

**Oracle[®] Retail Grade
Configuration Guide
Release 12.0
May 2006**

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Contents

- Preface..... v**
 - Customer Supportv
- 1 Configuring the Grade Solution Extension 1**
 - Overview.....1
 - Procedures.....1
 - Creating a Grade solution extension1
 - Create Clusters.....2
 - Editing Grade Parameters2
 - Autogenerating Hierarchies, Measures, Rules and Workbook Templates3
 - Adding or Deleting Clusters in the Configuration4
 - Editing the Grade GA Configuration4
 - Grade Example5

Customer Support

- <https://metalink.oracle.com>

When contacting Customer Support, please provide:

- Product version and program/module name.
- Functional and technical description of the problem (include business impact).
- Detailed step-by-step instructions to recreate.
- Exact error message received.
- Screen shots of each step you take.

Configuring the Grade Solution Extension

Overview

Grade is a clustering tool that provides insight into how various parts of a retailer's operations can be grouped together. Typically, a retailer may cluster stores over item sales to create logical groupings of stores based on sales of particular products. This provides increased visibility to where products are selling, and it allows the retailer to make more accurate decisions in merchandising. Beyond this traditional use of clusters, Grade is flexible enough to cluster any business measure based on products, locations, time, promotions, customers, or any hierarchy configured in the solution.

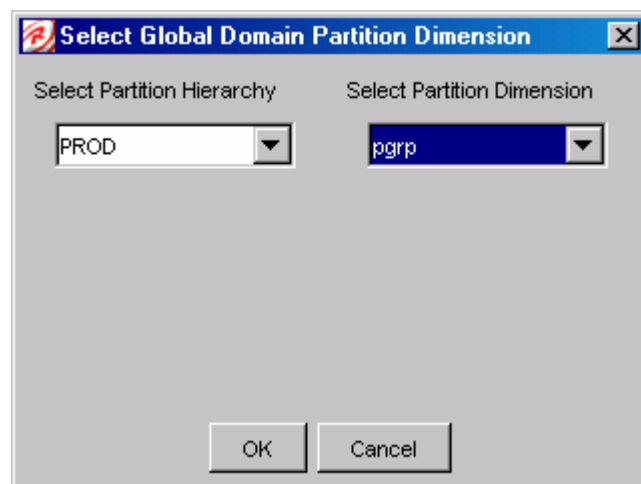
Grades/clusters that will be used within the Grade Solution are defined using the Grade Parameters utility in the RPAS Configuration Tools.

Procedures

Creating a Grade solution extension

To create a Grade solution extension:

1. Open an existing configuration in which hierarchies (for example, Product, Location, and Calendar) have already been defined.
2. From the Configuration Tools toolbar, select the 'Automation' menu. If installing a Global Domain environment, go on to step 3. If installing a Simple Domain environment, go on to step 4.
3. Select 'Common', and then the 'Specify Partition Dimension.' You will see the screen below. Select the hierarchy in which the domains will be partitioned, and then the Partition Dimension. Select 'OK,' and continue with step 4.



Select Global Domain Partition Dimension window

Note: To access this dialog, the configuration must already be flagged as a Global Domain environment. To do this, access the Workspace Properties from the File menu, and place a checkmark next to 'GlobalDomain.'

- Optional: The 'Common' plug-in may also be used to create an example hierarchy configuration. Select 'Common,' and then 'Build RMS Example Hierarchy.' The resulting hierarchy configuration is the same hierarchy that is used for the mock installation configurations provided in the release packages.
- Open the Function Library Manager and add the 'ClusterEngine' library.
- From the Grade option, select 'Specify Parameters.' The following sections outline the process for configuring profiles.



Create Clusters

To create Clusters:

- On the Grade Parameters utility, enter the Maximum Number of Clusters that will be required to support any Clustering/Grading process.
Click the 'Create Clusters' icon.
- The 'Cluster' and 'Label' parameters will update to reflect the number of clusters specified.
- Specify the properties for the clusters. See Editing Grade Parameters for details.

Editing Grade Parameters

Edit Grade parameters:

- Cluster** – Cluster is the system assigned Cluster Name. This value cannot be edited.
- Label** – The Label is the description of the cluster/grade that will be viewed by the user once the domain is created.

Cluster Labels may not exceed forty characters.

The following characters may not precede or follow the label that is entered in this field:

- '(' Example: (cluster01)
- '-' Example: -cluster01-

The following may not be use at all in the Cluster Label:

':' Example: cluster01:

Autogenerating Hierarchies, Measures, Rules and Workbook Templates

The following is the process to autogenerate the hierarchies, measures, rules, and workbook templates that are required by Promote to support the promotion configuration entered in the Promote plug-in:

On the Grade Parameters utility, click the **OK** icon.

- The system automatically generates:
- **Hierarchies** – The CLSH hierarchy will be created with a clst dimension. The GRCH hierarchy will be created with the grcd dimension.
- **Measures** – All measures necessary to support the base Grade solution will be created.
- **Rules** – Only the rules and rule groups necessary to support the installation of the Grade solution are visible in the configuration. A special code is used within the domain to create rules as needed for cluster generation and workbook templates.
- **Workbook Templates** – All pre-defined workbook templates to support the base Grade solution will be created; however, only the worksheets necessary to support the domain installation are visible. Additional processes within the application handles the creation of additional worksheets based on the user's selections in the workbook template wizards.
- You may continue to make changes to the Grade plug-in configuration and the autogeneration process may be repeated as often as needed prior to the installation

Note: After autogeneration completes, the following rules will display as invalid however these should be ignored:

Rule: clad_11

Rule: clad_12

Rule: clev_12

Rule: clev_13

Rule: clev_14

Rule: clev_15

Rule: clev_16

Rule: clev_17

Rule: clev_18

Rule: clev_19

RuleGroup: clad_load

Rule Group: clad_refresh

Rule Group: clev_load

Rule Group: clev_refresh

Adding or Deleting Clusters in the Configuration

Follow this process if you need to add clusters to the configuration or remove clusters from the configuration:

1. On the Grade Parameters utility, enter the new Maximum Number of Clusters that will be required to support any Clustering/Grading process.
2. Click the 'Create Clusters' icon.
3. The 'Cluster' and 'Label' parameters will update to reflect the number of clusters specified.
4. Select the 'OK' icon to regenerate the solution with the changes to the cluster configuration.

Editing the Grade GA Configuration

The Grade autogeneration process creates all hierarchy dimensions and measures to support the essential Grade functionality; however, only the minimum rules, workbook templates, and worksheets required to support the domain installation are visible in the configuration. Additional processes within the application handles the creation of rules and workbook template worksheets.

Note: This limitation allows for fewer options than in RDF and Curve for edits to the GA Configuration.

Acceptable changes and restrictions are outlined as follows:

'Grade' Solution Extension Name – The name assigned to the resulting Grade solution after autogeneration occurs **cannot** be edited.

Major and Minor Classes – Additional Major and Minor classes may be added to the Grade GA Configuration. The Major and Minor classes that are part of the GA Configuration may not be edited. This restriction also applies to Measure Names and Measure Labels.

Rules – Additional Rule Sets, Rule Groups, and Rules may be added to the Grade GA Configuration. This includes support for adding new Rules to existing GA Configuration Rule Groups. New Rules that are added to the GA Configuration Rule Groups should include 'cust' (represents 'Custom') in the Rule Name, which makes it easy to identify Rules that are not part of the GA Configuration. Rule Sets, Rule Groups, and Rules that are part of the GA Configuration may not be renamed. Existing Rules that are part of the GA Configuration may not be modified in any way.

Workbook Templates – Additional Workbook Templates may be added to the Grade GA Configuration; however, new Measures and Rules can only be added to the GA Configuration Workbook Template worksheets that are visible in the configuration.

Grade Example

The following is an example of the Grade Parameters utility:

Cluster	Label
01	Cluster01
02	Cluster02
03	Cluster03
04	Cluster04
05	Cluster05
06	Cluster06
07	Cluster07
08	Cluster08
09	Cluster09
10	Cluster10

Select Data Source Measures: csal,dpos,psal,rsal

Partition Dimension:

OK Cancel

Grade Parameters window