

# *Space Planning Optimization Tool (SPOT)*

## *User Manual*

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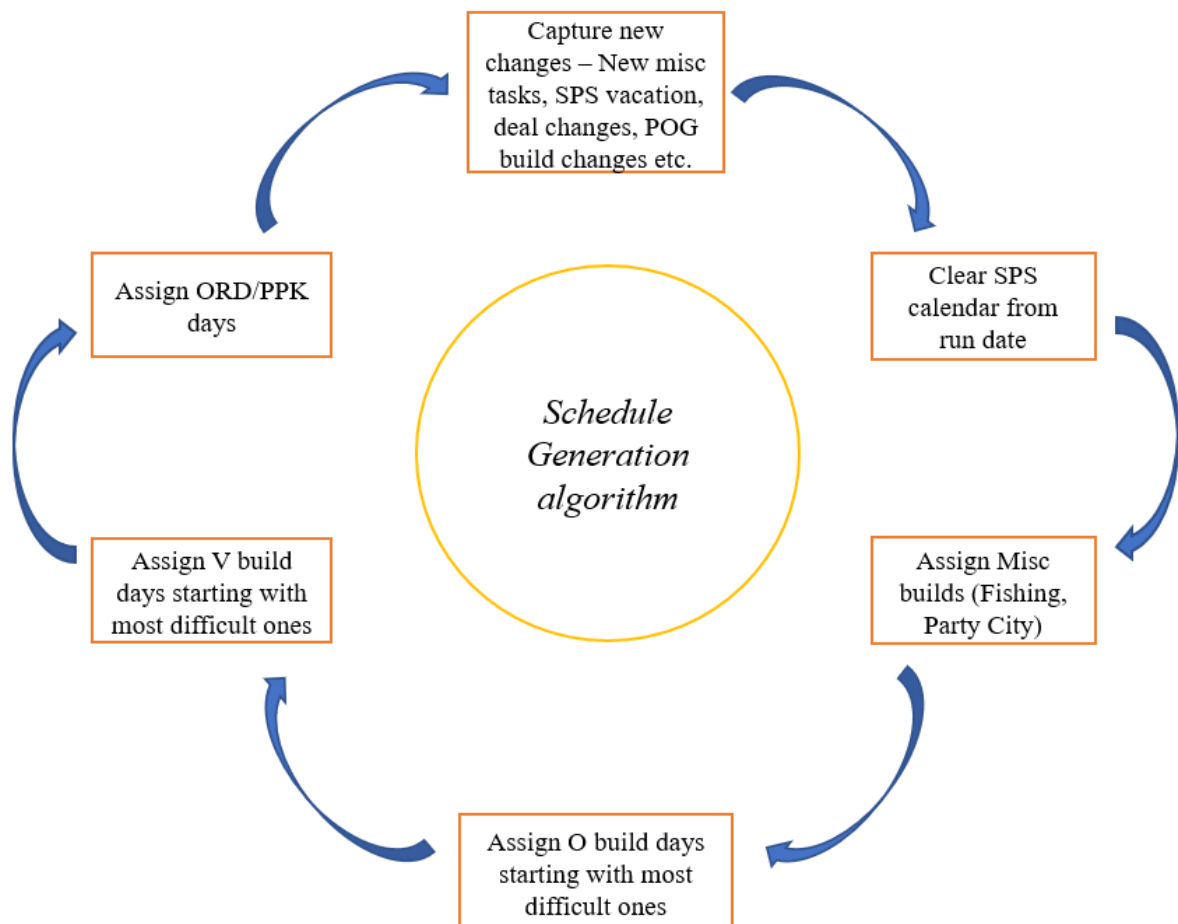
## *Understanding the underlying Scheduling algorithm*

The schedule should incorporate changes that include (but aren't limited to) – changing Gate 3 dates, SPS vacation days, changes in category ownership, changes in POG build days, changes to deals – POGs added/taken off deals and any miscellaneous builds/tasks (ex: Fishing, Party City).

When the schedule is generated, the entire SPS calendar is cleared from the date its run (Wednesday or Thursday).

The chronological order for builds assigned:

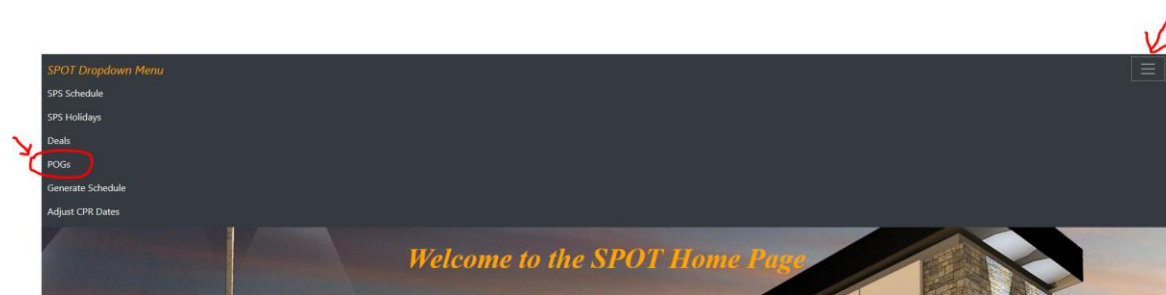
- Miscellaneous builds/tasks. The miscellaneous dates are assigned first to SPS before anything else.
- OPOG days – Most difficult O builds (O builds that require most days) are allocated first. The category owner is always given first preference. If that category owner isn't available, a person from their department is chosen. If no one from that department is available to do the O build, only then the algorithm looks for people in other departments for the builds.
- VPOG days – The exact same approach is used for allocated VPOG days as the OPOG.
- Ordering/PPK POGs – These are given last preference. Only a day is assigned. An SPS can be assigned 2 ordering/PPK POG builds a day.



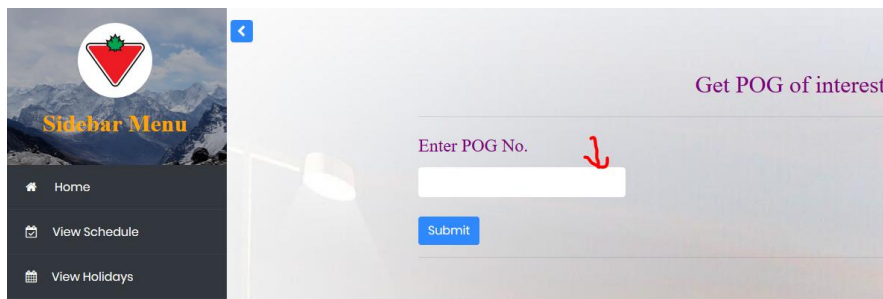
## Updating POG data and adding new POGs

### Viewing and updating POG info

After logging in with valid user credentials, users will be redirected to the SPOT home page. On the top right side, the dropdown menu button is located. In that menu, we can see an option “POGs”



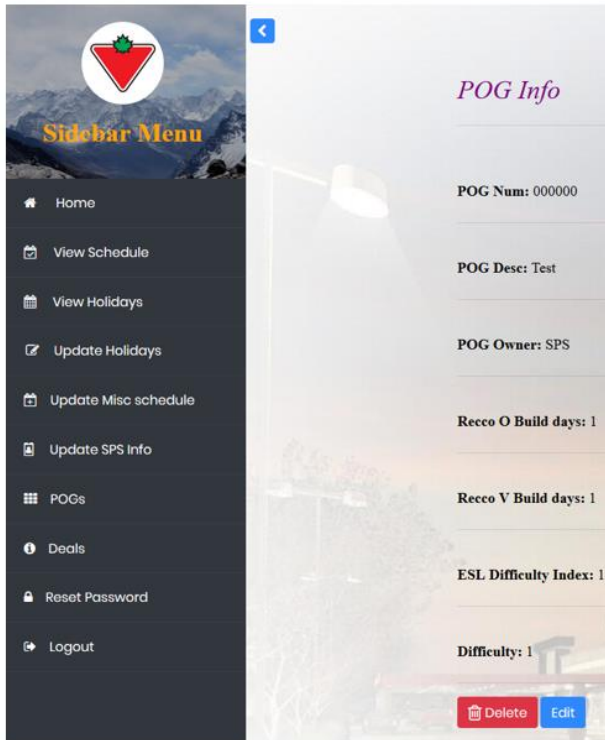
Clicking on that button will direct us to the POG search page.



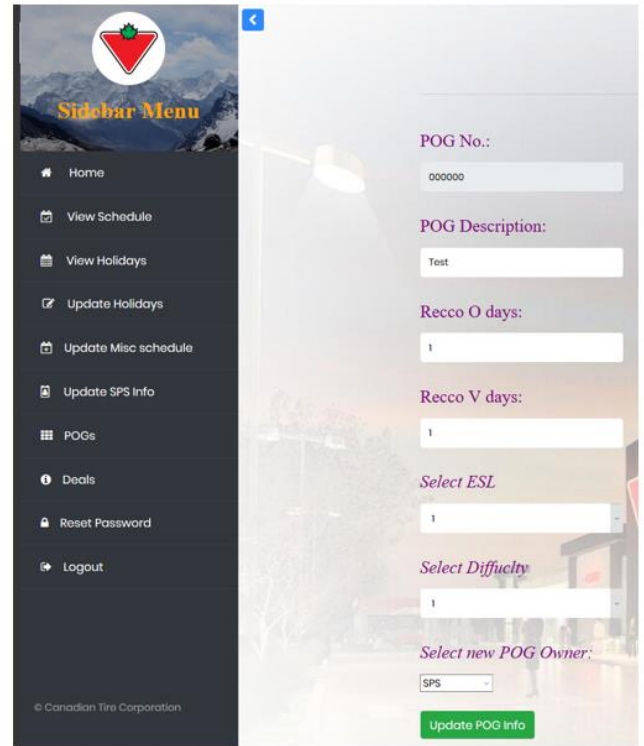
The user must type in a valid six-digit POG number and click “Submit”. They will then be directed to the POG info page that contains POG information that will be utilized by the scheduling algorithm. The following info can be found:

- Recco O – Recommended days for the O build as advised by the SPS TLs
- Recco V – Recommended days for the V build as advised by the SPS TLs
- ESL Difficulty Index – Recommended days for ESL build for that POG as advised by SPS TLs.  
(All above numbers could change with time and are not fixed values).
- POG owner – The category owner for this POG.
- Difficulty – In the event that we don’t have the Recco values, the algorithm will calculate the necessary build days based on this metric.

The “Delete” button will work only for superusers. All of the above information can be edited by clicking the “Edit” button. This has been illustrated in the screenshot below.

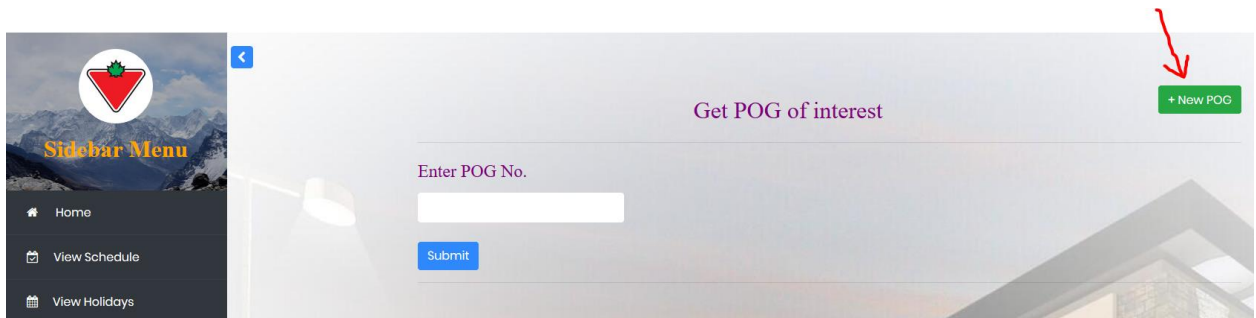


POG Info Page



POG Edit Page

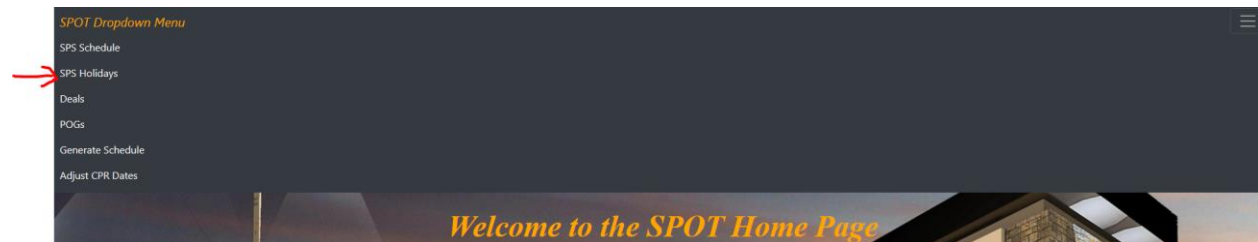
.New POGs can be added the clicking the green button (+ New POG).



The new POG information screen is identical to the POG edit screen.

## Viewing and Updating SPS Holidays

SPS Holidays can be viewed by navigation as follows:



The user will then be redirected to the page below:

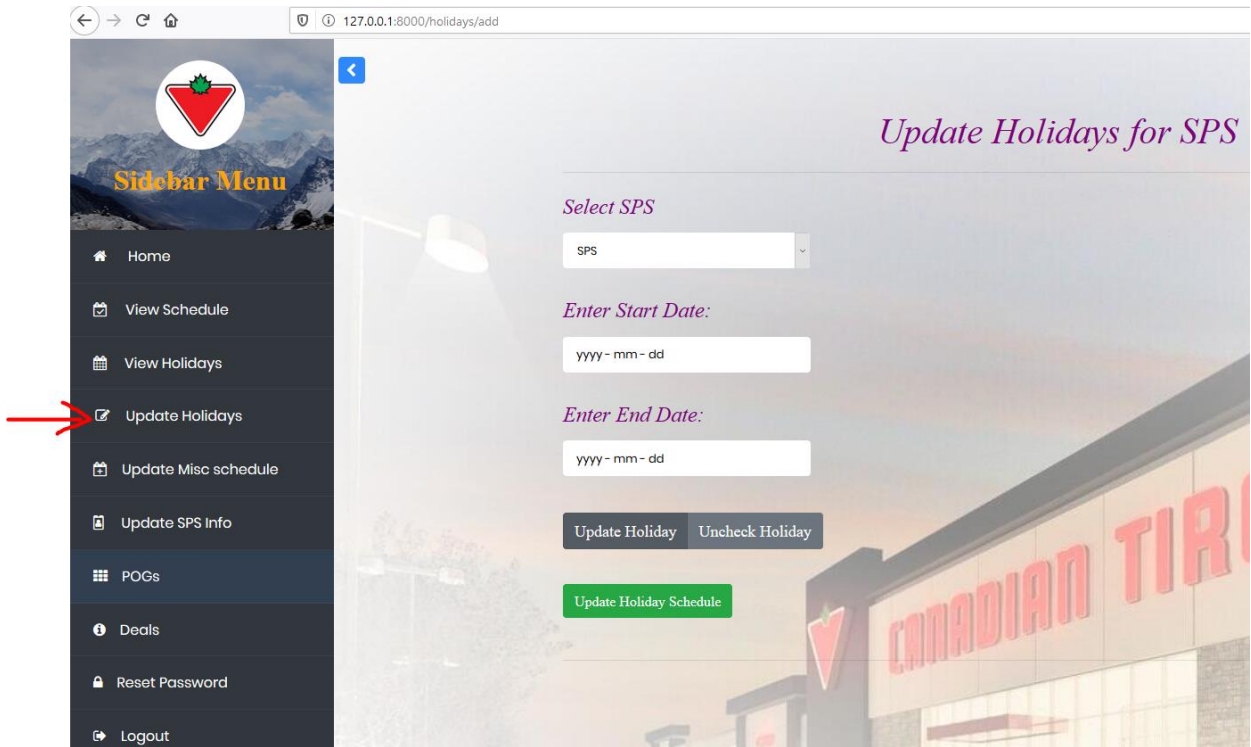
A screenshot of the 'Get Holidays' page. On the left is a 'Sidebar Menu' with icons and labels for 'Home', 'View Schedule', 'View Holidays', 'Update Holidays', 'Update Misc schedule', 'Update SPS Info', and 'POGs'. The main content area has a title 'Get Holidays' and three input fields: 'Enter Start Date:' (2020-06-09), 'Enter End Date:' (2020-06-09), and 'Select Department:' (Seasonal\_Auto). A blue button labeled 'Get Holiday Schedule' is at the bottom.

Users can select a date range and also the department. On selecting a date range, we get a calendar view:

DAY	WKDY	MNTH	MATT	NICOLE	SEAN	AMY	KIONA	LU-ANNA	KATHY
2020-06-09	TUE	JUN	x						
2020-06-10	WED	JUN	x						
2020-06-11	THU	JUN	x						
2020-06-12	FRI	JUN	x						

An 'x' indicates that SPS is on Holiday (Matt in this case). The scheduling tool will not assign build days to SPS on holiday.

From the sidebar menu, the user can navigate to the Update SPS holidays page clicking on the button illustrated in the screenshot below. The screen here is where the user will be redirected on clicking this button. We can select the SPS for whom we want to update vacation days from the dropdown menu.



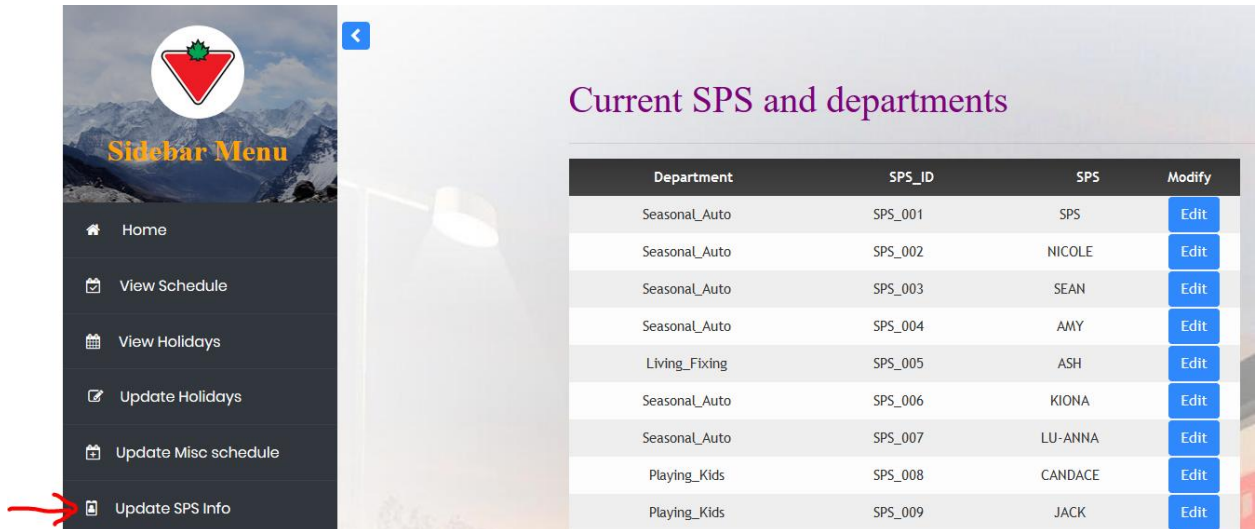
We see 2 radio buttons here (In shades of grey). They are – i) Update Holiday and ii) Uncheck Holiday

The **Update holiday** button is “checked” by default. Selecting a date range for the SPS and clicking on the green button will update holidays for that SPS. The next time the scheduling tool is run, this SPS will not be on schedule for days on vacation. To release an SPS (in the event of Holiday change or if their vacation days were entered in error), the user can select the “**Uncheck Holiday**” button and the SPS will become available in the schedule.

Only super users and SP Managers are able to update holidays for SPS’.

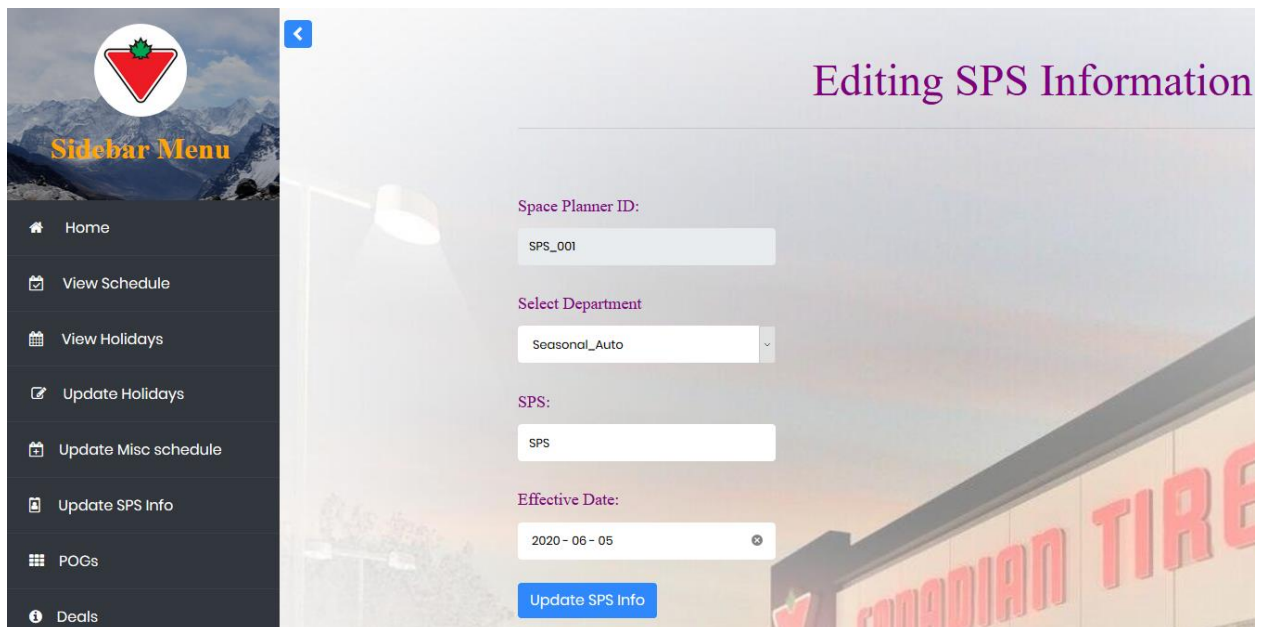
## Updating SPS Info

The Update SPS info page can be accessed here:



Department	SPS_ID	SPS	Modify
Seasonal_Auto	SPS_001	SPS	<a href="#">Edit</a>
Seasonal_Auto	SPS_002	NICOLE	<a href="#">Edit</a>
Seasonal_Auto	SPS_003	SEAN	<a href="#">Edit</a>
Seasonal_Auto	SPS_004	AMY	<a href="#">Edit</a>
Living_Fixing	SPS_005	ASH	<a href="#">Edit</a>
Seasonal_Auto	SPS_006	KIONA	<a href="#">Edit</a>
Seasonal_Auto	SPS_007	LU-ANNA	<a href="#">Edit</a>
Playing_Kids	SPS_008	CANDACE	<a href="#">Edit</a>
Playing_Kids	SPS_009	JACK	<a href="#">Edit</a>

We can see a listing of all the SPS and the departments they belong to. When we click on the “Edit” button, we’re redirected to this page:



Editing SPS Information

Space Planner ID:  
SPS\_001

Select Department:  
Seasonal\_Auto

SPS:  
SPS

Effective Date:  
2020-06-05

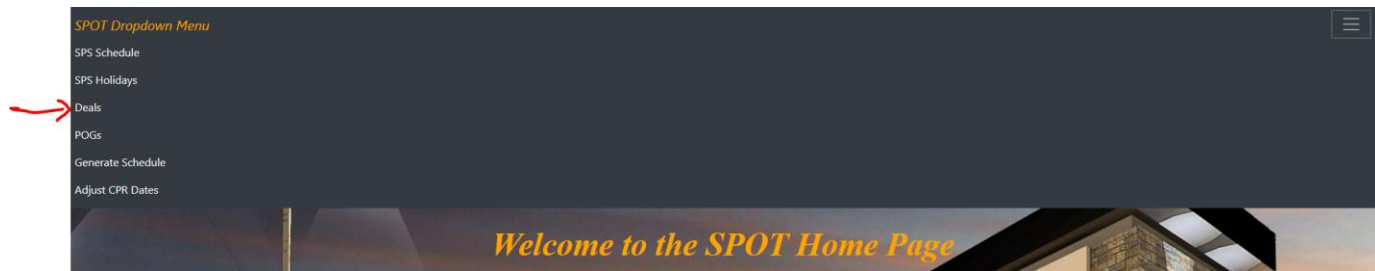
[Update SPS Info](#)

Under the SPS field, changing the name is equivalent to replacing an SPS. This would also automatically transfer category ownership of the POGs that the previous SPS owned. For ex: “SPS A” has ID “SPS\_001” and had 14 categories assigned. If we change the name to “SPS B”, then “B” would inherit ownership of these 14 categories. POG ownership can also be updated at POG level. The new names will reflect immediately after.

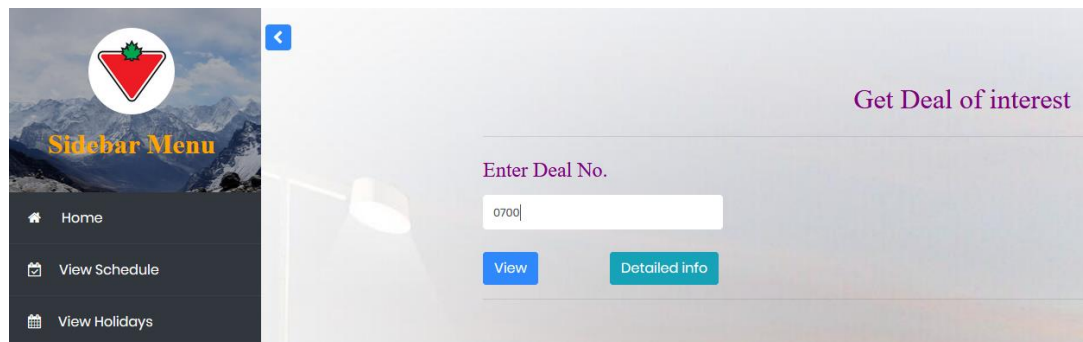


## *Updating Deals – Add/Delete POGs from deals and date changes*

Often times, POGs associated with a deal change – we may have to add new POGs or erase POGs from a deal. This will directly impact POG build days associated and the schedule itself. All of this can be achieved on the “Deals” page. It can be accessed from the drop down menu on the home page after successful login.



The user is then redirected to this page:



On the deals page, clicking on the “Detailed Info” button will give us information of the scheduled days for POG builds associated with that deal.

Deal_Num	DAY_DATE	MERCH_RELEASE	POG	POG_DESC	BUILD_TYP	SPS
0700	2020-05-28	2020-08-28	030210	BLOCK HEATERS	OPOG	SEAN
0700	2020-05-29	2020-08-28	030210	BLOCK HEATERS	OPOG	SEAN
0700	2020-08-05	2020-08-28	030210	BLOCK HEATERS	VPOG	SEAN

The “DAY\_DATE” field represents the different days for which that POG build has been scheduled. If a POG build has been scheduled for 2 days, we will see 2 rows. VPOG build days can be identified with blue coloring whereas for O builds, it is orange.

Typing the deal number and clicking on “View” or the Enter button will direct us to a page that shows all the POGs associated with the deals.

Deal Information

Filter by POG.

LR_ID	LR_Deal	POG_NUM	O_start_date	Dealer_mail_date	Target_store_setup	Add/Delete POG		Edit Dates
LR-2019-0102	0700_Auto General Winter(pilot)_FW20_021	021251	2020-05-27	2020-07-26	2020-09-25	Add	Delete	Modify
LR-2019-0099	0700_Auto General Winter(pilot)_FW20_021	030207	2020-04-15	2020-07-26	2020-09-25	Add	Delete	Modify
LR-2019-0141	0700_Auto General Winter (OV)_FW20_019	030210	2020-05-27	2020-07-26	2020-09-25	Add	Delete	Modify

The “Delete” button will delete a POG from this deal. During the next run of the schedule, the schedule will not be generated for this POG.

We can also add a new POG to a deal. The user has to click the “Add” button. The user is then directed to the screen illustrated below:

### Editing Deal

Deal ID:  
LR-2019-0102

LR Deal  
0700\_Auto General Winter(pilot)\_FW20\_

Enter POG to be added

Enter if Ordering/PPK  
N

+ Add POG

The user will have to fill out 2 fields –

The POG number, and select if this POG is an Ordering/PPK POG. Clicking on the “Add POG” button will add this deal to the POG and during the next run of the tool, the schedule will be generated for this POG

Clicking on the “Modify Dates” button will direct the user to the following page:

## Editing Deal Dates

Deal ID:  
LR-2019-0469

LR Deal  
0500\_Garden Tools\_SS21\_038

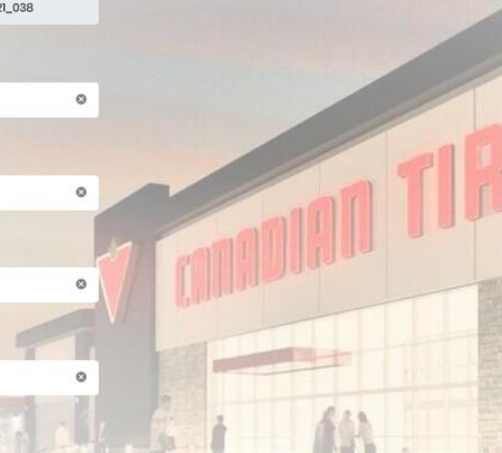
O Build start date  
2020 - 09 - 02

O Build end date  
2020 - 09 - 09

Dealer Mail date  
2020 - 11 - 01

Target Store setup  
2021 - 02 - 19

Submit Dates



The O build window can be modified by changing the ***O build start*** and ***end dates***. Similarly the V build window can be modified by changing the ***Dealer Mail Date*** and ***Target Store setup*** dates. The changes are updated at the deal level and not Deal/POG level. These changes will be reflected in the next run of the scheduling tool.

Deal information can only be edited by super users. Every other user has read access to deal information.

## Updating Miscellaneous Schedule

The Miscellaneous build facility can be utilized to schedule no regular builds and tasks. These include (but aren't limited to) – Fishing, party city POGs etc.

It can be accessed from the sidebar menu. The permissions to add Misc builds belongs to superusers alone. Any other user will be able to view this schedule.

The screenshot shows a web application interface for updating a miscellaneous schedule. On the left is a dark sidebar menu with a 'Sidebar Menu' header and a list of options: Home, View Schedule, View Holidays, Update Holidays, Update Misc schedule (highlighted with a red arrow), Update SPS Info, POGs, Deals, Reset Password, and Logout. The main content area is titled 'Update Miscellaneous schedule' and contains several form fields: 'Enter Deal Id:' with a text input, 'Enter Start Date:' with a date input (placeholder: yyyy-mm-dd), 'Enter End Date:' with a date input (placeholder: yyyy-mm-dd), 'Select Task Type' with a dropdown menu (selected: FISHING), 'Task Description (POG#):' with a text input, and 'Select SPS' with a dropdown menu. A blue button labeled 'Update Misc Schedule' is at the bottom. The background of the form area shows a blurred image of a Canadian Tire store.

The user can select the date range and the SPS. For task description, we can enter the POG number if we want to assign a specific POG to a SPS.

Misc builds are given first preference and will be assigned before regular O/V builds.

### Note to Superusers:

Please exercise some caution while assigning Misc builds so as to assume minimum impact on regular O/V build schedules. Let us consider two scenarios:

- i) Misc build was assigned to SPS A from June 1<sup>st</sup> to June 10<sup>th</sup>. But SPS A was originally supposed to work on O build (SPS A is category owner of this POG) with window from Jun 3<sup>rd</sup> to June 10<sup>th</sup>. In this case, since SPS is unavailable, the O build will be assigned to the next available SPS.
- ii) Similar to the above scenario, SPS A has Misc schedule running from June 1<sup>st</sup> to June 10<sup>th</sup>. SPS A is in the middle of a V build schedule. Let's assume V build window was from May 1<sup>st</sup> to June 10<sup>th</sup>. The O build was 10 days. SPS A has completed 7 days of this build and 3 days remain. When the schedule is generated, SPS A will not be able to complete the V build because Misc build schedule days take preference. In an event like this, next available SPS is assigned.

## Viewing schedule – by individual SPS and by Department

Users are able to see calendar views of the schedule – by department and by each SPS.

*Get Schedule for date range*

Enter Start Date:  
2020 - 08 - 03

Enter End Date:  
2020 - 08 - 07

Select Department  
Living, Filing

Get Department Schedule

Users can select a date range and department of their choice. The department view is summarized and doesn't contain POG descriptions.

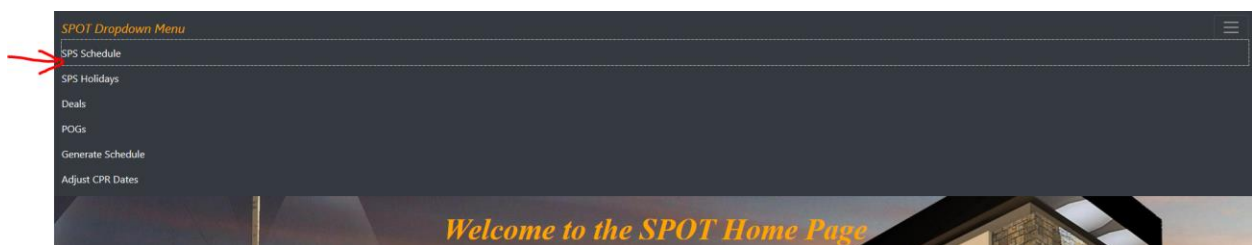
Clicking the “Get the Department Schedule” button generates a sheet in the following format:

*SPS Department Calendar*

DAY	WKDY	ASH	LAUREL	KAITLYN	CARLY	ALISON	JAKE M	SAMANTHA	RABIA
2020-08-03	MON								
2020-08-04	TUE	O-D:819-058206	O-D:866-049203			V-D:876-153201			
2020-08-05	WED		O-D:866-064211			V-D:766-051260			
2020-08-06	THU	O-D:809-046210	O-D:809-061228	O-D:804-152222	O-D:809-054205	O-D:809-061229	O-D:809-061227	O-D:809-061219	
2020-08-07	FRI	O-D:809-046210	O-D:809-061228		O-D:809-054211	O-D:809-061229	O-D:809-061227	O-D:809-061219	

The format is as follows: The first letter indicated type of Build. **O** – O build or Ordering/PPK. **V** is for builds. **D:876** indicates Deal 876. The *last 6 digits* represent the POG number.

The individual SPS calendar can be accessed from the home page.



This will direct us to a page similar to the department view page. Except that we can choose to see calendar by each SPS. This has been illustrated below.

**Sidebar Menu**

- Home
- View Schedule
- View Holidays
- Update Holidays
- Update Misc schedule
- Update SPS Info

*Get SPS Schedule for date range*

Enter Start Date:  
2020 - 08 - 03

Enter End Date:  
2020 - 08 - 10

Select SPS  
CANDACE

View Schedule

What we see below is the individual SPS calendar view.

**Sidebar Menu**

- Home
- View Schedule
- View Holidays

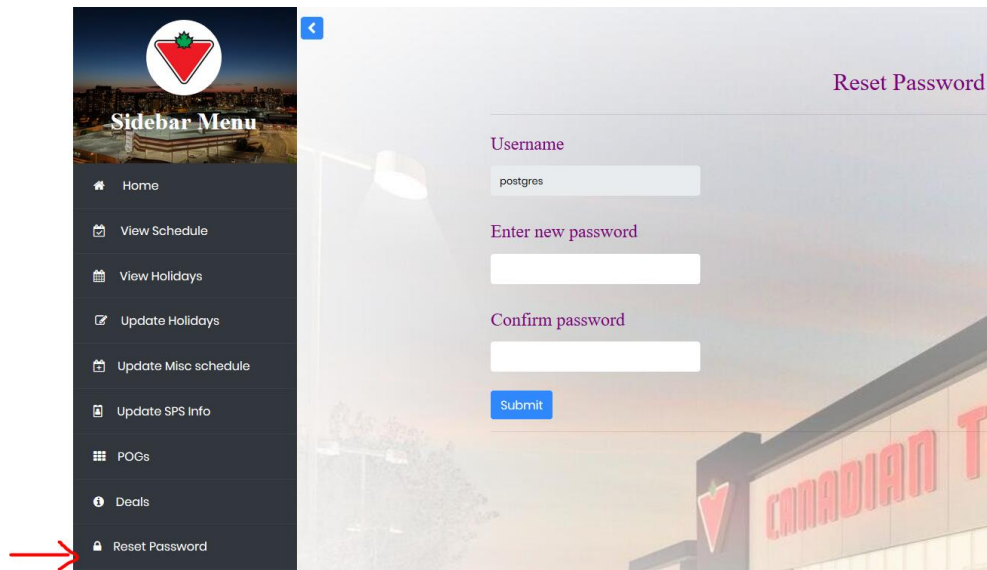
**SPS Schedule Calendar**

DAY	DAY_OF_WK	CANDACE
2020-08-03	MON	
2020-08-04	TUE	Deal: 0726, POG: 079208, POG Desc: WINTER PFDs, Build: VPOG
2020-08-05	WED	Deal: 0726, POG: 082209, POG Desc: WINTER HELMETS & GOGGLES, Build: VPOG
2020-08-06	THU	Deal: 0726, POG: 082209, POG Desc: WINTER HELMETS & GOGGLES, Build: VPOG
2020-08-07	FRI	Deal: 0726, POG: 082209, POG Desc: WINTER HELMETS & GOGGLES, Build: VPOG
2020-08-10	MON	

The description here is more verbose than the department view with the full POG description.

## *Resetting login password.*

Login passwords can be reset by following the navigation:

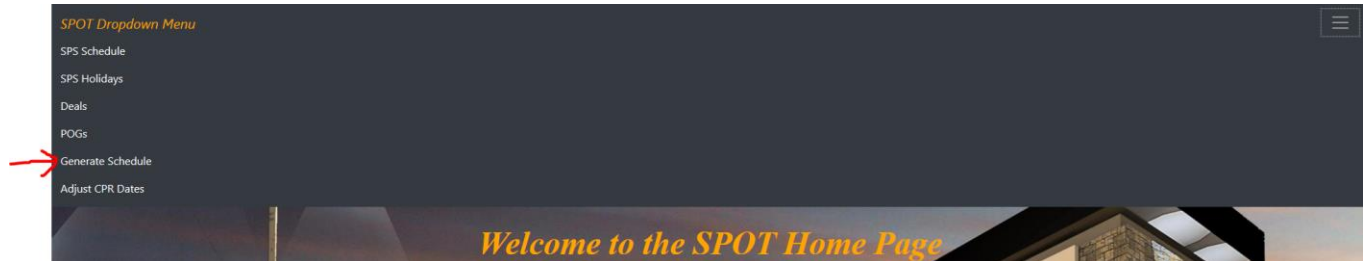


Clicking on “Submit” will validate entries from the user. If both the “enter new password” and “confirm password” are exactly the same, then the password is reset.

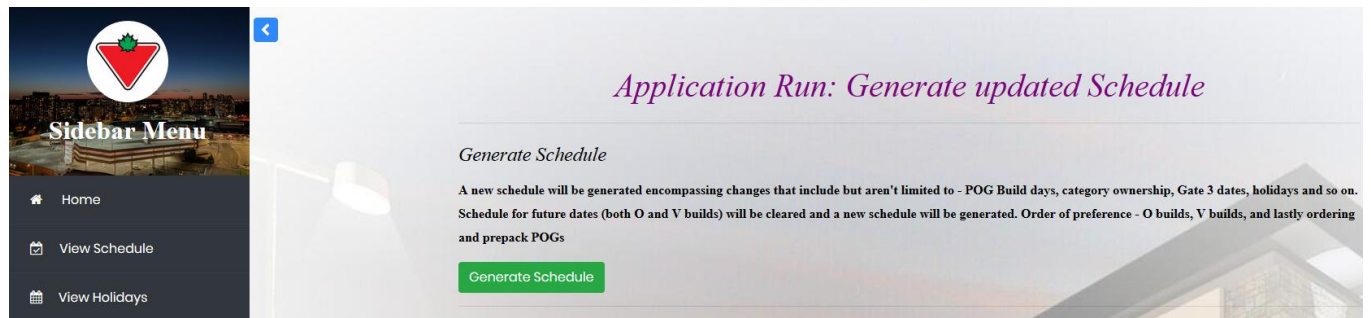


## *Generating the Schedule*

Users can follow this navigation on the home page to generate the new schedule:



Users are then redirected to the page below:



The green button generates the new schedule incorporating all the changes.

Only super users can generate the schedule.