**Oracle® Retail Promotion Intelligence and Promotion Planning and Optimization**
Sample Data Set Guide
Release 12.0.1

October 2006

ORACLE®

# Preface

## Audience

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

## Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Accessibility standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For more information, visit the Oracle Accessibility Program Web site at

http://www.oracle.com/accessibility/

Accessibility of Code Examples in Documentation

Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

Accessibility of Links to External Web Sites in Documentation

This documentation may contain links to Web sites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these Web sites.

TTY Access to Oracle Support Services

Oracle provides dedicated Text Telephone (TTY) access to Oracle Support Services within the United States of America 24 hours a day, seven days a week. For TTY support, call 800.446.2398.

## Related Documents

For more information, see the following documents in the Oracle Retail Promotion Intelligence and Promotion Planning and Optimization documentation set:

- Oracle Retail Promotion Intelligence and Promotion Planning and Optimization 12.0.1 Release Notes
- Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Installation Guide
- Oracle Retail Promotion Intelligence User Guide
- Oracle Retail Promotion Planning and Optimization User Guide
- Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Operations Guide
- Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Configuration Guide

# Customer Support

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

| Convention | Meaning |
|---|---|
| **boldface** | Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary. |
| **Note:** This is a note. | Notes are used to call out information that is important, but not necessarily part of the procedure. |
| `This is a code sample` | Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter. |
| hyperlink | Hyperlinks provide a method of opening another document or jumping to another location within the document. |

## Introduction

This guide describes some of the features of the KSInc dataset distributed with Oracle Retail Promotion Intelligence (Promo Intelligence) and Oracle Retail Promotion Planning and Optimization (Promo Planning).

KSInc is a fictional retailer used to illustrate the functional capabilities of the product set. In addition, the dataset can be used as a model for simple customer implementations.

## About KSInc

### Company Overview

KSInc is a general retailer that sells a variety of merchandise. Most of the sample data distributed with the product is under the Core Toys division.

### Merchandise Hierarchy

KSInc is deployed with a simple merchandise hierarchy with 6 levels.

```
┌──────────────┐
│    Chain     │
└──────────────┘
┌──────────────┐
│   Company    │
└──────────────┘
┌──────────────┐
│   Division   │
└──────────────┘
┌──────────────┐
│  Department  │
└──────────────┘
┌──────────────┐
│    Class     │
└──────────────┘
┌──────────────┐
│     Sku      │
└──────────────┘
```
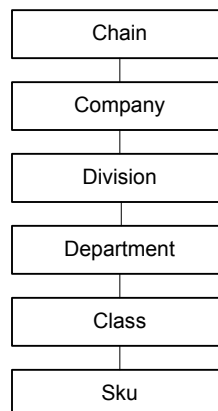
### Location Hierarchy

The location hierarchy consists of 8 levels.

```
┌──────────────┐
│    Chain     │
└──────────────┘
┌──────────────┐
│    Market    │
└──────────────┘
┌──────────────┐
│   Country    │
└──────────────┘
┌──────────────┐
│   Finance    │
└──────────────┘
┌──────────────┐
│     Zone     │
└──────────────┘
┌──────────────┐
│    Region    │
└──────────────┘
┌──────────────┐
│   District   │
└──────────────┘
┌──────────────┐
│    Store     │
└──────────────┘
```
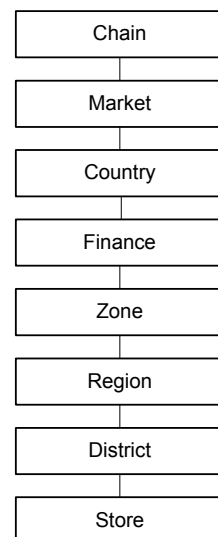
## *Organization Structure*

### Roles

The following table illustrates the roles and responsibilities for KSInc.

| Role Name | Description | Access | | | | |
| --- | --- | --- | --- | --- | --- | --- |
| | | Master Data | Calendar | Pro-motions | Vehicle | Items |
| PROMO_BUSINESS_ADMIN | Business Administrator – Is a business user with "superuser" privileges. Make take on other responsibilities, but is the point person on things like maintaining data, managing templates, etc. | Create Edit View | | | | |
| PROMO_AD_PLANNER | Ad Planner – A marketing person who thinks about the larger promotional calendar. This user should have the ability to edit and create calendar events, create promotions, etc. This is not a person responsible for configuration, defining templates, etc. | View | Create Edit View | Create Edit View Export Reports | Create Edit View | View |
| PROMO_MERCH_PLANNER | For KSInc, merchandise planners are those that are assigned to execute a merchandising plan for a part of KSInc's business. Used in conjunction with the CATEGORY_MANAGER role below. | View | View | Edit View | View | |
| PROMO_CATEGORY_MANAGER | Category Manager – A person who is directly responsible for one or more specific categories of merchandise. Typically used in conjunction with the MERCHANDISE_PLANNER role. CATEGORY_MANAGER is usually assigned at a given point in the merchandise hierarchy and MERCHANDISE_PLANNER is the role assigned at the chain level. | | | | | View Create Edit |
| PROMO_EXEC | Marketing Executive – An executive who monitors performance across all merchandise. While not responsible for editing or executing the promotional strategy, this user would expect to be able to see what is happening both at a high level and at a low level if desired. | View | View | View Export Reports | View | View |

The meaning of each access area is defined below.

> **Master Data** – Master Data refers to foundation data used to configure and maintain the product. Examples include page, vehicle, and promotion templates.
>
> **Marketing Calendar** – The calendar refers to the time based marketing plan, the Calendar screen within the application and its associated events. For example, for a user to create a competitive event on the shared marketing calendar access has to be granted to the marketing calendar.
>
> **Promotions** – Promotions are the documents used to plan advertisements. A user must have promotion view rights in order to see these advertising plans.
>
> **Vehicle** – A vehicle is a specific mechanism or tactic used to execute a promotion, for example a circular. Vehicle rights are required in order to change the layout or allocation of a specific media. For example, to allocate categories to existing whitespace, create additional vehicles, or change the number of pages a user has to have vehicle editing rights.
>
> **Items** – Items refer to specific SKUs or groups of SKUs on a vehicle. In the context of roles and responsibilities, this refers to rights that grant a user the ability to manage (choose) merchandise from a subset of the merchandise hierarchy. Only those users with Items access can make decisions about specific items to promote.

### Users

The following table lists the users and roles configured in the application.

| Full Name | Username/password | Role |
| --- | --- | --- |
| Rodney Tudor | rodneyt | Executive |
| Steve Calhoon | stevec | Executive |
| Bernard Allen | bernard | Business Admin |
| Geof Rogers | geofr | Ad Planner |
| Ann Smith | anns | Ad Planner |
| Vladimiro Olson | vladimiro | Ad Planner |
| Bob Hashimoto | bobh | Ad Planner |
| Jason Hawthorn | jaysonh | Merch Planner + Cat Mgr Games |
| Kerry O'Leary | kerryo | Merch Planner + Cat Mgr Construction Toys |
| Joseph Hunter | josephh | Merch Planner + Cat Mgr Action Figures |
| Devin Pritchard | devinp | Merch Planner + Cat Mgr Puzzles |
| Nick Bosworth | nickb | Merch Planner + Cat Mgr Barbie and Accessories |
| Stephanie Tauzell | stephaniet | Merch Planner + Cat Mgr Basic Fashion Dolls |
| Ken Smith | kens | Business Admin, Ad Planner, Merch Planner, Cat Mgr (all), Executive |
| Tony Jones | tonyj | Ad Planner, Merch Planner, Cat Mgr (all) |

### *Promotion History*

The sample dataset includes promotion history for the following time periods. These are the time periods that can be used when using the sample Promo Intelligence reports.

Transaction History:     12/29/2002 – 04/05/2003, 12/28/2003 – 4/10/2004,

and 1/2/2005 – 12/31/2005


Promo History:          1/31/2003 – 3/1/2003, 2/1/2004 – 3/6/2004 and 1/2/2005 – 3/13/2005

### Focus Periods

By default, the sample dataset includes predicated baseline windows as follows. These are the only time periods that support forecasting and predictive analytics for this dataset.

| Fiscal Week Number | Start Date |
|---|---|
| 49 | 12/31/2006 |
| 50 | 1/7/2007 |
| 51 | 1/14/2007 |
| 52 | 1/21/2007 |
| 1 | 1/28/2007 |
| 2 | 2/4/2007 |
| 3 | 2/11/2007 |
| 4 | 2/18/2007 |
| 5 | 2/25/2007 |
| 6 | 3/4/2007 |
| 7 | 3/11/2007 |
| 8 | 3/18/2007 |
| 9 | 3/25/2007 |


### Prediction Candidates

The following table describes which items in the dataset have been configured to support prediction. The item list is a function of which categories have been modeled, what sample transaction data exists, etc.

| Item ID | Item Description | Class Name | Image | Predictable |
|---|---|---|---|---|
| T0000817417 | Mix & Magic Kitchen Barbie | Barbie Licensed Goods | Yes | No |
| T0000048183 | BB American Idol Barbie | Basic Barbie Dolls | Yes | No |
| T0000048981 | BB Beautiful Bride | Basic Barbie Dolls | Yes | Yes |
| T0000048458 | BB C.G. Horse Doll Ast. | Basic Barbie Dolls | Yes | Yes |
| T0000048377 | BB Cali Girl Barbie | Basic Barbie Dolls | Yes | Yes |
| T0000049015 | BB Happy Birthday | Basic Barbie Dolls | No | Yes |
| T0000049031 | BB Pet Doctor | Basic Barbie Dolls | Yes | Yes |
| T0000049082 | BB W Kitchen | Basic Barbie Dolls | No | Yes |
| T0000049039 | BB W Nursery | Basic Barbie Dolls | No | Yes |
| T0000100045 | Pregnant Midge | Basic Barbie Dolls | Yes | Yes |
| T0000048205 | BB American Idol Stage | Furniture&Acc.For Barbie | Yes | No |
| T0000048515 | BB Cali Girl Colt Ast. | Furniture&Acc.For Barbie | Yes | No |
| T0000048493 | BB Cali Girl Convertible | Furniture&Acc.For Barbie | Yes | No |
| T0000088387 | BB Cali Girl Pool Playset | Furniture&Acc.For Barbie | Yes | No |
| T0000500453 | BB Fabulous Fountain Pool | Furniture&Acc.For Barbie | Yes | No |
| T0000120793 | BB Happy Fam. Nursery Playset | Furniture&Acc.For Barbie | Yes | No |
| T0000099958 | BB Sounds Home | Furniture&Acc.For Barbie | Yes | No |
| T0000049268 | BB Wee 3 Pool Set | Furniture&Acc.For Barbie | Yes | No |

| T0000710248 | Cruise Ship | Furniture&Acc.For Barbie | Yes | No |
| T0000709110 | R C Vw Beetle Convertible | Furniture&Acc.For Barbie | Yes | No |
| T0000714456 | Sweet Sounds Pet Shop Playset | Furniture&Acc.For Barbie | Yes | No |
| T0000071867 | Ants In The Pants | Hasbro Preschool Games | Yes | No |
| T0000051222 | Boohbah Game | Hasbro Preschool Games | Yes | No |
| T0000051769 | Buckaroo | Hasbro Preschool Games | Yes | No |
| T0000071859 | Candyland | Hasbro Preschool Games | Yes | No |
| T0000855189 | Don T Wake Daddy | Hasbro Preschool Games | Yes | No |
| T0000246444 | Hide & Seek | Hasbro Preschool Games | Yes | No |
| T0000961305 | Whac A Mole | Hasbro Preschool Games | Yes | No |
| T0000875341 | Wp Pooh Candyland | Hasbro Preschool Games | Yes | No |
| T0000070294 | Arc 170 | Lego Star Wars Space | Yes | No |
| T0000070235 | Darth Vader Transformation | Lego Star Wars Space | Yes | No |
| T0000070243 | Droid Tri Fighter | Lego Star Wars Space | Yes | No |
| T0000070259 | Gievous Chase | Lego Star Wars Space | Yes | No |
| T0000091364 | Imperial Inspection | Lego Star Wars Space | Yes | No |
| T0000070267 | Lightsaber Duel | Lego Star Wars Space | Yes | No |
| T0000070162 | Turbo Tank | Lego Star Wars Space | Yes | No |
| T0000070286 | Wookie Attack | Lego Star Wars Space | Yes | No |
| T0000070316 | Wookie Catamaran | Lego Star Wars Space | Yes | No |
| T0000049112 | BB Fairytopia Elina | Video Themed Line | No | No |
| T0000049104 | BB Fairytopia Elina Aa | Video Themed Line | No | No |

## Using the KSInc Dataset

### *Installing the dataset*

The dataset is installed using the a script located in the `$PCE_HOME/sample` directory. Running the `deploy.sh` script with no arguments will list the available options. Use the `all` option to install the entire dataset.

```
bash$ bash deploy.sh all
```

### *Creating Promotions*

When creating promotions, note the existence of two sample templates. The Std Weekly Promo is an example of a template that uses a circular and 6 positioned pages. The Ad Hoc Promo template illustrates how to create an unpositioned page. When using Promotion Planning for the first time, use the Std Weekly Promo template as it illustrates a more complete set of capabilities.