard SQL with real values for what will be the placeholders. For example a real STR_ID could be used in a Where clause. When the query executes satisfactorily, then a placeholder - for example {STR_ID} - can be substituted as required.

> **Note:** Custom SQL cannot be used in external reporting tools.

Custom Queries

MSP comes with pre-configured Custom Queries. This section describes the Custom Queries pertinent for Macro Space Management. They come configured with a default query that will meet most retailer's requirements. If the retailer has more specialised requirements, the Custom Queries can be modified.

> **Note:** A list of MSM Custom Queries and ISSC Mobile Custom Queries is provided below.

MSM Custom Queries

The MSM Custom Queries are as follows:

Table 12–1 MSM Custom Queries

Custom Query	Description
Fixture Swap	Controls the selection of fixtures for the Fixture Swap functionality in Planner.
Floor Plan Print	Controls the selection of floor plans for floor plan printing.
Floor Plan Publish	Controls the selection of floor plans for floor plan publishing
Planogram Substitution Definitions	Selection of planograms for substitution definitions in the Planogram Substitution dialog box.
Planograms	This used in the Planogram Substitution dialog box to populate the list of planograms.
POG Print	Controls the selection of planogram for the Planogram Print dialog box.
Publish POG By POG Hierarchy	Controls the selection of planograms for planogram publishing where publishing is to be by planogram hierarchy.
Publish POG by Store Hierarchy	Controls the selection of planograms for planogram publishing where publishing is to be by store hierarchy.
Stores	This used in the Planogram Substitution dialog box to populate the list of stores.

ISSC Mobile Custom Queries

The ISSC Mobile Custom Queries are as follows:

Table 12–2   ISSC Mobile Custom Queries

Custom Query	Description
ISSC Mobile File Properties	The general properties displayed for a floor plan.
ISSC Mobile Fixel Properties	The properties displayed for an item of planogram equipment.
ISSC Mobile Fixture Properties	The properties displayed for an item of equipment.
ISSC Mobile POG Product Properties	The properties displayed for a product in a planogram.
ISSC Mobile Profile Properties	The properties displayed for a profile (bay) in a planogram.
ISSC Mobile Profile Properties 2	Continuation of the SQL for the displayed for a profile (bay) in a planogram.
ISSC Mobile Zone Properties	The properties displayed for a zone.

Configuring the Custom Queries

> **Note:**   custom Queries can use Custom SQL placeholders - see section on Custom SQL at the beginning of this chapter.

Custom Queries are configured in the Custom Search Query dialog box accessed from the General menu in the Administration module. Each query can be selected from the drop down list at the top of the dialog box. Selecting a specific query will bring up text documenting the requirements for that piece of custom SQL. The Custom SQL statement can then be modified as required. The test button allows the custom SQL statement to be verified before it is saved

Quick Reports

Quick Reports allow a floor planner to get listed information on the currently active floor plan. They are accessed from the Reports option on the view menu in Planner. The application comes with a set of pre configured reports that will meet the needs of most retailers. Implementers have the option of deleting existing reports and adding new ones.

> **Note:**   Quick Reports can use Custom SQL placeholders - see section at beginning of this chapter. The application comes with a number of generic Quick Reports - the available placeholders can be determined by inspecting the Custom SQL for these reports.

Configuring Quick Reports

Quick Reports are configured directly in the database. This is done in the AVTTB_ CUSTOM_SQL table. Quick Reports ban be of three general types. The type is defined by its CST_ID (AVTTB_CUSTOM_SQL_TYPE table).

Table 12–3   Quick Report Types

CST_ID	Description
1	Store Plan Report.
2	Planogram Report.
3	General Report.

Deleting Custom Reports

To delete a custom report remove the pertinent row from the AVTTB_CUSTOM_SQL table.

Adding Custom Reports

To add a custom report, add a new row in the AVTTB_CUSTOM_SQL table.

Table 12–4   Fields for AVTTB_CUSTOM SQL table

Column	Description
CSQ_ID	Primary key for the table.
CSQ Name	Name of the Quick Report. This will appear in the Quick Reports dialog box.
CSQ_FILTERFIELDNAME1	Not required.
CSQ_FILTERFIELDNAME2	Not required.
CSQ_SQL	The Custom SQL that will execute.when the Quick Report is opened or refreshed.
CST_ID.	Foreign key to the AVTTB_CUSTOM_SQL_TYPE table. Identifies the use for the Custom SQL.

KPIs (Key Performance Indicators)

KPIs allow a floor planner to get visual information on the currently active floor plan. They are accessed from the KPI tab of the Object Browser. The application comes with a set of pre configured KPIs that will meet the needs of most retailers. Implementers have the option of deleting existing KPIs and adding new ones.

Overview of Configuring KPIs

KPIs are configured in the Administration module. There are two basic components to the KPI:

- Color Theme - this specifies the colors objects will be color coded.

- KPI - this specifies the data for the KPI.

Each KPI value should fall within a band within the associated color theme, causing the specified objects to color accordingly. The KPI values themselves are supplied from one of two sources:

- A SQL Statement

- A Stored Procedure

KPIs in the Planner Module

For KPIs to work in the Planner module, the objects that make up the block must have their lineweight set to **ByBlock** before the block was created. If this is not done, the blocks will not color.

In addition, if the visual style in Planner is set to wire frame, only the outline of the block will color. this can make the color changes in the KPI difficult to see. To make them more visible change the visual style to Realistic or Conceptual (View menu > Visual Styles).

SQL statements for KPIs

The SQL statement for a KPI must contain five mandatory fields.

Table 12–5   Mandatory Fields for SQL Statements

Field	Description
Object ID	This is the identifier for the object that is to be colored by the KPI. The options are: ■ ZON_ID: primary key for zones from the AVTTB_ZONE table. ■ FIX_ID: primary key for fixtures from the AVTTB_FIXTURE table. ■ SHF_ID: primary key for shelves from the AVTTB_SHELF table. ■ PRO_ID: primary key for products from the AVTTB_PRODUCT table.
Store ID	The STR_ID is the identifier for the store which the KPI is being applied to. It is from the AVTTB_STORE table (or as a foreign key in the AVTTB_FILE table).
Calendar ID	The CAL_ID is the identifier for the time period any data applies to. It is from the AVTTB_CALENDAR table. It can be for time periods such as weeks or months for time sensitive data like sales results. For no time sensitive data it can be se to the CAL_ID for All.
File ID	The FIL_ID is the identifier for the floor plan that the KPI is to be applied to. It is from the AVTTB_FILE table.
Result Column	This is the actual value that will be used in the KPI. The selected objects will color according to which band of the Color Theme falls within. Results should be chosen such that they fall within a distinct band and not on a boundary value.

Stored Procedures for KPIs

The stored procedure used for KPIs must contain specified inputs and outputs.

Table 12–6   Mandatory inputs to Stored Procedure

Input Parameter	Description
fileId IN NUMBER	This is the FIL_ID (AVTTB_FILE table). It will be supplied by the code when the stored procedure is executed.
calId IN NUMBER	This is the CAL_ID (AVTTB_CALENDAR table). It will be supplied by the code when the stored procedure is executed.
storeId IN NUMBER	This is the STR_ID (AVTTB_STORE table). It will be supplied by the code when the stored procedure is executed.

The stored procedure for KPIs must return a record set called SYS_REFCURSOR. This must contain the following five mandatory fields. Note that the permissible options for the Object ID vary depending on whether the KPI is for MSM and ISSC or for ISSC Mobile.

Table 12–7   Mandatory Fields for Stored Procedure Output

Field	Description
Object IDs in MSM and ISSC	This is the identifier for the object that is to be colored by the KPI. For MSM and ISSC the options are: ■ ZON_ID: primary key for zones from the AVTTB_ZONE table. ■ FIX_ID: primary key for fixtures from the AVTTB_FIXTURE table. ■ SHF_ID: primary key for shelves from the AVTTB_SHELF table. ■ PRO_ID: primary key for products from the AVTTB_PRODUCT table. The record set should contain one - **and only one** - of these identifiers.
Object IDs in ISSC Mobile	This is the identifier for the object that is to be colored by the KPI. For ISSC Mobile the options are: ■ FIX_ID: primary key for fixtures from the AVTTB_FIXTURE table. ■ PPR_ID: primary key for the planogram products in the AVTTB_POG_PRODUCT table. ■ FXL_ID: primary key for an item of planogram equipment in the AVTTB_POG_FIXEL table. The record set should contain one - **and only one** - of these identifiers. The identifier must be appropriate to the type of KPI.
Store ID	The STR_ID is the identifier for the store which the KPI is being applied to. It is from the AVTTB_STORE table.
Calendar ID	The CAL_ID is the identifier for the time period any data applies to. It is from the AVTTB_CALENDAR table. It can be for time periods such as weeks or months for time sensitive data like sales results. For no time sensitive data it can be se to the CAL_ID for All.
File ID	The FIL_ID is the identifier for the floor plan that the KPI is to be applied to. It is from the AVTTB_FILE table.
Result Column	This is the actual value that will be used in the KPI. The selected objects will color according to which band of the Color Theme falls within. Results should be chosen such that they fall within a distinct band and not on a boundary value. A stored procedure can have multiple result columns, with different KPIs referencing different columns. However, a KPI itself can only reference a single column in its definition.

Deleting KPIs

To delete a KPI, open the **Key Performance Indicators dialog box** from the General Menu in the Administration module. Highlight the required KPI in the list of KPIs and click **Delete.** The KPI will be deleted.

Creating KPIs

To create a KPI, open the **Key Performance Indicators dialog box** from the General Menu in the Administration module.

1. Create the required SQL statement or stored procedure that will be the source of the data. Depending on the access granted to the database, this could either be done by an SI or the DBA.

2. Create (or identify) a suitable Color Theme.

3. Create the KPI.

External Reporting Tools

External reporting tools can be used for many purposes. An example would be to report on the quantities of merchandise required to put a new floor plan into service. There are many Reporting Tools available - Oracle's is BI Publisher.

Configuring the reporting tool is beyond the scope of this Implementation Guide - please see the pertinent documentation.

External Reports and Logging

One use of external reports is to report from the log tables in the database. The tables specified below typically hold the results of objects affected by batch processes.

Table 12–8   Tables used for logging batch operations

Table	Description
AVTTB_FILE_PROCESS_LOG	Holds information on all files that have been checked out as part of a batch process. Batch processes include Automated Calculations, Update Status.exe, Data Importer, Planogram Substitutions and Planogram Changes.
AVTTB_IMPORT_LOG	Holds the results of Imports using the Data Importer module.
AVTTB_POG_SUB_LOG	Holds the results of any planogram substitutions or dry runs that have been executed.
AVTTB_PROCESSLOG	Holds the result of any files that have has their status changes as a result of UpdateStatus.exe being invoked.
AVTTB_PROCESS_FILE_LOG	Holds information on floor plans (drawings) subjected to a batch process.
AVTTB_PUBLISH_POG_LOG	Holds the results from Planogram Publishing.

In addition, there are other tables that log user actions. Examples include:

Table 12–9   Tables used for logging user actions

Table	Description
AVTTB_FILELOG	Holds details of files have been checked out by specific users using the Store Manager module.
AVTTB_PLANO_LOG	Hold details of which planograms have been edited by users in the Merchandiser module.
AVTTB_SECURITY_LOG	Hold details of users making changes to the Security Options in the Administration module.
AVTTB_USER_LOG	Holds details of all users that have logged into Macro Space Management.

The SI should set up the reports required by the retailer. They may also wish to set up a mechanism for purging data that is no longer required.

13

Follow Up Actions

This section describes some of the follow up actions required by the retailer. These are required to take the application after the initial implementation and put it into a condition where the store planning process can be put into production. These actions are summarized below but should not be regarded as an exhaustive list.

For details of where to find detailed information on the actions in this chapter, Appendix A, "Information Locations."

- Macro Space Management

- In-Store Space Collaboration

- General Database Maintenance Actions

- Integration into Other Retailer Systems

Macro Space Management

The implementation process described for Macro Space Planning describes how to get the application into a condition where detailed information for store planning can be entered. This section gives some examples of that information.

Administration Module

There are a several additional options that can be configured. Two of the most common are User Defined Attributes and Adjacency Rules and Severity Types. These are not pre-requisites for going into production, but can be useful to the retailer.

User Defined attributes

User Defined Attributes are customizable items of information that can be assigned to files, fixtures, planograms, planogram equipment (fixels), planogram products, planogram profiles (bays), products, stores and users. These are configured in the **User Defined Attribute dialog box** accessed from the General menu in the Administration module.

Individual values can then be assigned in the pertinent dialog boxes in the various modules. Alternatively, the values can be populated by data import.

Adjacency Rules and Severity Types

Adjacency rules and severity types can get set up to allow product adjacencies to be reported in on a floor plan - typically be means of a KPI. this allows the user to see that products commonly brought together are in suitably close physical proximity. Adjacency Rules and Severity Types are configured using the respective options from

the Planning menu in the Administration module. A suitable KPI will also need to be developed.

Fixture Studio

Additional configuration can be carried out in Fixture Studio. Again, these are not pre-requisites for production, but can be useful to the retailer. This includes:

Fixture Library

During implementation a partial set of fixtures were registered in Fixture Studio. These were sufficient to carry out a number of required implementation tasks. The retailer will have to create and register the full fixture library. If it is desired to use the Merchandiser module, the corresponding 3DS files have to be created as well.

Gondolas

Similarly, a partial set of gondolas were created during implementation. The full set must now be configured.

User Defined Attributes

Two forms of User Defined Attributes can be assigned to fixtures.

- **Fixed Attributes**: These are Definition Data assigned to all fixtures of a specific type.
- **Variable Attributes**: These are Instance Data that can vary from fixture to fixture, even for fixtures of the same type.

User Defined Attributes are custom information. They are configured in the Administration module, assigned (as fixed attributes) to fixtures in Fixture Studio. This lets retailers assigned their own very specific definition data to fixtures.

Variable attributes are instance data that can have specific values assigned in the Planner and Merchandiser modules and in ISSC. An example of their use is verifying compliance in a floor plan. Users in ISSC can walk round a WiFi enabled store and assign them on a case by case basis to the pertinent fixtures.

Planner

Further configuration can be carried out by the retailer in the Planner module.

Store Manager

The full store hierarchy needs to be created in Store Manager. The store hierarchy was imported down to store level. However, the floor plans now need to be created for each store. This can be done in one of two ways:

- The entire floor plan can be created from scratch starting with an architectural plan. this involves the placement of zones, equipment, aisles and merchandise.
- If a raw AutoCAD floor plan exists, and the requisite blocks have been registered in Fixture Studio, importing the AutoCAD drawing into Store Manager, opening the floor plan in Planner and then synchronizing 'match the drawing'. This will write a lot of the information to the database.

  Planner has functionality not present in AutoCAD. An example is the ability to draw lines representing aisles and associated fixtures with them. This sort of information will have to be manually added later in Planner.

As an alternative to manual synchronisation, batch synchronisation of the recently imported floor plans can be done using Floor Plan Publishing or Automated floor Plan Processing.

> **Note:** These floor plans can be validated in ISSC using the pertinent functionality.

User Defined Attributes

If User Defined Attributes have been configured in the Administration module, they can be manually assigned to stores, files and fixtures. Alternatively, these values can be imported. Again, these are not pre-requisites for production but can be useful to the retailer.

User Defined Attributes for planograms, planogram equipment, planogram products and planogram bays are generally imported. These can be manually edited after import or additional fields can be configured to hold additional information.

In-Store Space Collaboration

One of the potential uses for ISSC after an implementation process is to validate floor plans.

Floor Plan Validation Tools

A number of tools for validation of floor plans are provided. These are:

Table 13–1   Validation Tools

Tool	Description
User Defined Attributes	Allows custom information to be assigned to objects in a floor plan - for example fixtures.
Notes:	Allows the floor plan to be annotated with comments.
Dimensions	Allows a dimension to be measured in the floor plan and compared to a physical dimension in the store.
Markups	Allows objects in a floor plan to be highlighted to draw attention to them.
Scan Schematic	Allows an ISSC user to identify the planogram on a fixture in a store. This is done by attacking a bar code scanner to a computer running ISSC in a WiFi enabled store. The user can then go to a physical fixture and start scanning bar codes. As more bar codes are scanned, the functionality will progressively narrow down the list of potential planograms. ■ If the planogram show as present on the fixture is physically present is can be left unchanged in the floor plan. ■ If a different planogram is present on the fixture, the floor plan can be changed accordingly. ■ If no distinct planogram can be identified, a placeholder planogram can be put in the floor plan pending resolution of the problem.

Using Floor Plan Validation Tools

No hard and fast rules can be laid down for using these tools - the details will vary from retailer to retailer. The general process is:

1. Create a floor plan in Planner.

2. Set the floor plan to a status that makes it visible in ISSC.

3. Use an individual in the store to carry out a survey comparing the ISSC version of the floor plan with the physical reality in the store.

4. Annotate the ISSC floor plan accordingly and change the status.

5. Use the information in the ISSC floor plan to update the floor plan in Planner, ensuring that the floor plan reflects the reality in the store.

General Database Maintenance Actions

As a follow up to the implementing the process, the retailer may set up actions to run as batch processes in order to maintain the optimum performance of the database. Examples are given in the table below.

Table 13–2   General Maintenance Actions

Action	Description
Periodically clear back-up tables.	There are a number of tables with a suffix of _**BAK** in the database. These are used to roll back data if a user closes a floor plan without saving their latest changes. Over time these _BAK tables will gradually fill up with data.
	Files that have achieved Current or Historical status will no longer be edited. Periodically purging the _BAK tables of data from files of this status will keep the table size down.
Periodically clear logs	Information is periodically written to log tables such as AVTTB_EVENT or AVTTB_FILELOG. Periodically purging older data from these tables will keep the size down.
Update NEXT_ID table	The AVTTB_NEXT_ID table holds the next primary key to be assigned for a number of database tables. If the value held in this table gets out of sync with the actual value, referential integrity errors can result when users use functionality.
	After bulk import of data is carried out, this table should as a precautionary measure after all imports have finished. One way of doing this is to call the AVTSP_UPDATE_NEXT_IDS stored procedure.
Purging historical data	Floor plans that have been superseded by more recent versions are at historical status. The pertinent information is maintained in the database until manually removed. There are two strategies for doing this:
	■ Delete the data when the historical file reaches a certain age - for example 15 months (five quarters) after it was superseded.
	■ Copy the data to an archive for preservation and delete the original data.
	Periodically purging data will keep the table size down.

Integration into Other Retailer Systems

MSP will need to be integrated into the retailers other systems. The detail of this is outside of this implementation guide, but some examples are given below.

Floor Plans and Planogram Designs

Floor plans and planogram designs will be published according to their publish dates. They will generally be published in electronic form into folders at a specified location. The users of this information will require access to the folder location.

Supply Chain

When a floor plan and its associated planogram designs are published, there will be a need for new products and signage to be sent to the stores.Similarly, there may also be a need for new equipment. This information needs to fed into the retailers supply chain so that the required equipment, merchandise and signage arrives at the required locations in a timely manner.

Distribution of Reports

It is possible to generate a series of reports that show how well space is being managed - for example reports can show the sales per square foot of allocated floor area for a fixture, planogram, sub department, department or store. Like floor plans and planograms this information needs to be distributed in a timely manner to the pertinent recipients.

14

Validation Tasks

This section describes how to validate the implementation. The suggested checks comprise a brief regression test to verify the main functionality is operating as intended. After the completion of validation, the software should be in a position to be handed over to the retailer for more detailed User Acceptance Testing (UAT).

- Summary of Validation Testing
- Initial Security
- Basic Data Configuration
- Data Import
- Initial Fixture Studio Set Up
- Initial Planner Set Up
- Planner Configuration
- Batch Processes
- Configuring Reporting
- ISSC Setup
- ISSC Mobile Setup
- Follow Up Actions

Summary of Validation Testing

This section contains all the suggested validation testing. Implementers may wish to do this stage by stage as they complete each section of the implementation process. Alternatively, they can be systematically executed after all stages of implementation have been carried out.

For details of where to find detailed information on the actions in this chapter, Appendix A, "Information Locations."

Initial Security

Initial security is concerned with setting up a sub-set of users who will be associated with the rest of the implementation process.

Table 14–1   Validation of Initial Security

Action	Validation
Security Options	Verify passwords can only be set according to the criteria accounts are locked out as required and so on.
MSM User Accounts	Verify that an example user from each user group can access the pertinent MSM modules. Also verify that in Planner they can assess the Find and Open, Search and Print and Automated Processing dialog boxes.
ISSC User Accounts	Verify example user groups can log in, have the toolbar accessible and can access floor plans in the designated stores. also verify that each User Group has access to the designated Save dialog box. If a User Group has access to the District Manager button verify that it brings up a list of floor plans at the pertinent status.

Basic Data Configuration

Basic Data Configuration is usee to manually set up a number of parameters necessary to allow further configuration.

Table 14–2   Validation of Basic Data Configuration - Configuration Module

Action	Validation
Directories	Verify that the directories are functioning as required. For example create a temporary store, floor, revision and blank floor plan in Planner and verify that the correct Windows folders are created underneath the designated **Store Root**.
Files	Verify that when a blank floor plan is created, the prototype drawing can be accessed.

Table 14–3   Validation of Basic Data Configuration - Administration Module

Action	Validation
Calendar Data	Verify that Calendar data can be seen in the Calendar dialog box (General Menu) contains a correctly configured calendar.
Zone Definitions	Verify the required zone definitions are present and that example zones can be placed.

Data Import

This is the import of store, products, planograms and their associated hierarchies.

Table 14–4   Validation of Data Import

Action	Validation
Store Hierarchy	After the store hierarchy and its associated stores have been imported confirm that the total number of stores in the database matches the number to be imported.
	Take an example node in the store hierarchy and verify:
	■ All stores associated with that cluster are present.
	■ Basic store data (such as Open Date, Close Date and Status) are correct.
	■ Other information such as address information and UDAs is correct.
Product Hierarchy (In the Product Studio module)	After the product hierarchy and its associated products have been imported confirm that the total number of SKU's in the database matches the number to be imported.
	Take a node in the product hierarchy and verify:
	■ All expected products are present at SKU level.
	■ The unique identifier used by the retailer to identify the SKU (SKU Code, GTIN Number, and so on) is correct.
	■ The name and description of the products is correct.
	■ If required, the display style associated with the SKU is present and correctly configured.
Planogram Hierarchy (In the Merchandiser module)	After the planogram hierarchy and its associated planograms have been imported confirm that the total number of planograms in the database matches the number to be imported.
	Take a node in the planogram hierarchy and verify:
	■ All expected planograms are present in the node.
	■ Basic data such as the Publish Date, effective Date, Expiry Date and Status are correct.
	■ The planogram design if correct with the correct number of shelves and with products in the correct sequence and with the correct quantity.

> **Note:** The varying logs should have been checked at the time of import. The validation checks are independent confirmation the import executed correctly.

Initial Fixture Studio Set Up

This is the configuration of a sub-set of the required fixtures and gondolas, together with their associated hierarchies.

Table 14–5 Validation of Initial Fixture Studio Set Up

Action	Validation
Remapping System Blocks	Verify the following:
	■ **I_PBASE__**: If this block is correctly mapped.
	■ **I_Module**: If this block is correctly mapped, products and planograms can be dragged into an aisle in Top Graphical view in ISSC.
	■ **I_REF_** blocks: These blocks are used for bay numbering in planner. Place an gondola and apply basic bay numbering.
	■ **Title Blocks**: After title block configuration has been configured in the Administration module, open a floor plan, place a title block and verify the published floor plan contains the title block.
	The above block names are for an imperial database. for a metric database the equivalents are **P_BASE__**, **MODULE** and **I_REF_**.
Fixture Hierarchy	Verify fixture hierarchy has folders required by retailer.
Fixtures	Place some of the example fixtures and confirm:
	■ Fixture goes onto designated layer and colors accordingly.
	■ Fixture merchandises with product block.
	■ Product block occupies specified merchandisable area. (The merchandisable area should take into account the structure of the fixture.
Gondolas Hierarchy	Verify gondola hierarchy has nodes required by retailer.
Gondolas	Place some example gondolas and verify:
	■ Gondola goes onto correct layer and places accordingly.
	■ All the correct combinations of sizes place.
	■ Example optional parts can be selected as required.

Initial Planner Set Up

The initial planner set up is concerned with configuring a number of system variables and setting up a basic floor plan as preparation for further implementation tasks.

Table 14–6 Validation of Initial Planner Set Up

Action	Validation
System Variables	After the **PUBLISH_DATE_LEAD_PERIOD** and **EFFECTIVE_DATE_LEAD_PERIOD** system variables have been set, take a floor plan and set it to Authorized status in the File Properties dialog box. Verify:
	■ The **Publish Date** is the specified number of data ahead of today's date.
	■ The **Effective Date** is the specified number of days ahead of the Publish date.

Table 14–6   (Cont.) Validation of Initial Planner Set Up

Action	Validation
Synchronization	How synchronization behaves can be tested by creating a floor plan in Planner and then saving and closing it. The floor plan can then be opened in ISSC, edited and saved. This will create a difference between the data held in the Planner DWG file and the database.
	When the floor plan is re-opened in Planner, verify that synchronisation is behaving as the settings made in the pertinent system variables require. for example, if Auto-Synchronize is on, does the floor plan automatically update with the modified information in the database.
Creating the Store	Verify that the correct structure of folders has been created under the store root designated in the Directories Tab of the Configuration module.
Architectural Plans	Verify that architectural plans can be accessed. Associate an architectural plan with a floor.
Zones	Verify the following from the Zones tab of the Object Browser:
	■ **Clashing**: when zones of the same type are placed overlapping, the **Detect Clashes** option on the toolbar results in the overlapping zones being identified.
	■ **Annotation**: Verify the zones annotated when placed.
	■ **Hatching**: Verify hatching can be turned on and off.
Fixturing	Place Fixtures and Gondolas. Verify that they go on the correct layer and initially adopt the color of that layer.
Aisles	Draw some test aisles and verify the aisles draw correctly with annotation at the start.
	(The reporting aspects for aisles will be checked in the reporting section of validation).
Place products	Verify products can be placed from different levels in the product hierarchy.
Planograms	Place some example planograms. Verify imported multi-bay planograms can be placed in both normal and reversed orientations.

Planner Configuration

Planner configuration is concerned with the setting up of annotation, the final configuration of the provided title blocks and the configuration of floor plan and planogram printing in advance of running them via a batch process.

Table 14–7   Validation of Planner Configuration

Action	Validation
Text Styles	Place several short gondolas. Merchandise those gondolas with example products and planograms. Verify the fixture, product, profile and planogram annotation are the correct size and do not overlap when present simultaneously.

Table 14–7   (Cont.) Validation of Planner Configuration

Action	Validation
Title Blocks	Create a temporary floor plan with zones of specified area, specified number of fixtures and so on. Insert a title block into the floor plan.
	■ Verify that the information in the title block populates correctly.
	■ Verify that the title block shows correctly when the floor plan is manually published.
Floor Plan Publishing	Create a few temporary floor plans in Planner. Modify the floor plan in ISSC so there is a difference between the data held in the Planner floor plan and the database. Also temporarily modify the expiry date for a planogram in the database. Manually publish and verify that:
	■ The files publish to the specified directories with the correct file names.
	■ If printing as a hard copy, the files are collated in the right order.
	■ Pre-processing has reconciled the differences between the floor plan and database.
	■ Any expired planograms are flagged.
Planogram Reports	Manually print off some example planogram reports. Compare to original planogram design.
Planogram Publishing	Copy some planograms and set the Publish Date to a date in the recent past. Place in some temporary floor plans. Manually publish and verify that:
	■ The planogram designs publish to the correct directories with the correct file names.
	■ The planogram design is published using the specified template.
	■ The planogram designs are collated as required.

Batch Processes

Batch processes are used to automate many of the processes in MSP used for retail chain wide activities such as floor plan or planogram publishing. Some of these batch processes have been tested manually at an earlier stage. As such they will only require limited testing. Others, such as planogram substitution and update status, will not have been tested before and may require more extended checks.

Table 14–8   Validation of Batch Processes

Action	Validation
Floor Plan Automated Processing	Create several example floor plans in Planner. Modify some of these floor plans in ISSC. Run Floor Plan Automated Processing as a batch process with the /OUTOF SYNC flag. Verify that only the modified floor plans have been processed.
Data Importer	Call an import via the scheduling tool. Verify the database is updated as required and the changes are visible in the pertinent dialog boxes. This can be done by taking a subset of data from the retailer and importing that as a test.
Planogram Import	Run a delta planogram import (differences only). Identify the differences before hand and verify the pertinent changes to planogram hierarchy and planogram design are present.

Table 14–8   (Cont.) Validation of Batch Processes

Action	Validation
Adjacency Calculations	Create some temporary floor plans with gondolas, aisles and planograms. Run adjacency calculations as a batch processes. Entries should appear in the pertinent database tables - for example AVTTB_FIXTURE_ADJACENCY.
Planogram Substitution	Create some temporary floor plans in Planner and place several planograms in them. Manually set up some simple planogram substitutions in the Administration module. Run planogram substitutions as a batch process and verify the substitutions have occurred.
	Because the substitutions occur purely in the database, the Planner floor plan will have to be synchronized 'match the database' before the changes are visible in the floor plan.
	alternatively, if Auto Sync is enabled, opening the floor plan will automatically add the changes.
Automated Calculations	Create some temporary floor plans with gondolas, aisles and planograms. Run adjacency calculations as a batch processes. Entries should appear in the pertinent database tables.
Floor Plan Publishing	The detail of floor plan publishing was checked in the section on Planner module configuration. This validation test verifies that floor plans will publish as part of a batch process.
	Create some temporary floor plans and set the Publish Date accordingly. Verify that they publish as a result of the batch process.
Planogram Publishing	The detail of planogram publishing was checked in the section on Planner module configuration. This validation test verifies that planogram designs will publish as part of a batch process.
	Create some temporary planograms by copying some existing ones and set the Publish date to the past. Place examples in some floor plans. Verify they publish as part of the batch process.
Update Status	Create some temporary stores. Set some to Proposed status with the Opened Date in the past. Set some to Open status with the Closed date in the past. Also create some floor plans with the Effective Date set to a date in the past.
	Run Update Status as part of a batch process and verify that the store statuses change to Open or Closed as appropriate. Also verify that the floor plan statuses change to Current as appropriate.

Configuring Reporting

Reporting is used both the validate the placement of objects in a floor plan and to report on the performance of that floor plan after it has gone into service.

Table 14–9   Validation of Configuring Reporting

Action	Validation
Custom Queries	If any Custom Queries have been modified, verify that the pertinent dialog boxes are showing the required fields.

Table 14–9   (Cont.) Validation of Configuring Reporting

Action	Validation
Quick Reports	Quick Reports can be tested in one of two ways: ■ Using an example floor plan ■ Entering a set of test data in the database and verifying the Custom SQL for the Quick Report Verify any existing Quick Reports function correctly. If any new Quick Reports have been created, they should be subjected to slightly more extensive testing.
KPIs	Test any existing KPIs on an example floor plan or enter a set of test data into the database and verify the correct results are returned. An example of the latter option would be entering or importing POS data to verify a financial KPI. If any new KPIs have been created, they should be subjected to slightly more extensive testing
External Reports	Validate the external reports as required. An example would be validating the reports that show the contents of tables in the database used for logging. An example would be a report showing the contents of the AVTTB_PROCESS_FILE_LOG table which holds information on which floor plans have been modified by a batch process.

ISSC Setup

ISSC setup is configuring ISSC to modify the visual appearance and functionality for users.

Table 14–10   Validation of ISSC Set Up

Action	Validation
Save Dialog Boxes	Log in as a user with the appropriate privileges and check that the Submit, Accept and Reject buttons change the floor plan status to the designated one. As there are three different forms of the Save dialog box, this will require testing with users from three different user groups.
District Manager Button	Log in as a user with the appropriate privileges and check that the District Manager button brings all files of the required status. Further verify that the Accept and Reject buttons change the floor plan status to the designated on
General System Variables	Verify correct operation for any system variables that have been changed from their default values.
Merchandising System Variables	Verify correct operation for any system variables that have been changed from their default values.
Annotation System Variables	Verify correct appearance of zone annotation, fixture annotation, profile annotation and product annotation.
Markup System Variables	Verify left and right mouse buttons draw lines of the correct weight.
Note System Variables	Verify correct appearance.
Duplicating Floor Plans	Verify that a duplicated floor plan has the intended status.

ISSC Mobile Setup

The ISSC Mobile set up is designed to configure access to the application and allow modification of KPIs and Custom Queries to be carried. The Notes functionality is also verified.

Table 14–11   Validation of ISSC Mobile Set Up

Action	Validation
Users and User Groups	Verify a specific user can log into the designated store.
Fixture KPI	Copy a Current floor plan in Planner. Make the later copy Current, and change some fixture positions in it. Modify the database dates as required so the effective dates of the floor plans are less than 7 days apart. Open the more recent floor plan in ISSC mobile and verify the changes to the fixtures show in the KPI.
Merchandise KPI	Copy a Current floor plan in Planner. Make the later copy Current, and change some planograms in it. Modify the database dates as required so the effective dates of the floor plans are less than 7 days apart. Open the more recent floor plan in ISSC mobile and verify the changes to the merchandise show in the KPI.
Notes	Create notes and verify they are visible in MSM (Store Manager) and ISSC (from toolbar).
Custom Queries (If modified)	If modified, verify the queries return the required results.

Follow Up Actions

Follow up actions are out of the scope of this implementation guide. As such no validation actions are specified.

A

Information Locations

This section of the implementation guide contains information on where detailed information on configuring functionality can be found. Each section corresponds to a chapter in the implementation guide.

- General Information
- Initial Security
- Basic Data Configuration
- Data Import
- Initial Fixture Studio Setup
- Initial Planner Setup
- Planner Configuration
- Batch Processes
- ISSC Set Up
- ISSC Mobile Set Up
- Configuring Reporting
- Follow Up Actions

General Information

The *Oracle Retail Macro Space Management Data Model* contains information on bitwise and enumerated values used for system variables. Its entity relationship diagrams show the relationship between tables in the database. This and other information contained in the data model is essential for SIs configuring the application.

Initial Security

Initial on configuring initial security and setting up initial users can be found in the following locations.

Table A–1   Initial Security Information

Security Action	Location of Information
Setting Security Options	Section on Security Options in the Administration Module User Guide.
Adding other Administrative Users	Section on Functional Security in the Administration Module User Guide.

Table A–1 (Cont.) Initial Security Information

Security Action	Location of Information
Associating User Groups with Functionality	Section on Functional Security in the Administration Module User Guide.
Adding other users	Section on Functional Security in the Administration Module User Guide.

Basic Data Configuration

Information on basic data configuration can be found in the following locations:

Table A–2 Basic Data Configuration Option

Configuration Action	Location of Information
Configuration Module	Information on the Options Tab and Directories tab in the Configuration Module User Guide.
Calendar Data	Section on Calendars in the Administration Module User Guide.
Statuses	Section on Calendars in the Administration Module User Guide.
Zone Definitions	Section on Zones in the Administration Module User Guide. Information on placing zones in the Planner Module User Guide.

Data Import

Information on the import of the store hierarchy together with product and planogram information can be found in the following locations.

Table A–3 General Data Import Information

Data Import process	Location of Information
Data Importer	Data Importer User Guide.
Planogram Import	This is in two sections: creating the XML file and importing the data. ■ Information on creating the XML file is in a white paper called Planogram Import on My Oracle Support. ■ Information on importing the planogram information is in the following document on OTN: *ODI Planogram Import, User Guide, Volume 1*.

Table A–4 Detailed Data Import Information

Data Import Action	Location of Information
Planogram Import Styles	Section on Planogram import styles in the Merchandising section of the Administration Module User Guide.
System Variables for Planogram Import	Some of the system variables are described in the General section of the Administration Module User Guide.
Importing Store Hierarchy via Data Importer	See the Data Importer User Guide for general information.
Importing Product Hierarchy via Data Importer	See the Data Importer User Guide for general information.
Planogram Import via ODI	See the ODI Planogram Import, User Guide, Volume 1.

Initial Fixture Studio Setup

Information on the initial set-up tasks in Planner can be found in the following locations in the *Oracle Retail Macro Space Management Fixture Studio User Guide*.

Table A–5   Initial Fixture Studio Set Up Information

Fixture Studio Action	Location
Remapping System Blocks	Categories tab in the Block Details dialog box section.
Create Fixture Hierarchy	Fixture Groups in Fixture Creation section.
Creating Fixtures	Sections on Fixture Creation and Block Details dialog box.
Create Gondola Hierarchy	Gondola Hierarchies section.
Creating Gondolas	Worked examples in Gondolas section.

Initial Planner Setup

Information on the initial set-up tasks in Planner can be found in the following locations.

Table A–6   Initial Planner Setup Information

Setup Action	Location of Information
Store Manager System Variables	Information on system variables in System Variable section of Administration Module User Guide.
Synchronisation	Information on system variables in System Variable section of Administration Module User Guide. Information on manual synchronization in Planner Module User Guide.
Configuring Layers	Not presently covered in User Guides.
Selecting Cluster and Store	Store Manager section of Planner Module User Guide.
Associating an Architectural Plan	See the Using Architectural Plans section of the Planner Module User Guide.
Laying out Zones	Zones section of the Planner Module User Guide.
Fixturing	Equipment section in the Planner Module User Guide.
Aisles	Aisles section in the Planner Module User Guide.
Products and Planograms	Merchandise section in the Planner Module User Guide.
Creating a temporary floor plan	Information in varying parts of the Planner User Guide.

Planner Configuration

Information on the section on Planner configuration can be found in the following locations:

Table A–7   Planner Configuration Information

Planner Action	Location of Information
Text Styles	Section on configuring Text Styles in Administration module user Guide. Section on Using Annotation in Planner Module User Guide.

Table A–7 (Cont.) Planner Configuration Information

Planner Action	Location of Information
Title Blocks	Section on how to register blocks in Fixture Studio User guide. Section on creating the DWG Title Block and how to use it in the Planner Module User Guide. Section on how to configure them for Planner use in the Administration Module User Guide.
Floor Plan Publishing	Administration Module User Guide. Additional information in Planner Module User Guide.
Planogram Reports	Report Designer User Guide.
Planogram Publishing	Administration Module User Guide. Additional information in Planner Module User Guide.

Batch Processes

Information in the section on batch processes can be found in the following locations:

Table A–8   Batch Process Information

Batch Process	Location of Information
Floor Plan Automated Processing	Administration Module User Guide. Additional information in Planner Module User Guide.
Data Importer	Data Importer User Guide
Planogram Import	This is in two sections: creating the XML file and importing the data. ■ Information on creating the XML file is in a white paper called Planogram Import on My Oracle Support. ■ Information on importing the planogram information is in the following document on OTN: *ODI Planogram Import, User Guide, Volume 1.*
Adjacency Calculations	Section on Calculations in Planner module contains information on how Adjacency Calculations work.
Planogram Substitution	Administration Module User Guide. See the section on Functional Security as to how to configure access to the planogram substitution functionality. There is an second section on the planogram substitution functionality itself.
Automated Calculations	Section on Calculations in Planner module contains information on how Calculations work.
Floor Plan Publishing	Administration Module User Guide. Additional information in Planner Module User Guide.
Planogram Publishing	Administration Module User Guide. Additional information in Planner Module User Guide.
Update Status	Section on Update Status in Planner Module User Guide.

ISSC Set Up

Information in the section on ISSC Set Up can be found in the following locations:

Table A–9   ISSC Set Up Information

ISSC Set Up Action	Information
Users and User Groups	Security section in Administration Module User Guide.

Table A–9   (Cont.) ISSC Set Up Information

ISSC Set Up Action	Information
Statuses and Status Levels	Pertinent sections in Administration Module User Guide.
Save Dialog Boxes	In-Store Space Collaboration User Guide.
District Manager Button	In-Store Space Collaboration User Guide.
System Variable	Pertinent sections in Administration Module User Guide.

ISSC Mobile Set Up

General information on ISSC Mobile can be found in the Oracle Retail Macro Space Planning ISSC Mobile User Guide. Information on configuring it can be found in the following locations.

Table A–10   ISSC Mobile configuration Information

ISSC Mobile Action	Location of Information
Configuring Users and User Groups	Section on Security in the Administration Module User Guide.
configuring Functional and Data Security	Section on Security in the Administration Module User Guide.
Configuring Custom Queries	Section on Custom Queries in the Administration Module User Guide.

Configuring Reporting

Information on configuring reporting can be found in the following locations:

Table A–11   Reporting Configuration Information

Report Option	Location of Information
Customer Queries	Section on Custom Queries in the Administration Module User Guide.
Quick Reports	Some information in the section on Quick Reports in the Planner Module User Guide.
KPIs	Section on KPIs in the General Menu section of the Administration Module User Guide.
External Reporting Tool	See pertinent documentation for that action.

Follow Up Actions

Some follow up actions are outside the scope of this implementation guide. Information on some of the MSP functionality discussed can be found in the following locations:

Table A–12   Follow Up Action Information

Follow Up Action	Location of Information
User Defined Attributes	Section on UDAs in Administration Module User Guide.
Adjacency Rules and Severity Types	Adjacency Rules and Severity Types sections in the Administration Module User Guide.

Table A–12 (Cont.) Follow Up Action Information

Follow Up Action	Location of Information
Floor Plan Validation	Pertinent sections of ISSC User Guide. For example the section on Scanning Planograms in the Merchandising section shows how the identify of planograms physically in a store can be verified.
General Database Maintenance Actions	See the *Oracle Retail Macro Space Management Data Model* for information on the specified tables.

Glossary

2D/3D Fixtures

Specialized way of configuring AutoCAD blocks so they can be toggled between 2D and 3D form in a Planner floor plan.

2D/3D Planograms

Planograms can be placed in one of three forms in the Merchandise module.

- 2D form: header information only.

- 2.5D form: planogram has shelves and products blocks to represent position of products. No information on number or orientation of products.

- 3D form: full information on shelves or products.

Planograms can only be placed in 2D form in Planner. They can only be seen in 3D form is ISSC and ISSC Mobile if first set to that form in Merchandiser.

3DS File

These are 3D Studio graphics files. 3DS files can be created from AutoCAD drawing files. They are used to represent objects in the Merchandiser module. They are also used in the Preview tab of the Block Details dialog box in Fixture Studio.

BatchRunner

Batchrunner.exe is a small tool used to invoke the batch processes used for Planogram Substitution, Floor Plan Automated Processing, Floor Plan Publishing and Planogram Publishing.

Bitwise Variable

Bitwise variables are typically used to specify combinations of options. Consider the following list:

1 = Option A
2 = Option B
4 = Option C
8 = Option D
The numbering sequence for a bitwise variable is such that every combination sums to a unique value. Thus options A, B and D would result in a bitwise variable value of 11.

Block

Blocks are named groups of AutoCAD objects that act as a single 2D or 3D object. Blocks are used in the Planner module to represent objects in the floor plan such as fixtures, fittings or merchandise. The term block is also sometimes used as a generic term in MSM to describe these objects.

Canonical Media

List of sizes for printing hard copy or electronic versions of floor plans. Read by AutoCAD from the available printers and plotters and imported into the database.

Cluster

User as a container in the store hierarchy for stores sharing a common characteristic. Examples of such characteristics are location or store size.

Command Group

Used in the functional Security dialog box in the Administration module. Controls access to functionality.

Custom SQL

An extension of standard SQL. Valid only in specific parts of the MSP suite.

Data Security

This option (accessed from the Security Menu in the Administration Module) determines what objects users can access. This affects which stores, statuses, products or planograms can be read, edited or deleted.

Display Style

Used within MSMs Merchandiser module and in ISSC to describe the physical form and dimensions of a SKU (Product Item).

DWG File

AutoCAD file used in the Planner module. It can contain varying levels of detail ranging from a full floor plan down to an individual fixture.

ETL Tool

Extract, Transform and Load tools are software designed to take data from one database, modify the form if required and insert it into another database.

Fitting

An item of equipment that cannot accept merchandise. Fittings can be placed directly on the floor or onto fixtures or shelves. An example of a fitting would be the gates that scan for security tags when shoppers leave the store.

Fixel

An alternative name for an item of equipment in the planogram design.

Fixture

An item of equipment that can accept merchandise, either directly, or on shelves. Fixtures are typically placed on the floor. An example of a fixtures would be a chiller unit.

Fixture Hierarchy

The Fixture Hierarchy is an arrangement of fixture groups and associated fixtures that allow manual navigation to specific fixtures during floor planning. It is created in the Fixture Studio module and displays in the Object Browser in the Planner and Merchandiser modules and in In-Store Space Collaboration.

Functional Security

This option (accessed from the Security Menu in the Administration Module) determines what functionality users can access

Gondola

Pre-configured arrangement of fixtures set up in Fixture Studio. This allows long runs of fixtures to be rapidly placed - and hence to represent real life gondolas in stores.

ISSC (In-Store Space Collaboration)

Internet Enabled store planning application that can be deployed to stores. Dependent on MSM.

ISSC Mobile

A partner application of ISSC designed for use on a mobile device. It can be used by store associates to see changes in fixturing and merchandise in a specific store and to collaborate with other retail employees. Dependent on ISSC.

Key Performance Indicator (KPI)

A way of showing performance by color coding objects in a floor plan or planogram.

MSM (Macro Space Management)

Store Planning suite intended for use at corporate headquarters.

MSP (Macro Space Planning)

Umbrella term for the software suite comprising Macro Space Management (MSM) and In-Store Space Collaboration (ISSC).

Object Browser

Control in the Planner and Merchandiser modules in MSM and in ISSC used to initiate actions involving zones, equipment, merchandise and KPIs.

Object Grid

Control in the Planner and Merchandiser modules in MSM. Provides an alternative way to place equipment and merchandise.

Oracle Data Integrator (ODI)

Oracle's ETL tool. It can be supplies with pre configured scenarios to import planogram designs from an XML file of specified form.

Quick Report

A customizable dialog box within MSM and ISSC. The information can be configured to suit retailer requirements.

Status

Used to indicate where an object is in its business life cycle. Certain actions can only be carried out when an object is at a specific status.

System Integrator (SI)

In the context of this document, used as a generic term to describe a person with the appropriate skills to carry out implementation tasks.

Template Database

Database created from a supplied script. The database is populated with sufficient information for MSP to open and for the functionality to be accessible. The SIs task is to add the information required for a retailer to begin store planning.

UpdateStatus

updateStatus.exe is a small executable file used to change the status of floor plans and stores.

User Defined Attribute

Customizable information that can be assigned to fixtures, files, planograms, planogram equipment (fixels), planogram products, planogram profiles (bays), products, stores and users.

Zone

Used within MSP to indicate an area of floor used for a specific purpose. The Internal Area zone is used to delineate the total area used for retail purposes. The Food and Drink zone might indicate the floor area associated with the Food & Drink department.