

GoPlanogram® HTML5 Quick Reference Guide

©2011-2017 Northwoods Software Corporation

Revised October 23, 2017

1. INTRODUCTION AND OVERVIEW

This reference guide is organized to help new users quickly start using GoPlanogram HTML5.

The GoPlanogram HTML software is constantly improving, so the latest features may not be fully described here. For an up to date list of features, please visit <http://www.goplanogra.com/features>. Customers may make feature requests and learn more by joining the user forum at <http://forum.goplanogram.com>.

Note: Some common terms are not defined here. If you don't understand a word or phrase here, place it in quotes and search the internet for a definition, for example "what is the maximize button."

The GoPlanogram HTML5 User Interface

Figure 1 below illustrates what you will see after you log in to your GoPlanogram HTML5 site using your internet browser.

The **Internet Browser Commands** depend on the internet browser you choose to use. Refer to that browser's documentation for an explanation of those controls.

The GoPlanogram HTML5 user interface appears within the browser window and consists of these main parts:

- The **Product Catalog** lists all the products that you can add to a planogram.
- The **Canvas** is where you build a planogram by creating fixtures (such as shelves, pegboards, racks and tables), and add products, signs, text, and more to those fixtures.
- The **Settings Panel** displays frequently used controls.
- The **GoPlanogram Command Bar** has symbols and words for less frequently used commands.
- The **Catalog/Canvas Slider** lets you control how much of the screen is occupied by the Product Catalog versus the Canvas.
- The **Catalog button** and the **Settings button** let you control whether the Product Catalog or Settings Panel are displayed.
- The **Login Panel** controls and displays login information.

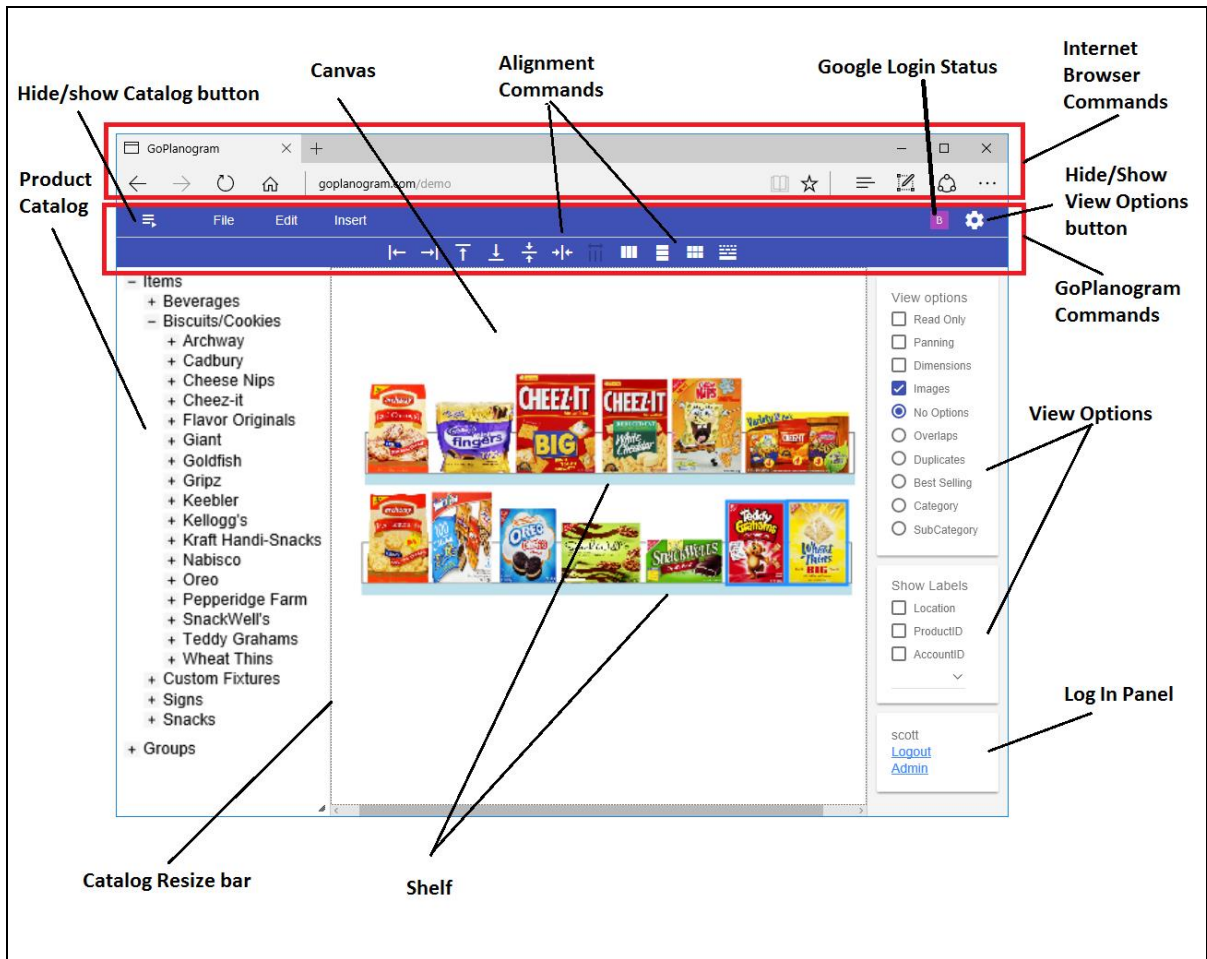


Figure 1. The GoPlanogram HTML5 User Interface

The Menu Commands

Figure 2. Illustrates the commands on the File, Edit and Insert menus. Most, but not all of the commands are discussed in this Quick Reference Guide.

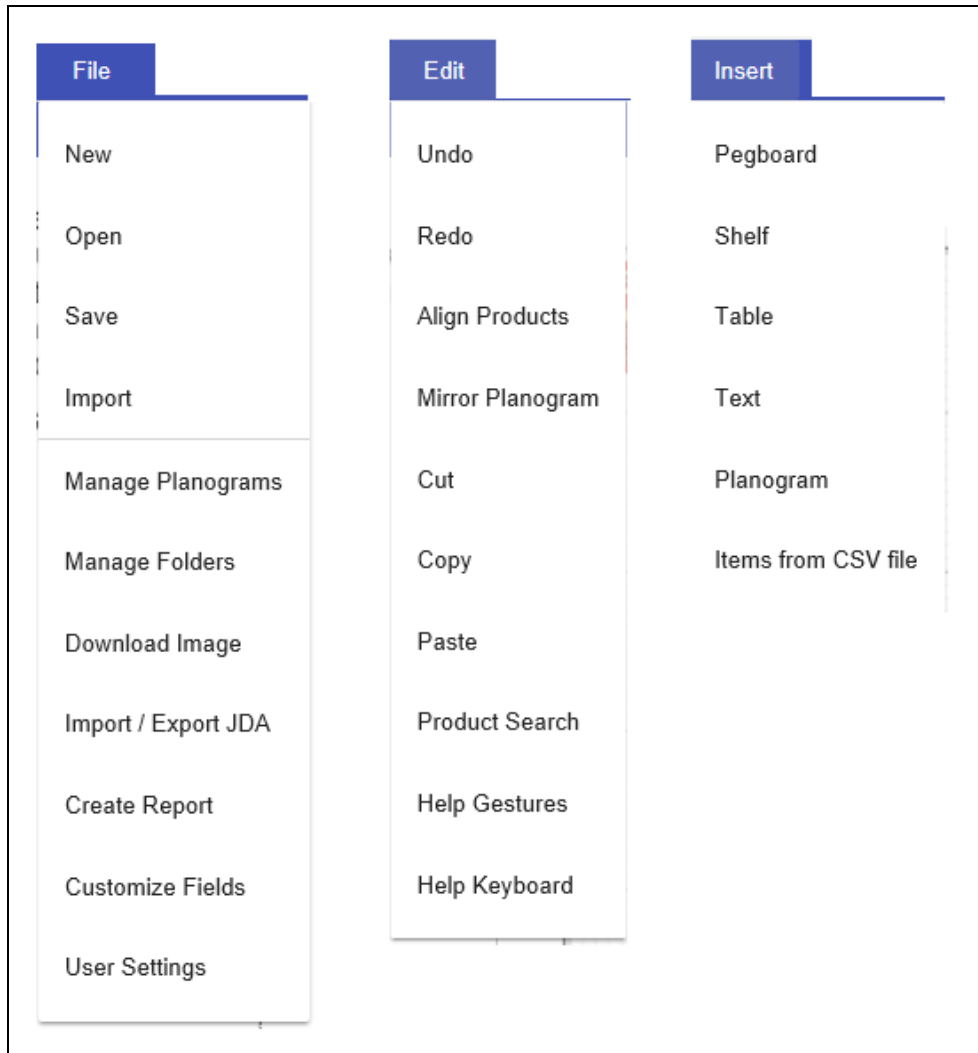


Figure 2. The Menu Commands

2. GETTING STARTED

Adjust your browser

For best results, consider making your browser fill the screen.

- 1 Login to your GoPlanogram website using the URL, username, and password that were provided to you.
- 2 Maximize your browser's window by double-clicking its title bar, or by clicking its maximize button.
- 3 Set the browser's zoom level to 100% or another magnification (via the browser's settings control) so that the GoPlanogram controls and text have a size that you can work with. Planogram scroll bars (located at the bottom and right side of the canvas) may appear; the planogram scroll bars let you move to different areas of the Canvas.

Adjust the planogram zoom level and layout

- 1 Place your mouse cursor in the **Product Catalog** area, hold down **Ctrl** and move your mouse wheel to zoom in out to adjust the size of the text to suit your preferences.
- 2 In a similar manner, adjust the zoom level for the **Canvas**, and also the **Settings Panel**.
- 3 Use your mouse to drag the **Catalog/Canvas Slider** to further adjust the layout of the screen.

3. BUILDING A PLANOGRAM

You can build a new planogram by:

- o Copying another user's planogram
- o Opening one of your own planograms
- o Creating a planogram from scratch

GoPlanogram uses a "sandbox model" for storing planograms. What we mean by that is that each user can only change their own planograms, and sharing is accomplished by allowing a user to make their own copy of another user's planogram. The sandbox model for storing planograms means that no other users can damage your planograms.

Use the following method to copy a planogram from another user.

To Build a Planogram By Copying Another User's Planogram

- 1 On the **File** menu, click **Import**.
- 2 Enter a name (or part of the name), and select the User and the Folder for the planogram that you want to import. A list of matching planograms will appear.
- 3 Click the name of the planogram you want to import.
- 4 A copy of that planogram is now loaded in your browser, but is not yet saved.
- 5 If you want to keep the planogram, on the **File** menu, click **Save**. Optionally, give the copy a new name of your own choosing, place it in a folder (if you created one), and choose whether to share it or not. And then, click **OK**.
- 6 Customize the imported and saved planogram by going to section **Editing An Existing Planogram** below.

Use the following method to continue to edit one your own planograms.

To Build a Planogram By Opening One of Your Own Planograms

- 1 On the **File** menu, click **Open**
- 2 Enter a name (or part of the name), and select the Folder for the planogram that you want to open. A list of matching planograms will appear.
- 3 Click the name of the planogram you want to open.
- 4 A copy of that planogram is now loaded in your browser.
- 5 If you want to make a new version of the original, on the **File** menu click **Save**, and enter a new name for the copy and click **OK**.
- 6 Customize the planogram by going to section **Editing An Existing Planogram** below.

NOT YET IMPLEMENTED

Use the following method to allow other users to import one of your already saved planograms.

~~To Control Who can Import of Your Previously Saved Planograms~~

- ~~1 On the **Edit** menu, click **Sharing**~~
- ~~2 Your saved planograms are listed.~~
- ~~3 Select the name of the planogram you want to share and specify the amount of sharing you want to allow in the **Share With** column by choosing **All**, **None**, or **Selected**. The default is **All** users.~~
- ~~4 If you chose **Selected**, select the users in the **Selected Users** column.~~
- ~~5 If you change your mind, you can reset sharing for any of your planograms by clicking **Change Selected to 'None'** or **Change Selected to 'All'**.~~
- ~~6 Click **OK**~~

Use this method if you want to create a planogram from scratch.

To Build a Planogram from Scratch

First, add the fixtures you need to the Canvas.

- 1 On the **File** menu click **New**.
- 2 Right-click the Canvas, and then **Add Pegboard...** (or similarly, add other fixtures, text, etc.)
- 3 Choose the dimensions and options for the fixture, and Click **OK**.
- 4 Use your mouse to position the fixture where you want it on the Canvas.
- 5 Double-click the fixture (or right-click and choose Properties), then uncheck Selectable and Movable, and click **OK**.

Now, add items to the fixture by moving them from the Catalog.

- 1 Click an icon (+) in the Products Catalog to expand a category.
- 2 Continue clicking icons to “drill down” into categories, until there is no more such icon. You’ve reached a product item.
- 3 Drag the item to a fixture.
- 4 Position the item on the display by dragging it to approximately where you want it.

NOTE: To place an item “on” a shelf, your mouse pointer must be located within the border of the shelf; doing so snaps the item onto the shelf and allows you to move the item horizontally.

- 5 Repeat the process, selecting all the items you want
- 6 Click **Save**.
- 7 Customize the planogram by going to section **Editing An Existing Planogram** below.

TIP: you can also double-click a category name in the Catalog to open (or close) that category

4. EDITING AN EXISTING PLANOGRAM

If the planogram you want to edit is not already on your screen, use one of the techniques of section **Building a Planogram** to make one visible. Then use one of the techniques in this section to make changes to your planogram.

IMPORTANT: While you are editing, periodically click the **Save** command on the **File** menu, to save the planogram stored in your browser into the cloud (i.e. onto the remote server). Saving your work to the cloud will allow you to resume where you left off after a power or internet connection failure.

Selecting Items or Groups

Selecting objects allows you to then duplicate them, move them, delete them, etc.

To select an individual item or group:

- o Click it

A blue box appears around the selected items.

To clear a selection

- o Click on the white space of the Canvas or fixture.

The blue box around the item(s) disappears

To select multiple items or groups

- o Click in the white space and drag a box around the items you want to select.

A blue box appears around the selected items.

To extend any existing selection

- o Hold down **CONTROL** and click the new items you want to add to the selection

A blue box appears around the selected items.

Moving or Removing Items, Groups, or a Selection

To move a group, item, or selection:

- o Click the group, item, or selection and, while holding down on the left mouse button, drag it to where you want it.

OR

- 1 Click the item, group or selection to select it

~~2 While the item is selected, use the arrow keys on your keyboard to move it~~

To remove a item, group, or selection from the Canvas or a fixture

- 1 Click the item, group or selection to select it
- 2 Press the **DELETE** key on your keyboard

Copying and Pasting

To Duplicate a Group, item, or any selection

- 1 Select the parts
- 2 Hold **Control** and drag the selection to a different location

A copy will be created and moved to the destination.

To Copy a Group, item, or any selection

- 1 Select the parts
- 2 Type **Control** and C

To Paste the copied items:

- 1 Type **Control** and V
- 2 The duplicated items are placed right on top of the originals.
- 3 Drag the copy off the originals and place it where you want.

Grouping and Ungrouping

You can create un-named groups of items to easily move them around, duplicate them, etc.

To group items:

- 1 Select the items
- 2 Right-click one of the selected items, and click **Group**

In order to edit individual items in a group, first Ungroup it.

To ungroup (split up) a group into its items:

- 1 Click to select the group
- 2 Right-click one of the selected items, and click **Ungroup**

Now you can move individual items around

Editing Fixtures

To Change a Fixture's Size and Properties

- 1 Double-click the fixture (or right-click and choose Properties).
- 2 Change any properties of the fixture.
- 3 Check **Selectable and Movable** if you would like to be able to reposition the fixture.
- 4 Click **OK**.

Note: If you need to select and move any of the items located on a fixture, you should first uncheck the fixture's Selectable and Movable property.

Editing Shelves

To add a shelf to the planogram

- 1 Right-click the whitespace on the Canvas or a Pegboard
- 2 Select **Add shelf**

To move a shelf

- o Double-click to set the properties of the shelf to Selectable and Movable.
- o Click the shelf and while holding down on the left mouse button, drag it to where you want it.

To add an item or group to a shelf

- 1 Drag the group or item out of the catalog
- 2 And place it on a shelf, making sure your mouse pointer is within the border of the shelf itself

To remove a item or group from a shelf

- 1 Click the item to select it
- 2 Press the **DELETE** key on your keyboard

Note: If you want to move the part you can also simply drag the part off the shelf and park it in the whitespace on the Canvas.

Helpful Display Options

Note: use the following display options only when needed - enabling some may slow down your editing

To Show Product IDs

- o On the Settings Panel, under Show Labels, check **ProductID**

Note: The "part number" for an item is defined by the ProductID column in the parts database; depending on your database design, it might be the SKU, UPC, EAN, or anything else you choose that is unique.

To Show Images

- o On the Settings Panel, under View Options, check **Images**

Note: the first use for a large planogram may take a long time on a slow internet connection while images are downloaded – so if you have done a lot of editing work, consider clicking **Save** first.

To Show Duplicates

- o On the Settings Panel, under View Options, click Duplicates

Items with multiple facings show in yellow.

Items already on your planogram show blue in the Catalog.

To Show Overlaps

- o On the Settings Panel, under View Options, click Overlaps

Overlaps show in red

To Show the Best Selling score

On the Settings Panel, under View Options, click Best Selling

Items show in various shades of green

To Display Rulers

- 1 Right-click the Canvas
- 2 Click Add Ruler

Other Useful Commands

To Undo the most recent change

- o On the Edit menu, click **Undo**

To Redo the last change that you un-did

- o On the Edit menu, click **Redo**

To Start a New Planogram

- o On the File menu, choose New
- o The Canvas is erased and a blank planogram will be created (but not yet Saved).

Note: this procedure will delete all items

To Erase the Display and contents of a Planogram

- o Hold Control and type A (selects all selectable items)
- o Press **Delete** key

Note: this procedure will not delete items that are not Selectable and Movable

Caution: your open planogram is now blank. Do not click **Save** until your new design is complete.

5. MANAGING SAVED PLANOGRAMS

To Delete a saved planogram

- 1 On the File menu, click **Manage Planograms**
- 2 Select the planogram you want to delete and click the trash can
- 3 Then, click Done

6. CREATING A REPORT

The suggested pre-report creation checks are:

- Scroll through the planogram with **View... Overlaps** checked to verify that there are no items on other items.
- Print the planogram and examine the printout

To create a report

- 1 On the **File** menu, click **Save**, to save the planogram in the cloud.
- 2 On the **File** menu, click **Reports**
- 3 Click **Output to CSV** to create a CSV file report, or click **Output to Google Sheets** to create a Google spreadsheet.
- 4 Open the CSV file using Excel or Google docs

APPENDIX

Mouse and Keyboard Shortcuts

Table 1. Mouse Shortcuts

Object	Mouse Action	Result
Item	Hover over	Shows item details (if Show Tooltips is checked)
Item or Group	Click	Selects the item or group
	CONTROL + Click	Selects the item or group and adds it to the current selection
Fixture	Click	Unselects any existing selection
	Right-Click or Double-Click	Shows options
Selection	Right-Click	Shows options
Group	Right-Click	Shows options
Shelf	Right-Click	Shows options

Table 2. Keyboard Shortcuts

Pre-action	Keyboard Combination	Result
Select one or more items or groups	DELETE	Removes the selection from the display
	CONTROL + Click on another item	Adds the item or group to the selection
Click Canvas	Turn mouse wheel	Canvas is scrolled up or down
	SHIFT + turn mouse wheel	Canvas is scrolled right or left
Click item and place mouse over item	CONTROL + mouse wheel **	Zooms in or out on the chosen item

Troubleshooting

Problem	Possible Causes	Recommended Action
Show Images is taking a long time.	The first time you Show Images for a large planogram after a reboot, images need to be downloaded into your browser.	Don't turn on images until you need them. If you need images, consider zooming all the way out before clicking View...Images. This will

	This can take several minutes for a large planogram on a slow internet connection.	force all the images to load at one time. After the initial load, the images will remain cached in your browser until you reboot. (Note: you may need to click View...Images more than once to make them all load.)
Entering the name of a planogram is not working.	Entering data may be difficult if your browser is zoomed in or out.	Try first setting your browser's zoom level to 100% (on its View menu).
The application becomes non-responsive or "freezes"	The internet connection or website has disconnected momentarily.	Attempt to Save your work if you haven't already. Then, close all your browser windows and restart it.
Printing does not finish	Printing requires a lot of computer memory.	You can speed up the software by using a 64-bit processor and increasing your main memory to 2 Gigabytes or more.
Editing is very slow	Your planogram might be unusually large.	Try unchecking View...Overlaps and View...Duplicates. You can speed up the software by using a 64-bit processor and increasing your main memory to 2 Gigabytes or more.
Starting the application is very slow	Your internet connection may be slow.	Try using a faster internet connection. Consider switching to a wired instead of wireless connection.