

**Oracle® Retail Promotion Intelligence and  
Promotion Planning and Optimization**

Configuration Guide

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Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Configuration Guide,  
Release 12.0.2

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# Preface

Oracle Retail Promotion Intelligence analyzes the results of past promotions and advertising and the affinity effects of products on one another to deliver insight into the performance of a promotional strategy.

Oracle Retail Promotion Planning and Optimization assists you in creating and improving your promotions. It allows you to leverage the information gained from Promotion Intelligence to make the best promotion decisions by using what-if analysis and predictive forecasting.

Promotion Planning and Optimization combines analysis, planning, and implementation components to give retailers the capability to achieve the highest return on their advertising, promotion, and inventory investments.

## Audience

This document is intended for administrators of the Oracle Retail Promotion Intelligence and Promotion Planning and Optimization application.

## Related Documents

For more information, see the following documents in the Oracle Retail Promote documentation set:

- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Release Notes*
- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Operations Guide*
- *Oracle Retail Promotion Intelligence User Guide*
- *Oracle Retail Promotion Planning and Optimization User Guide*
- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Installation Guide*
- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Sample Dataset Guide*

## 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

## Conventions

The following text conventions are used in this document:

Convention	Meaning
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
<code>monospace</code>	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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# Introduction

This chapter contains the following:

- “About the Promotion Intelligence and Promotion Planning and Optimization Configuration Guide” on page 1
- “What’s In This Book” on page 1

## About the Promotion Intelligence and Promotion Planning and Optimization Configuration Guide

The Configuration Guide provides information about configuring the Oracle Retail Promotion Intelligence (PI) and Oracle Retail Promotion Planning and Optimization (PPO) products to meet a customer's specific business requirements. In order to take full advantage of the PI and PPO products and integrate them into your business practices, it is desirable to perform a customization to reflect your own business requirements.

## What’s In This Book

The Configuration Guide contains the following chapters:

- Chapter 1 - Introduction - a list of all the chapters in the Configuration Guide.
- Chapter 2 - User Management - used to create, modify, and inactivate user accounts.
- Chapter 3 - Configurable Data Attributes - used to specify custom data that can be viewed through the UI.
- Chapter 4 - PPO UI Configuration - used to configure the UI display.
- Chapter 5 - Template Configuration - used to configure the xml files for promotion templates.
- Chapter 6 - Inference Rules - Used to configure inference rules.
- Chapter 7 - Reports - used to configure reports that can be used to view analytical information.





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# User Management

This chapter contains the following:

- “Introduction” on page 2-1
- “About User Roles and User Actions” on page 2-1
- “User Management Bulk Loader Utility” on page 2-3
- “Promote Sample xml Files” on page 2-5

## Introduction

User Management is a utility that lets you create, modify, and remove user accounts from a central location. The User Management utility is installed automatically when you install the application.

Each user who accesses the application must have a user account. Each user account is assigned one or more roles that determine the types of functions the user can perform with the application.

## About User Roles and User Actions

Roles are defined by a specific set of user actions. The actions that define each role serve to delimit the activities a user can perform. All actions are self-contained. For example, Create does not imply View. So a role must include all the actions that are necessary for complete functionality.

Promote comes with a default set of actions, loaded into ACTION\_TBL:

- PROMO\_CREATE\_CE - add and delete campaigns and events.
- PROMO\_EDIT\_CE - make changes to campaigns and events.
- PROMO\_VIEW\_CE - view campaigns and events.
- PROMO\_CREATE\_MD - add and delete master data.
- PROMO\_EDIT\_MD - make changes to master data.
- PROMO\_VIEW\_MD - view master data.
- PROMO\_CREATE\_PROMO - add and delete promotions.
- PROMO\_EDIT\_PROMO - make changes to promotions.
- PROMO\_VIEW\_PROMO - view promotions.
- PROMO\_MANAGE\_CATEGORY - edit the offers for a promotion.

- **PROMO\_MANAGE\_MERCHANDISE** - edit Like Item information.
- **PROMO\_MANAGE\_VEHICLE** - edit the definition and design of the promotion vehicle, category assignments, white space allocation, and workflow.
- **PROMO\_EXPORT\_PROMO** - provides access to the Export button, which is used to create xml and txt files of promotions. Necessary for access to the Export API functionality.
- **PROMO\_VIEW\_REPORTS** - launch the Promote Intelligence reports.

Promote comes with a default set of roles, loaded into **ROLE\_ACTION\_TBL**:

- **PROMO\_AD\_PLANNER** - a member of marketing who is responsible for the entire promotional calendar. This user can create and edit calendar events and create promotions.
- **PROMO\_BUSINESS\_ADMIN** - a business user who is responsible for activities such as data maintenance and template management.
- **PROMO\_CATEGORY\_MANAGER** - the person directly responsible for one or more categories of merchandise, assigned at a given level in the merchandise hierarchy.
- **PROMO\_EXEC** - an executive who monitors promotion performance across all merchandise categories. Such a user would expect to monitor performance at both a high level and a low level, but would not need to edit or execute promotions.
- **PROMO\_MERCH\_PLANNER** - a merchandise planner who executes merchandising plans. Such a user is assigned responsibility at the Chain level.

The following table shows the default assignment of actions to roles in Promote.

**Table 2–1 Actions Assigned to Roles**

Promote Role	Assigned Actions
PROMO_AD_PLANNER	PROMO_CREATE_CE
	PROMO_EDIT_CE
	PROMO_VIEW_CE
	PROMO_CREATE_MD
	PROMO_EDIT_MD
	PROMO_VIEW_MD
	PROMO_CREATE_PROMO
	PROMO_EDIT_PROMO
	PROMO_VIEW_PROMO
	PROMO_MANAGE_VEHICLE
	PROMO_EXPORT_PROMO
	PROMO_VIEW_REPORTS
PROMO_BUSINESS_ADMIN	PROMO_CREATE_MD
	PROMO_EDIT_MD
	PROMO_VIEW_MD
PROMO_CATEGORY_MANAGER	PROMO_MANAGE_CATEGORY
	PROMO_MANAGE_MERCHANDISE

**Table 2–1 (Cont.) Actions Assigned to Roles**

Promote Role	Assigned Actions
PROMO_EXEC	PROMO_VIEW_CE
	PROMO_VIEW_MD
	PROMO_VIEW_PROMO
	PROMO_MANAGE_CATEGORY
	PROMO_MANAGE_VEHICLE
	PROMO_EXPORT_PROMO
	PROMO_VIEW_REPORTS
PROMO_MERCH_PLANNER	PROMO_VIEW_CE
	PROMO_VIEW_MD
	PROMO_VIEW_PROMO
	PROMO_EDIT_PROMO

Default actions cannot be deleted.

Roles are assigned to users with restrictions that are defined at or above a specific node of the merchandise hierarchy and the location hierarchy. The scope of actions can be across the merchandise and location hierarchies.

The sample file, "Role Assignment Sample xml File" provides an illustration of defining the scope.

## About User Management Roles

User accounts with user management roles have access to features such as creating users, assigning roles, removing user accounts, resetting passwords.

When a user with a user management role logs on, a link to the User Management utility appears on the Main Menu.

The following list describes the default User Management roles:

- **UM\_READ\_ONLY\_ADMIN** – This role allows read-only access to the User Management utility. This role has privileges to view the list of users and their roles and hierarchy levels, but not to create new user accounts or modify or inactivate existing ones.
- **UM\_ROLE\_ASSIGN\_ADMIN** – This role allows assigning new roles (and related hierarchy levels) to existing user accounts, but it does not allow the creation of new user accounts.
- **UM\_USER\_ADMIN** – This role allows creating new user accounts, but it does not allow the assignment of roles to the new accounts.

## User Management Bulk Loader Utility

If you are creating a small number of user accounts using the default roles, you can create those accounts using the application UI. (For more information on using the User Management utility, consult the application Online Help.) However, if you want to create user accounts for a group of users all at one time, you can use the User Management bulk loader utility.

Prior to running the User Management bulk loader utility, you must:

- Set the jndi.properties. The jndi.properties file, which is located in <installed>/modules/tools/conf/jndi.properties, specifies the initial context factory and the url where the JNDI lookups are carried out.

For WebLogic, typical values are:

```
java.naming.factory.initial=weblogic.jndi.WLInitialContextFactory
java.naming.provider.url=t3://localhost:7001
```

- Make sure that usermanagement.ear, suiteproperties.ear, and common4p.ear are deployed on the running application server.

## Users and Roles

You need to create and validate (using a tool like XML Spy) three xml files containing entries for Users, Roles, and Role Assignments.

**Note:** The actions associated with roles must be created, using brmadmin.sh in order for the roles to be successfully created.

- The user file contains user names. All user names must be unique. The schema includes a flag that indicates whether or not the password should be hashed.
- The Roles file contains the possible roles that can be assigned. All role keys must be unique. The action key attributes must be loaded into the database before the bulk loader utility can be used. All elements and attributes must be lower case.
- The Role Assignment file contains user names and the role or roles associated with the user name. The user names must be loaded into the database before this file can be processed by the bulk loader utility. All elements and attributes must be lower case. The merchandise ID and the Location ID are provided by a pipe-delimited string of CLIENT\_LOAD\_ID, as found in the MERCHANDISE\_HIERARCHY\_TBL or LOCATION\_HIERARCHY\_TBL. For example, to assign a user to a certain department of merchandise:

CHAIN COMPANY DIVISION DEPARTMENT merchandise attribute in .xml

```
-----
0 1 123 8765 1 | 123 | 8765
0 1 22 789 1 | 22 | 789
```

The information in the three files is loaded into database tables by the bulk loader. (Users and Role Assignments can be added or modified via the application UI. Roles can only be added or modified via the bulkloader.)

## The xml Files

The xml schemas and samples of the three required xml files can be found in <installed>/modules/tools/conf.

**Table 2–2 User Management xml Files**

Schema	Sample	Database Table
user-set.xsd	test_user_set.xml	USERS_TBL
role-set.xsd	test_role_set.xml	ROLES_TBL
role-assignment-set.xsd	test_assignment_set.xml	USER_RESOURCE_ROLE_TBL

## Standard Load Prerequisites

Before you run the bulk loader, you must have run the standard load so that the merchandise hierarchy table (ASH\_MH\_TBL) and the location hierarchy table (ASH\_LH\_TBL) have been populated. (For more information on the standard load, see the application Operations Guide).

## Promote Sample xml Files

This section provides sample input files for adding or updating users and roles.

### User Sample xml File

```
<?xml version="1.0" encoding="UTF-8" ?>
- <user-set hash-passwords="true"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:noNamespaceSchemaLocation="user-set.xsd">
- <!-- execs
-->
  <user username="rodneyt" password="rodneyt" last-name="Tudor"
first-name="Rodney" middle-initial="R" employeeID="21427" title="CMO" />
  <user username="stevec" password="stevec" last-name="Calhoon" first-name="Steve"
middle-initial="D" employeeID="21426" title="Marketing Director" />
- <!-- IT
-->
  <user username="bernarda" password="bernarda" last-name="Allen"
first-name="Bernard" middle-initial="R" employeeID="21990" title="Business IT" />
  <user username="kens" password="kens" last-name="Smith" first-name="Ken"
middle-initial="R" employeeID="8674309" title="CTO" />
- <!-- Marketing
-->
  <user username="geofr" password="geofr" last-name="Rogers" first-name="Geof"
middle-initial="L" employeeID="01230" title="Directory, Marketing" />
  <user username="anns" password="anns" last-name="Smith" first-name="Ann"
middle-initial="T" employeeID="21664" title="Marketing" />
  <user username="vladimiro" password="vladimiro" last-name="Olson"
first-name="Vladimir" middle-initial="D" employeeID="21657" title="Marketing" />
  <user username="bobh" password="bobh" last-name="Hashimoto" first-name="Bob"
middle-initial="E" employeeID="28872" title="Marketing" />
- <!-- Merchants
-->
  <user username="jaysonh" password="jaysonh" last-name="Hawthorn"
first-name="Jayson" middle-initial="K" employeeID="88494" title="Category Manager"
/>
  <user username="kerryo" password="kerryo" last-name="O'Leary" first-name="Kerry"
middle-initial="Z" employeeID="21784" title="Category Manager" />
  <user username="josephh" password="josephh" last-name="Hunter"
first-name="Joseph" middle-initial="G" employeeID="21344" title="Category Manager"
/>
  <user username="devinp" password="devinp" last-name="Pritchard"
first-name="Devin" middle-initial="P" employeeID="21344" title="Category Manager"
/>
  <user username="nickb" password="nickb" last-name="Bosworth" first-name="Nick"
middle-initial="P" employeeID="21555" title="Category Manager" />
  <user username="stephaniet" password="stephaniet" last-name="Tauzell"
first-name="Stephanie" middle-initial="A" employeeID="21432" title="Category
Manager" />
- <!-- Leads
-->
```

```
<user username="tonyj" password="tonyj" last-name="Jones" first-name="Tony"
middle-initial="S" employeeID="12345" title="Promotion Lead" />
</user-set>
- <!--
This XML support adding/updating "users" for the User Management subsystem.
Note:
1) All user usernames must be unique among all applications.
2) user-set has a flag indicating whether the password should be hashed
   prior to persistence. This is just to support migration from prior
   implementations of Price. So that users can keep existing passwords

-->
```

## Roles Sample xml Files

```
<?xml version="1.0" encoding="UTF-8" ?>
- <role-set xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:noNamespaceSchemaLocation="role-set.xsd">
- <role key="PROMO_BUSINESS_ADMIN">
  <action key="PROMO_CREATE_MD" />
  <action key="PROMO_VIEW_MD" />
  <action key="PROMO_EDIT_MD" />
</role>
- <role key="PROMO_AD_PLANNER">
  <action key="PROMO_VIEW_CE" />
  <action key="PROMO_CREATE_CE" />
  <action key="PROMO_EDIT_CE" />
  <action key="PROMO_CREATE_PROMO" />
  <action key="PROMO_EDIT_PROMO" />
  <action key="PROMO_VIEW_PROMO" />
  <action key="PROMO_CREATE_MD" />
  <action key="PROMO_VIEW_MD" />
  <action key="PROMO_EDIT_MD" />
  <action key="PROMO_MANAGE_VEHICLE" />
  <action key="PROMO_EXPORT_PROMO" />
  <action key="PROMO_VIEW_REPORTS" />
</role>
- <role key="PROMO_MERCH_PLANNER">
  <action key="PROMO_VIEW_CE" />
  <action key="PROMO_VIEW_MD" />
  <action key="PROMO_VIEW_PROMO" />
  <action key="PROMO_EDIT_PROMO" />
</role>
- <role key="PROMO_CATEGORY_MANAGER">
  <action key="PROMO_MANAGE_CATEGORY" />
  <action key="PROMO_MANAGE_MERCHANDISE" />
</role>
- <role key="PROMO_EXEC">
  <action key="PROMO_VIEW_PROMO" />
  <action key="PROMO_VIEW_CE" />
  <action key="PROMO_VIEW_MD" />
  <action key="PROMO_EXPORT_PROMO" />
  <action key="PROMO_MANAGE_VEHICLE" />
  <action key="PROMO_MANAGE_CATEGORY" />
  <action key="PROMO_VIEW_REPORTS" />
</role>
</role-set>
- <!--
This XML support adding/updating "roles" for the User Management subsystem.
```

Note:

- 1) All role keys must be unique among all applications. Names like PRICE\_APPROVER, PLAN\_EDITOR, and PLACE\_READER would be expected.
- 2) The action key attributes must be present in the DB before bulkloader is run. Action key values will also typically be unique among all applications. Names like PRICE\_APPROVE, PLAN\_EDIT, PLACE\_SUBMIT would be expected.
- 3) All elements and attributes are case sensitive and all are lower case.

-->

## Role Assignment Sample xml File

```
<?xml version="1.0" encoding="UTF-8" ?>
- <role-assignment-set xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:noNamespaceSchemaLocation="role-assignment-set.xsd">
- <role key="PROMO_BUSINESS_ADMIN">
- <user-assignment username="bernarda">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="kens">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="root">
  <node location="" merchandise="" />
</user-assignment>
</role>
- <role key="PROMO_AD_PLANNER">
- <user-assignment username="geofr">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="anns">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="vladimiro">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="bobh">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="tonyj">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="kens">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="root">
  <node location="" merchandise="" />
</user-assignment>
</role>
- <role key="PROMO_MERCH_PLANNER">
- <user-assignment username="jaysonh">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="kerryo">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="josephh">
  <node location="" merchandise="" />
```

```
</user-assignment>
- <user-assignment username="devinp">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="nickb">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="stephaniet">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="tonyj">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="kens">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="root">
  <node location="" merchandise="" />
</user-assignment>
</role>
- <role key="PROMO_CATEGORY_MANAGER">
- <user-assignment username="jaysonh">
- <!-- games
-->
  <node location="" merchandise="1|1 80|2 23" />
</user-assignment>
- <user-assignment username="kerryo">
- <!-- construction toys
-->
  <node location="" merchandise="1|1 80|2 55" />
</user-assignment>
- <user-assignment username="josephh">
- <!-- action figures
-->
  <node location="" merchandise="1|1 80|2 11" />
</user-assignment>
- <user-assignment username="devinp">
- <!-- puzzles
-->
  <node location="" merchandise="1|1 80|2 92" />
</user-assignment>
- <user-assignment username="nickb">
- <!-- barbie and accessories
-->
  <node location="" merchandise="1|1 80|2 32" />
</user-assignment>
- <user-assignment username="stephaniet">
- <!-- basic fashion dolls
-->
  <node location="" merchandise="1|1 80|2 34" />
</user-assignment>
- <user-assignment username="tonyj">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="kens">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="root">
  <node location="" merchandise="" />
</user-assignment>
```



```

    </role>
- <role key="PROMO_EXEC">
- <user-assignment username="stevec">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="rodneyt">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="kens">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="root">
  <node location="" merchandise="" />
</user-assignment>
</role>
</role-assignment-set>
- <!--
  This XML support adding/updating "role assignments" for the User Management
  subsystem.
  Note:
  1) All role keys must be unique among all applications. Names like
    PRICE_APPROVER, PLAN_EDITOR, and PLACE_READER would be expected.
    They must match those already persisted into the DB.
  2) The Users with given username must be present in the DB prior to this
    file being processed by the bulkloader.
  3) The location and merchandise attributes are "pipe" delimited strings of
    client load IDs. The first node is just below the root (Chain-Level)
    node. An empty attribute represents a chain level assignment.
  4) All elements and attributes are case sensitive and all are lower case.

  5) The values of the Merch and Loc hierarchy client load ID are based
    on the TitusTenInc data set.

-->

```



---

## Configurable Data Attributes

This chapter contains the following:

- “Introduction” on page 3-1
- “Defining Configurable Data Attributes” on page 3-1

### Introduction

Configurable Data Attributes (CDAs) provide a way for retailers to see, in addition to the default data that is visible through the application interface, custom data that they themselves specify and that is not required by the application. This data can be used in business rules and can be displayed in the application UI.

### Defining Configurable Data Attributes

Configurable Data Attributes are defined in the database using the CDA Administration Utility. The data is then staged and loaded. All client-specified data is included in the standard interface specification in fields with field names beginning with the word ATTRIBUTE.

**Note:** CDAs are disabled by default. The column PL\_DD\_ATTRIBUTES.DISABLED should be set to 1 to disable the CDA and should be set to 0 to enable the CDA.

You can access the CDAs in the database via database queries or change the grid configuration to make them visible in the user interface.

The number of CDAs per entity is limited by the number of database columns pre-allocated in every CDA storage table. Every application schema provides eight data columns of type VARCHAR and DATE, and ten number columns of type NUMBER. When you are creating a new attribute, you can choose the storage columns from the following disassociated columns of the corresponding type:

**Table 3–1 CDA Data Type**

Data Attribute Type	Data Type
String	VARCHAR
Integer	NUMBER
Boolean	NUMBER
Double	NUMBER
Date	NUMBER
Currency	VARCHAR
Currency	NUMBER (2 columns)

The following tables supports extension by the CDA Administrative Utility:

**Table 3–2 Standard Interface Tables with CDAs**

Entity Name	Staging Table	Active Table	CDA Table
Location	ASH_LH_TBL	LOCATION_HIERARCHY_TBL	LH_CDA_TBL
Merchandise	ASH_MH_TBL	MERCHANDISE_HIERARCHY_TBL	MH_CDA_TBL

---

## PPO UI Configuration

This chapter contains the following

- “Introduction” on page 4-1
- “<configroot>” on page 4-1
- “PPO Configuration File” on page 4-1
- “Configuring Display Strings” on page 4-2
- “Configuring Export” on page 4-2
- “Integration with Promote Intelligence” on page 4-3
- “Debug Messages” on page 4-4

### Introduction

The PPO product includes a configurable Graphical User Interface (GUI). Several configuration points can be used to modify GUI behavior.

### <configroot>

<configroot> is the entry point directory that is used by the application to look up all the configuration files. This value has to be set at the application server (OAS) level. Refer to the *Promotion Installation Guide* for instructions to set it. It usually points to <install-dir>/config.

### PPO Configuration File

GUI-wide properties are set in the promote.properties file, which is located in <configroot>/promote. This file is pre-populated during the installation process with installation-specific values.

Other properties relate to OAS 10.1.3.0.0 and contain the prefix oas. For example, oas.java.naming.provider.url has to be set to the correct (opmn or non-opmn) url, such as ormi://host:port.

The same is true for the configuration of the User Management application. Its properties are stored in <configroot>/usermanagement/usermanagement.properties.

To specify the time interval at which Promote Planning updates the server session on browser-only user activity (that is, when a user click does not result in a server call), set promotekeepalive.interval to the desired interval (in seconds).

## promote.properties

Here are the default settings for the promote.properties file:

```
promote.config.file=promote-config.xml
promote.saxparser.classname=org.apache.xerces.parsers.SAXParser
promote.export.root.path=%{installdir}%/config/promote
promote.export.xml.template.promotion=%{installdir}%/config/promote/XmlExportTemplate.xslt
promote.export.xml.template.promotionofferitemsummary=%{installdir}%/config/promote/XmlExportTemplate.xslt
promote.export.xml.template.promotionofferpositionsummary=%{installdir}%/config/promote/XmlExportTemplate.xslt
promote.export.txt.template.promotion=%{install}%/config/promote/TxtExportTemplate.xslt
promote.export.txt.template.promotionofferitemsummary=%{installdir}%/config/promote/PromoOfferItemSumTxtTmpl.xslt
promote.export.txt.template.promotionofferpositionsummary=%{installdir}%/config/promote/PromoOfferPosSumTxtTmpl.xslt
promote.engine.url=rmi://%{KDE_RMI_SERVER_ADDRESS}%:%{KDE_RMI_SERVER_PORT}%/ItemPredictorFactory
promote.imageserver.baseurl=http://%{suite.host}%:%{suite.port}%/iserver/images/mh
promote.datetime.dateformatpolicy=configured
promote.datetime.sysdateformat=us
promote.datetime.eu.date=dd/MM/yyyy
promote.datetime.us.date=MM/dd/yyyy
promote.datetime.iso.date=yyyy-MM-dd
promote.datetime.us.time=HH:mm:ss
promote.datetime.iso.time=HH:mm:ss
promote.datetime.eu.time=HH:mm:ss
promote.datetime.us.timestamp=MM/dd/yyyy HH:mm:ss
promote.datetime.iso.timestamp=yyyy-MM-dd HH:mm:ss
promote.datetime.eu.timestamp=dd/MM/yyyy HH:mm:ss
promote.format.int=#,##0
promote.format.decimal=#,##0.###
promote.format.percent=#,##0.##%
promote.format.currency=\u00A4#,##0.00
promote.data.maxrows=1000
promote.width.ratio=0.20d
promote.height.ratio=0.20d
promote.report.auto_auth=false
promote.keepalive.interval=60000
```

## Configuring Display Strings

GUI resources such as labels and error messages are kept in the promoteResources.properties file, which is located in <configroot>/promote.

## Configuring Export

The following stylesheets are shipped with Promote Planning:

- XmlExportTemplate.xslt, which is used to format the XML output of a promotion
- TxtExportTemplate.xslt, which describes the instructions for the TXT format.
- PromoOfferItemSumTxtTmpl.xslt, which provides promotion offer item details.
- PromoOfferPosSumTxtTmpl.xslt, which provides offer position details.

The location and naming of these files are specified in the `promote.properties` file, which is located in `<configroot>/promote`.

The following values must be specified:

**Table 4–1 Export Configuration Values**

Value	Description
<code>export.root.path</code>	Location of exported files for a push export
<code>export.xml.template</code>	Location of the XML format XSLT stylesheet (e.g., <code>&lt;configroot&gt;/config/promote/XmlExportTemplate.xslt</code> )
<code>export.txt.template</code>	Location of the TXT format XSLT stylesheet (e.g., <code>&lt;configroot&gt;/config/promote/TxtExportTemplate.xslt</code> )

Values for `export.txt.template` must be specified for all export types:

- `promote.export.txt.template.promotion`
- `promote.export.txt.template.promotionofferitemsummary`
- `promote.export.txt.template.promotionofferpositionsummary`

## Pull Export Configuration

Two files must be configured for a pull export:

- `promo-pullclient.properties` - defines the defaults for the pull client
- `promo-pullclient.log4j.properties` - defines the Log4j configuration

These files are located in `<installdir>/modules/tools/conf`.

### Example `promo-pullclient.properties` File

```
promote.pullclient.servlet.contextroot=promote
promote.pullclient.servlet.appname=export.do
promote.pullclient.protocol=http
promote.pullclient.host=localhost
promote.pullclient.port=8888
promote.pullclient.datemask=MM/dd/yyyy_HH:mm:ss
promote.pullclient.format=xml
promote.pullclient.command=list
promote.pullclient.timeout=10
```

No spaces are permitted for any of the assigned values. The date mask specifies only the input arguments format. The output format is specified in `promote.properties`.

## Integration with Promote Intelligence

The following configuration points must be set so that Promote Intelligence reports can be open from Promote Planning.

## Auto Authentication Flag

The `promote.properties` file contains an auto-authentication flag called `promote.report.auto_auth`. The values for the flag are **true** and **false**.

When the flag is set to true, the Promo Planning/Intelligence integration uses the currently logged-in user's name and password when logging into MicroStrategy.

## Report Links Configuration

Report mapping and report links must be defined in `<configroot>/promote/promote-config.xml`. A sample file is populated during the installation procedure. The XML schema definition file is located in `<OAS-dir>/j2ee/home/applications/promote/xmlSchema/promote.xsd`.

This configuration includes:

- The MicroStrategy server DNS name, port, protocol, and webapp name
- The organization of the MicroStrategy reports into groups and the list of reports that are included in each group
- Label displays
- Resource file mapping information

The following XML attributes are used in `promote.xml`:

- Connect attributes used in the construction of the URL for all links (protocol://server:port/webapp\_path).
- Each reporting group has its own node. The name is used for the resource file mapping. The report request uses the `param` tag.
- For all report tags in group, sub-nodes are created in the GUI for the reporting area, using name, params and the common configuration from connect tag. A group with no reports does not have sub-nodes.
- If there is no params tag inside the group or report tag, then no link is provided.
- Groups cannot be nested inside other groups or reports.

## Display Strings

The Promote Planning and Promote Intelligence GUI properties are located in `promoteResources.properties`. This file includes locale-specific labels and descriptions. The value name in `promote-config.xml` is used as the key in the resource file.

Here is an example, using "My Reports":

`label.report.MyReports.name=My Reports`

`label.report.SharedReports.name=Shared Reports`

`label.report.SharedReports.AdPageAllocation.name=Ad Page Allocation`

`label.report.SharedReports.AdRoi.name=Ad ROI`

## Debug Messages

The log files are located in `<configroot>/promote/promote.log4j.properties`. The location of the file and the debug level can both be modified. If changes are made to these values, the application server must be restarted.



---

## Template Configuration

This chapter contains the following:

- “Introduction” on page 5-1
- “Using the Promote Template” on page 5-1

### Introduction

The Promotion templates provides a model that can be used when creating a promotion. This feature is available only in Promote Planning and Optimization. Templates can be designed through the Promote UI or directly through the xml file. This chapter provides details on configuring the xml file. Information about using the Promote UI to design the promotion templates can be found in the *Promotion Planning and Optimization User Guide*.

### Using the Promote Template

Promotion designers use the Promote templates to design and manage a promotion. Template design includes promotion features such as page width and height and page structure.

Example templates are included in the sample load. These templates are located in `<install-dir>/modules/pce/sample/templates`. The source file is an XML text file that outlines the information being loaded. Here is an example:

```
.name
.pageElements
.adPosition
I.e.:
  <pageTemplate>
    <name>Standard Spread AX (024)</name>
  ...
  <pageElements>
    <!-- HEADER ROW 1 -->
    <adPosition>
      <name>Alt Focus</name>
  ...
```

After the product is installed, the schema definition is can be found in

`<OAS-dir>/j2ee/home/applications/promote/xmlSchemas/templates.xsd`.

### Loading the Template

To load a template into the system, do the following:

1. Prepare the template XML text file.
2. Run the following script:  
    <install>/modules/tools/bin/promo-importer.sh.  
    This script assumes that a Java interpreter is part of the PATH. The script requires these input parameters:
  - host - DNS name or IP address of the application server
  - port - HTTP port of the application server
  - template file being loaded

---

## Inference Rules

This chapter contains the following:

- “Introduction” on page 6-1

### Introduction

The following views should be modified to reflect the required summary levels. The view creation scripts are located in:

```
<install-dir>/  
modules/Database/ROSEWOODSchema/install/oracle/ROSEWOODSchema  
/dictionary/views_ir.
```

**Table 6–1** *Modifying Inference Rules*

View	Guidelines for Modification
IR_PR_MERCH_SUMMARY_X_VW	These views map each merchandise summary level to its SKU.
IR_PR_LOCATION_SUMMARY_X_VW	These views map each location summary level to its SKU.
IR_PR_PROMOTIONS_VW	This view exposes the attributes needed by the PCE for modeling.
IR_PR_PROMO_ITEM_VW	This view exposes the attributes needed by the PCE for modeling.



This chapter contains the following:

- “Introduction” on page 7-1
- “Available Reports” on page 7-1
- “Configuration Report Details” on page 7-2
- “Changing MicroStrategy Summary Levels” on page 7-3

## Introduction

Use the Standard Reports GUI to create and share new reports. All reports are based on a standard template. Several pre-defined reports are available, including reports that provide information on General Trends, Product Categories, and Individual Products.

## Available Reports

Promote provides the following reports:

- Ad Page Allocation - contains an analysis of the impact of page allocation on return on investment (ROI). This report is based on a Circular promotion.
- Ad ROI - contains an analysis of the return on investment (ROI) for all ad events that occurred during a specified time period. Also provides a comparison between ROIs from different time periods.
- All Affinities - provides information about the affinities between items that sell together. The report displays all the affinity rules produced by the ARM application.
- Model Accuracy Scorecard - provides information to help evaluate the efficiency of the predictive model.
- Promotion Scorecard - contains an analysis of the effect of individual items that are included in a promotion on the success of that promotion. The report can be filtered by promotion and merchandise hierarchy level.
- Strategic Ad Emphasis - contains an analysis of the total effect of an ad event that occurred during a specified time period for a specified level of the merchandise hierarchy. This report is typically run at the department level.
- Strategic Business Emphasis - contains a sales and profit analysis of all groups within a given merchandise hierarchy level. This report is typically run at the department level.

- TAE Assessment Report - provides information that can be used to evaluate the accuracy and completeness of the data generated by TAE.
- Top Affinities - provides information about affinity products. It displays the top affinity rules, based on the confidence factor or likelihood. The affinity rules are produced by the ARM application.

## Configuration Report Details

This section provides details about the two reports that are used during the configuration process. Details about the other reports can be found in the *Promotion Intelligence User Guide*.

### Model Accuracy Scorecard Report

Use this report to evaluate the efficiency of the predictive model before you deploy it into the production environment. To test the model and produce this report, the PCE generates sales predictions for past ad events. Then, the application compares those predictions to the actual sales data gathered during the past ad event. The results are used to generate measures of error that you can use to evaluate the accuracy of the predictive model.

#### Report Prompts and Display

The report prompts you to select segments from the product hierarchy. The resulting report measures error only from the predictions that were generated for products that belong to the selected segment. This enables you to evaluate how well a specific model predicts for a given segment. You can page through the report by Model Run, in order to compare results of models that were built with different parameters. Results are grouped by the Model\_ID that was used to produce the item/store level prediction.

**Table 7-1 Model Accuracy Scorecard Report**

Metric Number	Metric	Description
1	Model	The model's name from rdm
2	Focus Item	Focus Item (SKU Level)
3	Location	Location (Store Level)
4	Actual Quantity	Actual number of units sold
5	Predicted Quantity	Predicted number (generated by the model) of units sold
6	Chain Level Error	Mean Absolute Percent Error calculated from chain level aggregated units sold
7	Store Level Error	Total of Mean Absolute Percent Error calculated at the item/store level

### TAE Assessment Report

Use this report to check the accuracy and completeness of TAE results. This report facilitates evaluating the data generated by the TAE process before integrating the data into the dataset. The report executes against the temporary table, PR\_TAE\_TEMP\_METRIC.

## Report Prompts and Display

The report prompts you to select the run ID, the merchandise hierarchy, and the ad event. Multiple data runs are identified by separate run IDs.

**Table 7–2 TAE Assessment Report**

Metric Number	Metric	Description
1	Run ID	Unique ID for TAE execution.
2	Focus Item	Item ID and description.
3	Promotion	Promotion description.
4	Ad Item MB Count	Count of ad market baskets that contain at least one focus item.
5	Item Baseline MB Count	Count of baseline market baskets that contain the item.
6	Index: Ad MBs to Baseline MBs	Count of item ad market baskets compared to the count of item baseline market baskets.
7	Status	OK. Bl_subst_code = 0 Substituted. Bl_subst_code = 1 No Result. Bl_subst_code in (2,3,4)
8	Substitute Item	Item used in substitution.

## Changing MicroStrategy Summary Levels

Promote reports use a default level (Department or MH level 4) of analysis. To change this level, do the following (demonstrated changing Summaries from Department (MH level 4) to Division (MH level 3):

1. Edit the Merchandise Level in Schema Objects/Attributes/Product Attributes
2. Select PI\_ID and click Modify.

