

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

Configuration Guide

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Preface

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

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

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

Audience

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

Related Documents

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

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

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

Conventions

The following text conventions are used in this document:

Convention	Meaning
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
- “Promote Sample xml Files” on page 2-6

Introduction

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

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

About User Roles and User Actions

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

Promote comes with a default set of actions, loaded into ACTION_TBL:

- PROMO_CREATE_CE – add and delete campaigns and events.
- PROMO_EDIT_CE – make changes to campaigns and events.
- PROMO_VIEW_CE – view campaigns and events.
- PROMO_CREATE_MD – add and delete master data.
- PROMO_EDIT_MD – make changes to master data.
- PROMO_VIEW_MD – view master data.
- PROMO_CREATE_PROMO – add and delete promotions.
- PROMO_EDIT_PROMO – make changes to promotions.
- PROMO_VIEW_PROMO – view promotions.
- PROMO_MANAGE_CATEGORY – edit the offers for a promotion.

- `PROMO_MANAGE_MERCHANDISE` – edit Like Item information.
- `PROMO_MANAGE_VEHICLE` – edit the definition and design of the promotion vehicle, category assignments, white space allocation, and workflow.
- `PROMO_EXPORT_PROMO` – provides access to the Export button, which is used to create xml and txt files of promotions. Necessary for access to the Export API functionality.
- `PROMO_VIEW_REPORTS` – launch the Promote Intelligence reports.
- `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.

Promote comes with a default set of roles, loaded into `ROLE_ACTION_TBL`:

- `PROMO_AD_PLANNER` – a member of marketing who is responsible for the entire promotional calendar. This user can create and edit calendar events and create promotions.
- `PROMO_BUSINESS_ADMIN` – a business user who is responsible for activities such as data maintenance and template management.
- `PROMO_CATEGORY_MANAGER` – the person directly responsible for one or more categories of merchandise, assigned at a given level in the merchandise hierarchy.
- `PROMO_EXEC` – an executive who monitors promotion performance across all merchandise categories. Such a user would expect to monitor performance at both a high level and a low level, but would not need to edit or execute promotions.
- `PROMO_MERCH_PLANNER` – a merchandise planner who executes merchandising plans. Such a user is assigned responsibility at the Chain level.
- `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 Promote.

Table 2–1 Actions Assigned to Roles

Promote Role	Assigned Actions
PROMO_AD_PLANNER	PROMO_CREATE_CE
	PROMO_EDIT_CE
	PROMO_VIEW_CE
	PROMO_CREATE_MD
	PROMO_EDIT_MD
	PROMO_VIEW_MD
	PROMO_CREATE_PROMO
	PROMO_EDIT_PROMO
	PROMO_VIEW_PROMO
	PROMO_MANAGE_VEHICLE
	PROMO_EXPORT_PROMO
	PROMO_VIEW_REPORTS
	PROMO_APPROVE_OFFER
PROMO_BUSINESS_ADMIN	PROMO_CREATE_MD
	PROMO_EDIT_MD
	PROMO_VIEW_MD
	PROMO_BUSINESS_ADMIN
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_VEHICLE
	PROMO_EXPORT_PROMO
	PROMO_VIEW_REPORTS
PROMO_MERCH_PLANNER	PROMO_VIEW_CE
	PROMO_VIEW_MD
	PROMO_VIEW_PROMO
	PROMO_EDIT_PROMO
	PROMO_EXPORT_PROMO
	PROMO_VIEW_REPORTS
PROMO_AGENT	PROMO_ADMIN_DOC
	PROMO_VIEW_PROMO
	PROMO_CREATE_PROMO
	PROMO_EDIT_PROMO

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

Promote Role	Assigned Actions
	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_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_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: The actions associated with roles must be created, using `brmadmin.sh` in order for the roles to be successfully created.

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

CHAIN COMPANY DIVISION DEPARTMENT merchandise attribute in .xml

0 1 123 8765 1 | 123 | 8765

0 1 22 789 1 | 22 | 789

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

The xml Files

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

Table 2–2 User Management xml Files

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

Standard Load Prerequisites

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

Promote Sample xml Files

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

User Sample xml File

```
<?xml version="1.0" encoding="UTF-8" ?>
- <user-set hash-passwords="true"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:noNamespaceSchemaLocation="user-set.xsd">
- <!-- execs -->
  <user username="rodneyt" password="rodneyt" last-name="Tudor"
first-name="Rodney" middle-initial="R" employeeID="21427" title="CMO" />
  <user username="stevec" password="stevec" last-name="Calhoon" first-name="Steve"
middle-initial="D" employeeID="21426" title="Marketing Director" />
- <!-- IT -->
  <user username="bernarda" password="bernarda" last-name="Allen"
first-name="Bernard" middle-initial="R" employeeID="21990" title="Business IT" />
  <user username="kens" password="kens" last-name="Smith" first-name="Ken"
middle-initial="R" employeeID="8674309" title="CTO" />
- <!-- Marketing -->
  <user username="geofr" password="geofr" last-name="Rogers" first-name="Geof"
middle-initial="L" employeeID="01230" title="Directory, Marketing" />
  <user username="anns" password="anns" last-name="Smith" first-name="Ann"
middle-initial="T" employeeID="21664" title="Marketing" />
  <user username="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>
</role>

```

```
        </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 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 4-11
- “Configuring Export” on page 4-12
- “Integration with Promote Intelligence” on page 4-13
- “Debug Messages” on page 4-14

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

promote.properties

Here are 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
promote.config.file=promote-config.xml	Identifies the location of file used for integration with Promote Intelligence (PI).
promote.saxparser.classname=org.apache.xerces.parsers.SAXParser	Name of xml parser.
promote.server.mode=prod	<p>The mode values are:</p> <p>dev = 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>sqa = reserved for future use by QA.</p> <p>impl = reserved for future use by implementation team for debugging.</p> <p>stage = reserved for future use for staging system features.</p> <p>prod = the default. It enables the server to maintain a cache of master data (such as merchandise/location hierarchy data).</p> <p>maint = 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 promote.export.template + template name + output file extension + short name of the exported domain class.

Table 4–2 Export Properties

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

Table 4–2 (Cont.) Export Properties

Property	Description
promote.export.template.xml.promotion=XmlExportTemplate.xslt	
promote.export.template.AllSKU.csv.promotionoffer=AllSKUExportTemplate.xslt	
promote.export.template.Versions.csv.promotionoffer=VersionsExportTemplste.xslt	
promote.export.template.txt.promotionoffer=TxtExportTemplate.xslt	
promote.export.template.xml.promotionoffer=XmlOfferExportTemplate.xslt	
The xml export keys take the form promote.export.template.xml + short name of exported domain class, to lower case.	
promote.export.template.xml.promotionofferpositionsummary=XmlCmdlineExportTemplate.xslt	
promote.export.template.xml.promotionofferfullsummary=XmlCmdlineExportTemplate.xslt	
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.promotionofferpositionsummary=PromoOfferPosSumTxtTmpl.xslt	
promote.export.template.txt.promotionofferfullsummary=PromoOfferSumTxtTmpl.xslt	
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	
promote.filter.columns.promotionofferriterionattributetranslator=none,vendorID,retail, cost, purchaseType, group	
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=DefaultPromoEventExtName.xslt	
promo.eventexternalname.template.promotionoffer=DefaultPromoOfferEventExtName.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.url=http://%{suite.host}%:%{suite.port}%/ promote/export.do	
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.	
promote.agent.user.1=sysid0	
promote.agent.password.1=sysid0	
promote.agent.user.2=sysid1	
promote.agent.password.2=sysid1	
promote.agent.user.3=sysid2	
promote.agent.password.3=sysid2	
promote.agent.user.4=sysid3	
promote.agent.password.4=sysid3	
promote.agent.user.5=sysid4	
promote.agent.password.5=sysid4	
promote.agent.user.6=sysid5	
promote.agent.password.6=sysid5	
promote.agent.user.7=sysid6	
promote.agent.password.7=sysid6	
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.
promote.agent.preplannedpromo.runweeks=1-52	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.
promote.agent.preplannedpromo.rundays=Mon,Tue,Wed, Thu,Fri,Sat,Sun	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.
promote.agent.preplannedpromo.start=19:30	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.

Table 4–3 (Cont.) Agent Properties

Property	Description
promote.agent.preplannedpromo.end=23:30	The end time for the agent schedule in a 24-hour format of hh:mm.
promote.agent.preplannedpromo.delay=10	Defines the length of the delay in seconds. See also promote.agent.run.policy.
promote.agent.preplannedpromo.max_num_threads=1	Recommended value is 1.
promote.translate.storeset=Default	
promote.translate.storesubset=Central	
promote.translate.forecast=false	
promote.agent.promoforecast.command=runPromotionForecastor	Calls the loader.
promote.agent.promoforecast.enabled=false	Defines whether or not the agent is enabled. True = enabled; False = not enabled. The default is false.
promote.agent.promoforecast.runweeks=1-52	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.
promo.agent.promoforecast.rundays=Mon,Tue,Wed,Thu,Fri,Sat,Sun	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.
promote.agent.promoforecast.start=23:30	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.
promo.agent.promoforecast.end=6:30	The end time for the agent schedule in a 24-hour format of hh:mm.
promo.agent.promoforecast.delay=10	Defines the length of the delay in seconds. See also promote.agent.run.policy.
promote.agent.promoforecast.max_num_threads=1	Recommended value is 1.
promote.agent.forecast.command=runForecast	Forecast task
promote.agent.forecast.enabled=false	Defines whether or not the agent is enabled. True = enabled; False = not enabled. The default is false.
promote.agent.forecast.runweeks=1-26,27-52	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.
promote.agent.forecast.rundays=Mon,Tue,Wed,Thu,Fri	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.

Table 4–3 (Cont.) Agent Properties

Property	Description
<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=10</code>	Defines the length of the delay in seconds. See <code>promote.agent.run.policy</code> .
<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> .
<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.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.forecast.runonce=false</code>	Defines how often to run the agent during a given period. True = once per period. False (the default) = continually for period.
<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.

Table 4–3 (Cont.) Agent Properties

Property	Description
<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=10</code>	Defines the length of the delay in seconds. See <code>promote.agent.run.policy</code> .
<code>promote.agent.forecastweekly.max_num_threads=1</code>	Recommended value is 1.
<code>promote.agent.forecastweekly.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.forecastweekly.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 todate must be greater than the fromdate. Format is based on <code>promote.datetime.us.timestamp</code> . If omitted, defaults to <code>sysdate</code> .
<code>promote.agent.forecastweekly.uptodate=03/31/2007 00:00:00</code>	The uptodate must be greater than the todate. If this value is omitted, all future promotions will be forecast. Format is based on <code>promote.datetime.us.timestamp</code> .
<code>promote.agent.forecastweekly.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.forecastweekly.phase=</code>	Indicates which workflow. If no value - all phases will be included.
<code>promote.agent.forecastweekly.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.forecastweekly.groupby=false</code>	Flag that indicates whether to not to do multiple promotions. The default - true - groups promotions.

Table 4–3 (Cont.) Agent Properties

Property	Description
promote.agemt.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.
promote.agent.forecastweekly.runonce=false	Defines how often to run the agent during a given period. True = once per period. False (the default) = continually for period.

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. Default is true.
promote.audit.promotionoffer=false	Flag to activate auditing. Default is true.
promote.audit.promotionvehiclepage=false	Flag to activate auditing. Default is true.
promote.audit.forecast=false	Flag to activate auditing. Default is true.
promote.audit.forecast_value=units	Possible values are units, sales, and margin.
promote.audit.same.user=false	Audits all users' changes except for current user.
promote.audit.system.user=false	Only audits first user's changes.

The miscellaneous properties are used to identify system URLs.

Table 4–6 Miscellaneous Properties

Property	Description
promote.engine.url=rmi://%{KDE_RMI_SERVER_ADDRESS}:%{KDE_RMI_SERVER_PORT}/ItemPredictorFactory	Engine property.
promote.imageserver.baseurl=http://%{suite.host}:%{suite.port}/iserver/images/mh	Image server connection information.

The date properties define the formatting for dates.

Table 4–7 Date Properties

Property	Description
promote.datetime.dateformatpolicy=configured	<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>
promote.datetime.sysdateformat=us	
promote.datetime.eu.date=dd/MM/yyyy	
promote.datetime.us.date=MM/dd/yyyy	
promote.datetime.iso.date=yyyy-MM-dd	
promote.datetime.us.time=HH:mm:ss	
promote.datetime.iso.time=HH:mm:ss	
promote.datetime.eu.time=HH:mm:ss	
promote.datetime.us.timestamp=MM/dd/yyyy HH:mm:ss	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.
promote.datetime.eu.timestamp=dd/MM/yyyy 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.

The number properties must be valid Java number formats.

Table 4–8 Number Properties

Property	Description
promote.format.int=#,##0	
promote.format.decimal=#,##0,###	
promote.format.percent=#,##0,##%	
promote.format.currency=\u00A4#,##0.00	\u00A4 is the unicode general currency symbol, which java localizes to the currency symbol.

Table 4–8 (Cont.) Number Properties

Property	Description
promote.metric.int=#,##0.0	
promote.metric.decimal=#,##0.###	
promote.metric.percent=#,##0.##%	
promote.metric.currency=\u00A4,##0	\u00A4 is the unicode general currency symbol, which java localizes to the currency symbol.

The data properties must be valid Java integers in the valid range 200-5000 with a default if unspecified of 1000. If the value exceeds 5000, the limit will be 5000. If the value is below 200, the limit will be 200.

Table 4–9 Data Properties

Property	Description
promote.data.maxrows=1000	
promote.data.caselessSearch=true	Case is ignored.
promote.data.wildcardSearch=true	Searches use wild cards.
promote.data.likeSearch=true	
promote.data.caselessSort=false	
promote.data.sortDepth=2	
promote.pagesize.lookahead=1	
promote.offer.criterion.filternum=5	
promote.unpositioned.offer.rollup=false	Offer rollups include unpositioned values.
promote.persist.item.rollup=false	
promote.persist.loc.rollup=false	
promote.persist.cat.rollup=false	
promote.persist.promo.rollup=false	
promo.persist.page.rollup=false	
promote.persist.ver.rollup=false	
promote.promo.items.unique=false	
promote.promo.cats.analysis=false	
promote.roi.includes.affinity=false	
promote.partial.threshold=100	
promote.cache.expiration=1	
promote.agent.delay=2	
promote.clear.cache.gc=true	
promote.clear.cache.task=true	
promote.confidence.greenThreshold=70	
promote.confidence.yellowThreshold=30	
promote.confidence.redThreshold=0	
promote.planning.phase.editable=true	

Table 4–9 (Cont.) Data Properties

Property	Description
promote.show.excluded.items=true	
promote.show.ineffective.items=true	
promote.show.offerrule.round=true	

The value index metric properties define the metric properties.

Table 4–10 Value Index Metric Properties

Property	Description
promote.sales.ratio=0.4d	
promote.margin.ratio=0.4d	
promote.units.ratio=0.2d	
promote.valueidx.offset=100	

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.

Configuring Display Strings

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.Offer=+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.

Configuring Export

The following stylesheets are shipped with Promote Planning:

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

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

The following values must be specified:

Table 4–14 Export Configuration Values

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

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

- `promote.export.txt.template.promotion`
- `promote.export.txt.template.promotionofferitemsummary`
- `promote.export.txt.template.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 Promote Intelligence

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

Auto Authentication Flag

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

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

Report Links Configuration

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

This configuration includes:

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

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

- Connect attributes used in the construction of the URL for all links (protocol://server:port/webapp_path).
- Each reporting group has its own node. The name is used for the resource file mapping. The report request uses the `param` tag.

- For all report tags in group, sub-nodes are created in the GUI for the reporting area, using name, params and the common configuration from connect tag. A group with no reports does not have sub-nodes.
- If there is no params tag inside the group or report tag, then no link is provided.
- Groups cannot be nested inside other groups or reports.

Display Strings

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

Here is an example, using "My Reports":

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

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

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

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

Debug Messages

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

Template Configuration

This chapter contains the following:

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

Introduction

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

Using the Promote Template

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

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

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

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

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

Loading the Template

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

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

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

Summary Configurations

Several configurations must be included in ASH_CP_TBL. These configurations specify the level of aggregation in the merchandise hierarchy that Promote 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	
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.

Table 6–1 (Cont.) Summary Configurations

INTERSECT_NAME	MERCHANDISE_LEVEL	LOCATION_LEVEL	Description
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-Promote 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')`

Forecast Accuracy Indicator

This chapter contains the following:

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

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 Promote 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
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=[?]	=, <, <=, >, >=, !=

Table 7-1 (Cont.) Model Metrics

Metric ID	Metric Description	Metric String Abbreviation	Type	CR/VI=	Operator
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	=, <, <=, >, >=, !=
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	=, <, <=, >, >=, !=

Table 7–1 (Cont.) Model Metrics

Metric ID	Metric Description	Metric String Abbreviation	Type	CR/VI=	Operator
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	=, <, <=, >, >=, !=

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- “Configuration Report Details” on page 8-3
- “Changing MicroStrategy Summary Levels” on page 8-4
- “MB Counts” on page 8-5

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).
- **Model Accuracy Scorecard** – This report provides information to help evaluate the efficiency of the predictive model.
- **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.

- TAE Assessment Report – provides information that can be used to evaluate the accuracy and completeness of the data generated by TAE.

Configuration Report Details

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

Model Accuracy Scorecard Report

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

Report Prompts and Display

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

Table 8–1 Model Accuracy Scorecard Report

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

TAE Assessment Report

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

Report Prompts and Display

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

Table 8–2 TAE Assessment Report

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

Changing MicroStrategy Summary Levels

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

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

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.

