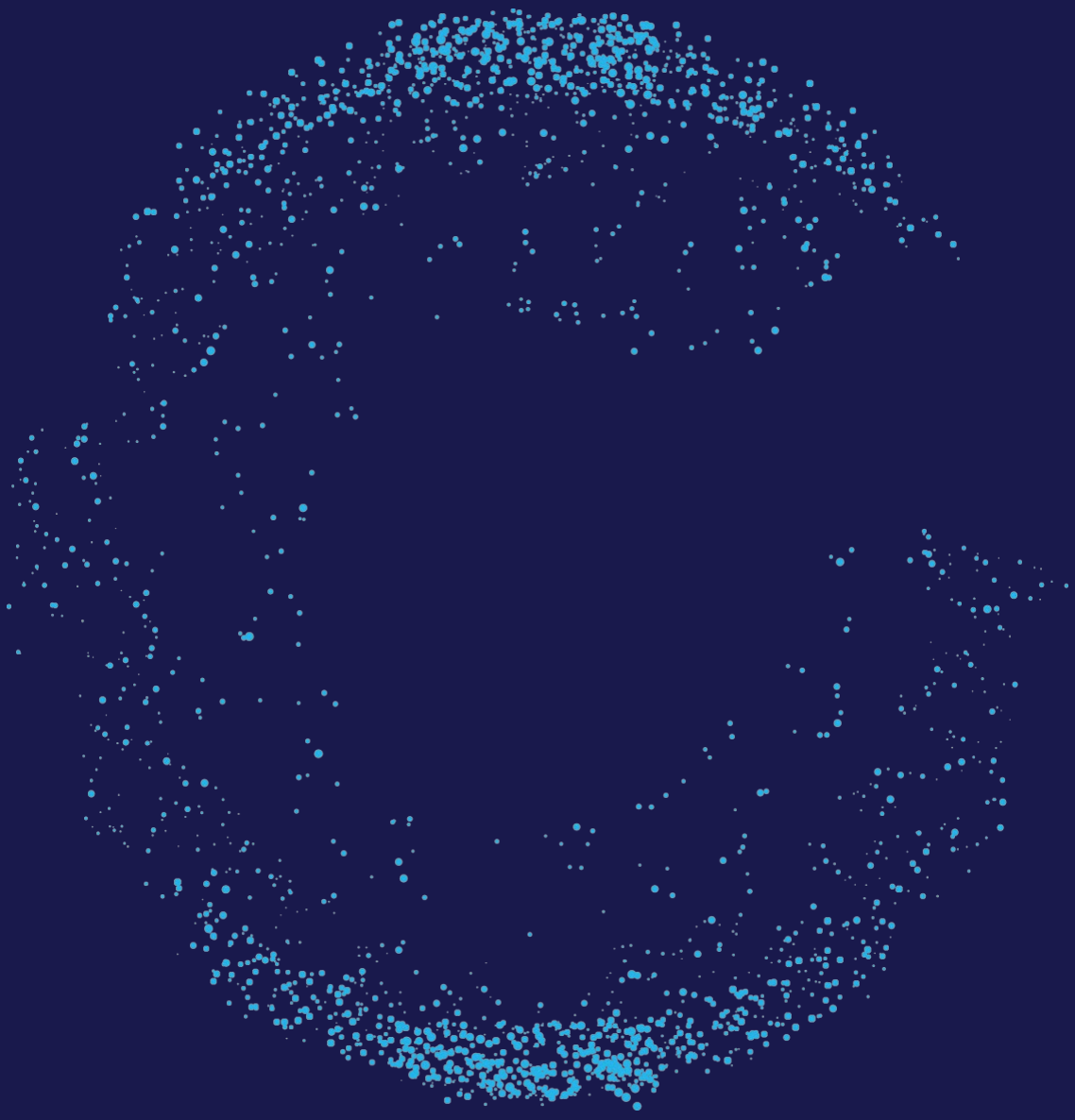
Education Services

Course Catalog



Category Management

BlueYonder
Move beyond boundaries

About This Catalog

This catalog is your essential guide to Blue Yonder Category Management instructor-led training courses. Whether you are a new user or an experienced professional, the courses outlined in this catalog help you gain the knowledge and skills required for the successful adoption and effective use of Blue Yonder's Category Management applications.

The catalog provides a structured overview of available courses and their learning objectives, audience, and duration. For assistance or guidance in selecting the right courses, you can contact your Blue Yonder Customer Experience or Education Services team.

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About Blue Yonder Education Services

Blue Yonder Education Services seeks to improve supply chain excellence by offering innovative, tailored, and cost-effective training solutions. It focuses on transforming training with adaptable, high-quality programs that help you achieve your business goals, deliver industry-leading performance, and drive economic growth. Blue Yonder Education Services' core offerings include:

- Product courses delivered in person or virtually, as instructor-led training
- Public schedule and private course events
- Applied coaching and mentoring services
- Digital subscriptions and online courses
- Certifications
- Skill gap analysis surveys and training need assessments
- Organizational change and end-user training advisory and professional services

Blue Yonder Education Courses

Designed to facilitate effective adoption and utilization of its software solutions, Blue Yonder training courses provide a structured, expert-guided learning experience.

Features and Benefits

- Offer in-person or live virtual classroom training, delivered by a qualified Blue Yonder instructor, with standard or customized courses and hands-on exercises
- Provide comprehensive training on specific Blue Yonder solutions and related business processes
- Ensure learner engagement throughout the training program
- Award learners with badges and certification, when applicable

Category Management Course Catalog—Overview

The Blue Yonder Category Management catalog provides comprehensive training courses designed for different audiences in an organization. These courses combine learning concepts with practical exercises that help learners deepen their knowledge of Blue Yonder Category Management.

Course Name	Course Objectives	Audience	Duration
3120: Space Planning Level 1	After completing this course, learners will be able to: • Define the foundational concepts to get started using the software. • Create and edit planograms using industry-standard techniques. • Analyze merchandising products using the merchandising hierarchy. • Set up product images effectively to enhance visual presentation. • Utilize the product library for efficient product management. • Organize and manage the fixture library for optimal resource allocation. • Produce layouts to create PDFs for documentation and presentation. • Apply tips and tricks to enhance efficiency and effectiveness in Space Planning.	All users of Space Planning	2 days
3121: Space Planning Level 2	After completing this course, learners will be able to: • Describe the analysis features available in Space Planning. • Import sales data into planograms using two different methods. • Create tables (reports) to effectively evaluate productivity. • Develop charts, highlights, labels, status bars, layouts, and formulas to analyze productivity metrics. • Evaluate productivity using various analytical tools and methods in Space Planning. • Analyze Space Planning's analysis options to identify strategies for maximizing profitability. • Apply tips and tricks to enhance efficiency and effectiveness in Space Planning.	All users of Space Planning	2 days

3123: Floor Planning	After completing this course, learners will be able to: • Describe the process of creating floorplans from beginning to end. • Apply techniques for importing AutoCAD files (DXF Trace files) into floorplans. • Create fixtures using multiple methods to enhance floorplan design. • Merchandise the floorplan effectively. • Utilize analysis features available in Floor Planning, including tables, charts, highlights, and labels. • Analyze floorplans to improve design efficiency and effectiveness. • Evaluate floorplan designs for optimal functionality and appearance. • Apply tips and tricks to create and edit floorplans efficiently.	All Floor Planning users	2 days
2224: Planogram Generator	After completing this course, learners will be able to: • Describe the features and functionality of Planogram Generator. • Create large volumes of planograms using a highly automated, intelligent process. • Analyze different actions to select the appropriate ones for creating logical action lists. • Create logical action lists to be stored in template planograms for efficient planogram generation. • Perform the planogram generation process in Open Access and/or Data Manager. • Evaluate the effectiveness of the planogram generator process in producing target planograms. • Explain the entire planogram generator process from beginning to end.	All users of Planogram Generator	2 days

2209: Open Access	After completing this course, learners will be able to: • Describe the functionalities of Open Access and Category Knowledge Base. • Describe the life cycle of planograms and floorplans within the platform. • Apply global changes and bulk edits to enhance planogram and floorplan management. • Analyze real-world tasks that can be performed through Open Access for improved efficiency. • Evaluate the effectiveness of Open Access features in managing planograms and floorplans. • Experience hands-on application of tasks using Open Access to reinforce learning and practical skills.	All users of Category Knowledge Base	2 days
2215: Assortment Optimization	After completing this course, learners will be able to: • Describe the basic features and functionalities of Assortment Optimization. • Describe how Assortment Optimization enables the creation and assignment of strategies and tactics to product hierarchies. • Demonstrate the process of creating tactics that consider inventory requirements, space constraints, and financial goals. • Examine how transferable demand, product ranking, indexing facilities, and product families are integrated into assortment strategies. • Assess the effectiveness of different strategies and tactics across multiple assortments. • Develop comprehensive assortment strategies that incorporate various constraints and objectives for optimized product hierarchy management.	All users of Assortment Optimization	2 days

2218: Strategic Assortment	After completing this course, learners will be able to: • Describe the features and benefits of Strategic Assortment. • Differentiate between Strategic Assortment and Assortment Optimization. • Navigate the Strategic Assortment application user interface. • Configure the Strategic Assortment application settings. • Review the dataflow in the Strategic Assortment application. • Review the workflows in Strategic Assortment. • Apply assortment recommendations to planograms in Space Planning.	All users of Strategic Assortment	2 days
2219: Store Insights	After completing this course, learners will be able to: • Describe the value and benefits of the Store Insights application. • List the processes running within the application. • List the key elements of the Store Insights user interface. • Describe the main use cases of the application.	All users of Store Insights	1 day
3040: Strategic Space	After completing this course, learners will be able to: • Explain the space hierarchy and space allocation workflow in a store. • Review an allocation in Strategic Space. • Describe the purpose and usage of templates and activities in Strategic Space. • Create templates, activities, and allocations in Strategic Space.	All users of Strategic Space	2 days

Category Management Course Details

3120: Space Planning Level 1

Course Objectives

After completing this course, learners will be able to:

- Get started using the Space Planning software.
- Create and edit planograms using industry-standard techniques.
- Merchandise products using the merchandising hierarchy.
- Set up product images effectively to enhance planogram visual presentation.
- Utilize the product library for efficient product management.
- Organize and manage the fixture library for optimal resource allocation.
- Generate planogram layouts to create PDFs for documentation and presentation purposes.
- Apply tips, tricks, and shortcut keys to enhance efficiency and effectiveness in Space Planning.

Audience

All Blue Yonder Space Planning users

Prerequisites

No prerequisites are required for this course.

Duration

2 days (in person or virtual)

Training Level

Beginner and intermediate

Lesson	Learning Objectives	Duration
01: Introduction to Space Planning	After completing this lesson, learners will be able to describe Space Planning object hierarchy.	1 hour
02: Creating Planograms	After completing this lesson, learners will be able to: • Create planograms. • Create segments. • Create fixtures such as shelf and pegboard. • Copy, paste, and multiply objects. • Check for project warnings. • Save a project file.	2.5 hours

03: Merchandising a Planogram Using Product Library	After completing this lesson, learners will be able to: • Access an existing product library. • Add positions of products to a planogram. • Change position facings, position orientation, and merchandising styles. • Map and display product images. • Utilize Can Combine options. • Access Shelf Schematic Report (table). • Save planogram changes.	2.5 hours
04: Introduction to Merchandising Controls	After completing this lesson, learners will be able to: • Explain the merchandising hierarchy. • Use the merchandising X, Y, and Z controls to control position placement on shelf. • Use property lists to efficiently edit merchandising controls and add properties to property lists. • Use property lists to efficiently edit merchandising controls.	3 hours
05: Creating a Product Library with Access	After completing this lesson, learners will be able to: • Create and configure a product library. • Update a product library. • Update the products in a project from a product library. • Duplicate products. • Swap positions. • Remove unused products.	3 hours
06: Creating a Fixture Library	After completing this lesson, learners will be able to: • Create a sign. • Create, edit, and save a fixture library. • Add fixtures, assemblies, and planograms to a fixture library. • Add fixtures and planograms to a space planning project from the fixture library. • Use Manipulation options such as Can Select Planograms and Segments. • Copy planograms and segments.	2 hours

07: Creating and Printing Layouts	After completing this lesson, learners will be able to: • Create a print layout. • Print planograms by segment. • Print a table. • Create a PDF file using a layout. • Use Save Picture option.	2 hours

Hands-on Exercises: This course contains hands-on exercises for practicing the tasks covered in the lessons.

Note: The hands-on exercises will be practiced during the training sessions with the help of the instructor.

3121: Space Planning Level 2

Course Objectives

After completing this course, learners will be able to:

- Describe the analysis features available in Space Planning.
- Import sales data into planograms using two different methods.
- Create tables (reports) to effectively evaluate productivity.
- Develop charts, highlights, labels, status bars, layouts, and formulas to analyze productivity metrics.
- Evaluate productivity using various analytical tools and methods in Space Planning.
- Analyze Space Planning's analysis options to identify strategies for maximizing profitability.
- Apply tips, tricks, and shortcut keys to enhance efficiency and effectiveness in Space Planning.

Audience

All users of Blue Yonder Space Planning software

Prerequisite

3120: Space Planning Level 1

Duration

2 days (in person or virtual)

Training Level

Intermediate and advanced

Lesson	Learning Objectives	Duration
01: Introduction to Performance Object	After completing this lesson, learners will be able to: • Explain where the performance object fits into the object hierarchy. • Identify the difference between product and performance data.	1 hour
02: Importing Data from Clipboard or Text File	After completing this lesson, learners will be able to: • View product and performance data fields. • Reset financial data. • Import product and/or performance data from Excel. • Change the space planning project or planogram movement period. • Rename fields in the Space Planning application.	2 hours
03: Updating Performance Data via a Performance Library	After completing this lesson, learners will be able to: • Create a performance library using Excel. • Update the space planning project movement period. • Update the performance data and space planning project through the performance library.	1.5 hours

04: Viewing, Editing, and Analyzing Data with Tables	After completing this lesson, learners will be able to: • Create new tables to meet analysis needs. • Create subtotal and grand total rows. • Use sorting and filtering. • Hide rows and columns. • Create formulas for data and subtotal rows. • Apply the User Name feature. • Edit existing tables to meet analysis needs. • Edit Space Planning data via a table. • Export table data to Excel. • Customize the Open Table menu.	3 hours
05: Viewing and Analyzing Data with Charts	After completing this lesson, learners will be able to: • Create and edit charts to meet analysis needs. • Describe different chart elements and formatting options. • Export chart data to Excel and save pictures of charts. • Customize the Open Chart menu.	1.5 hours
06: Viewing and Analyzing Data with Highlights	After completing this lesson, learners will be able to: • Create and edit highlights to meet analysis needs. • Describe the different highlight methods. • Apply highlights to a table. • Customize the Open Highlight menu.	3 hours
07: Viewing Data with Labels and Status Bar	After completing this lesson, learners will be able to: • Create, copy, and edit labels to meet analysis needs. • Apply additional formula functions. • Save or merge label files to share and refer in print layouts. • Customize the Open Label menu. • Edit status bar properties.	2 hours
08: Creating Print Layouts for Tables, Charts, Highlights, and Labels	After completing this lesson, learners will be able to: • Create a print layout. • Add tables, charts, highlights, and labels to a print layout. • Assign print layouts to various Space Planning objects. • Edit default printing options.	2 hours

Hands-on Exercises: This course contains hands-on exercises for practicing the tasks covered in the lessons.

Note: The hands-on exercises will be practiced during the training sessions with the help of the instructor.

3123: Floor Planning

Course Objectives

After completing this course, learners will be able to:

- Describe the process of creating floorplans from beginning to end.
- Apply techniques for importing AutoCAD files (DXF Trace files) into floorplans.
- Create fixtures using multiple methods to enhance floorplan design.
- Merchandise the floorplan effectively.
- Utilize analysis features available in Floor Planning, including tables, charts, highlights, and labels.
- Analyze floorplans to improve design efficiency and effectiveness.
- Evaluate floorplan designs for optimal functionality and appearance.
- Apply tips and tricks to create and edit floorplans efficiently.

Audience

All users of Blue Yonder Floor Planning

Prerequisites

No prerequisites are required for this course.

Duration

2 days

Training Level

Beginner

Lesson	Learning Objectives	Duration
01: Floor Planning Essentials	After completing this lesson, learners will be able to: • Define the Floor Planning key terminologies. • Navigate the Floor Planning interface.	1 hour
02: Fundamentals	After completing this lesson, learners will be able to: • Review Floor Planning views. • Illustrate multiple object selection techniques.	2 hours

03: Creating a New Project	After completing this lesson, learners will be able to: • Create a floorplan. • Add a trace file to a floorplan. • Create departments. • Create fixtures such as regular, irregular, and obstructions. • Add sections of planograms to a floorplan using the planogram library. • Promote and demote objects within trace files. • Swap planogram sections. • Attach objects to departments. • Split planogram sections. • Join segment sections.	4 hours
04: Libraries	After completing this lesson, learners will be able to: • Discuss, access, and create fixture libraries. • Discuss, access, and create planogram libraries.	2 hours
05: Tables	After completing this lesson, learners will be able to: • Access existing tables in Floor Planning. • Edit table data or appearance. • Edit floorplan data using a table. • Save a table design.	2 hours
06: Charts	After completing this lesson, learners will be able to: • Access an existing chart in Floor Planning. • Edit a chart. • Save a chart design.	1 hour
07: Highlights	After completing this lesson, learners will be able to: • Access an existing highlight in Floor Planning. • Edit a highlight. • Save a highlight.	1 hour

08: Labels	After completing this lesson, learners will be able to: • Create a label. • Edit existing labels. • Save label files. • Display hover label in 3-D view.	1 hour
09: Printing from Layouts	After completing this lesson, learners will be able to: • Create a print layout. • Configure default layouts. • Create a PDF file using a layout.	2 hours

Hands-on Exercises: This course contains hands-on exercises for practicing the tasks covered in the lessons.

Note: These hands-on exercises will be practiced during the training sessions with the help of the instructor.

2224: Planogram Generator

Course Objectives

After completing this course, learners will be able to:

- Describe the features and functionality of Planogram Generator.
- Apply knowledge to create large volumes of planograms using a highly automated, intelligent process.
- Analyze different actions to select the appropriate ones for creating logical action lists.
- Create logical action lists to be stored in template planograms for efficient planogram generation.
- Evaluate the effectiveness of the Planogram Generator process in producing target planograms.
- Explain the entire Planogram Generator process from beginning to end.

Audience

All users of Blue Yonder Planogram Generator

Prerequisites

A strong understanding of Blue Yonder Space Planning is recommended.

Duration

2 days

Training Level

Intermediate to advanced

Lesson	Learning Objectives	Duration
01: Introduction to Planogram Generator	After completing this lesson, learners will be able to: • Describe the purpose and functionalities of Planogram Generator. • Get started with Planogram Generator. • Analyze and differentiate between template and target planograms, explaining their respective uses. • Access Planogram Generator Designer within Space Planning. • Evaluate the features and functions of Planogram Generator Designer.	1 hour

02: Getting Started with Planogram Generator	After completing this lesson, learners will be able to: • Specify planogram generator types in Space Planning. • Select template/target planograms. • Add an action to an action list. • Preview the action and generate planograms in Space Planning. • Analyze the Planogram Generator Results dialog box, interpreting the data presented to make informed decisions. • Utilize the functionality of the preview pane and describe its role in visualizing planogram changes. • Edit and refine an action.	4 hours
03: Generating Multiple Size Planograms	After completing this lesson, learners will be able to: • Describe and utilize the most common actions. • Generate varying planogram widths.	2 hours
04: Using Open Access and/or Data Manager: Template and Target Planograms	After completing this lesson, learners will be able to: • Create and prepare target planograms for planogram generation. • Discuss Planogram Generator statuses. • Generate target planograms with template planograms using Category Knowledge Base. • Approve or reject generated planograms.	2 hours
05: Working with Auxiliary Planograms	After completing this lesson, learners will be able to: • Explain and create auxiliary planograms. • Discuss anchor products. • Generate target planograms using template and auxiliary planograms.	2 hours
06: Using Open Access and/or Data Manager: Template, Target, and Auxiliary Planograms	After completing this lesson, learners will be able to: • Create and prepare target planograms for planogram generation using auxiliary planograms. • Explain Planogram Generator statuses. • Generate target planograms with template and auxiliary planograms using Category Knowledge Base. • Approve or reject generated planograms.	2 hours

07: Working with Revision Template and Tagging	After completing this lesson, learners will be able to: • Explain and create revision template planograms. • Describe tagging and its purpose. • Create a tag. • Add actions to an auxiliary planogram. • Generate target planograms using revision template and auxiliary planograms.	1.5 hours
08: Using Open Access and/or Data Manager: Revision Template, Target, and Auxiliary Planograms	After completing this lesson, learners will be able to: • Create and prepare target planograms for planogram generation using revision template. • Explain Planogram Generator statuses. • Generate target planograms with revision template and auxiliary planograms using Category Knowledge Base. • Approve or reject generated planograms.	1.5 hours

Hands-on Exercises: This course contains hands-on exercises for practicing the tasks covered in the lessons.

Note: The hands-on exercises will be practiced during the training sessions with the help of the instructor.

2209: Open Access

Course Objectives

After completing this course, learners will be able to:

- Describe Open Access and the Category Knowledge Base platform and their functionalities for end users.
- Describe the life cycle of planograms and floorplans within the platform.
- Apply global changes and other efficient features offered by Open Access to enhance planogram and floorplan management.
- Analyze real-world tasks that can be performed through Open Access for improved efficiency.
- Evaluate the effectiveness of Open Access features in managing planograms and floorplans.
- Experience hands-on application of tasks using Open Access to reinforce learning and practical skills.

Audience

Blue Yonder Open Access users who need to manage Category Knowledge Base

Prerequisites

A strong understanding of Blue Yonder Category Management software and applications is recommended.

Duration

2 Day

Training Level

Advanced

Lesson	Learning Objectives	Duration
01: Introduction to Open Access	After completing this lesson, learners will be able to: • Define key terms from the glossary of Open Access terminology. • Describe the purpose and functionalities of Open Access and its role within the Blue Yonder ecosystem. • Explain how Category Knowledge Base integrates with Open Access to support data management. • Demonstrate the process of logging on to Open Access. • Navigate and interpret the Open Access home page to efficiently locate tools and resources. • Utilize object hierarchies to locate and retrieve specific data within Category Knowledge Base. • Compare and contrast the methods for opening planograms stored in Category Knowledge Base using both Open Access and Space Planning. • Analyze the search and sorting functionalities to efficiently manage and organize objects in a list.	4 hours

02: Lifecycle Management	After completing this lesson, learners will be able to: • Explain the concept and significance of Lifecycle Management in product and planogram management. • Demonstrate how to access and navigate Database Product Library and Database Planogram Library. • Utilize sorting techniques to organize columns in a database library and add products to a planogram and planograms to a floorplan. • Apply a standard filter to efficiently locate and manage data within the database. • Implement an advanced filter to refine searches and extract specific datasets. • Analyze the process of saving new planograms and floorplans to the database, ensuring data integrity and accessibility. • Examine the procedures for promoting planograms and floorplans through their life-cycle stages. • Evaluate the use of the status filter to monitor and manage the status of planograms and floorplans effectively. • Assess the implications of working with locked objects and how it affects data management and collaboration. • Develop strategies for selecting data from an object list to streamline workflow and data retrieval. • Set appropriate dates for planograms and floorplans to align with project timelines and life-cycle requirements.	3 hours
03: Object Assignment	After completing this lesson, learners will be able to: • Explain the concept of object relationships and their significance. • Describe the process and rationale for assigning objects to each other. • Demonstrate how to assign planograms to stores, ensuring alignment with store-specific requirements and strategies. • Demonstrate how to assign floorplans to stores, optimizing space utilization and store layout. • Describe the process of unassigning objects from each other and analyze the implications for store operations and data integrity. • Examine object relationships through Linked Reports to gain insights into how objects interact and influence each other.	2 hours

04: Object Versions and Copies	After completing this lesson, learners will be able to: • Explain the concept of object versions and their significance in managing changes over time. • Describe parent–child relationships and their role in organizing and managing hierarchical data structures. • Describe the concept of object copies and their use in duplicating and managing data. • Demonstrate how to version a planogram in Open Access, ensuring accurate tracking of changes and updates. • Demonstrate how to view version results in Open Access to analyze changes and their impacts. • Utilize Version Animator in Space Planning and Floor Planning to visualize and manage version transitions effectively. • Use Version List in Space Planning and Floor Planning to track and manage different versions of planograms and floorplans. • Add fields to the Open From Database dialog box to customize data retrieval and improve workflow efficiency. • Evaluate the floorplan versioning process in Open Access and Floor Planning to identify the appropriate versioning practices. • Compare and contrast the methods for copying planograms and floorplans in Open Access and Space Planning and Floor Planning to determine the most efficient approach.	3 hours
05: Global Changes and Bulk Edits	After completing this lesson, learners will be able to: • Explain the concept of global changes and their significance in managing large-scale updates across datasets. • Describe how bulk edits are processed and their role in efficiently updating multiple data entries simultaneously. • Perform global changes, ensuring consistency and accuracy across affected datasets. • Perform bulk edits to efficiently modify multiple records, optimizing data management processes. • Interpret how global changes are processed and explain their impact on data integrity and system performance.	2 hours

06: Web Publisher	After completing this lesson, learners will be able to: • Describe the purpose and functionality of Web Publisher in the context of planogram and floorplan management. • Demonstrate how to view published planograms using Web Publisher, ensuring accessibility and usability of visual merchandising plans. • Demonstrate how to view floorplans through Web Publisher to analyze store layouts and spatial arrangements. • Create PDFs or printed versions of published planograms using Web Publisher, ensuring high-quality outputs for distribution and review.	2 hours

Hands-on Exercises: This course contains hands-on exercises for practicing the tasks covered in the lessons.

Note: The hands-on exercises will be practiced during the training sessions with the help of the instructor.

2215: Assortment Optimization

Course Objectives

After completing this course, learners will be able to:

- Describe the basic features and functionalities of the Assortment Optimization solution.
- Describe how Assortment Optimization enables the creation and assignment of strategies and tactics to product hierarchies.
- Demonstrate the process of creating tactics that consider inventory requirements, space constraints, and financial goals.
- Examine how transferable demand, product ranking, indexing facilities, and product families are integrated into assortment strategies.
- Assess the effectiveness of different strategies and tactics across multiple assortments.
- Develop comprehensive assortment strategies that incorporate various constraints and objectives for optimized product hierarchy management.

Audience

All users of Assortment Optimization

Prerequisites

A strong understanding of Blue Yonder Category Management software and applications is recommended.

Duration

2 days

Training Level

Intermediate and advanced

Lesson	Learning Objectives	Duration
01: Introduction to Assortment Optimization	After completing this lesson, learners will be able to: • Describe the purpose and features of Assortment Optimization. • Explain the Assortment Optimization interface and its components.	2 hours
02: Creating an AO Project	After completing this lesson, learners will be able to: • Create an Assortment Optimization project. • Describe the data import process and its significance in Assortment Optimization. • Execute the process of accessing, saving, and closing assortment projects in Category Knowledge Database.	4 hours

03: Editing an AO Project	After completing this lesson, learners will be able to: • Analyze the initialization, ranking, and selection tactics, including combined performance index, planogram space selection, and product count selection. • Evaluate the effectiveness of tactic libraries in maintaining and optimizing assortment strategies. • Review assortment recommendations. • Access and review object tables and charts.	4 hours
04: Incorporating Minimum Product Recommendations	After completing this lesson, learners will be able to: • Create and save a tactic library. • Create tactic types such as Initialization – Exclude and Selection – Product Count. • Enable tactic priorities.	1 hour
05: Incorporating Product Specific Rules	After completing this lesson, learners will be able to: • Create the initialization type tactics such as Product Family, Product Linking, and Product Replacement. • Disable and enable tactics.	1 hour
06: Incorporating Transferable Demand to Assortment Tactics	After completing this lesson, learners will be able to: • Create and review Transferable Demand tactics. • Differentiate between attribute- and node-based Transferable Demand tactics. • Evaluate and interpret data within the Quantification view. • Apply knowledge of global settings to configure Transferable Demand tactics effectively and assess their impact.	1 hour
07: Importing AO Project Recommendations into Space Planning Planograms	After completing this lesson, learners will be able to: • Implement Assortment Optimization project recommendations into Space Planning planograms. • Formulate and finalize assortment recommendations, considering overrides when necessary.	2 hours

Hands-on Exercises: This course contains hands-on exercises for practicing the tasks covered in the lessons.

Note: The hands-on exercises will be practiced during the training sessions with the help of the instructor.

2218: Strategic Assortment

Course Objectives

After completing this course, learners will be able to:

- Describe the features and benefits of Strategic Assortment.
- Differentiate between Strategic Assortment and Assortment Optimization.
- Navigate the Strategic Assortment application user interface.
- Configure the Strategic Assortment application settings.
- Review the dataflow in the Strategic Assortment application.
- Review the workflows in Strategic Assortment.

Audience

Strategic Assortment users

Prerequisites

No prerequisites are required for this course.

Duration

2 days

Training Level

Intermediate and advanced

Lesson	Learning Objectives	Duration
01: Introduction to Strategic Assortment	After completing this lesson, learners will be able to: • Explain the placement of Strategic Assortment within the overall Category Management solution suite. • List the features of Strategic Assortment. • Identify the differences between Assortment Optimization and Strategic Assortment. • Explain the personas in Strategic Assortment. • List the benefits of Strategic Assortment.	2 hours
02: Difference Between Assortment Optimization and Strategic Assortment	After completing this lesson, learners will be able to differentiate between Assortment Optimization and Strategic Space.	2 hours

03: Navigation in Strategic Assortment	After completing this lesson, learners will be able to: • Access the Strategic Assortment application. • Access the navigation pane.	2 hours
04: Configuration in Strategic Assortment	After completing this lesson, learners will be able to configure the GENERAL, DEFINE, CALCULATE, REVIEW, and PUBLISH tabs of the application.	4 hours
05: Dataflow in Strategic Assortment	After completing this lesson, learners will be able to review the dataflow in Strategic Assortment.	3 hours
06: Workflows in Strategic Assortment	After completing this lesson, learners will be able to review the three workflows and analyze how they affect location hierarchy organization, product selection, and data analysis.	3 hours

Hands-on Exercises: This course contains hands-on exercises for practicing the tasks covered in the lessons.

Note: The hands-on exercises will be practiced during the training sessions with the help of the instructor.

2219: Store Insights

Course Objectives

After completing this course, learners will be able to:

- Describe the value and benefits of the Store Insights application.
- List the processes running within the application.
- List the key elements of the Store Insights user interface.
- Describe the main use cases of the application.

Audience

Store Insights users

Prerequisites

No prerequisites are required for this course.

Duration

1 Day

Training Level

Intermediate and advanced

Lesson	Learning Objectives	Duration
01: Introduction to Store Insights	After completing this lesson, learners will be able to: • Explain how Store Insights creates store clusters. • Describe the components within the Category Management solution suite that Store Insights interacts with to create the store plan. • Describe the benefits and advantages of using Store Insights for store and cluster planning.	2 hours
02: Process Flow	After completing this lesson, learners will be able to: • Describe the services Store Insights uses to create store clusters. • Explain the process Store Insights follows to ensure the appropriate clustering of stores.	3 hours
03: User Interface Key Elements	After completing this lesson, learners will be able to: • Explain the key elements of the Store Insights user interface. • Set parameters within Store Insights to create clustering runs. • Analyze cluster performance based upon set parameters. • Review store performance and model quality.	3 hours

3040: Strategic Space

Course Objectives

After completing this course, learners will be able to:

- Explain the space hierarchy and process workflow of space allocation in a store.
- Review an allocation in Strategic Space.
- Describe the purpose and usage of templates in Strategic Space.
- Review and utilize activities in Strategic Space.
- Create templates, activities, and allocations in Strategic Space.

Audience

Strategic Space users

Prerequisites

No prerequisites are required for this course.

Duration

2 days

Training Level

Intermediate and advanced

Lesson	Learning Objectives	Duration
01: introduction	After completing this lesson, learners will be able to: • Describe the benefits and purpose of Strategic Space. • Identify the elements of the space hierarchy and how they are applied to the Strategic Space process workflow. • Explain the various data inputs required for optimized floorplans within Strategic Space.	2 hours
02: Accessing and Navigating the Strategic Space UI	After completing this lesson, learners will be able to: • Access the Strategic Space application. • Identify the pages accessed through the navigation and header panes and how they are used within Strategic Space.	2 hours
03: Reviewing an Allocation in Strategic Space	After completing this lesson, learners will be able to: • Review an allocation in Strategic Space. • Compare and contrast existing floorplan space with proposed floorplan space. • Utilize the Advanced Review tab to analyze elements, adjustments, and scoring.	3 hours
04: Creating and Reviewing Templates in	After completing this lesson, learners will be able to: • Describe the purpose of templates in Strategic Space.	4 hours

Strategic Space	• Create and define adjustment rules in a template. • Identify scoring measures in a template. • Review template properties and how they are applied within Strategic Space.	
05: Creating and Reviewing Activities in Strategic Space	After completing this lesson, learners will be able to: • Create activities in the Strategic Space application. • Configure an activity in Strategic Space. • Edit an allocation in an activity. • Start an allocation in an activity. • Analyze space allocation in an activity. • Review an allocation in an activity.	5 hours

Hands-on Exercises: This course contains hands-on exercises for practicing the tasks covered in the lessons.

Note: The hands-on exercises will be practiced during the training sessions with the help of the instructor.


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