

Oracle® Retail Promotion Intelligence and Promotion Planning and Optimization

Sample Dataset Guide

Release 12.0.2

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Introduction

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

About KSInc

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.

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.



Location Hierarchy

The location hierarchy consists of 8 levels.



Organization Structure

Roles

The following table illustrates the roles and responsibilities for KSIInc.

Role Name	Description	Master Data	Calendar	Promotions	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

Role Name	Description	Master Data	Calendar	Promotions	Vehicle	Items
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
Vladimir 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 Tazzell	stephaniet	Merch Planner + Cat Mgr Basic Fashion Dolls
Ken Smith	kens	Business Admin, Ad Planner, Merch Planner, Cat Mgr (all), Executive
Tony Jones	tonyi	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
T0000048981	BB Beautiful Bride	Basic Barbie Dolls	Barbiebride.jpg
T0000048458	BB C.G. Horse Doll Ast.	Basic Barbie Dolls	barbiecghorsedoll.jpg
T0000048377	BB Cali Girl Barbie	Basic Barbie Dolls	barbiecaligirl.jpg
T0000049015	BB Happy Birthday	Basic Barbie Dolls	
T0000049031	BB Pet Doctor	Basic Barbie Dolls	barbiepetdoctor.jpg
T0000049082	BB W Kitchen	Basic Barbie Dolls	
T0000049039	BB W Nursery	Basic Barbie Dolls	
T0000100045	Pregnant Midge	Basic Barbie Dolls	barbiepregnantmidge.jpg
T0000071867	Ants In The Pants	Hasbro Preschool Games	antsinthepants.jpg

Item ID	Item Description	Class Name	Image
T0000051222	Boohbah Game	Hasbro Preschool Games	boohbah.jpg
T0000051769	Buckaroo	Hasbro Preschool Games	buckaroo.jp
T0000071859	Candyland	Hasbro Preschool Games	candyland.jpg
T0000855189	Don T Wake Daddy	Hasbro Preschool Games	dontwakedaddy.jpg
T0000246444	Hide & Seek	Hasbro Preschool Games	hideandseek.jpg
T0000961305	Whac A Mole	Hasbro Preschool Games	whacamole.jpg
T0000875341	Wp Pooh Candyland	Hasbro Preschool Games	poohcandyland.jpg
T0000361057	Pk Southern Islands Box Set	Pokemon Ccg	

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. TheCircular - Std Weekly 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 Circular - Std Weekly template as it illustrates a more complete set of capabilities.