

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

Configuration Guide

Release 13.1.1

September 2009

Copyright © 2009, Oracle and/or its affiliates. All rights reserved.

Primary Author: Judith Meskill

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this software or related documentation is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation shall be subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License (December 2007). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

This software is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications which may create a risk of personal injury. If you use this software in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure the safe use of this software. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software in dangerous applications.

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

This software and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Value-Added Reseller (VAR) Language

Oracle Retail VAR Applications

The following restrictions and provisions only apply to the programs referred to in this section and licensed to you. You acknowledge that the programs may contain third party software (VAR applications) licensed to Oracle. Depending upon your product and its version number, the VAR applications may include:

(i) the software component known as **ACUMATE** developed and licensed by Lucent Technologies Inc. of Murray Hill, New Jersey, to Oracle and imbedded in the Oracle Retail Predictive Application Server - Enterprise Engine, Oracle Retail Category Management, Oracle Retail Item Planning, Oracle Retail Merchandise Financial Planning, Oracle Retail Advanced Inventory Planning, Oracle Retail Demand Forecasting, Oracle Retail Regular Price Optimization, Oracle Retail Size Profile Optimization, Oracle Retail Replenishment Optimization applications.

(ii) the **MicroStrategy** Components developed and licensed by MicroStrategy Services Corporation (MicroStrategy) of McLean, Virginia to Oracle and imbedded in the MicroStrategy for Oracle Retail Data Warehouse and MicroStrategy for Oracle Retail Planning & Optimization applications.

(iii) the **SeeBeyond** component developed and licensed by Sun Microsystems, Inc. (Sun) of Santa Clara, California, to Oracle and imbedded in the Oracle Retail Integration Bus application.

(iv) the **Wavelink** component developed and licensed by Wavelink Corporation (Wavelink) of Kirkland, Washington, to Oracle and imbedded in Oracle Retail Mobile Store Inventory Management.

(v) the software component known as **Crystal Enterprise Professional and/or Crystal Reports Professional** licensed by SAP and imbedded in Oracle Retail Store Inventory Management.

(vi) the software component known as **Access Via™** licensed by Access Via of Seattle, Washington, and imbedded in Oracle Retail Signs and Oracle Retail Labels and Tags.

(vii) the software component known as **Adobe Flex™** licensed by Adobe Systems Incorporated of San Jose,

California, and imbedded in Oracle Retail Promotion Planning & Optimization application.

(viii) the software component known as **Style Report™** developed and licensed by InetSoft Technology Corp. of Piscataway, New Jersey, to Oracle and imbedded in the Oracle Retail Value Chain Collaboration application.

(ix) the software component known as **DataBeacon™** developed and licensed by Cognos Incorporated of Ottawa, Ontario, Canada, to Oracle and imbedded in the Oracle Retail Value Chain Collaboration application.

You acknowledge and confirm that Oracle grants you use of only the object code of the VAR Applications. Oracle will not deliver source code to the VAR Applications to you. Notwithstanding any other term or condition of the agreement and this ordering document, you shall not cause or permit alteration of any VAR Applications. For purposes of this section, "alteration" refers to all alterations, translations, upgrades, enhancements, customizations or modifications of all or any portion of the VAR Applications including all reconfigurations, reassembly or reverse assembly, re-engineering or reverse engineering and recompilations or reverse compilations of the VAR Applications or any derivatives of the VAR Applications. You acknowledge that it shall be a breach of the agreement to utilize the relationship, and/or confidential information of the VAR Applications for purposes of competitive discovery.

The VAR Applications contain trade secrets of Oracle and Oracle's licensors and Customer shall not attempt, cause, or permit the alteration, decompilation, reverse engineering, disassembly or other reduction of the VAR Applications to a human perceivable form. Oracle reserves the right to replace, with functional equivalent software, any of the VAR Applications in future releases of the applicable program.

Contents

Preface	vii
Audience	vii
Related Documents	vii
Customer Support	viii
Review Patch Documentation	viii
Oracle Retail Documentation on the Oracle Technology Network	viii
Conventions	viii
 1 Introduction	
About the Promotion Intelligence and Promotion Planning and Optimization Configuration Guide	1-1
What's In This Book	1-1
 2 User Management	
Introduction	2-1
About User Roles and User Actions	2-1
About User Management Roles	2-5
User Management Bulk Loader Utility	2-5
Users and Roles	2-6
The xml Files	2-6
Standard Load Prerequisites	2-6
Sample xml Files	2-7
User Sample xml File	2-7
Roles Sample xml Files	2-8
Role Assignment Sample xml File	2-10
 3 Configurable Data Attributes	
Introduction	3-1
Defining Configurable Data Attributes	3-1
 4 PPO UI Configuration	
Introduction	4-1
<configroot>	4-1
PPO Configuration File	4-1

promote.properties	4-2
Configuring Display Strings	4-12
Configuring Export	4-12
Pull Export Configuration.....	4-13
Integration with Promotion Intelligence	4-14
Auto Authentication Flag	4-14
Report Links Configuration.....	4-14
Display Strings.....	4-14
Debug Messages	4-15
 5 Template Configuration	
Introduction.....	5-1
Using the Promote Template	5-1
Loading the Template.....	5-2
 6 Database Configuration	
Summary Configurations	6-1
CLIENT_HIERARCHY_ACTIONS_TBL	6-3
IR Views	6-3
PR_DB_PARAMS	6-5
 7 Forecast Accuracy Indicator	
Introduction.....	7-1
Configuration	7-1
Metrics	7-2
 8 Reports	
Introduction.....	8-1
Available Reports	8-1
Changing MicroStrategy Summary Levels	8-3
Summary Configurations.....	8-3
MB Counts	8-3

Preface

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.

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 Promotion Intelligence and Promotion Planning and Optimization application.

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 Release Notes*
- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Installation Guide*
- *Oracle Retail Promotion Intelligence User Guide*
- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Operations Guide*
- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Data Model*
- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Implementation Guide*
- *Oracle Retail Promotion Planning and Optimization User Guide*
- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Licensing Information*

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

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

When contacting Customer Support, please provide the following:

- 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

Review Patch Documentation

If you are installing the application for the first time, you install either a base release (for example, 13.0) or a later patch release (for example, 13.1.1). If you are installing a software version other than the base release, be sure to read the documentation for each patch release (since the base release) before you begin installation. Patch documentation can contain critical information related to the base release and code changes that have been made since the base release.

Oracle Retail Documentation on the Oracle Technology Network

In addition to being packaged with each product release (on the base or patch level), all Oracle Retail documentation is available on the following Web site (with the exception of the Data Model which is only available with the release packaged code):

http://www.oracle.com/technology/documentation/oracle_retail.html

Documentation should be available on this Web site within a month after a product release. Note that documentation is always available with the packaged code on the release date.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	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.

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 *Promotion Intelligence and Promotion Planning and Optimization 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. For more information, see the *Promotion Intelligence and Promotion Planning and Optimization Operations Guide*.

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 – Database Configuration. Used to configure the database and inference rules.
- Chapter 7 – Forecast Accuracy Indicator. Used to compare current forecasts to historical ones.
- Chapter 8 – Reports. Used to configure reports that can be used to view analytical information.

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 2-5
- “Sample xml Files” on page 2-7

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.

Note that master data includes the hierarchy information (merchandise, location, and calendar), configuration information (data aggregation levels and other parameters), promotion attributes, store sets information, SKU lists, image information (images and associated mappings for items in the merchandise hierarchy), and dark periods information (time periods that must be excluded from baseline calculations)."

PI PPO 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_MANAGE_LOCATION – edit location information.
- PROMO_MANAGE_STORE – edit store information.
- 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 PromotionIntelligence reports.
- PROMO_ADMIN_DOC – only users assigned this action can log into the application when the server is in maintenance mode. Also provides access to the following commands: releaselocks, clearcache, refreshprops, refreshloggin, refreshbundle, refreshconfig, modestage, nodeprod, and modemaint.
- PROMO_APPROVE_OFFER – allows ad planners to approve or deny submitted offers.

PI PPO 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.
- PROMO_AGENT – configure users to execute forecast and preplanned import tasks.
- PROMO_VER_PLANNER – a version planner who executes version plans. Such a user is assigned responsibility at the Chain level.
- PROMO_VER_MANAGER – a version manager who manages version plans. Such a user is assigned responsibility at the Department level.
- PROMO_MERCH_WHATIF – a whatif manager who manages at the Department level.

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

Table 2–1 Actions Assigned to Roles

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_LOCATION
	PROMO_MANAGE_STORE
	PROMO_MANAGE_VEHICLE
	PROMO_EXPORT_PROMO
	PROMO_VIEW_REPORTS
	PROMO_APPROVE_OFFER
PROMO_BUSINESS_ADMIN	PROMO_CREATE_MD
	PROMO_EDIT_MD
	PROMO_VIEW_MD
	PROMO_ADMIN_DOC
PROMO_CATEGORY_MANAGER	PROMO_MANAGE_CATEGORY
	PROMO_MANAGE_MERCHANDISE
PROMO_EXEC	PROMO_VIEW_CE
	PROMO_VIEW_MD
	PROMO_VIEW_PROMO
	PROMO_MANAGE_CATEGORY
	PROMO_MANAGE_MERCHANDISE
	PROMO_MANAGE_VEHICLE
	PROMO_MANAGE_LOCATION
	PROMO_MANAGE_STORE
	PROMO_EXPORT_PROMO
	PROMO_VIEW_REPORTS

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

Role	Assigned Actions
PROMO_MERCH_PLANNER	PROMO_VIEW_CE
	PROMO_VIEW_MD
	PROMO_VIEW_PROMO
	PROMO_EDIT_PROMO
	PROMO_CREATE_PROMO
	PROMO_EXPORT_PROMO
	PROMO_VIEW_REPORTS
PROMO_AGENT	PROMO_ADMIN_DOC
	PROMO_VIEW_PROMO
	PROMO_CREATE_PROMO
	PROMO_EDIT_PROMO
	PROMO_VIEW_CE
	PROMO_CREATE_CE
	PROMO_EDIT_CE
	PROMO_VIEW_MD
	PROMO_CREATE_MD
	PROMO_EDIT_MD
	PROMO_MANAGE_MERCHANDISE
	PROMO_MANAGE_CATEGORY
	PROMO_MANAGE_VEHICLE
	PROMO_MANAGE_LOCATION
	PROMO_MANAGE_STORE
	PROMO_EXPORT_PROMO
	PROMO_VIEW_REPORTS
PROMO_VER_PLANNER	PROMO_VIEW_CE
	PROMO_VIEW_MD
	PROMO_VIEW_PROMO
	PROMO_EDIT_PROMO
	PROMO_CREATE_PROMO
	PROMO_EXPORT_PROMO
	PROMO_VIEW_REPORTS
PROMO_VER_MANAGER	PROMO_MANAGE_VEHICLE
	PROMO_MANAGE_LOCATION
	PROMO_MANAGE_STORE

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

Role	Assigned Actions
PROMO_MERCH_WHATIF	PROMO_VIEW_CE
	PROMO_VIEW_MD
	PROMO_VIEW_PROMO
	PROMO_EDIT_PROMO
	PROMO_EXPORT_PROMO
	PROMO_VIEW_REPORTS

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 that 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).

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="ann2" password="ann2" last-name="Smith2" first-name="Ann"
middle-initial="T" employeeID="21665" 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="nick2" password="nick2" last-name="Bosworth2" first-name="Nick"
middle-initial="P" employeeID="21556" 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" />
  <!-- Automated tasks -->
  <user username="sysid0" password="sysid0" last-name="Runner"
first-name="Background" middle-initial="0" employeeID="0" title="System id"/>
  <user username="sysid1" password="sysid1" last-name="Runner"
first-name="Background" middle-initial="1" employeeID="1" title="System id"/>
  <user username="sysid2" password="sysid2" last-name="Runner"
first-name="Background" middle-initial="2" employeeID="2" title="System id"/>
```

```

    <user username="sysid3" password="sysid3" last-name="Runner"
first-name="Background" middle-initial="3" employeeID="3" title="System id"/>
    <user username="sysid4" password="sysid4" last-name="Runner"
first-name="Background" middle-initial="4" employeeID="4" title="System id"/>
    <user username="sysid5" password="sysid5" last-name="Runner"
first-name="Background" middle-initial="5" employeeID="5" title="System id"/>
    <user username="sysid6" password="sysid6" last-name="Runner"
first-name="Background" middle-initial="6" employeeID="6" title="System id"/>
    <user username="sysid7" password="sysid7" last-name="Runner"
first-name="Background" middle-initial="7" employeeID="7" title="System id"/>
    <user username="sysid8" password="sysid8" last-name="Runner"
first-name="Background" middle-initial="8" employeeID="8" title="System id"/>
    <user username="sysid9" password="sysid9" last-name="Runner"
first-name="Background" middle-initial="9" employeeID="9" title="System id"/>
  </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_VER_PLANNER">
  <action key="PROMO_VIEW_CE" />
  <action key="PROMO_VIEW_MD" />
  <action key="PROMO_VIEW_PROMO" />
  <action key="PROMO_EDIT_PROMO" />
  <action key="PROMO_CREATE_PROMO" />
  <action key="PROMO_EXPORT_PROMO" />
  <action key="PROMO_VIEW_REPORTS" />
</role>
- <role key="PROMO_VER_MANAGER">

```

```

        <action key="PROMO_MANAGE_VEHICLE" />
    </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_MERCH_WHATIF">
    <action key="PROMO_VIEW_CE" />
    <action key="PROMO_VIEW_MD" />
    <action key="PROMO_VIEW_PROMO" />
    <action key="PROMO_EDIT_PROMO" />
    <action key="PROMO_EXPORT_PROMO" />
    <action key="PROMO_VIEW_REPORTS" />
</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 key="PROMO_AGENT">
    <action key="PROMO_ADMIN_DOC" />
    <action key="PROMO_VIEW_PROMO" />
    <action key="PROMO_CREATE_PROMO" />
    <action key="PROMO_EDIT_PROMO" />
    <action key="PROMO_VIEW_CE" />
    <action key="PROMO_CREATE_CE" />
    <action key="PROMO_EDIT_CE" />
    <action key="PROMO_VIEW_MD" />
    <action key="PROMO_CREATE_MD" />
    <action key="PROMO_EDIT_MD" />
    <action key="PROMO_MANAGE_MERCHANDISE" />
    <action key="PROMO_MANAGE_CATEGORY" />
    <action key="PROMO_MANAGE_VEHICLE" />
    <action key="PROMO_EXPORT_PROMO" />
    <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="ann2">
  <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="nick2">
  <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="nick2">
    - <!-- 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_MERCH_WHATIF">
  - <user-assignment username="whatif">
    <node location="" merchandise="" />
  </user-assignment>
</role>
- <role key="PROMO_EXEC">
  - <user-assignment username="stevec">
    <node location="" merchandise="" />
  </user-assignment>

```

```
        </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 key="PROMO_AGENT">
    - <user-assignment username="sysid0">
        <node location="" merchandise="" />
    </user-assignment>
    - <user-assignment username="sysid1">
        <node location="" merchandise="" />
    </user-assignment>
    - <user-assignment username="sysid2">
        <node location="" merchandise="" />
    </user-assignment>
    - <user-assignment username="sysid3">
        <node location="" merchandise="" />
    </user-assignment>
    - <user-assignment username="sysid4">
        <node location="" merchandise="" />
    </user-assignment>
    - <user-assignment username="sysid5">
        <node location="" merchandise="" />
    </user-assignment>
    - <user-assignment username="sysid6">
        <node location="" merchandise="" />
    </user-assignment>
    - <user-assignment username="sysid7">
        <node location="" merchandise="" />
    </user-assignment>
    - <user-assignment username="sysid8">
        <node location="" merchandise="" />
    </user-assignment>
    - <user-assignment username="sysid9">
        <node location="" merchandise="" />
    </user-assignment>
</role>
- <role key="UM_READ_ONLY_ADMIN">
    - <user-assignment username="bernarda">
        <node location="" merchandise="" />
    </user-assignment>
    - <user-assignment username="kens">
        <node location="" merchandise="" />
    </user-assignment>
    - <user-assignment username="geofr">
        <node location="" merchandise="" />
    </user-assignment>
    - <user-assignment username="anns">
        <node location="" merchandise="" />
    </user-assignment>
    - <user-assignment username="ann2">
        <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="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="nick2">
    <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="stephaniet">
    <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="stevec">
    <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="rodneyt">
    <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.

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 4-12
- “Configuring Export” on page 4-12
- “Integration with Promotion Intelligence” on page 4-14
- “Debug Messages” on page 4-15

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 10.1.3.1 and OAS 10.1.3.3 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 PI-PPO 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

Note that all internationalization configuration settings are contained in `promote.properties` and all translated text for display in the UI are contained in `promoteResources.properties`.

Here are details and the default settings for the `promote.properties` file:

The system configuration properties are used to define necessary system configuration parameters.

Table 4–1 System Configuration Properties

Property	Description
<code>promote.config.file=promote-config.xml</code>	Identifies the location of file used for integration with Promotion Intelligence (PI).
<code>promote.saxparser.classname=org.apache.xerces.parsers.SAXParser</code>	Name of xml parser.
<code>promote.server.mode=prod</code>	<p>The mode values are:</p> <p><code>dev</code> = an optional mode used only by developers for debugging. It enables HTTP get request, supports addition debug URL commands, and disables master data caching.</p> <p><code>sqa</code> = reserved for future use by QA.</p> <p><code>impl</code> = reserved for future use by implementation team for debugging.</p> <p><code>stage</code> = reserved for future use for staging system features.</p> <p><code>prod</code> = the default. It enables the server to maintain a cache of master data (such as merchandise/location hierarchy data).</p> <p><code>maint</code> = allows a production to temporarily disable user logins but allow system users to perform various maintenance activities.</p>

The export properties are used for mapping between the UI and the export file. These entries can be added to or changed. Export keys used in the UI take the form of `promte.export.template + template name + output file extension + short name of the exported domain class`.

Table 4–2 Export Properties

Property	Description
<code>promote.export.path=%{installdir}%/config/promote</code>	Identifies the directory for the templates.
The export keys used in the UI take the form <code>promote.export.template + output file extension + short name of the exported domain class</code> , to lower class.	
<code>promote.export.template.AllOffersForecast.csv.promotion=AllOffersForecastExportTemplate.xslt</code>	Mapping for AllOffersForecast (csv).
<code>promote.export.template.AllOffers.csv.promotion=AllOffersDetailExportTemplate.xslt</code>	Mapping for AllOffers (csv).

Table 4–2 (Cont.) Export Properties

Property	Description
promote.export.template.Layout.xml.promotion=Layout XMLExportTemplate.xslt	Mapping for Layout (xml).
promote.export.template.Layout.html.promotion=Layout ExportTemplate.xslt	Mapping for Layout (html).
promote.export.template.xml.promotion=XmlExport Template.xslt	Mapping for xml.
promote.export.template.AllSKU.csv.promotionoffer=All SKUExportTemplate.xslt	Mapping for AllSKU (csv).
promote.export.template.Versions.csv.promotionoffer=Ver sionsExportTemplste.xslt	Mapping for Versions (csv).
promote.export.template.txt.promotionoffer=TxtExport Template.xslt	Mapping for Offer (txt).
promote.export.template.xml.promotionoffer=XmlOffer ExportTemplate.xslt	Mapping for Offer (xml).
The xml export keys take the form promote.export.template.xml + short name of exported domain class, to lower case.	
promote.export.template.xml.promotionofferposition summary=XmlCmdlineExportTemplate.xslt	Mapping for promotionofferposition (xml).
promote.export.template.xml.promotionofferfullsummary =XmlCmdlineExportTemplate.xslt	Mapping for promotionofferfullsummary (xml).
The txt export keys take the form promote.export.template.txt + short name of the exported domain class, to lower case.	
promote.export.template.txt.promotionofferpositionsumm ary=PromoOfferPosSumTxtTmpl.xslt	Mapping for promotionofferpositionsummary (txt).
promote.export.template.txt.promotionofferfullsummary= PromoOfferSumTxtTmpl.xslt	Mapping for promotionofferfullsummary (txt).
The filter keys used in the UI take the form promote.filter.columns + short name of the exported domain class, to lower case. The values are comma-separated lists of column names.	
promote.filter.columns.promotionoffercategoryattribute= none,vendorID, retail, cost, purchaseType, group	Mapping for promotionoffercategoryattribute (csv).
promote.filter.columns.promotionofferriterionattribute translator=none,vendorID,retail, cost, purchaseType, group	Mapping for promotionofferriterionattribute (csv).
The xslt templates for computing promo properties. The keys used in the UI include promote + property +template + <short name of the domain class>	
promo.eventexternalname.template.promotion=Default PromoEventExtName.xslt	Mapping for promotion (xslt).
promo.eventexternalname.template.promotionoffer= DefaultPromoOfferEventExtName.xslt	Mapping for promotionoffer (xslt).

The agent properties are used to configure the scheduling and performance of agents. The agents include ones for the pre-planned promotion loader, forecasts, weekly forecasts, email properties, audit trail properties, and formatting for dates and numbers. Ensure that the schedules for the forecast and the weekly forecast do not clash. The agent configuration consists of name of task class + command to servlet. The same tasks can be used by multiple agents.

Table 4–3 Agent Properties

Property	Description
promote.agent.delay=2	Delay schedule.
promote.agent.url=http://%{suite.host}%:%{suite.port}%/ promote/export.do	Agent url.
promote.agent.run.policy=fixed_delay	Policy for submitting agent requests. Values allowed: fixed_rate and fixed_delay (the default). This is a global setting for all agents and determines the type of delay between agent requests. See also, for example, promote.agent.preplannedpromo.delay.
Each agent requires a user password and the user must have PromoAgent permission. There should be as many as the maximum number of threads for all the agents that have a common schedule. Must be a unique set per node in a cluster. For example, for one thread for preplannedpromo + 2 threads per forecast, you will need at least three users and corresponding passwords. These passwords must be hashed using suite_lib.jar.	
promote.agent.user.1=sysid0	Agent 1 id.
promote.agent.password.1=	Agent 1 password.
promote.agent.user.2=sysid1	Agent 2 id.
promote.agent.password.2=	Agent 2 password.
promote.agent.user.3=sysid2	Agent 3 id.
promote.agent.password.3=	Agent 3 password.
promote.agent.user.4=sysid3	Agent 4 id.
promote.agent.password.4=	Agent 4 password.
promote.agent.user.5=sysid4	Agent 5 id.
promote.agent.password.5=	Agent 5 password.
promote.agent.user.6=sysid5	Agent 6 id.
promote.agent.password.6=	Agent 6 password.
promote.agent.user.7=sysid6	Agent 7 id.
promote.agent.password.7=	Agent 7 password.
promote.agent.user.8=sysid7	Agent 8 id.
promote.agent.password.8=	Agent 8 password.
promote.agent.user.9=sysid8	Agent 9 id.
promote.agent.password.9=	Agent 9 password.
promote.agent.user.10=sysid9	Agent 10 id.
promote.agent.password.10=	Agent 10 password.
promote.translate.storeset=Default	Translation configuration for storeset.
promote.translate.storesubset=Central	Translation configuration for store subset.
promote.translate.forecast=false	Translation configuration for forecast.
promote.agent.preplannedpromo.command=runPre plannedPromoLoad	Calls the pre-planned promotion loader.
promote.agent.preplannedpromo.enabled=false	Defines whether or not the x is enabled. True = enabled; False = not enabled. The default is false.

Table 4–3 (Cont.) Agent Properties

Property	Description
<code>promote.agent.preplannedpromo.runonce=false</code>	Defines how often to run the agent for a given period. False (default) = continually. True = once per period.
<code>promote.agent.preplannedpromo.runweeks=1-52</code>	The weeks assigned for the agent to run. Use either a comma-separated list of numbers (1 through 52 in ascending order) for individual weeks or two numbers separated by a hyphen for a range of weeks. (For example, 1,5,9,13... would define a one-week-a- month schedule.) The default is all weeks. The schedules for different instances of the same task should not overlap.
<code>promote.agent.preplannedpromo.rundays=Mon,Tue,Wed,Thu,Fri,Sat,Sun</code>	The day or days of the week assigned for the agent to run. Use a comma-separated list of days of the week (either Mon/Tue/Wed/Thu/Fri/Sat/Sun or the full name of the day). Cannot be localized. The default is all days of the week.
<code>promote.agent.preplannedpromo.start=19:30</code>	The start time for the agent schedule in a 24-hour format of hh:mm. Note that an end date is also required, or the agent will run continuously.
<code>promote.agent.preplannedpromo.end=23:30</code>	The end time for the agent schedule in a 24-hour format of hh:mm.
<code>promote.agent.preplannedpromo.delay= 60</code>	Defines the length of the delay in seconds. See also <code>promote.agent.run.policy</code> .
<code>promote.agent.preplannedpromote.num_threads = 1</code>	Number of threads for preplanned promo.
<code>promote.agent.preplannedpromo.max_num_threads=1</code>	Recommended value is 1.
<code>promote.agent.promoforecast.command=runPromotionForecastor</code>	Calls the loader.
<code>promote.agent.promoforecast.enabled=false</code>	Defines whether or not the agent is enabled. True = enabled; False = not enabled. The default is false.
<code>promote.agent.promoforecast.runonce=false</code>	Defines how often to run the agent for a given period. False (default) = continually. True = once per period.
<code>promote.agent.promoforecast=runweeks=1-52</code>	The weeks assigned for the agent to run. Use either a comma-separated list of numbers (1 through 52 in ascending order) for individual weeks or two numbers separated by a hyphen for a range of weeks. (For example, 1,5,9,13... would define a one-week-a- month schedule.) The default is all weeks. The schedules for different instances of the same task should not overlap.
<code>promo.agent.promoforecast.rundays=Mon,Tue,Wed,Thu,Fri,Sat,Sun</code>	The day or days of the week assigned for the agent to run. Use a comma-separated list of days of the week (either Mon/Tue/Wed/Thu/Fri/Sat/Sun or the full name of the day). Cannot be localized. The default is all days of the week.
<code>promote.agent.promoforecast.start=23:30</code>	The start time for the agent schedule in a 24-hour format of hh:mm. Note that an end date is also required, or the agent will run continuously.
<code>promo.agent.promoforecast.end=6:30</code>	The end time for the agent schedule in a 24-hour format of hh:mm.

Table 4–3 (Cont.) Agent Properties

Property	Description
<code>promo.agent.promoforecast.delay=60</code>	Defines the length of the delay in seconds. See also <code>promote.agent.run.policy</code> .
<code>promote.agent.promoforecast.num_threads=1</code>	Number of threads for promo forecast.
<code>promote.agent.promoforecast.max_num_threads=1</code>	Recommended value is 1.
<code>promote.agent.promoforecast.refresh=true</code>	Indicates whether refresh occurs.
<code>promote.agent.promoforecast.forecast=true</code>	Indicates whether forecast occurs.
<code>promote.agent.forecast.command=runForecast</code>	Forecast task
<code>promote.agent.forecast.enabled=false</code>	Defines whether or not the agent is enabled. True = enabled; False = not enabled. The default is false.
<code>promote.agent.forecast.runonce=false</code>	Defines how often to run the agent for a given period. False (default) = continually. True = once per period.
<code>promote.agent.forecast.runweeks=1-26,27-52</code>	The weeks assigned for the agent to run. Use either a comma-separated list of numbers (1 through 52) for individual weeks or two numbers separated by a hyphen for a range of weeks. (For example, 1,5,9,13... would define a one-week-a-month schedule.) The default is all weeks.
<code>promote.agent.forecast.rundays=Mon,Tue,Wed,Thu,Fri</code>	The day or days of the week assigned for the agent to run. Use a comma-separated list of days of the week (either Mon/Tue/Wed/Thu/Fri/Sat/Sun or the full name of the day). Cannot be localized. The default is all days of the week.
<code>promote.agent.forecast.start=23:30</code>	The start time for the agent schedule in a 24-hour format of hh:mm. Note that an end date is also required, or the agent will run continuously.
<code>promote.agent.forecast.end=6:30</code>	The end time for the agent schedule in a 24-hour format of hh:mm.
<code>promote.agent.forecast.delay=60</code>	Defines the length of the delay in seconds. See <code>promote.agent.run.policy</code> .
<code>promote.agent.forecast.num_threads=1</code>	Number of threads for forecast.
<code>promote.agent.forecast.max_num_threads=1</code>	Recommended value is 1.
<code>promote.agent.forecast.fromdate=01/01/2007 00:00:00</code>	Agents search for promotions to forecast that begin on a date that is greater than this date. Format is based on <code>promote.datetime.us.timestamp</code> .
<code>promote.agent.forecast.todate=01/01/2007 00:00:00</code>	Agents search for promotions to forecast that end on a date that is less than this date. The <code>todate</code> must be greater than the <code>fromdate</code> . Format is based on <code>promote.datetime.us.timestamp</code> . If omitted, defaults to <code>sysdate</code> .
<code>promote.agent.forecast.uptodate=03/31/2007 00:00:00</code>	The <code>uptodate</code> must be greater than the <code>todate</code> . If this value is omitted, all future promotions will be forecast. Format is based on <code>promote.datetime.us.timestamp</code> .

Table 4–3 (Cont.) Agent Properties

Property	Description
<code>promote.agent.forecast.type=</code>	Indicates which type. 0 =promotion created in UI. 4 = historical promotion. 5 = pre-planned promotion received from client. If no value - all types will be included.
<code>promote.agent.forecast.phase=</code>	Indicates which workflow. If no value - all phases will be included.
<code>promote.agent.forecast.status=</code>	Values include forecast (to do), current (in process), outofdate (re-forecast), failed, and expired. An empty or non-force value produces forecast for only Out-of-date and No forecast.
<code>promote.agent.forecast.groupby=false</code>	Flag that indicates whether to not to do multiple promotions. The default - true - groups promotions.
<code>promote.agent.forecast.forecast=trur</code>	False = in order that refresh can be done separately, do not forecast. True (default) = forecast.
<code>promote.agent.forecast.force=false</code>	If true, forecast even if the offer status is CURRENT/PARTIAL after the offer is opened and the status is recomputed. If false (the default), do not forecast CURRENT/PARTIAL offers (as of the last db status).
<code>promote.agent.forecast.refresh=false</code>	Flag that indicates whether SKUS are refreshed before the forecast. If set to true, the SKUs are refreshed, which adds time to the forecast.
<code>promote.agent.forecastweekly.command=runForecast</code>	Weekly forecast task
<code>promote.agent.forecastweekly.enabled=false</code>	Defines whether or not the agent is enabled. True = enabled; False = not enabled. The default is false.
<code>promote.agent.forcastweekly.runonce=false</code>	Defines how often to run the agent for a given period. False (default) = continually. True = once per period.
<code>promote.agent.forecastweekly.runweeks=1-26,27-52</code>	The weeks assigned for the agent to run. Use either a comma-separated list of numbers (1 through 52) for individual weeks or two numbers separated by a hyphen for a range of weeks. (For example, 1,5,9,13... would define a one-week-a-month schedule.) The default is all weeks.
<code>promote.agent.forecastweekly.rundays=Sun</code>	The day or days of the week assigned for the agent to run. Use a comma-separated list of days of the week (either Mon/Tue/Wed/Thu/Fri/Sat/Sun or the full name of the day). Cannot be localized. The default is all days of the week.
<code>promote.agent.forecastweekly.start=23:35</code>	The start time for the agent schedule in a 24-hour format of hh:mm. Note that an end date is also required, or the agent will run continuously.
<code>promote.agent.forecastweekly.end=06:30</code>	The end time for the agent schedule in a 24-hour format of hh:mm.
<code>promote.agent.forecastweekly.delay=60</code>	Defines the length of the delay in seconds. See <code>promote.agent.run.policy</code> .
<code>promote.agent.forecastweekly.num_threads=1</code>	Number of threads for weekly forecast.

Table 4–3 (Cont.) Agent Properties

Property	Description
promote.agent.forecastweekly.max_num_threads=1	Recommended value is 1.
promote.agent.forecastweekly.fromdate=01/01/2007 00:00:00	Agents search for promotions to forecast that begin on a date that is greater than this date. Format is based on promote.datetime.us.timestamp.
promote.agent.forecastweekly.todate=01/01/2007 00:00:00	Agents search for promotions to forecast that end on a date that is less than this date. The todate must be greater than the fromdate. Format is based on promote.datetime.us.timestamp. If omitted, defaults to sysdate.
promote.agent.forecastweekly.uptodate=03/31/2007 00:00:00	The uptodate must be greater than the todate. If this value is omitted, all future promotions will be forecast. Format is based on promote.datetime.us.timestamp.
promote.agent.forecastweekly.type=	Indicates which type. 0 = promotion created in UI. 4 = historical promotion. 5 = pre-planned promotion received from client. If no value - all types will be included.
promote.agent.forecastweekly.phase=	Indicates which workflow. If no value - all phases will be included.
promote.agent.forecastweekly.status	Values include forecast (to do), current (in process), outofdate (re-forecast), failed, and expired. An empty or non-force value produces forecast for only Out-of-date and No forecast.
promote.agent.forecastweekly.groupby=false	Flag that indicates whether to not to do multiple promotions. The default - true - groups promotions.
promote.agent.forecastweekly.forecast=true	Flag that indicates whether or not to forecast so that a refresh can occur. If value is true (default) the forecast is done.
promote.agent.forecastweekly.force=false	If true, forecast even if the offer status is CURRENT/PARTIAL after the offer is opened and the status is recomputed. If false (the default), do not forecast CURRENT/PARTIAL offers (as of the last db status).
promote.agent.forecastweekly.refresh=false	Flag that indicates whether SKUs are refreshed before the forecast. If set to true, the SKUs are refreshed, which adds time to the forecast.

The email properties are used to configure system email.

Table 4–4 Email Properties

Property	Description
promote.mail.smtp.host	The IP address of the SMTP host.
promote.mail.smtp.port	The number of the SMTP port.
promote.mail.username	The username to use when connecting to the email server.
promote.mail.password	The password to use when connecting to the email server.

The audit trail properties are used to activate and restrict auditing.

Table 4–5 Audit Trail Properties

Property	Description
promote.audit.promotion=false	Flag to activate auditing of promotion. Default is true.
promote.audit.promotionoffer=false	Flag to activate auditing of promotion offer. Default is true.
promote.audit.promotionoffer.userdefinedfields=false	Flag to activate auditing of user defined fields for promotion offer. Default is false.
promote.audit.promotionvehicle=false	Flag to activate auditing of the promotion vehicle. Default is false.
promote.audit.promotionvehiclepage=false	Flag to activate auditing of promotion vehicle page. Default is false.
promote.audit.forecast=false	Flag to activate auditing of forecast. Default is false.
promote.audit.forecast_value=units	Possible values of forecast are units, sales, and margin.
promote.audit.same.user=false	Audits all users' changes except for changes made by the same user to the same object in succession.
promote.audit.system.user=false	Excludes changes triggered by system and batch processes users.

The miscellaneous properties are used to identify system URLs and engine passwords.

Table 4–6 Miscellaneous Properties

Property	Description
promote.engine.url=rmi://%{KDE_RMI_SERVER_ADDRESS}%:%{KDE_RMI_SERVER_PORT}%/ItemPredictorFactory	Engine property.
promote.engine.user=root	Engine root password.
promote.engine.password=	This password must be hashed using suite_lib.jar. java com.profitlogic.common.security.util.PasswordUtility clearPassWord
promote.imageserver.baseurl=http://%{suite.host}%:%{suite.port}%/iserver/images/mh	Image server connection information.
promote.help.url=http://%{suite.host}%:%{suite.port}%/ppohelp/help	Help url

The locale properties specify country and language. For each country and language specified, the corresponding translated promoteResources.properties for that language are used for display in the UI.

Table 4–7 Locale Properties

Property	Description
promote.locale.country=US	Specifies the locale being used.
promote.locale.language=en	Specifies the language for the locale.

The date properties define the formatting for dates.

Table 4–8 Date Properties

Property	Description
<p>promote.dateformat.lenient=false</p> <p>promote.datetime.dateformatpolicy=configured</p>	<p>Values are:</p> <p>metadata = the format coded by the server developer for the class (currently there are none), reserved for future use.</p> <p>bean = the format coded by the server developer for the instance (currently there are none), reserved for future use.</p> <p>request = the default format of the java virtual machine for the locale specified in the browser.</p> <p>system = the default format of the java virtual machine for the locale specified in the server.</p> <p>configured (the default) = uses the format configured in promote.properties.</p>
<p>promote.datetime.???date</p> <p>promote.datetime.???time</p> <p>promote.datetime.???timestamp</p>	Specified value for formatting is substituted for date, time, and timestamp keys.
promote.datetime.sysdateformat=us	Defines the country for the formatting.
promote.datetime.eu.date=dd/MM/yyyy	Defines the date format for the eu country.
promote.datetime.us.date=MM/dd/yyyy	Defines the date format for the us.
promote.datetime.iso.date=yyyy-MM-dd	Defines the iso date format.
promote.datetime.us.time=HH:mm:ss	Defines the time format for the us.
promote.datetime.iso.time=HH:mm:ss	Defines the iso time format.
promote.datetime.eu.time=HH:mm:ss	Defines the time format for the eu country.
<p>promote.datetime.us.timestamp=MM/dd/yyyy</p> <p>HH:mm:ss</p>	If the date and time formats are known, but the timestamp is missing, it will be created by concatenating (separated by a space) the date and time formats.
promote.datetime.iso.timestamp=yyyy-MM-dd HH:mm:ss	If the date and time formats are known, but the timestamp is missing, it will be created by concatenating (separated by a space) the date and time formats.
<p>promote.datetime.eu.timestamp=dd/MM/yyyy</p> <p>HH:mm:ss</p>	If the date and time formats are known, but the timestamp is missing, it will be created by concatenating (separated by a space) the date and time formats.
label.header.format.date=M/d/yyyy	Defines the calendar header.
label.header.format.month=MMMM yyyy	Defines the calendar header.
label.header.format=yyyy	Defines the calendar header.

The number properties must be valid Java number formats.

Table 4–9 Number Properties

Property	Description
promote.format.int=#,##0	Integer format.
promote.format.decimal=#,##0,###	Decimal format.
promote.format.percent=#,##0,##%	Percent format.
promote.format.currency=\u00A4#,##0.00	\u00A4 is the unicode general currency symbol, which java localizes to the currency symbol.
promote.metric.int=#,##0.0	Metric integer format
promote.metric.decimal=#,##0,###	Metric decimal format.
promote.metric.percent=#,##0,##%	Metric percent format.
promote.metric.currency=\u00A4#,##0	\u00A4 is the unicode general currency symbol, which java localizes to the currency symbol.

The value index metric properties define the metric properties.

Table 4–10 Value Index Metric Properties

Property	Description
promote.sales.ratio=0.4d	Sales ratio.
promote.margin.ratio=0.4d	Margin ratio.
promote.units.ratio=0.2d	Units ratio.
promote.affinity.sales.ratio=0.4d	Affinity sales ratio.
promote.affinity.margin.ratio=0.4d	Affinity margin ratio.
promote.affinity.units.ratio=0.2d	Affinity units ratio.
promote.valueidx.offset=100	Value idx offset.

The page properties define page size properties.

Table 4–11 Page Properties

Property	Description
promote.ratio.width=0.20d	Value must be valid Java double between 0 and 1.
promote.ratio.height=0.20d	Value must be valid Java double between 0 and 1.

The reports properties define MicroStrategy access.

Table 4–12 Reports Properties

Property	Description
promote.report.auto_auth=false	Separate login for access to MicroStrategy.

The sessions properties define the duration of the keepalive.

Table 4–13 Sessions Properties

Property	Description
promote.keepalive.duration=60	Value in minutes for duration of keepalive.

Configuring Display Strings

Note that all internationalization configuration settings are contained in `promote.properties` and all translated text for display in the UI are contained in `promoteResources.properties`.

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

The `promoteResources.properties` file is organized into functional sections, most of which define information presented to the user that should not be modified. Each section is preceded by a comment that defines either the purpose of the section (such as Error Messages) or the screen in the UI that the section details (such as Promotion Template).

The `promoteResources.properties` file also provides limited functionality to configure the columns and rows that appear in certain screens. Consult this file for more information about configuring columns and rows.

You can configure the following:

- Which columns or rows are displayed.
- The sort order, descending (-) or ascending (+), of specified columns. For example, `sort.Offers=+position` sorts the grid in ascending order based on the position column.
- Which metrics are displayed. You can select from two lists of available metrics: `BASE_METRIC_COLUMNS`, which is a list of common metrics, and `METRIC_COLUMNS`, which is a list of additional available metrics.
- Column locking (defined using a pipe symbol).
- User defined fields can be added to the Offer Definition and Notes grids. Different types of fields, such as text or date) can be selected and client-defined labels can be specified for the fields.
- The default view configuration for What If. This property is `offer.whatif.view=1`. The two available options are List View = 0 and Vertical view = 1.
- The default values for the single page and all pages views in the Vehicle Design tab. The possible values for the property `promotion.vehicleDesign.allPagesView` are List View = 1, Thumbnail view = 2, and Chart view = 3. The possible values of the property `promotion.vehicleDesign.singlePageView` are List View = 1 and Layout view = 2.

Configuring Export

The following stylesheets are shipped with PI-PPO 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.

- PromoOfferPosSumTxtTpl.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 4–14 Export Configuration Values

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

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

- promote.export.txt.template.promotion
- promote.export.txt.template.promotionofferitemssummary
- promote.export.txt.template.promotionofferpositionssummary

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 Promotion Intelligence

The following configuration points must be set so that Promotion Intelligence reports can be open from PI-PPO 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 Promotion Planning and Promotion 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

Database Configuration

This chapter contains the following:

- “Summary Configurations” on page 6-1
- “CLIENT_HIERARCHY_ACTIONS_TBL” on page 6-3
- “IR Views” on page 6-3
- “PR_DB_PARAMS” on page 6-5

Summary Configurations

Several configurations must be included in ASH_CP_TBL. These configurations specify the level of aggregation in the merchandise hierarchy that the application and the RDM require.

Table 6–1 Summary Configurations

INTERSECT_NAME	MERCHANDISE_LEVEL	LOCATION_LEVEL	Description
PROMOTE_TAE	SKU	DISTRICT	Identifies the Level at which TAE output is produced.
PROMOTE_DETAIL	SKU	STORE	Identifies the Level at which POS data is expected. It is assumed to be the STORE level.
PROMOTE_SUMMARY_1	CLASS	STORE	Identifies the Merchandise and Location levels of the first level of the summary.
PROMOTE_SUMMARY_2	DEPARTMENT	STORE	Identifies the Merchandise and Location levels of the second level of the summary.
PROMOTE_SUMMARY_3	DIVISION	STORE	Identifies the Merchandise and Location levels of the third level of the summary.
PROMOTE_AFFINITY_LEVEL	CLASS	CHAIN	The level of calculation of the APE summary.
PROMOTE_APC	CLASS	REGION	The level of calculation of the APC summary.
PROMOTE_ANALYSIS	SKU	COUNTRY	

Table 6–1 (Cont.) Summary Configurations

INTERSECT_NAME	MERCHANDISE_LEVEL	LOCATION_LEVEL	Description
PROMOTE_SCORECARD_SUMMARY_1	SUBCLASS	STORE	Specifies the level of aggregation from the MH that is used to generate the totals for the scorecard by the MH.
PROMOTE_SCORECARD_SUMMARY_2	CLASS	STORE	Specifies the level of aggregation from the MH that is used to generate the totals for the scorecard by the MH.
PROMOTE_MIN_LCD	DEPT	CHAIN	Defines the lowest level of the hierarchy that is available for display in the UI.
PROMOTE_PROMO_OFFER_MH_SUMMARY	DEPT	STORE	Specifies the level of aggregation from the MH that is used to generate the totals for the Scorecard by Offer/Dept report.
PROMOTE_SCORECARD_MERCH_OFF_AMT_SUMM_3	DEPT	STORE	Specifies the level of aggregation from the MH that is used to generate the totals for the Scorecard by MH and Offer Amt.
PROMOTE_SCORECARD_MERCH_OFF_AMT_SUMM_2	CLASS	STORE	Specifies the level of aggregation from the MH that is used to generate the totals for the Scorecard by MH and Offer Amt.
PROMOTE_SCORECARD_MERCH_OFF_AMT_SUMM_1	SUBCLASS	STORE	Specifies the level of aggregation from the MH that is used to generate the totals for the Scorecard by MH and Offer Amt.
PROMOTE_TAE_NONAD_PART_LEVEL_1	SUBCLASS	CHAIN	Specifies the level of aggregation from the MH that is used for the TAE non-ad metrics. It is also used by the TAE process to identify the starting MH level that should be used to generate its output.
PROMOTE_TAE_NONAD_PART_LEVEL_2	CLASS	CHAIN	Specifies the level of aggregation from the MH that is used for the TAE non-ad metrics. It is also used by the TAE process to identify the starting MH level that should be used to generate its output.
PROMOTE_TAE_NONAD_PART_LEVEL_3	DEPT	CHAIN	Specifies the level of aggregation from the MH that is used for the TAE non-ad metrics. It is also used by the TAE process to identify the starting MH level that should be used to generate its output.
PROMOTE_MIN_BL_AGGR_LEVEL	SUBCLASS	CHAIN	Specifies the lowest level that aggregated baseline data should be calculated for.
PROMOTE_MAX_BL_AGGR_LEVEL	CHAIN	CHAIN	Specifies the highest level that aggregated baseline data should be calculated for.

The following non-PI and PPO entries are required for compatibility reasons:

Table 6–2 Intersect Names

INTERSECT_NAME	MERCHANDISE_LEVEL	LOCATION_LEVEL
OPTIMIZATION	SKU	STORE
WORKSHEET	DEPARTMENT	CHAIN
SALES	SKU	CHAIN
CLUSTER	CHAIN	CHAIN
DEFAULTLEVEL	CHAIN	CHAIN

The Cust_Parameter_Levels PL/SQL package provides an interface to the following values. For examples, see “IR Views” on page 6-3.

- getMerchandiseLevelDesc(in_intersect_name)
- getMerchandiseLevelSqc(in_intersect_name)
- getLocationLevelDesc(in_intersect_name)
- getLocationLevelSqc(in_intersect_name)

CLIENT_HIERARCHY_ACTIONS_TBL

The Client_Hierarchy_Actions_Tbl must be modified according to the levels of inventory aggregation required.

Table 6–3 Actions for Hierarchy Actions Table

Action Type	Action Name	Action Level Name	Action Level	Hierarchy Type	Description
SUITE	STORE	STORE	0	LOCATION	Identifies the level in the location hierarchy corresponding to physical STORE
PROMOTE	HIST_AGG_MERCH_LEVEL_0	HIST_AGG_LEVEL_0	0	MERCHANDISE	Identifies the Lowest Merchandise Level at which History should be persisted
PROMOTE	HIST_AGG_LOC_LEVEL_0	HIST_AGG_LEVEL_0	0	LOCATION	Identifies the Lowest Location Level at which History should be persisted

IR Views

The following views must be modified according to the level of summary needed. The view creation scripts are located in <installdir>/modules/Database/ROSEWOODSchema/install/oracle/ROSEWOODSchema/dictionary/views_ir. Example (found in the supplied sample KSInc dataset) are located in <installdir>/modules/pce/sample/ir_views/oracle.

Table 6–4 Modifying Inference Rules

View	Description
IR_OLF_CANDIDATES_VW	This view defines what merchandise nodes are the source of Offer level Forecast (OLF) aggregates.
IR_OLF_NODES_VW	This view defines what merchandise receives an OLF forecast.
IR_PBL_ATTRS_PURCHASE_X_VW	This view defines how the merchandise hierarchy is divided for the predicted baseline calculation.
IR_PR_DEFAULT_PRICE_ZONE_VW	This required view must be manipulated so that it references the primary store set for which pricing data is provide via the Store Set Prices interface. it is used to generate price data for other store sets or location hierarchy levels.
IR_PR_LOCATION_SUMMARY_X_VW	These views map each location summary level to its SKU.
IR_PR_MERCH_SUMMARY_X_VW	These views map each merchandise summary level to it SKU.
IR_PR_PROMO_ITEM_VW	This view exposes the attributes needed by the PCE for modeling.
IR_PR_PROMOTIONS_VW	This view exposes the attributes needed by the PCE for modeling.
IR_TREND_CANDIDATES	

Update the views using the following guidelines:

For `ir_pr_merch_summary_X_vw`. These views map each merchandise summary level to its SKUs. For example:

- `CREATE OR REPLACE VIEW ir_pr_merch_summary_3_vw AS SELECT hierarchy3_pid parent_pid, merchandise_id, mod(merchandise_id,10) seas_cd FROM merchandise_tbl WHERE level_sqc = 6`
- `CREATE OR REPLACE VIEW ir_pr_merch_summary_4_vw AS SELECT hierarchy4_pid parent_pid, merchandise_id, mod(merchandise_id,10) seas_cd FROM merchandise_tbl WHERE level_sqc = 6`
- `CREATE OR REPLACE VIEW ir_pr_merch_summary_5_vw AS SELECT hierarchy5_pid parent_pid, merchandise_id, mod(merchandise_id,10) seas_cd FROM merchandise_tbl WHERE level_sqc = 6`

For `ir_pr_location_summary_X_vw`. These views map each location summary level to its SKUs. For example:

- `CREATE OR REPLACE VIEW ir_pr_location_summary_1_vw AS SELECT hierarchy1_lid, location_id FROM location_tbl WHERE level_sqc = Cust_Parameter_Levels.getLocationLevelsqc('PROMOTE_ANALYSIS')`
- `CREATE OR REPLACE VIEW ir_pr_location_summary_7_vw AS SELECT hierarchy7_lid parent_lid, location_id FROM location_tbl WHERE level_sqc = Cust_Parameter_Levels.getLocationLevelSqc('PROMOTE_ANALYSIS')`

PR_DB_PARAMS

When PPO and RDF are deployed in the same environment, each application uses the base demand forecast generated by RDF for forecasting. The field PREDICT_BASELINE_SOURCE_TYPE, which must be removed if the value generated by RDF is not used is part of the PR_DB_PARAMS table shown in [Table 6–5, "PR_DB_PARAMS"](#).

Table 6–5 PR_DB_PARAMS

Field Name	Description
LAST_CREATE_MISSING_PROMO_CT	The date of the last attempt to create missing promotion counts. Only promotions modified after this date can be fixed when the promotion counts are created again.
LAST_PROCESSED_MB_DATE	The last market basket date loaded.
MB_START_DATE	Obsolete.
MB_END_DATE	Obsolete.
DEFAULT_TABLESPACE	The tablespace that holds the tables created by the application.
DEFAULT_INDEX_TABLESPACE	The tablespace that holds the indexes created by the application.
PROMOTE_SCORECARD_TOP_NONOD	The number of records stored by the TAE NonAd contributor feature. This affects Scorecard reports.
APE_DFLT_NODE_DESCR	The name of the default APE node that receives miscellaneous affinity numbers during forecasting.
LAST_LOAD_MISSING_PROMO_SUM	The date of the last attempt to create missing promotion summaries. Only promotions modified after this date can be fixed when the promotion summaries are created again.
PREDICT_BASELINE_SOURCE_TYPE	The source data for externally provided predicted baseline values. This field must be removed if the external predict baseline is not supported.

Forecast Accuracy Indicator

This chapter contains the following:

- [“Introduction” on page 7-1](#)
- [“Configuration” on page 7-1](#)
- [“Metrics” on page 7-2](#)

Introduction

The Forecast Accuracy Indicator is an enhancement to the PCE forecast prediction that evaluates the accuracy of a forecast by comparing current forecast data with historical data.

A rule-based decision tree based on a statistical analysis is used in the determination of the forecast accuracy. The decision tree is configured by Analytical Services (AS), using the `accuracy.properties` file. This file is used to configure the rules and the values used in the decision tree.

The UI displays the results of the accuracy determination.

Configuration

You can configure the forecast accuracy feature as follows:

Use the property `com.netperceptions.kde.rmi.server.RGIndicatorFlag=true` to enable or disable the Forecast Accuracy Indicator in the PCE.

For information about configuring the default thresholds that the UI uses to control the display of Red, Yellow and Green confidences, see the following properties in `promote.properties`:

- `promote.confidence.greenThreshold=70`
- `promote.confidence.yellowThreshold=30`
- `promote.confidence.redThreshold=0`

See the Merchandise Thresholds standard interface for information about the configuration of different thresholds for different areas of the merchandise hierarchy.

Metrics

This section lists the metrics used by AS to configure the accuracy.properties file. The supported rule operators in this file are:

=, <, >, <=, >=, !=

The metrics listed in [Table 7–1, "Model Metrics"](#) use the following abbreviations:

Abbreviation	Definition
XXX	attribute name
Metric String	abbreviation used in rule
CR	hard-coded constant expression
VI	metrics that are pre-evaluated as part of PCE start-up
X	data type
#	data type
Boolean	true/false

[Table 7–1, "Model Metrics"](#) contains metrics used in accuracy.properties

Table 7–1 Model Metrics

Metric ID	Metric Description	Metric String Abbreviation	Type	CR/VI=	Operator
PBL-1	Type of merchandise	PBL_MET.MERCH_TYPE	X	CR=[B/S]	=, !=
PBL-2	Maximum size of baseline window (# of weeks 5 or 9 for example)	PBL_MET.MAX_BL_PERIOD	#	CR=[?]	=, <, <=, >, >=, !=
PBL-3	Actual number of historic baseline weeks used for prediction	PBL_MET.TTL_GOOD_PERIODS	#	CR=[?]	=, <, <=, >, >=, !=
PBL-4	Number of dark weeks from all baseline window weeks	PBL_MET.DARK_PERIOD	#	CR=[?]	=, <, <=, >, >=, !=
PBL-5	Number of promotion weeks from historic baseline window	PBL_MET.PROMO_PERIOD	#	CR=[?]	=, <, <=, >, >=, !=
PBL-6	Number of clearance weeks from historic baseline window	PBL_MET.CLEARANCE_PERIOD	#	CR=[?]	=, <, <=, >, >=, !=
PBL-7	Number of gray weeks from historic baseline window	PBL_MET.GRAY_PERIOD	#	CR=[?]	=, <, <=, >, >=, !=
PBL-8	Average baseline sales of item during historic baseline window	PBL_MET.AVG_BL_SLS	##	CR=[?]	=, <, <=, >, >=, !=
PBL-9	Average baseline sales variance of item during historic baseline window	PBL_MET.AVG_BL_SLS_VAR	##	CR=[?]	=, <, <=, >, >=, !=
PBL-10	Future clearance indicator	n/a	n/a	n/a	n/a

Table 7-1 (Cont.) Model Metrics

Metric ID	Metric Description	Metric String Abbreviation	Type	CR/VI=	Operator
PBL-11	APC elasticity level of item	PBL_MET.PRICE_ELASTICITY_LEVEL	#	CR=[?]	=, <, <=, >, >=, !=
PBL-12	APC seasonality level of item	PBL_MET.SEAS_INDX_LEVEL	#	CR=[?]	=, <, <=, >, >=, !=
PBL-13	Seasonality Index of item	PBL_MET.SEAS_INDX	##	CR=[?]	=, <, <=, >, >=, !=
PBL-14	APC Price elasticity used for the item	PBL_MET.PRICE_ELASTICITY	##	CR=[?]	=, <, <=, >, >=, !=
PBL-15	Number of weeks between forecast as-of-date and ad-date	PBL_MET.WEEKS_TO_AD	#	CR=[?]	=, <, <=, >, >=, !=
MSC-1	Holiday ad?	n/a	n/a	n/a	n/a
MSC-2	Fiscal month of ad date	PBL_MET.FISCAL_MO	#	CR=[?]	=, <, <=, >, >=, !=
MSC-3	Fiscal quarter of ad date	PBL_MET.FISCAL_QUARTER	#	CR=[?]	=, <, <=, >, >=, !=
MSC-4	Error between Monkey Model forecast and PCE forecast.	n/a	n/a	n/a	n/a
MSC-5	Was like item	PBL_MET.LIKE_ITEM_USED_FLG	#	CR=[0/1]	=, !=
MSC-6	Was an offer level forecast used for predict baseline	PBL_MET.AGGR_PBL_USED_FLG	#	CR=[0/1]	=, !=
MDL-1	Lift model level of item	MDL_MET.MERCHANDISE_LEVEL	#	CR=[?]	=, <, <=, >, >=, !=
MDL-2	Lift model fitting error (MSE in pmml file)	MDL_MET.MSE	##	CR=[?]	=, <, <=, >, >=, !=
MDL-3	Lift model R2 (rsquare in pmml file)	MDL_MET.RSQUARE	##	CR=[?]	=, <, <=, >, >=, !=
MDL-4	Lift model intercept (intercept in pmml file)	MDL_MET.INTERCEPT	##	CR=[?]	=, <, <=, >, >=, !=
MDL-5	Lift model condition number (condNum in pmml file)	MDL_MET.CONDITION_NUMBER	##	CR=[?]	=, <, <=, >, >=, !=
MDL-6	Lift model F-statistic (fvalue in pmml file)	MDL_MET.FVALUE	##	CR=[?]	=, <, <=, >, >=, !=
MDL-7	Lift model p-statistic (pvalue in pmml file)	MDL_MET.PVALUE	##	CR=[?]	=, <, <=, >, >=, !=
MDL-8-1	Is current value < minimum historic value for each numerical predictor, where XXX is discount/price_ratio	MDL_MET.XXX.NUM_MIN	##	VI	=, <, <=, >, >=, !=
MDL-8-2	Is current value < maximum historic value for each numerical predictor	MDL_MET.XXX.NUM_MAX	##	VI	=, <, <=, >, >=, !=
MDL-8-3	STDDEV of current value from mean historic value for each numerical predictor	MDL_MET.XXX.NUM_STDDEV & MDL_MET.XXX.NUM_MEAN	##	VI	=, <, <=, >, >=, !=

Table 7–1 (Cont.) Model Metrics

Metric ID	Metric Description	Metric String Abbreviation	Type	CR/VI=	Operator
MDL-8-4	P-Value of predictor coefficient for each numerical predictor	MDL_MET.XXX.PVALUE	##	VI	=, <, <=, >, >=, !=
MDL-8-5	Standard error of predictor coefficient (sbk in pmml file) for each numerical predictor	MDL_MET.XXX.STD_ERROR	##	VI	=, <, <=, >, >=, !=
MDL-8-6	Variance inflation factor of predictor coefficient (vif in pmml file) for each numerical predictor	MDL_MET.XXX.VIF	##	VI	=, <, <=, >, >=, !=
MDL-8-7	The value of the predictor coefficient for each numerical predictor	MDL_MET.XXX.COEFFICIENT	##	VI	=, <, <=, >, >=, !=
MDL-9-1	Value of the predictor coefficient for categorical variables	MDL_MET.XXX.COEFFICIENT	##	VI	=, <, <=, >, >=, !=
MDL-9-2	P-value of the predictor coefficient for categorical variables	MDL_MET.XXX.PVALUE	##	VI	=, <, <=, >, >=, !=
MDL-9-3	Standard error of the predictor coefficient (sbk in pmml file) for categorical variables	MDL_MET.XXX.STD_ERROR	##	VI	=, <, <=, >, >=, !=
MDL-9-4	Variance inflation factor of the predictor coefficient (vif in pmml file) for categorical variables	MDL_MET.XXX.VIF	##	VI	=, <, <=, >, >=, !=

This chapter contains the following:

- “Introduction” on page 8-1
- “Available Reports” on page 8-1
- “Changing MicroStrategy Summary Levels” on page 8-3
- “MB Counts” on page 8-3

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. Because of rounding issues, the calculations in reports may be inaccurate. Because of rounding issues, the calculations are not displaying accurate results in reports. Metrics are calculated using full precision numbers; however, the reports only display two decimals. Validating these values manually using the metrics displayed in the reports can result in different results that are caused by the rounding of numbers. To prevent this, increase the number of decimals displayed in the reports.

- Affinity (Pull) – This report provides information about the affinity products or items that tend to sell well with other items. This report shows the affinity relationship over a longer period of time. This report contains metrics similar to the Affinity report as discussed in the previous section but also contains an additional column, “Pull Indicator”, that defines whether the relationship Likely, Unlikely, or Inconclusively drives sales between two items. It displays the affinity rules produced by the ARM application.
- Affinity Report – This report provides information about all affinity products or items that tend to sell with other items. It displays all of the affinity rules produced by the ARM application.
- Audit Trail Report – This report tracks changes made to a promotion at the user, date/time, and offer level. It also tracks changes to offers that affect the forecast including Promotion dates, promotion phase changes, edits to vehicle types, added and deleted offers, offer status changes (submissions and approvals), and

any offer changes that affect the forecast (e.g. criteria, offer type, offer amount, demand drivers, forecast overrides, and position changes).

- **Event Scorecard By Class Report** – This report provides an analysis of the effect that individual classes have on the success of particular events. Viewers of this report also have the option of drilling into the metrics for Incr Allocated Non-Ad Sales, Incr Allocated Non-Ad GM, and Incr Allocated Non-Ad Units.
- **Event Scorecard By Class/Offer Amount** – This report provides an analysis of the effectiveness of different offer types and amounts. This report summarizes the offer type–amount performance within a class across multiple events. It enables a merchant to determine whether a %off discount was more effective than a price point even if the effective discount was equivalent. Similarly, it can help determine whether a specific offer amount 25% or 30% off of a given offer type was more effective historically. Viewers of this report also have the option of drilling into the metrics for Incr Allocated Non-Ad Sales, Incr Allocated Non-Ad GM, and Incr Allocated Non-Ad Units.
- **Event Scorecard By Department/Offer Amount** – This report provides an analysis of the effectiveness of different offer types and amounts. This report summarizes the offer type–amount performance within a department across multiple events. It enables a merchant to determine whether a %off discount was more effective than a price point even if the effective discount was equivalent. Similarly, it can help determine whether a specific offer amount 25% or 30% off of a given offer type was more effective historically.
- **Event Scorecard By Item Report** – This report provides an analysis of the effect that individual items have on the success of particular events.
- **Event Scorecard By Offer/Department Report** – This report provides an analysis of the effect that each offer/department combination has on the success of particular events.
- **Event Scorecard By Sub-Class Report** – This report provides an analysis of the effect that individual Sub-classes have on the success of particular events. Viewers of this report also have the option of drilling into the metrics for Incr Allocated Non-Ad Sales, Incr Allocated Non-Ad GM, and Incr Allocated Non-Ad Units.
- **Event Scorecard by Sub-Class/Offer Amount** – This report provides an analysis of the effectiveness of different offer types and amounts. This report summarizes the offer type–amount performance within a sub-class across multiple events. It enables a merchant to determine whether a %off discount was more effective than a price point even if the effective discount was equivalent. Similarly, it can help determine whether a specific offer amount 25% or 30% off of a given offer type was more effective historically.
- **Forecast Accuracy Report** – This report compares the system and user (if one exists) predicted forecasts from a promotion created in Promotion Planning and Optimization against the sales results within Promotion Intelligence. Analysis is done only at the event level.
- **Forecast Exception Report** – This report provides information about changes in an offer's total forecast units. The changes in the forecast could be the result of system re-forecast process or a manual re-forecast by any user. The system has the ability to track forecast changes by units, sales or margin (one at a time).
- **Overlapping SKUs Report** – This report identifies cases where the same SKU exists in different offers in the same event. The specific offers and duplicate SKUs are listed so that the user can correct the offers and avoid a pricing conflict where the same SKU is promoted at different prices.

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.

Summary Configurations

The PROMOTE_PROMO_OFFER_MH_SUMMARY parameter is a value for the INTERSECT_NAME in the ASH_CP_TBL standard interface. It specifies the level of aggregation for the merchandise hierarchy that is used to generate the totals for the scorecard by Offer/Department. The merchandise level should be the level that corresponds to the Department. The location level is not relevant to this aggregation.

The following summary configuration parameters specify the level of aggregation from the merchandise hierarchy that are used to generate the totals for the scorecard by merchandise hierarchy and offer amount.

INTERSECT_NAME	MERCHANDISE_LEVEL	LOCATION_LEVEL
PROMOTE_SCORECARD_MERCH_OFF_AMT_SUMM_3	DEPT	STORE
PROMOTE_SCORECARD_MERCH_OFF_AMT_SUMM_1	SUBCLASS	STORE
PROMOTE_SCORECARD_MERCH_OFF_AMT_SUMM_2	CLASS	STORE

MB Counts

The MB count is generated under the assumption that no overlap exists between promotions in the same event and that no overlap exists within events during the same calendar period. If this assumption is disregarded, double counting may occur when MB counts are done.

