

Oracle® Retail Markdown Optimization

Operations Guide

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Oracle Retail Markdown Optimization Operations Guide, Release 13.2.2

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Preface

Markdown Optimization is an application that provides markdown recommendations and forecasts that allow customers to make informed markdown decisions. In this way, customers can maximize gross margins on seasonal merchandise while clearing inventory to specified levels by defined dates.

Audience

This document is intended for system administrators who configure and manage Markdown Optimization.

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Related Documents

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

- *Oracle Retail Markdown Optimization Administration Guide*
- *Oracle Retail Markdown Optimization Configuration Guide*
- *Oracle Retail Markdown Optimization Data Model*
- *Oracle Retail Markdown Optimization Grid Designer User Guide*
- *Oracle Retail Markdown Optimization Installation Guide*
- *Oracle Retail Markdown Optimization Implementation Guide*
- *Oracle Retail Markdown Optimization Release Notes*
- *Oracle Retail Markdown Optimization User Guide*

or in the Oracle Retail Analytic Parameter Calculator Markdown Optimization documentation set:

- *Oracle Retail Analytic Parameter Calculator Markdown Optimization Configuration Guide*
- *Oracle Retail Analytic Parameter Calculator Markdown Optimization Installation Guide*
- *Oracle Retail Analytic Parameter Calculator Markdown Optimization Release Notes*
- *Oracle Retail Analytic Parameter Calculator Markdown Optimization User Guide*

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- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 13.1) or a later patch release (for example, 13.1.2). If you are installing the base release, additional patch, and bundled hot fix releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch and bundled hot fix releases can contain critical information related to the base release, as well as information about code changes since the base release.

Oracle Retail Documentation on the Oracle Technology Network

Documentation is packaged with each Oracle Retail product release. Oracle Retail product documentation is also available on the following Web site:

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

(Data Model documents are not available through Oracle Technology Network. These documents are packaged with released code, or you can obtain them through My Oracle Support.)

Documentation should be available on this Web site within a month after a product release.

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. |
| monospace | 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 provides a basic orientation to the *Oracle Retail Markdown Optimization Operations Guide*.

The Introduction chapter contains the following sections:

- [About the Markdown Optimization Operations Guide](#)
- [What's In This Book](#)

About the Markdown Optimization Operations Guide

The *Oracle Retail Markdown Optimization Operations Guide* provides details about the essential tasks involved in using this application: the staging and loading of data that is provided by the retailer in specified formats and the weekly processes that produce markdown recommendations and forecasts.

What's In This Book

The *Oracle Retail Markdown Optimization Operations Guide* addresses the following topics:

- Chapter 1 – Introduction. An orientation.
- Chapter 2 – Standard Interface. Explains the data format specifications for the retailer-supplied data feeds to the application.
- Chapter 3 – Standard Load. Describes the load procedures for loading the data feeds into the application.
- Chapter 4 – Model Run. Describes all the commands involved in the weekly batch process and the model run.
- Chapter 5 – RDM Load. Describes the RDM refresh loads.
- Chapter 6 – Markdown Optimization Tools. Describes the Markdown Optimization Admin tools.
- Chapter 7 – Troubleshooting. Guidelines for fixing problems and a list of error messages.

Standard Interface

This chapter contains the standard interface specifications for the data that is loaded into the application.

It contains the following sections:

- Budget Standard Interface
- Business Rule Instances Standard Interface
- Calendar Standard Interface
- Cluster Levels Standard Interface
- Cluster Mapping Standard Interface
- Demand Parameters Standard Interface
- Distribution Center Allocation Standard Interface
- Distribution Center Inventory Standard Interface
- Items Standard Interface
- Items CDA Standard Interface Specification
- Location Hierarchy Standard Interface
- Location Hierarchy CDA Standard Interface
- Location Hierarchy Rename Standard Interface
- Markdowns Taken Standard Interface
- Merchandise Hierarchy Standard Interface
- Merchandise Hierarchy CDA Standard Interface
- Merchandise Hierarchy Rename Standard Interface
- Price Ladders Standard Interface
- Promotions Standard Interface
- Sales/Inventory/Orders Standard Interface
- Seasonalities Standard Interface
- Budget Specification (ASH_BUDGET_TBL)
- Business Rule Instances Specification (ASH_BRM_INSTANCE_TBL)
- Calendar Specification (ASH_CAL_TBL)
- Cluster Levels Specification (ASH_CSHL_TBL)

- Cluster Mapping Specification (ASH_CLUSTER_MAPPING_TBL)
- Demand Parameters Specification (ASH_PARAMETER_VALUES_TBL)
- DC Allocation Specification (ASH_DC_ALLOCATION_TBL)
- DC Inventory Specification (ASH_DCI_TBL)
- Items Specification (ASH_ITEMS_TBL)
- Items CDA Specification (ASH_ITEMS_CDA_TBL)
- Location Hierarchy Specification (ASH_LH_TBL)
- LH CDA Specification (ASH_LH_CDA_TBL)
- LH Rename Specification (ASH_LHRENAME_TBL)
- Markdowns Taken Specification (ASH_MDTAKEN_TBL)
- Merchandise Hierarchy Specification (ASH_MH_TBL)
- MH CDA Specification (ASH_MH_CDA_TBL)
- MH Rename Specification (ASH_MHRENAME_TBL)
- Price Ladders Specification (ASH_PRICE_LADDERS_TBL)
- Promotions Specification (ASH_PROMO_TBL)
- Sales Specification (ASH_SALES_TBL)
- Seasonalities Specification (ASH_SEASONALITY_MAPS_TBL and ASH_SEASONALITY_VALUES_TBL)

Introduction

An important part of getting Markdown Optimization up and running in a production environment is the gathering and loading of enterprise data. Markdown Optimization requires historical and weekly data to be loaded into the application database. The data must be provided in a standard format, as specified in the standard interface specification. The data can then be loaded according to the standard load procedure.

Markdown Optimization Standard Interface Descriptions

This section details the data interface to the application. The application requires that retailer data be provided in flat files containing pipe-delimited data organized so that the data can be loaded into the application database tables that follow the formats specified here.

The terminal pipe delimiter is optional, but recommended.

The following special characters are not allowed: colon, semi-colon, comma, forward slash, backward slash, any type of quote, ampersand, any type of apostrophe, <, or >.

Three interfaces (Merchandise Hierarchy Levels, Location Hierarchy Levels, and Cross Product Information) that are required by the application are only loaded once. The information contained in these three files is collected during discussions with specific retailers; however, the files themselves are not provided by retailers but are created and loaded as part of the initial Markdown Optimization configuration.

The standard interface includes the following:

Table 2–1 Interface Specifications

| Interface Specification | Required/Optional |
|--------------------------------|--------------------------|
| Budget | Optional |
| Business Rule Instances | Optional |
| Calendar | Required |
| Cluster Mapping | Optional |
| Demand Parameters | Required |
| Distribution Center Allocation | Optional |
| Distribution Center Inventory | Optional |
| Items | Required |
| Items CDA | Optional |
| Location Hierarchy | Required |
| Location Hierarchy CDA | Optional |
| Location Hierarchy Rename | Optional |
| Markdowns Taken | Required |
| Merchandise Hierarchy | Required |
| Merchandise Hierarchy CDA | Optional |
| Merchandise Hierarchy Rename | Optional |
| Price Ladders | Required |
| Promotions | Optional |
| Sales/Inventory/Orders | Required |
| Seasonalities | Required |

Budget Standard Interface

The budget interface describes markdown budget and other financial planning data. Each row in the data file contains the financial metrics for the level of the merchandise hierarchy that corresponds to the application worksheet for a given month. The budget information is provided to help retailers understand the consequences of any markdown decisions.

How Markdown Optimization Uses the Budget Data

Markdown Optimization uses the budget data in a variety of ways, such as:

- to provide users with the budgetary context for their markdown decisions
- to derive an internal value for the Optimize to Budget screens

Data Fields

Here is some information about the key fields that specify the budget data.

- MARKDOWN_BUDGET
- PLANNED_GM_DOLLARS
- PLANNED_GM_PERC

Technical Notes

This file is optional, so retailers who do not want to see budget information in the application user interface do not have to provide this data.

Business Rule Instances Standard Interface

The data to be loaded by the Business Rule Manager bulk loader utility must conform to the following standard interface specification. For more information on the Business Rule Manager, see the *Oracle Retail Markdown Optimization Configuration Guide*.

Technical Notes

The following list provides details to consider regarding the business rule instance data.

- The merchandise and location keys map to the CLIENT_LOAD_ID.
- The merchandise and location levels map to LEVEL_DESC.
- The rule name is the name of the business rule as specified in the business rule definition.
- The rule value is the value assigned to the business rule instance.
- The attribute values are the specific values for the custom variables, which have been derived from columns in the permitted source tables.
- The delete flag defines whether the instance is to be deleted (a value of 1) or added/updated (a value of 0 – the default).

Calendar Standard Interface

The calendar interface describes a retailer’s fiscal calendar. Each record in the file corresponds to a single fiscal week.

How Markdown Optimization Uses the Calendar Data

Markdown Optimization uses the calendar data in a variety of ways, such as:

- To construct the markdown calendar that defines the valid markdown effective dates.
- To determine in what month the markdown effective date falls. The markdown effective month affects metrics displayed in the application UI and in the application reports such as “Markdown Budget.”

Data Fields

Seven fields describe each calendar record, which represents a fiscal week:

- EOP_CALEDAR_DT – the last day of the fiscal week, which is usually Saturday.
- FISCAL_YR – the number of the fiscal year for the record.
- FISCAL_QTR – the number of the fiscal quarter for the record.
- FISCAL_MO – the number of the fiscal month for the record.
- FISCAL_WK – the number of the fiscal week for the record.
- CALEDAR_WK – an alternative number for the calendar week for the record.
- SEASON – the number identifying the season associated with the calendar week.

An Example

The following table shows sample data for five weeks of a fiscal calendar.

Table 2-2 Sample Calendar Data

| EOP Calendar Date | Fiscal Year | Fiscal Quarter | Fiscal Month | Fiscal Week | Calendar Week | Season |
|----------------------------------|--------------------|---------------------------|-------------------------|------------------------|--------------------------|---------------|
| 2004-02-07 | 2004 | 1 | 1 | 1 | 1 | 1 |
| 2004-02-14 | 2004 | 1 | 1 | 2 | 2 | 1 |
| 2004-02-21 | 2004 | 1 | 1 | 3 | 3 | 1 |
| 2004-02-28 | 2004 | 1 | 1 | 4 | 4 | 1 |
| 2004-03-06 | 2004 | 1 | 2 | 5 | 1 | 1 |

Technical Notes

The following list provides details to consider regarding the calendar data.

- The calendar must include all weeks, beginning with the earliest historical sales record and extending to a minimum of five years and a maximum of nine years into the future.
- Each year included in the data must contain 52 – 53 weeks.
- The calendar file can be sent weekly or loaded all at once during the initial configuration of Markdown Optimization. If provided all at once, it should contain all the historic data and extend to a minimum of five years and a maximum of nine years into the future.
- Retailers can use the SEASON field to designate different seasons within the fiscal year. For example, a retailer might divide the fiscal year into two seasons. The season could then be used in the application metrics such as “Season to Date Sales.”

Cluster Levels Standard Interface

The cluster levels interface is used to specify the names of a retailer’s cluster levels and their order.

Technical Notes

The following list provides details to consider regarding the data:

- The *x* level should always be defined as 1.
- The sequence of level numbers must begin with 1 and increase in increments of 1, without any gaps in the sequence.
- The cluster levels information is generally loaded only once.

Cluster Mapping Standard Interface

The cluster mapping standard interface, part of Flexible Store Clustering, associates a cluster set with a pre-defined level in the merchandise hierarchy. Cluster sets are assigned to the merchandise hierarchy at the level specified by a system-wide configuration flag during the optimization process.

How Markdown Optimization Uses the Cluster Mapping Data

The cluster sets are assigned to the merchandise hierarchy. Individual clusters or cluster sets are used in the creation of worksheets and items. The clusters and cluster sets are stored in the location hierarchy. If a store cluster set is already assigned to a specified entry in the merchandise hierarchy, it will be replaced by the entry specified in the assignment element. Store clusters should not be linked to the merchandise hierarchy, but can be used in the creation of worksheets or items.

The merchandise key in the cluster mapping table must be at the merchandise level that is specified by the entry in ASH_CP_TBL for CLUSTER (INTERSECT_NAME).

Data Fields

Two fields describe cluster mapping:

- CLUSTER_SET_CLIENT_ID – client ID of the cluster set, which is provided by the retailer
- MERCHANDISE_CLIENT_ID – client ID from the Merchandise Hierarchy table.

An Example

The following table shows the assignment of cluster sets to the merchandise hierarchy:

Table 2–3 Cluster Mapping Sample Data

| Cluster Set Client ID | Merchandise Client ID |
|-----------------------|-----------------------|
| CL1 | 1 |
| CL1 | 2 |
| CL2 | 3 |
| CL2 | 99 |
| MSA1 | 4 |
| MSA1 | 6 |

Demand Parameters Standard Interface

The demand parameters standard interface describes the mapping between the analytical parameter values generated by Analytical Services and a specific merchandise/location/attribute.

How Markdown Optimization Uses the Parameters Data

Markdown Optimization uses the parameters data in a variety of ways, including:

- to provide a centralized list for the parameters and their values
 - AS_PARAMETER_ID and AS_VERSION_NUMER are used only by Analytical Services; they are not used by the application.

Data Fields

Nine fields describe each parameter record:

- MERCHANDISE_LEVEL – the external merchandise level.
- MERCHANDISE_KEY – the key from the merchandise hierarchy for the item.
- LOCATION_LEVEL – the external location level.

- LOCATION_KEY – the key from the location hierarchy for the item.
- ITEM_ATTRIBUTE – the item attribute for the parameter (set to % by default).
- PARAMETER_NAME – the name of the parameter. The names can be DEFAULT_GAMMA, DEFAULT_ALPHA, CRITICAL_INVENTORY, or ZERO_INVENTORY.
- PARAMETER_VALUE – the value assigned to the parameter.
- AS_PARAMETER_ID – a number that uniquely identifies the record across all output tables and can be used to trace issues. It is not an analytical value.
- AS_VERSION – the version number for the current run of the output, which is set by APC and can be used to track versions.

Distribution Center Allocation Standard Interface

The distribution center allocation interface describes how merchandise is to be allocated to the locations supplied by a warehouse. DC inventory allocation information can be supplied at any level of the merchandise hierarchy.

Technical Notes

The following list provides details to consider regarding the dc allocation data.

- The data includes the proportion (fraction) of merchandise that should be allocated to each location.
- Fractional units are truncated.
- Fractions can be specified at any level of the merchandise hierarchy.
- Fractions can only be specified at the location hierarchy optimization level.
- A fraction at a lower level always takes precedence over a fraction at a higher level.

Distribution Center Inventory Standard Interface

The distribution center inventory interface describes inventory and merchandise on order for a given distribution center.

Items Standard Interface

The items interface describes valid combinations of merchandise and location that specify an item. All items in the system are defined at a single level of the merchandise hierarchy (typically the lowest level) and a single level in the location hierarchy. For the merchandise and location hierarchy examples provided, items might be defined as combinations of Style in the merchandise hierarchy and Region in the location hierarchy.

How Markdown Optimization Uses the Items Data

Markdown Optimization uses the items data in a variety of ways, such as:

- to define the total set of valid items for markdown optimization. (Some items are typically excluded each week, based on their eligibility.)
- to define key fields that affect the determination by the application of the item's seasonality and model start date. (The model start date defines the date when sales are included in the calculation of forecasts and markdowns.)

Data Fields

Nine fields describe an item:

- **MERCHANDISE_KEY** – the key from the merchandise hierarchy for the item. (All items must be at the same level in the merchandise hierarchy.)
- **LOCATION_KEY** – the key from the location hierarchy for the item. (All items must be at the same level in the location hierarchy.)
- **FIRST_RECEIPT_DATE** – the date of the first receipt of this merchandise at this location. This date, if available, defines the beginning of life in the application for an item. Several application metrics, such as Model Start Date and First Sale Date, are lower bounded by First Receipt Date.
- **LAST_RECEIPT_DATE** – the date of the most recent receipt of this item at the item’s location. This date is only used for metrics in the application UI.
- **VENDOR** – the supplier for the item.
- **VENDOR_DESC** – a description of the supplier.
- **UNIT_COST** – the average unit cost of the item. This data is used by the application for margin calculations (metrics) only. These calculations do not affect the forecast and markdown recommendations made by the application.
- **SEASON_CODE** – a retailer-specific code that can be used to help determine an item’s seasonality. For example, a retailer may have four season codes (Spring, Summer, Fall, and Winter), and the seasonality assignment may be based on merchandise class and season code. Alternatively, some retailers may supply a Floor Set or Store Layout code in this field if such data exists. This may be more relevant for determining seasonality.
- **FULL_PRICE** – the original retail price of the merchandise.

An Example

The following table shows sample items, based on the sample data provided in the Merchandise Hierarchy and Location Hierarchy sections.

Table 2–4 *Items Sample Data*

| Merch. Key | Location Key | First Receipt Date | Last Receipt Date | Vendor Vendor | Vendor Desc. | Unit Cost | Season Code | Full Price |
|-------------------|---------------------|---------------------------|--------------------------|----------------------|---------------------|------------------|--------------------|-------------------|
| 101234509 | FL1 | 2004-11-07 | 2004-11-21 | | | 9.53 | Fall3 | 14.99 |
| 101234509 | FL2 | 2004-10-31 | 2004-11-07 | | | 9.98 | Fall2 | 15.99 |
| 101234512 | O1 | 2005-01-24 | 2005-01-24 | | | 17.40 | Spring1 | 24.99 |
| 101234512 | O2 | 2005-01-31 | 2005-01-31 | | | 17.40 | Spring1 | 24.99 |

The items in the example are defined at the Color-Region level. For example, the first item is color 101234509 and region FL1. It is possible for items with the same product key to have different values for other fields. The same piece of merchandise may have different cost, vendor, receipt date, or season code values for different locations. In addition, a single piece of merchandise may not be defined as a valid item for all locations.

Technical Notes

The following list provides details to consider regarding the items data.

- All items must be defined at the same level of the merchandise hierarchy and location hierarchy. Because of this, it may not be possible, for example, to define some items at the Chain level of the location hierarchy and to define other items at the Region level.
- Markdown Optimization loads, aggregates (if necessary), and persists sales and distribution center inventory data only at the item level.
- Retailers may start sending weekly data to the application for items that are not initially available for markdown optimization (if, for example, a retailer only turns on optimization for a subset of the business). The application accumulates the sales history for items that may then be made available for markdown optimization in the future.
- The lowest level for an item in the application merchandise hierarchy may not correspond to the lowest level in a retailer's merchandise hierarchy. A retailer may need to aggregate some of the data provided in the items interface. For example, if the lowest level in the application merchandise hierarchy is color, but the retailer has size beneath color, then the retailer will need to aggregate the items data fields as follows:
 - FIRST_RECEIPT_DATE – minimum aggregation
 - LAST_RECEIPT_DATE – maximum aggregation
 - UNIT_COST – average or weighted average, based on the total inventory aggregation

Items CDA Standard Interface Specification

The items cda interface specification provides the following 24 additional optional attributes. For more information, see the Configurable Data Attributes chapter.

Location Hierarchy Standard Interface

The location hierarchy interface describes how a retailer categorizes locations. The location hierarchy begins with the highest level, such as company or chain, and typically extends to the lowest level, the store. For example, a three-level location hierarchy might consist of Company, Region, and Store. Each entry (row) in the location hierarchy standard interface describes a specific location. In the example of a location hierarchy shown in Table on page 10, each record describes the region and company of a specific store.

How Markdown Optimization Uses the Location Hierarchy Data

Markdown Optimization uses the location hierarchy data in a variety of ways, such as:

- to allow business rules to be assigned at higher levels than the item
- to aggregate sales data to the item level (for example, sales are at store level; items are at region level)
- to aggregate metrics in the application UI and in the application reports
- to filter by location hierarchy in the Items Worksheet

Data Fields

The location hierarchy can have up to twelve levels. Each level in the location hierarchy, just like the merchandise hierarchy, is described by three fields:

- **HIERARCHY_ID** – an identifier or value for the hierarchy level that is meaningful to the application end-user. It may be displayed in the UI. It does not have to be unique.
- **HIERARCHY_KEY** – a key used to identify the location level that is unique across the chain for that level. The key may not be displayed in the UI; however, it is used to reference the location in other data files.
- **HIERARCHY_DESC** – a description for the level that describes that level in the location hierarchy.

These three fields are required for each level of the location hierarchy that is used. For example, if a retailer’s location hierarchy contains three levels, then the location hierarchy file will contain nine required fields. Any unused fields in the location hierarchy file should be present in the file as NULL (that is, consecutive delimiters) when the file is sent in delimited file format.

An Example

The following table shows sample data for a three-level location hierarchy that consists of Company, Region, and Store.

Table 2–5 Location Hierarchy Sample Data

| Hierarchy 1 (Company) | | | Hierarchy 2 (Region) | | | Hierarchy 3 (Store) | | |
|-----------------------|-----|-----------|----------------------|-----|-----------|---------------------|------|--------------|
| ID | Key | Desc | ID | Key | Desc | ID | Key | Desc |
| 1 | 1 | Full Line | 1 | FL1 | Northeast | 1000 | 1000 | New York |
| 1 | 1 | Full Line | 2 | FL2 | Southeast | 1001 | 1001 | Atlanta |
| 1 | 1 | Full Line | 2 | FL2 | Southeast | 1010 | 1010 | Charlotte |
| 1 | 1 | Full Line | 3 | FL3 | Resort | 1002 | 1002 | Puerto Rico |
| 2 | 2 | Outlet | 1 | O1 | Northeast | 2000 | 2000 | Philadelphia |
| 2 | 2 | Outlet | 2 | O2 | Southeast | 1003 | 1003 | Atlanta |

Technical Notes

The following list provides details to consider regarding the location hierarchy data.

- The best way to create a unique Key for each level in the location hierarchy depends on the retailer’s hierarchy data. Whenever possible, the hierarchy Keys should not be dependent on higher levels in the hierarchy. In this way, the application can automatically detect and handle hierarchy moves without additional data. For more information on how the application manages location hierarchy changes, see [“Location Hierarchy Rename Standard Interface” on page 2-11](#).
- The location hierarchy file must contain a record for each location that is referenced in any of a given week’s data files.
- The location hierarchy must be described consistently throughout the data file: each hierarchy node must have the same hierarchy ancestors for all records in the file that describes the hierarchy node. In the example shown in Table 2–5 on page 10, the two records describing the hierarchy above Region FL2 are identical. Note that this consistency requirement applies to all three of the hierarchy fields (Key, ID, and Desc). Inconsistent values for hierarchy descriptions are a common reason why some location hierarchy records fail to load.
- Each node in a hierarchy can only have one parent node.

- The lowest level in the location hierarchy should be the level at which sales data is provided.
- The lowest level does not have to be the level at which the optimization (called the “item level”) occurs. The lowest level in the location hierarchy is typically the store level. The item level is often higher.
- The historical location hierarchy should contain a record for each location that is referenced in any historical sales records, even if the location is now closed. It is recommended that retailers provide a single location hierarchy file for all the historical data, rather than one file for each historical week.

Location Hierarchy CDA Standard Interface

The location hierarchy cda interface provides 24 additional optional attributes. For more information, see the Configurable Data Attributes chapter.

Location Hierarchy Rename Standard Interface

The location hierarchy rename interface facilitates moving locations within the location hierarchy. You can rename any node in the hierarchy by supplying the old node name, the new node name, and the level in the hierarchy. You cannot do this through the Location Hierarchy Standard Interface.

Markdowns Taken Standard Interface

The markdowns taken interface describes permanent markdowns, past, present, or future, that have been entered into a retailer’s price change execution system. Markdown Optimization supports one markdown for a given fiscal week.

The markdowns-taken records must be at the item level (the level used for optimization). For example, if the markdown recommendations are at the color-region level, then the markdowns-taken records must be at the color-region level.

How Markdown Optimization Uses the Markdowns Taken Data

Markdown Optimization uses the markdowns taken data in a variety of ways, such as:

- to determine the markdowns that have already been executed in the store and the markdowns that are pending execution in the future. The CURRENT_RETAIL field in the Sales data feed does not reflect pending markdowns; however, the application builds the information about pending markdowns into its forecast. Markdown Optimization will not recommend new markdowns prior to any pending markdowns, but will recommend additional markdowns after pending markdowns if additional markdowns are needed and do not violate business rules.
- to determine the validity of future markdowns based on the number of previous markdowns and the date of the most recent markdown.

Data Fields

Eight fields describe each entry in the markdowns taken data.

- MERCHANDISE_KEY – in combination with the location key, identifies the item being marked down.
- LOCATION_KEY - in combination with the merchandise key, identifies the item being marked down.

- EFFECTIVE_DATE – the expected store execution date of the markdown.
- PRICE_VALUE_TYPE – Prices are expressed as either Percentage Off Original Retail Price (PO), Percentage Off Ticketed Price (PT), Amount Off Original Retail Price (AO), Amount Off Ticket Price (AT), or Price Point (PP).
- ACCOUNTING_TYPE – The accounting type for the markdown can be either Permanent (PERM) or Temporary (TEMP). This attribute is used only by the application.
- PRICE_POINT – If PRICE_VALUE_TYPE is PP, then this contains the price point values. Either PRICE_POINT or PRICE_PCT_OFF must be not null, depending on the value in PRICE_VALUE_TYPE.
- PRICE_PCT_OFF – If PRICE_VALUE_TYPE is PO, then this contains the percentage off (a value between 0 and 1). Either PRICE_POINT or PRICE_PCT_OFF must be not null, depending on the value in PRICE_VALUE_TYPE.
- CLIENT_LADDER_ID – Unique identifier for the price ladder (i.e., unique per price ladder string)

An Example

The following table shows two sample markdowns taken records for the items from the previous examples.

Table 2–6 Sample Markdowns Taken Data

| Merchandise Key | Location Key | EffectiveDate | Old Ticket Price | New Ticket Price |
|-----------------|--------------|---------------|------------------|------------------|
| 101234509 | FL1 | 2005-02-07 | 24.99 | 19.99 |
| 101234509 | FL2 | 2005-02-07 | 19.99 | 16.99 |

The first row in the table describes an item that is marked down from \$24.99 to \$19.99 in the application on Wednesday, February 2, 2005. The markdown will take effect in the stores on Monday, February 7, 2005. When the sales data feed is transmitted on Sunday, February 6, 2005, the item’s CURRENT_RETAIL price in the sales file should still be \$24.99, because that is the retail price as of the end of the week for the sales data feed. However, the item also has a record in the markdowns taken data feed that indicates that the item will be permanently marked down to \$19.99 on Monday.

Technical Notes

The following list provides details to consider regarding the markdowns taken data.

- The markdowns taken data must be at the item level (the level of optimization). Retailers typically must aggregate markdowns taken data from lower levels. The markdowns taken aggregation should be consistent with the CURRENT_RETAIL aggregation described for the sales interface. Because of this, the retailer should generate a markdown taken record whenever there is a change in the most frequently occurring value of CURRENT_RETAIL.
- The new ticket price must be less than the old ticket price (the interface does not support markups). The effective date must be a day. No two records are allowed to have the same merchandise, location, and effective date values.
- Markdown Optimization is not the system of record for price changes. It is therefore strongly recommended that all retailers provide this data, even if the markdowns taken in the application are being automatically transmitted to the

retailer's price execution system. In this way, the application is aware of any markdowns taken, either through the application itself or by some other means.

Merchandise Hierarchy Standard Interface

The merchandise hierarchy interface describes how a retailer categorizes merchandise. The merchandise hierarchy begins with the highest level, such as company or division, and typically extends to the style-color level. For example, a five-level merchandise hierarchy might consist of Division, Department, Class, Style, and Color. Each entry (row) in the merchandise hierarchy standard interface describes the hierarchy for a specific piece of merchandise. In the example of a merchandise hierarchy shown in Table 2-7 on page 14, the merchandise is an item of a specific color, and each row in the file describes the Division, Department, Class, and Style to which the specific color belongs.

How Markdown Optimization Uses the Merchandise Hierarchy Data

Markdown Optimization uses the merchandise hierarchy data in a variety of ways, such as:

- To define worksheets, such as at the Department level
- To allow business rules to be assigned at higher levels than the item level
- To aggregate metrics in the application UI and in application reports
- To filter data in the Items Worksheet

Data Fields

The merchandise hierarchy can have up to fifteen levels. Each level in the merchandise hierarchy is described by three fields:

- **HIERARCHY_ID** – an identifier or value for the hierarchy level that is meaningful to the application end user. It may be displayed in the application UI. It does not have to be unique.
- **HIERARCHY_KEY** – a key used to identify the merchandise level that is unique across the chain for that level. The key may not be displayed in the UI; however, it is used to reference the merchandise in other data files.
- **HIERARCHY_DESC** – a description for the level that describes that level in the merchandise hierarchy.

These three fields are required for each level of the merchandise hierarchy that is used. For example, if a retailer's merchandise hierarchy contains five levels, then the merchandise hierarchy file will contain fifteen required fields. Any unused fields in the merchandise hierarchy file should be present in the file as NULL (that is, consecutive delimiters) when the file is sent in delimited file format.

In addition to the three fields that describe each level of the merchandise hierarchy, two other attributes are part of this standard interface:

- **TXN_ID** – a unique transaction identifier for the current node that specifies the order of transactions to process.
- **TXN_FLAG** – the status of the transaction, where M indicates an Update or Add action and D indicates a delete action.

An Example

The following table shows sample data for a five-level hierarchy that consists of Division, Department, Class, Style, and Color. (The hierarchy descriptions are not included here):

Table 2–7 Merchandise Hierarchy Sample Data

| Hierarchy 1 (Division) | | Hierarchy 2 (Dept.) | | Hierarchy 3 (Class) | | Hierarchy 4 (Style) | | Hierarchy 5 (Color) | |
|------------------------|-----|---------------------|-----|---------------------|------|---------------------|--------|---------------------|-----------|
| ID | Key | ID | Key | ID | Key | ID | Key | ID | Key |
| 1 | 1 | 10 | 10 | 20 | 1020 | 1234 | 101234 | 9 | 101234509 |
| 1 | 1 | 10 | 10 | 20 | 1020 | 1234 | 101234 | 12 | 101234512 |
| 6 | 6 | 60 | 60 | 20 | 6020 | 1234 | 601234 | 12 | 601234512 |

In this example, the class, style, and color levels all have ID values that are not unique across the chain. Because of this, the Key values for these three levels cannot be the same as the ID values. The unique Key values for these three levels were created by combining values from higher levels in the hierarchy. The Key for the Class level was created by appending the Class ID to the Department Key. The Key for the Style level was created by appending the Style ID to the Department Key.

Technical Notes

The following list provides details to consider regarding the merchandise hierarchy data.

- The best way to create a unique Key for each level in the merchandise hierarchy depends on the retailer’s hierarchy data. Whenever possible, the hierarchy Keys should not be dependent on higher levels in the hierarchy. In this way, the application can automatically detect and handle hierarchy moves without additional data. For more information on how the application manages merchandise hierarchy changes, see [“Merchandise Hierarchy Rename Standard Interface” on page 2-15](#).
- The merchandise hierarchy file must contain a record for each product that is referenced in any other of a given week’s data files.
- The merchandise hierarchy must be described consistently throughout the data file: each hierarchy node must have the same hierarchy ancestors for all records in the file that describes the hierarchy node. In the example shown in Table 2–7 on page 14, the first two records describe the hierarchy above Style 101234 in an identical way. Note that this consistency requirement applies to all three of the hierarchy fields (Key, ID, and Desc). Inconsistent values for hierarchy descriptions are a common reason why some merchandise hierarchy records fail to load.
- Each node in a hierarchy can only have one parent node.
- The lowest level in the merchandise hierarchy must be the level at which sales and distribution data are provided.
- The lowest level does not have to be the level at which the optimization (called the “item level”) occurs; however, the lowest level typically is the optimization level.
- The historical data files should include a record for each product that is referenced in any historical sales records, even if the product is inactive. It is recommended that retailers provide a single merchandise hierarchy file for all the historical data, rather than one file for each historical week.

Merchandise Hierarchy CDA Standard Interface

The merchandise hierarchy cda interface provides 24 additional optional attributes. For more information, see the Configurable Data Attributes chapter.

Merchandise Hierarchy Rename Standard Interface

The merchandise hierarchy rename interface facilitates reclassifying and moving merchandise within the merchandise hierarchy. Any node in the hierarchy can be renamed by supplying the old node name, the new node name, and the level in the hierarchy. This cannot be done through the Merchandise Hierarchy Standard Interface.

Technical Notes

Note that this information pertains to both the Merchandise Hierarchy Rename Standard Interface and the Location Hierarchy Rename Standard Interface.

The application database associates other information with a node in the merchandise (or location) hierarchy through an internally generated key. Each node of the hierarchy has one of these internal keys in addition to the key that is sent by a retailer. Information like historical sales records, analytical parameters, and business rules is stored according to these internal keys. The relation between the internal keys and the retailer keys must be preserved when hierarchies are changed.

The rename interface is used to update the association between the retailer key and an internal key after a reclass occurs. The association between the retailer key and the internal key is updated by specifying the old key, the new key, and the level. The rename interface always needs to be combined with a merchandise hierarchy reflecting the changes that have been made. In the most general case, both of these files are required to fully specify a hierarchy change.

It is recommended that the keys at each level of the hierarchy should be unique without depending on parent levels so that hierarchy changes can be made without sending a rename file. In that case, when a node is moved, the changed hierarchy is sent. Since the keys for the nodes that move are unchanged, the internal keys will retain the correct association and nothing else needs to happen. The new parent-child relationships are simply defined by the latest hierarchy.

It may not be practical to provide keys at all levels that are independent of the keys at the parent level. For example, the CLASS key concatenates the DEPT and CO keys above it. This implies that the rename interface is needed for certain types of hierarchy changes, as discussed below.

Another important concept is that the rename interface can be used for a "move" in the merchandise hierarchy, but does not directly describe a "merge". So, for example, there is no direct way to specify (assuming Dept 42 already exists):

"Move Department 44 to Department 42"

However, the desired result can be accomplished by:

"Move all classes in Department 44 into Department 42"

The types of moves specified below fall into the following categories:

- Move all departments in one division into another division.
- Move all classes in one department to another department.
- Move some classes from one department to another department.

The way to accomplish these moves depends on how the keys, at and below the levels in question, will be affected.

Case 1 When departments are moved to another division, the keys at and below department will not change, since division is not incorporated in the key. (The exception would be if a division were moved into another company.) Since the keys do not change at department or below, this move can be accomplished by sending the new merchandise hierarchy, with departments that were in the old division having the new division as their parent.

Cases 2 and 3 When classes are moved to another department, the keys at and below class for the affected nodes will all change (since class keys and below are all constructed by concatenating the class into the key). In these cases, a rename file must be sent in addition to the updated merchandise hierarchy. This file will contain a record for the affected class and for each of its descendents.

For example, in order to move CLASS 0263 from DEP 0059 to DEP 0086 (the class has STYLES 0001 and 0002, each with HALF-SIZES 0 and 1, each with COLORS 0001 and 0002), the following records in the rename file must be sent:

```
TOO00590263|TOO00860263|CLASS
TOO005902630001|TOO008602630001|STYLE
TOO005902630002|TOO008602630002|STYLE
TOO0059026300010|TOO0086026300010|HALF-SIZE
TOO0059026300011|TOO0086026300011|HALF-SIZE
TOO0059026300020|TOO0086026300020|HALF-SIZE
TOO0059026300021|TOO0086026300021|HALF-SIZE
TOO00590263000100001|TOO00860263000100001|COLOR
TOO00590263000110001|TOO00860263000110001|COLOR
TOO00590263000200001|TOO00860263000200001|COLOR
TOO00590263000210001|TOO00860263000210001|COLOR
TOO00590263000100002|TOO00860263000100002|COLOR
TOO00590263000110002|TOO00860263000110002|COLOR
TOO00590263000200002|TOO00860263000200002|COLOR
TOO00590263000210002|TOO00860263000210002|COLOR
```

These records tell the application how to associate the internal keys at each node with the new keys. (The new merchandise hierarchy file should also reflect the result of the moves.)

Price Ladders Standard Interface

The price ladders standard interface describes the price ladders displayed in the application UI.

Note that the Price Ladders data feed will not load if the data contains a colon or a semi-colon.

How Markdown Optimization Uses the Price Ladder Data

Price ladders define a retailer-specific set of markdown prices that can be selected in the application. Prices in the price ladder are expressed either as a price point (PP), as a percentage off the original retail price (PO), or as a percentage off the ticket price (PT). Each of these three types of price ladder can be permanent or temporary. Temporary price ladders are denoted by a t- prefix in the UI.

Data Fields

Twelve fields describe each price ladder:

- CLIENT_LADDER_ID – an externally generated sequential number that identifies the price ladder.

- MERCHANDISE_KEY – the key for this level of the merchandise hierarchy.
- MERCHANDISE_LEVEL – the level of the merchandise hierarchy.
- LOCATION_KEY – the key for this level of the location hierarchy.
- LOCATION_LEVEL – the level of the location hierarchy.
- PRICE_VALUE_TYPE – price ladders are expressed as either percentage off original retail price (PO), percentage off ticketed price (PT), or price point (PP).
- PRICE_LADDER_DESC – The price ladder name that is displayed in the UI.
- MODEL_FLAG – a model run indicator. “R” indicates that the price ladder is used for the optimization.
- ITEM_PRG_FLAG – indicates if the price ladder is used for the optimization of individual items only (ITEM), pricing groups only (PRG), or both (BOTH).
- ACCOUNTING_TYPE – the accounting type can be either permanent (PERM) or temporary (TEMP).
- PRICE_POINT – if the price ladder type is PP, then this contains the price point values. Either PRICE_POINT or PRICE_PCT_OFF must be Not Null, depending on the value of the PRICE_VALUE_TYPE column.
- PRICE_PCT_OFF – if the price ladder type is PO, then this contains the percentage off (a value between 0 and 1). Either PRICE_POINT or PRICE_PCT_OFF must be Not Null, depending on the value of the PRICE_VALUE_TYPE column.

Technical Notes

The following list provides details to consider regarding price ladder data:

- The price ladder data is generally loaded after the merchandise/location hierarchy information, since price ladders are tied to levels. And, at least one price ladder must be loaded before the first model run.
- The inference rules, at a minimum, assign a default price ladder to each item or pricing group. In the application, ITEMS maps each ITEM_ID to a price ladder via the function getPriceLadderID. Each item can have only one price ladder for processing by the model.
- Percent off (PO) price ladders are discounts that are applied to the original price.
- Price point (PP) price ladders are actual prices that must be expressed as \$x.99.

Price ladders define a retailer-specific set of markdown prices that can be selected in the application. Prices in the price ladder are expressed either as a price point (PP), as a percentage off the original retail price (PO), or as a percentage off the ticket price (PT). Each of these three types of price ladder can be permanent or temporary. Temporary price ladders are denoted by a t- prefix in the UI.

The price ladder information collected from a retailer should include the name of the price ladder, the type of ladder, a list of price points or percentages (the rungs), and the hierarchy/location level.

The price ladder data is generally loaded after the merchandise/location hierarchy information, since price ladders are tied to levels. And, at least one price ladder must be loaded before the first model run.

The inference rules, at a minimum, assign a default price ladder to each item or pricing group. In the application, ITEMS maps each ITEM_ID to a price ladder via the function getPriceLadderID. Each item can have only one price ladder for processing by the model.

Price Ladder Views

Price ladder information is displayed in the UI. Users select from the drop-down list of price ladder names and then select a price point or percentage from the drop-down list of price ladder values. For more information, see the *Oracle Retail Markdown Optimization User Guide*.

Views in the UI are defined via the following:

P4P_LADDER_ROLES defines which price ladders are available for a specific worksheet.

Table 2-8 P4P_LADDER_ROLES

| Column Name | Data Type | Nullable |
|-------------|---------------|----------|
| HIERARCHY1 | VARCHAR2 (50) | Y |
| HIERARCHY2 | VARCHAR2 (50) | Y |
| HIERARCHY3 | VARCHAR2 (50) | Y |
| HIERARCHY4 | VARCHAR2 (50) | Y |
| LADDER_ID | Number | Y |

P4P_LADDER_INFO identifies the name and type of each price ladder. It is recommended that price ladder names contain meaningful information, including price ladder type, to help users in making selections.

Table 2-9 P4P_LADDER_INFO

| Column Name | Data Type | Nullable |
|-------------|---------------|----------|
| LADDER_ID | Number (32,0) | N |
| LADDER_NAME | VARCHAR2 (50) | Y |
| LADDER_TYPE | Number | Y |

P4P_LADDER_VALUES defines the rungs (fixed prices or percentages off) of the price ladder.

Table 2-10 P4P_LADDER_VALUES

| Column Name | Data Type | Nullable |
|--------------|---------------|----------|
| LADDER_ID | Number (32,0) | N |
| LADDER_VALUE | Number | Y |
| LADDER_TYPE | Number | Y |

Promotions Standard Interface

The promotions interface describes planned promotions or temporary markdowns. The application uses this information to adjust forecasting and markdown recommendations.

How Markdown Optimization Uses the Promotions Data

Markdown Optimization uses the promotions data in a variety of ways, such as:

- to determine the item level forecast, which can affect markdown recommendations. For example, a permanent markdown may be delayed or may not be necessary because of a planned promotion.
- to restrict markdown recommendations. For example, a retailer can specify that a markdown should be taken only if it is deeper or more shallow than a certain type of planned promotion.

Data Fields

Here is some information about the key fields that specify the promotions data.

- **PROMO_PRICE** – the price during the promotion (a value must be provided for either **PROMO_PRICE** or **PROMO_PERC_OFF**)
- **PROMO_PERC_OFF** – the price is calculated as a percentage of the forecasted retail price at the time of the promotion. This must be a value between 0 and 1.
- **PROMO_TYPE** – the promotion type, or interpretation, is either ceiling (candidate prices can be no higher than the promotion price), floor (candidate prices can be no less than the promotion), or unrestricted.
- **PROMO_EXCL_FG** – included (1) or excluded (-1) from a promotional event.

Technical Notes

The following list provides details to consider regarding the promotion data.

- The promotion is specified as either a price (**PROMO_PRICE**) or as a percentage off (**PROMO_PERC_OFF**) the current retail price, so one of the two fields is always blank.
- If a promotion is specified as a percentage off, it must be expressed as a value between 0 and 1. (For example, 30% off is expressed as 0.3.)
- The promotions records must be at or above the item level (the level of optimization). For example, if the markdown recommendations are at the region level, then the promotions records must be at the region level. If a promotion is above the item level, then the load will automatically explode the promotion down to the item level.
- The current week's promotion data should include all promotions that have an end date that occurs after the last date in the sales history, regardless of when the promotion started.
- The promotion type column (**PROMO_TYPE**) is mandatory.
- A point-of-sale (POS) promotion is always unrestricted.
- The application does not combine the price effects of simultaneous promotions on the same item. For example, if three promotions are in effect for an item on a given day, the application looks, in order, at the promotion's interpretation, priority, and price and determines the price. (The interpretation, or promotion type, and the priority, an assigned value, are both defined in **IR_PLANNED_PROMOS**, which is described in the *Oracle Retail Markdown Optimization Configuration Guide*.)
- If the price has already been marked down below the level of the promotion, then the current price does not change.
- When a promotion is defined and loaded, the promotion is applied (exploded) from the level at which it is defined down to the lower levels. The exclusion flag identifies merchandise within the defined promotion that is not to be included in the promotion.

The following table shows the use of the exclusion flag.

Table 2–11 Sample Promotion Data

| Merch. Key | Merch. Level | Loc. Key | Loc. Level | Promo. Key | Start Date | End Date | Promo. Price | Promo. % Off | Promo. Desc. | Ex. Flag |
|------------|--------------|----------|------------|------------|------------|----------|--------------|--------------|--------------|----------|
| 10 | DEPT | North | REGION | P1 | 01/01/04 | 02/01/04 | null | 0.2 | Apromo | 1 |
| 0 | CHAIN | NE | DISTRICT | P1 | 01/01/04 | 02/01/04 | null | 0.2 | Apromo | -1 |
| 1001 | STYLE | North | REGION | P1 | 01/01/04 | 01/01/04 | null | 0.2 | Apromo | -1 |
| 0 | CHAIN | 0 | CHAIN | P2 | 02/14/04 | 02/15/04 | null | null | PresDay | 1 |
| 1002 | STYLE | North | REGION | P3 | 01/01/04 | 02/01/04 | null | 0.2 | - | 1 |
| 1003 | STYLE | - | CHAIN | - | - | - | null | - | - | -1 |

Notes on the table entries:

- Row 1 shows a month-long 20 percent off P1 promotion.
- Row 2 excludes all merchandise in the NE from the P1 promotion.
- Row 3 excludes the 1001 Style from the P1 promotion from the entire North Region. (Row 2 simply excluded all merchandise from the NE.)
- Row 4 shows a non-price promotion over President’s Day for the entire company.
- Row 5 shows a month-long 20 percent off P3 promotion.
- Row 6 excludes Style 1003 from every promotion.

Sales/Inventory/Orders Standard Interface

The sales interface describes weekly sales, inventory, and order data at the lowest level of the merchandise and location hierarchy. If items are defined at higher levels in either hierarchy, then Markdown Optimization aggregates the data in the sales file to the level required by the items.

For the weekly data, the sales file should always contain the sales records for the most recent week of sales that have not yet been sent to the application. The same weekly sales file can also contain the complete sales records for one or more previous weeks of sales (for example, in order to correct previous weekly sales data because of subsequent adjustments). When the sales file contains data for previous weeks, it must contain the complete sales data for those weeks, not just the changes. The load procedure replaces the data already loaded with the new data.

How Markdown Optimization Uses the Sales Data

Markdown Optimization uses the sales data in a variety of ways, such as:

- to define the current selling price for an item in the absence of any promotions.
- to determine, in combination with analytical parameters, the base demand for an item.
- to calculate a number of historical sales and inventory-related metrics.
- to help define the total inventory to clear through markdown optimization (inventory on-hand is always part of the total inventory to clear and units on-order are typically part of the total inventory to clear provided by the model).

Data Fields

Sixteen fields describe each sales record:

- **MERCHANDISE_KEY** – the key for the lowest level in the merchandise hierarchy associated with this sale.
- **LOCATION_KEY** – the key for the lowest level in the location hierarchy associated with this sale.
- **FISCAL_YEAR** – the fiscal year of the sales record.
- **FISCAL_WEEK** – the fiscal week of the sales record.
- **NET_SALES_UNITS** – the number of units sold minus the number of units returned for the merchandise at the location. The application uses the net sales to calculate demand and to calculate sales-related metrics shown in the application.
- **NET_SALES_DOLLARS** – the dollars received at the register for all new sales minus the return dollars. Net sales dollars are used to calculate sales-related metrics shown in the application.
- **GROSS_SALES_UNITS** – the number of units sold, excluding returns, for the merchandise at the location. Gross sales units are used, in conjunction with **GROSS_SALES_DOLLARS**, to calculate the sales price that is passed to the model and used to calculate demand. Gross sales are not used for sales-related metrics shown in the application.
- **GROSS_SALES_DOLLARS** – the dollars received at the register for all new sales, excluding returns. Gross sales dollars are used, in conjunction with **GROSS_SALES_UNITS**, to calculate the sales price that is passed to the model and used to calculate demand. Gross sales are not used for sales-related metrics shown in the application.
- **POS_SALES_UNITS** – the number of units sold at a promotional price (temporary markdown taken at the register) for the merchandise at the location.
- **POS_SALES_DOLLARS** – the dollars received at the register for the **POS_SALES_UNITS**.
- **EOP_INVENTORY_UNITS** – the number of units of the merchandise on hand at the location at the end of the fiscal week.
- **EOP_ON_ORDER_UNITS** – the number of units of the merchandise on order for or in transit to the location at the end of the fiscal week.
- **CURRENT_RETAIL** – the retail sales price of the merchandise at the location at the end of the week in the absence of any promotional discounts. Current Retail is used as the starting price for forecasts and optimizations. **CURRENT_RETAIL** should not reflect planned changes to the retail sales price in the coming week or weeks. (Such pending changes are specified in the [Markdowns Taken](#) interface, which is described in [“Markdowns Taken Standard Interface”](#) on page 2-11.)
- **CURRENT_INV_PRICE** – the inventory price of the merchandise at the location at the end of the fiscal week. This price is used as the basis for calculating markdown dollars, using the retail accounting method. Some retailers may use a retail accounting method in which the inventory price of an item is not always the same as the retail sales price.
- **STORE_NUM_WITH_INV** – the number of locations that have positive inventory (**EOP_INVENTORY_UNITS**) at the end of the fiscal week. Assuming the sales records are at the store level in the location hierarchy, this value will be equal to

one when EOP_INVENTORY_UNITS is greater than zero, and it will be equal to zero when EOP_INVENTORY_UNITS is less than or equal to zero.

- STORE_NUM_WITH_OO – the number of locations that have positive units on order, but zero units on hand, at the end of the fiscal week. Assuming the sales records are at the store level in the location hierarchy, this value will be equal to one when EOP_ON_ORDER_UNITS is greater than zero and EOP_INVENTORY_UNITS is less than or equal to zero, and it will be equal to zero in all other cases.

An Example

The following table shows sample data, using previously defined items.

Table 2–12 Sample Sales Data

| Merch. Key/Loc. Key | Fisc. Yr. | Fisc. Wk. | Net Sales Units | Net Sales \$ | Gross Sales Units | Gross Sales \$ | POS Sales Units | POS Sales \$ | EOP Inv. Units | EOP OO Units | Store # Inv. | Store # OO | Curr. Rtl. Price | Curr. Inv. Price |
|---------------------|-----------|-----------|-----------------|--------------|-------------------|----------------|-----------------|--------------|----------------|--------------|--------------|------------|------------------|------------------|
| 101234509 /1000 | 2004 | 52 | 3 | 69.97 | 3 | 69.97 | 0 | 0.00 | 41 | 0 | 1 | 0 | 24.99 | 24.99 |
| 101234509 /1001 | 2004 | 52 | 4 | 74.96 | 5 | 99.95 | 0 | 0.00 | 60 | 0 | 1 | 0 | 19.99 | 19.99 |
| 101234509 /1010 | 2004 | 52 | 1 | 19.99 | 1 | 19.99 | 0 | 0.00 | 0 | 20 | 0 | 1 | 19.99 | 19.99 |
| 101234512 /2000 | 2004 | 52 | 2 | 84.98 | 2 | 84.98 | 1 | 39.99 | 28 | 0 | 1 | 0 | 49.99 | 49.99 |

Notes on Table:

- Row 1: The Net Sales Dollars are the actual sales dollars captured at the register and can thus be less than the Net Sales Units multiplied by the Current Retail Price (even if there are no POS Sales Units).
- Row 2: The Gross Sales Dollars are not the same as the Gross Sales Units, because of one unit being returned.
- Row 3: This location has zero EOP Inventory Units and non-zero EOP On Order Units. Because of this, the value in the Store # OO is 1.
- Row 4: Two units were sold this week, one during a promotion and one outside a promotion.

Technical Notes

The following list provides details to consider regarding the sales data.

- The application only persists the sales data at the item level in the database. If a retailer requires a copy of the weekly sales data, she or he should implement a process to archive the weekly data.
- The gross and net sales fields are required by the interface. The POS sales fields can be NULL if not available. If a retailer cannot provide the gross sales fields, then those fields must be populated with the corresponding value for net sales.
- The CURRENT_INV_PRICE field is required by the interface. Retailers who do not have an inventory price that is distinct from the retail price should populate this field with the value in the CURRENT_RETAIL field.
- The application expects a single record in the sales feed to summarize the sales for a given merchandise/location/week. For example, if a retailer is sending sales to

the application at the color-store level, they should send a single record for each color-store-week. The retailer is responsible for aggregating the transactions for the color-store-week to create this record.

- A retailer may have even lower levels in her or his merchandise hierarchy that are not known by the application; therefore, the retailer may need to aggregate some of the data provided in the sales interface. For example, if the lowest level in the merchandise hierarchy is color, but the retailer's hierarchy has size beneath color and the retailer's data source for sales is at the size level, then the retailer will need to aggregate the sales data fields as follows:
 - All UNITS and DOLLARS fields should be aggregated by summing the lower level records.
 - CURRENT_RETAIL and CURRENT_INV_PRICE should be aggregated by choosing the most frequently occurring value for the field. For example, if there are six sizes for an item (color), and five of the sizes have a current retail price of \$19.99, and one of the sizes has a current retail price of \$21.99, then the current retail sent to the application should be \$19.99.
 - If the records in the sales file are at a lower level than the item level in Price, then the application will aggregate the sales data following the same aggregation rules just described.

Seasonalities Standard Interface

The seasonalities standard interface describes the seasonality values (effects related to the time of year) provided by Analytical Services that are used by the application to calculate markdowns and forecasts.

How Markdown Optimization Uses the Seasonalities Data

Markdown Optimization uses the seasonalities data in a variety of ways, including:

- To support seasonality searches across the merchandise and location hierarchies.
- The following inference rules are involved in seasonalities:
 - IR_SEASONALITIES – provides the seasonality values to the model from start date to out date.
 - IR_SEASONALITY_ATTRIBUTE – defines the attributes value(s) used for seasonality matching.
 - IR_ITEM_IDS – maps item IDs to seasonality IDs

Data Fields

Eight fields describe a seasonality map record:

- PRIORITY – the search priority for the seasonality.
- SEASONALITY_ID – the ID for the seasonality.
- MERCHANDISE_LEVEL – description of the level of the merchandise hierarchy.
- MERCHANDISE_KEY – key for the merchandise hierarchy level.
- LOCATION_LEVEL – description of the level of the location hierarchy.
- LOCATION_KEY – key for the location hierarchy level.
- ATTRIBUTE_MASK – the search mask that specifies the season code and, optionally, the item attributes of the seasonality curves.

- AS_VERSION – the version number for the current run. Set by Analytical Parameter Calculator (APC) and used to track run versions.

Six fields describe a seasonality values record:

- SEASONALITY_ID – the ID for the seasonality.
- CALENDAR_DT – the date for the seasonality.
- SEAS_INDX – the value for the seasonality for the date.
- SEAS_ERR – for future use. Set to 0.
- AS_PARAMETER_ID – a number that uniquely identifies the current record and that is used for tracking.
- AS_VERSION – the version number for the current run. Set by APC and used to track run versions.

Markdown Optimization Interface Specifications

The following tables provide ordered lists of the contents of each of the Markdown Optimization interface specifications.

Budget Specification (ASH_BUDGET_TBL)

Table 2–13 Budget Standard Interface Specification¹

| Field Name | Field Description | Data Type | Maximum Length | Nullable Y/N |
|--------------------|--|-----------|----------------|--------------|
| MERCHANDISE_KEY | Unique key to the merchandise hierarchy level of the worksheet | String | 25 | N |
| LOCATION_KEY | Unique key to the location hierarchy level of the worksheet | String | 25 | N |
| FISCAL_YEAR | Fiscal Year ID | Integer | 4 | N |
| FISCAL_MONTH | Fiscal Month ID | Integer | 2 | N |
| MARKDOWN_BUDGET | Markdown budget | Decimal | 22,3 | Y |
| PLANNED_GM_DOLLARS | Planned GM Dollars | Decimal | 22,3 | Y |
| PLANNED_GM_PERC | Planned GM Percent | Decimal | 22,3 | Y |
| ATTRIBUTE1 | Attribute | Decimal | 22,3 | Y |
| ATTRIBUTE2 | Attribute | Decimal | 22,3 | Y |
| ATTRIBUTE3 | Attribute | Decimal | 22,3 | Y |
| ATTRIBUTE4 | Attribute | Decimal | 22,3 | Y |
| ATTRIBUTE5 | Attribute | Decimal | 22,3 | Y |
| ATTRIBUTE6 | Attribute | Decimal | 22,3 | Y |
| ATTRIBUTE7 | Attribute | Decimal | 22,3 | Y |
| ATTRIBUTE8 | Attribute | Decimal | 22,3 | Y |
| ATTRIBUTE9 | Attribute | Decimal | 22,3 | Y |
| ATTRIBUTE10 | Attribute | Decimal | 22,3 | Y |

¹ For Decimal, the requirement is a number of a certain defined length and with a certain number of decimal places. For example, (22,2) is a number that can be up to 22 digits long and that can have two digits after the decimal point.

Business Rule Instances Specification (ASH_BRM_INSTANCE_TBL)

Table 2–14 Business Rule Instances Standard Interface Specification

| Attribute | Attribute Description | Data Type | Maximum Length | Nullable Y/N |
|-------------------|---|--|----------------|--------------|
| MERCHANDISE_KEY | Key for this level of the hierarchy | String | 50 | N |
| MERCHANDISE_LEVEL | ID for this level of the hierarchy | String | 50 | N |
| LOCATION_KEY | Key for this level of the hierarchy | String | 50 | N |
| LOCATION_LEVEL | ID for this level of the hierarchy | String | 50 | N |
| RULE_NAME | The name of the business rule associated with the item. | String | 64 | N |
| RULE_VALUE | The business rule value assigned to the item. | String Note: Values < 1 should be expressed as 0.n. | 100 | N |
| ATTRIB1_VALUE | The specific value associated with the item for custom attribute 1. | String | 100 | Y |
| ATTRIB2_VALUE | The specific value associated with the item for custom attribute 2. | String | 100 | Y |
| DELETE_FLAG | A flag to indicate whether the instance is to be deleted or inserted. 0 = insert (the default). 1 = delete. | Integer | 1 | Y |

Calendar Specification (ASH_CAL_TBL)

Table 2–15 Calendar Standard Interface Specification

| Attribute | Attribute Description | Data Type | Maximum Length | Nullable Y/N |
|-----------------|---|---------------------------|----------------|--------------|
| EOP_CALENDAR_DT | Ending calendar date of the fiscal week (which is usually a Saturday) | Date in format YYYY-MM-DD | 10 | N |
| FISCAL_YR | Number of the fiscal year | Integer | 4 | N |
| FISCAL_QTR | Number of fiscal quarter | Integer | 1 | N |

Table 2–15 (Cont.) Calendar Standard Interface Specification

| Attribute | Attribute Description | Data Type | Maximum Length | Nullable Y/N |
|-------------|--|-----------|----------------|--------------|
| FISCAL_MO | Number of the fiscal month | Integer | 2 | N |
| FISCAL_WK | Number of the fiscal week | Integer | 2 | N |
| CALENDAR_WK | An alternative number for the calendar week (optional) | Integer | 2 | Y |
| SEASON | Season number associated with the week | Integer | 2 | N |

Cluster Levels Specification (ASH_CSHL_TBL)

Table 2–16 Cluster Levels Standard Interface Specification

| Attribute | Attribute Description | Data Type | Maximum Length | Nullable Y/N |
|---------------|---|-----------|----------------|--------------|
| CLUSTER_LEVEL | The name of the cluster level. | String | 50 | N |
| LEVEL_SQC | The sequence number of the cluster level. | Integer | 2 | N |

Cluster Mapping Specification (ASH_CLUSTER_MAPPING_TBL)

Table 2–17 Cluster Mapping Standard Interface Specification

| Attribute | Attribute Description | Data Type | Maximum Length | Nullable Y/N |
|-----------------------|--|-----------|----------------|--------------|
| CLUSTER_SET_CLIENT_ID | Client ID of the cluster set | String | 25 | Y |
| MERCHANDISE_CLIENT_ID | Client ID from the Merchandise Hierarchy table | String | 25 | Y |

Demand Parameters Specification (ASH_PARAMETER_VALUES_TBL)

Table 2–18 Demand Parameters Standard Interface Specification

| Field Name | Field Description | Data Type | Maximum Length | Nullable Y/N |
|-------------------|--|-----------|----------------|--------------|
| MERCHANDISE_LEVEL | The external merchandise level. | String | 50 | N |
| MERCHANDISE_KEY | In combination with the location key, identifies the item being marked down. | String | 25 | N |
| LOCATION_LEVEL | The external location level. | String | 50 | N |

Table 2–18 (Cont.) Demand Parameters Standard Interface Specification

| Field Name | Field Description | Data Type | Maximum Length | Nullable Y/N |
|-----------------|---|-----------|----------------|--------------|
| LOCATION_KEY | In combination with the merchandise key, identifies the item being marked down. | String | 25 | N |
| ITEM_ATTRIBUTE | The item attribute for the parameter (set to % by default). | String | 100 | N |
| PARAMETER_NAME | The name of the parameter. The names can be DEFAULT_GAMMA, DEFAULT_ALPHA, CRITICAL_INVENTORY, or ZERO_INVENTORY. | String | 50 | N |
| PARAMETER_VALUE | The value assigned to the parameter. | String | 25 | Y |
| AS_PARAMETER_ID | A number that uniquely identifies the record across all output tables and can be used to trace issues. It is not an analytical value. | Integer | 32 | Y |
| AS_VERSION | The version number for the current run of the output, which is set by APC and can be used to track versions. | String | 20 | Y |

DC Allocation Specification (ASH_DC_ALLOCATION_TBL)

Table 2–19 Distribution Center Allocation Standard Interface Specification¹

| Field Name | Field Description | Data Type | Maximum Length | Nullable Y/N |
|-------------------|--|-----------|----------------|--------------|
| WAREHOUSE_KEY | Unique identifier for a warehouse | String | 25 | N |
| MERCHANDISE_KEY | Key for the item level in the merchandise hierarchy | String | 25 | N |
| MERCHANDISE_LEVEL | The level of the merchandise key. Must be at the level of sales optimization in order to be inserted into WAREHOUSE_INV_TBL. | String | 32 | N |
| LOCATION_KEY | Key for the item level in the location hierarchy | String | 25 | N |
| FRACTION | Percentage of inventory, expressed as a value 0 - 1 | Decimal | 8,6 | N |

¹ For Decimal, the requirement is a number of a certain defined length and with a certain number of decimal places. For example, (22,2) is a number that can be up to 22 digits long and that can have two digits after the decimal point.

DC Inventory Specification (ASH_DCI_TBL)

Table 2–20 *Distribution Center Inventory Standard Interface Specification*

| Field Name | Field Description | Data Type | Maximum Length | Nullable Y/N |
|---------------------|---|-----------|----------------|--------------|
| MERCHANDISE_KEY | Key for the lowest level in the merchandise hierarchy | String | 25 | N |
| WAREHOUSE_KEY | Unique identifier for a warehouse | String | 25 | N |
| FISCAL_YEAR | Fiscal year ID | Integer | 4 | N |
| FISCAL_WEEK | Fiscal week ID | Integer | 2 | N |
| EOP_INVENTORY_UNITS | Describes the total DC EOP inventory units | Integer | 22 | Y |
| EOP_ON_ORDER_UNITS | Describes the total DC EOP on order units | Integer | 22 | Y |

Items Specification (ASH_ITEMS_TBL)

Table 2–21 *Items Standard Interface Specification¹*

| Field Name | Field Description | Data Type | Maximum Length | Nullable Y/N |
|--------------------|--|---------------------------|----------------|--------------|
| MERCHANDISE_KEY | Key for the item level in the merchandise hierarchy | String | 25 | N |
| LOCATION_KEY | Key for the item level in the location hierarchy | String | 25 | N |
| FIRST_RECEIPT_DATE | Receipt date is the date that an item first appears in a store or a distribution center (DC) | Date in format YYYY-MM-DD | 10 | Y |
| LAST_RECEIPT_DATE | Most recent date that an item was received in a store or a distribution center | Date in format YYYY-MM-DD | 10 | Y |
| VENDOR | Vendor that supplies merchandise to this location | String | 25 | Y |
| VENDOR_DESC | Vendor description | String | 50 | Y |

Table 2–21 (Cont.) Items Standard Interface Specification¹

| Field Name | Field Description | Data Type | Maximum Length | Nullable Y/N |
|-------------|---|-----------|----------------|--------------|
| UNIT_COST | Describes the merchandise's average unit cost (cost of inventory) | Decimal | 22,2 | N |
| SEASON_CODE | Retailer-specific season code, used to help determine seasonality | String | 25 | Y |
| FULL_PRICE | Original retail price of the merchandise | Decimal | 22,2 | Y |

¹ For Decimal, the requirement is a number of a certain defined length and with a certain number of decimal places. For example, (22,2) is a number that can be up to 22 digits long and that can have two digits after the decimal point.

Items CDA Specification (ASH_ITEMS_CDA_TBL)

Table 2–22 Items CDA Standard Interface Specification¹

| Field Name | Field Description | Data Type | Maximum Length | Nullable Y/N |
|-----------------|---|---------------------------|----------------|--------------|
| MERCHANDISE_KEY | Unique identifier for merchandise hierarchy | String | 25 | N |
| LOCATION_KEY | Unique identifier for location hierarchy | String | 25 | N |
| ATTRIBUTE1 | Attribute | String | 100 | Y |
| ATTRIBUTE2 | Attribute | String | 100 | Y |
| ATTRIBUTE3 | Attribute | String | 100 | Y |
| ATTRIBUTE4 | Attribute | String | 100 | Y |
| ATTRIBUTE5 | Attribute | String | 100 | Y |
| ATTRIBUTE6 | Attribute | String | 100 | Y |
| ATTRIBUTE7 | Attribute | String | 100 | Y |
| ATTRIBUTE8 | Attribute | String | 100 | Y |
| ATTRIBUTE1_DATE | Attribute Date | Date in format YYYY-MM-DD | 10 | Y |
| ATTRIBUTE2_DATE | Attribute Date | Date in format YYYY-MM-DD | 10 | Y |
| ATTRIBUTE3_DATE | Attribute Date | Date in format YYYY-MM-DD | 10 | Y |
| ATTRIBUTE4_DATE | Attribute Date | Date in format YYYY-MM-DD | 10 | Y |
| ATTRIBUTE5_DATE | Attribute Date | Date in format YYYY-MM-DD | 10 | Y |
| ATTRIBUTE6_DATE | Attribute Date | Date in format YYYY-MM-DD | 10 | Y |
| ATTRIBUTE7_DATE | Attribute Date | Date in format YYYY-MM-DD | 10 | Y |
| ATTRIBUTE8_DATE | Attribute Date | Date in format YYYY-MM-DD | 10 | Y |

Table 2–22 (Cont.) Items CDA Standard Interface Specification¹

| Field Name | Field Description | Data Type | Maximum Length | Nullable Y/N |
|-------------------|-------------------|-----------|----------------|--------------|
| ATTRIBUTE1_NUMBER | Attribute Number | Decimal | 31,3 | Y |
| ATTRIBUTE2_NUMBER | Attribute Number | Decimal | 31,3 | Y |
| ATTRIBUTE3_NUMBER | Attribute Number | Decimal | 31,3 | Y |
| ATTRIBUTE4_NUMBER | Attribute Number | Decimal | 31,3 | Y |
| ATTRIBUTE5_NUMBER | Attribute Number | Decimal | 31,3 | Y |
| ATTRIBUTE6_NUMBER | Attribute Number | Decimal | 31,3 | Y |
| ATTRIBUTE7_NUMBER | Attribute Number | Decimal | 31,3 | Y |
| ATTRIBUTE8_NUMBER | Attribute Number | Decimal | 31,3 | Y |

¹ For Decimal, the requirement is a number of a certain defined length and with a certain number of decimal places. For example, (22,2) is a number that can be up to 22 digits long and that can have two digits after the decimal point.

Location Hierarchy Specification (ASH_LH_TBL)

Table 2–23 Location Hierarchy Standard Interface Specification

| Attribute Name | Attribute Description | Data Type | Maximum Length | Nullable Y/N |
|-----------------|--|-----------|----------------|--------------|
| HIERARCHY1_ID | ID for this level of the hierarchy | String | 25 | Y |
| HIERARCHY1_KEY | Key for this level of the hierarchy | String | 25 | Y |
| HIERARCHY1_DESC | Description of this level of the hierarchy | String | 50 | Y |
| HIERARCHY2_ID | ID for this level of the hierarchy | String | 25 | Y |
| HIERARCHY2_KEY | Key for this level of the hierarchy | String | 25 | Y |
| HIERARCHY2_DESC | Description of this level of the hierarchy | String | 50 | Y |
| HIERARCHY3_ID | ID for this level of the hierarchy | String | 25 | Y |
| HIERARCHY3_KEY | Key for this level of the hierarchy | String | 25 | Y |
| HIERARCHY3_DESC | Description of this level of the hierarchy | String | 50 | Y |
| HIERARCHY4_ID | ID for this level of the hierarchy | String | 25 | Y |
| HIERARCHY4_KEY | Key for this level of the hierarchy | String | 25 | Y |
| HIERARCHY4_DESC | Description of this level of the hierarchy | String | 50 | Y |
| HIERARCHY5_ID | ID for this level of the hierarchy | String | 25 | Y |
| HIERARCHY5_KEY | Key for this level of the hierarchy | String | 25 | Y |

Table 2–23 (Cont.) Location Hierarchy Standard Interface Specification

| Attribute Name | Attribute Description | Data Type | Maximum Length | Nullable Y/N |
|-----------------------|--|------------------|-----------------------|---------------------|
| HIERARCHY5_DESC | Description of this level of the hierarchy | String | 50 | Y |
| HIERARCHY6_ID | ID for this level of the hierarchy | String | 25 | Y |
| HIERARCHY6_KEY | Key for this level of the hierarchy | String | 25 | Y |
| HIERARCHY6_DESC | Description of this level of the hierarchy | String | 50 | Y |
| HIERARCHY7_ID | ID for this level of the hierarchy | String | 25 | Y |
| HIERARCHY7_KEY | Key for this level of the hierarchy | String | 25 | Y |
| HIERARCHY7_DESC | Description of this level of the hierarchy | String | 50 | Y |
| HIERARCHY8_ID | ID for this level of the hierarchy | String | 25 | Y |
| HIERARCHY8_KEY | Key for this level of the hierarchy | String | 25 | Y |
| HIERARCHY8_DESC | Description of this level of the hierarchy | String | 50 | Y |
| HIERARCHY9_ID | ID for this level of the hierarchy | String | 25 | Y |
| HIERARCHY9_KEY | Key for this level of the hierarchy | String | 25 | Y |
| HIERARCHY9_DESC | Description of this level of the hierarchy | String | 50 | Y |
| HIERARCHY10_ID | ID for this level of the hierarchy | String | 25 | Y |
| HIERARCHY10_KEY | Key for this level of the hierarchy | String | 25 | Y |
| HIERARCHY10_DESC | Description of this level of the hierarchy | String | 50 | Y |
| HIERARCHY11_ID | ID for this level of the hierarchy | String | 25 | Y |
| HIERARCHY11_KEY | Key for this level of the hierarchy | String | 25 | Y |
| HIERARCHY11_DESC | Description of this level of the hierarchy | String | 50 | Y |
| HIERARCHY12_ID | ID for this level of the hierarchy | String | 25 | Y |
| HIERARCHY12_KEY | Key for this level of the hierarchy | String | 25 | Y |
| HIERARCHY12_DESC | Description of this level of the hierarchy | String | 50 | Y |

LH CDA Specification (ASH_LH_CDA_TBL)

Table 2–24 Location Hierarchy CDA Standard Interface Specification¹

| Field Name | Field Description | Data Type | Maximum Length | Nullable Y/N |
|-------------------|--|---------------------------|----------------|--------------|
| LOCATION_KEY | Unique identifier for location hierarchy | String | 25 | N |
| LOCATION_LEVEL | Level within the location hierarchy | String | 50 | N |
| ATTRIBUTE1 | Attribute | String | 100 | Y |
| ATTRIBUTE2 | Attribute | String | 100 | Y |
| ATTRIBUTE3 | Attribute | String | 100 | Y |
| ATTRIBUTE4 | Attribute | String | 100 | Y |
| ATTRIBUTE5 | Attribute | String | 100 | Y |
| ATTRIBUTE6 | Attribute | String | 100 | Y |
| ATTRIBUTE7 | Attribute | String | 100 | Y |
| ATTRIBUTE8 | Attribute | String | 100 | Y |
| ATTRIBUTE1_DATE | Attribute Date | Date in format YYYY-MM-DD | 10 | Y |
| ATTRIBUTE2_DATE | Attribute Date | Date in format YYYY-MM-DD | 10 | Y |
| ATTRIBUTE3_DATE | Attribute Date | Date in format YYYY-MM-DD | 10 | Y |
| ATTRIBUTE4_DATE | Attribute Date | Date in format YYYY-MM-DD | 10 | Y |
| ATTRIBUTE5_DATE | Attribute Date | Date in format YYYY-MM-DD | 10 | Y |
| ATTRIBUTE6_DATE | Attribute Date | Date in format YYYY-MM-DD | 10 | Y |
| ATTRIBUTE7_DATE | Attribute Date | Date in format YYYY-MM-DD | 10 | Y |
| ATTRIBUTE8_DATE | Attribute Date | Date in format YYYY-MM-DD | 10 | Y |
| ATTRIBUTE1_NUMBER | Attribute Number | Decimal | 31,3 | Y |
| ATTRIBUTE2_NUMBER | Attribute Number | Decimal | 31,3 | Y |
| ATTRIBUTE3_NUMBER | Attribute Number | Decimal | 31,3 | Y |
| ATTRIBUTE4_NUMBER | Attribute Number | Decimal | 31,3 | Y |
| ATTRIBUTE5_NUMBER | Attribute Number | Decimal | 31,3 | Y |
| ATTRIBUTE6_NUMBER | Attribute Number | Decimal | 31,3 | Y |
| ATTRIBUTE7_NUMBER | Attribute Number | Decimal | 31,3 | Y |
| ATTRIBUTE8_NUMBER | Attribute Number | Decimal | 31,3 | Y |

¹ For Decimal, the requirement is a number of a certain defined length and with a certain number of decimal places. For example, (22,2) is a number that can be up to 22 digits long and that can have two digits after the decimal point.

LH Rename Specification (ASH_LHRENAME_TBL)

Table 2–25 Location Hierarchy Rename Standard Interface Specification

| Field Name | Field Description | Data Type | Maximum Length | Nullable Y/N |
|------------------|--|-----------|----------------|--------------|
| OLD_LOCATION_KEY | Old unique identifier for location hierarchy | String | 25 | N |
| NEW_LOCATION_KEY | New unique identifier for location hierarchy | String | 25 | N |
| LOCATION_LEVEL | Level within the location hierarchy | String | 50 | N |

Markdowns Taken Specification (ASH_MDTAKEN_TBL)

Table 2–26 Markdowns Taken Standard Interface Specification¹

| Field Name | Field Description | Data Type | Maximum Length | Nullable Y/N |
|------------------|--|---------------------------|----------------|--------------|
| MERCHANDISE_KEY | In combination with the location key, identifies the item being marked down. | String | 25 | N |
| LOCATION_KEY | In combination with the merchandise key, identifies the item being marked down. This attribute is required only for Markdown Optimization. | String | 25 | Y |
| EFFECTIVE_DATE | Effective date of the retail price change. | Date in format YYYY-MM-DD | 10 | N |
| PRICE_VALUE_TYPE | Percentage Off Original Retail Price (PO), Percentage Off Ticketed Price (PT), Amount Off Original Retail Price (AO), Amount Off Ticket Price (AT), or Price Point (PP). | String | 2 | N |
| ACCOUNTING_TYPE | The accounting type for the markdown can be either Permanent (PERM) or Temporary (TEMP). This attribute is required only for Markdown Optimization. | String | 4 | N |

Table 2–26 (Cont.) Markdowns Taken Standard Interface Specification¹

| Field Name | Field Description | Data Type | Maximum Length | Nullable Y/N |
|------------------|--|-----------|----------------|--------------|
| PRICE_POINT | If PRICE_VALUE_TYPE is PP, then this contains the price point values. A value must be provided for either PRICE_POINT or PRICE_PCT_OFF. | Decimal | 7,2 | Y |
| PRICE_PCT_OFF | If PRICE_VALUE_TYPE is PO, then this contains the percentage off (a value between 0 and 1). A value must be provided for either PRICE_POINT or PRICE_PCT_OFF | Decimal | 3,2 | Y |
| CLIENT_LADDER_ID | Unique identifier for the price ladder (i.e., unique per price ladder string) | Integer | 22 | Y |

¹ For Decimal, the requirement is a number of a certain defined length and with a certain number of decimal places. For example, (22,2) is a number that can be up to 22 digits long and that can have two digits after the decimal point.

Merchandise Hierarchy Specification (ASH_MH_TBL)

Table 2–27 Merchandise Hierarchy Standard Interface Specification

| Attribute Name | Attribute Description | Data Type | Maximum Length | Nullable Y/N |
|-----------------|--|-----------|----------------|--------------|
| TXN_ID | Unique transaction ID. | Integer | 32 | N |
| TXN_FLAG | Transaction status. | String | 1 | N |
| HIERARCHY1_ID | ID for this level of the hierarchy | String | 25 | Y |
| HIERARCHY1_KEY | Key for this level of the hierarchy | String | 25 | Y |
| HIERARCHY1_DESC | Description of this level of the hierarchy | String | 50 | Y |
| HIERARCHY2_ID | ID for this level of the hierarchy | String | 25 | Y |
| HIERARCHY2_KEY | Key for this level of the hierarchy | String | 25 | Y |
| HIERARCHY2_DESC | Description of this level of the hierarchy | String | 50 | Y |
| HIERARCHY3_ID | ID for this level of the hierarchy | String | 25 | Y |
| HIERARCHY3_KEY | Key for this level of the hierarchy | String | 25 | Y |
| HIERARCHY3_DESC | Description of this level of the hierarchy | String | 50 | Y |
| HIERARCHY4_ID | ID for this level of the hierarchy | String | 25 | Y |

Table 2–27 (Cont.) Merchandise Hierarchy Standard Interface Specification

| Attribute Name | Attribute Description | Data Type | Maximum Length | Nullable Y/N |
|-----------------------|--|------------------|-----------------------|---------------------|
| HIERARCHY4_KEY | Key for this level of the hierarchy | String | 25 | Y |
| HIERARCHY4_DESC | Description of this level of the hierarchy | String | 50 | Y |
| HIERARCHY5_ID | ID for this level of the hierarchy | String | 25 | Y |
| HIERARCHY5_KEY | Key for this level of the hierarchy | String | 25 | Y |
| HIERARCHY5_DESC | Description of this level of the hierarchy | String | 50 | Y |
| HIERARCHY6_ID | ID for this level of the hierarchy | String | 25 | Y |
| HIERARCHY6_KEY | Key for this level of the hierarchy | String | 25 | Y |
| HIERARCHY6_DESC | Description of this level of the hierarchy | String | 50 | Y |
| HIERARCHY7_ID | ID for this level of the hierarchy | String | 25 | Y |
| HIERARCHY7_KEY | Key for this level of the hierarchy | String | 25 | Y |
| HIERARCHY7_DESC | Description of this level of the hierarchy | String | 50 | Y |
| HIERARCHY8_ID | ID for this level of the hierarchy | String | 25 | Y |
| HIERARCHY8_KEY | Key for this level of the hierarchy | String | 25 | Y |
| HIERARCHY8_DESC | Description of this level of the hierarchy | String | 50 | Y |
| HIERARCHY9_ID | ID for this level of the hierarchy | String | 25 | Y |
| HIERARCHY9_KEY | Key for this level of the hierarchy | String | 25 | Y |
| HIERARCHY9_DESC | Description of this level of the hierarchy | String | 50 | Y |
| HIERARCHY10_ID | ID for this level of the hierarchy | String | 25 | Y |
| HIERARCHY10_KEY | Key for this level of the hierarchy | String | 25 | Y |
| HIERARCHY10_DESC | Description of this level of the hierarchy | String | 50 | Y |
| HIERARCHY11_ID | ID for this level of the hierarchy | String | 25 | Y |
| HIERARCHY11_KEY | Key for this level of the hierarchy | String | 25 | Y |
| HIERARCHY11_DESC | Description of this level of the hierarchy | String | 50 | Y |

Table 2–27 (Cont.) Merchandise Hierarchy Standard Interface Specification

| Attribute Name | Attribute Description | Data Type | Maximum Length | Nullable Y/N |
|-----------------------|--|------------------|-----------------------|---------------------|
| HIERARCHY12_ID | ID for this level of the hierarchy | String | 25 | Y |
| HIERARCHY12_KEY | Key for this level of the hierarchy | String | 25 | Y |
| HIERARCHY12_DESC | Description of this level of the hierarchy | String | 50 | Y |
| HIERARCHY13_ID | ID for this level of the hierarchy | String | 25 | Y |
| HIERARCHY13_KEY | Key for this level of the hierarchy | String | 25 | Y |
| HIERARCHY13_DESC | Description of this level of the hierarchy | String | 50 | Y |
| HIERARCHY14_ID | ID for this level of the hierarchy | String | 25 | Y |
| HIERARCHY14_KEY | Key for this level of the hierarchy | String | 25 | Y |
| HIERARCHY14_DESC | Description of this level of the hierarchy | String | 50 | Y |
| HIERARCHY15_ID | ID for this level of the hierarchy | String | 25 | Y |
| HIERARCHY15_KEY | Key for this level of the hierarchy | String | 25 | Y |
| HIERARCHY15_DESC | Description of this level of the hierarchy | String | 50 | Y |

MH CDA Specification (ASH_MH_CDA_TBL)

Table 2–28 Merchandise Hierarchy CDA Standard Interface Specification¹

| Field Name | Field Description | Data Type | Maximum Length | Nullable Y/N |
|-------------------|---|---------------------------|-----------------------|---------------------|
| MERCHANDISE_KEY | Unique identifier for merchandise hierarchy | String | 25 | N |
| MERCHANDISE_LEVEL | Level within the merchandise hierarchy | String | 50 | N |
| ATTRIBUTE1 | Attribute | String | 100 | Y |
| ATTRIBUTE2 | Attribute | String | 100 | Y |
| ATTRIBUTE3 | Attribute | String | 100 | Y |
| ATTRIBUTE4 | Attribute | String | 100 | Y |
| ATTRIBUTE5 | Attribute | String | 100 | Y |
| ATTRIBUTE6 | Attribute | String | 100 | Y |
| ATTRIBUTE7 | Attribute | String | 100 | Y |
| ATTRIBUTE8 | Attribute | String | 100 | Y |
| ATTRIBUTE1_DATE | Attribute | Date in format YYYY-MM-DD | 10 | Y |

Table 2–28 (Cont.) Merchandise Hierarchy CDA Standard Interface Specification¹

| Field Name | Field Description | Data Type | Maximum Length | Nullable Y/N |
|-------------------|-------------------|---------------------------|----------------|--------------|
| ATTRIBUTE2_DATE | Attribute Date | Date in format YYYY-MM-DD | 10 | Y |
| ATTRIBUTE3_DATE | Attribute Date | Date in format YYYY-MM-DD | 10 | Y |
| ATTRIBUTE4_DATE | Attribute Date | Date in format YYYY-MM-DD | 10 | Y |
| ATTRIBUTE5_DATE | Attribute Date | Date in format YYYY-MM-DD | 10 | Y |
| ATTRIBUTE6_DATE | Attribute Date | Date in format YYYY-MM-DD | 10 | Y |
| ATTRIBUTE7_DATE | Attribute Date | Date in format YYYY-MM-DD | 10 | Y |
| ATTRIBUTE8_DATE | Attribute Date | Date in format YYYY-MM-DD | 10 | Y |
| ATTRIBUTE1_NUMBER | Attribute Number | Decimal | 31,3 | Y |
| ATTRIBUTE2_NUMBER | Attribute Number | Decimal | 31,3 | Y |
| ATTRIBUTE3_NUMBER | Attribute Number | Decimal | 31,3 | Y |
| ATTRIBUTE4_NUMBER | Attribute Number | Decimal | 31,3 | Y |
| ATTRIBUTE5_NUMBER | Attribute Number | Decimal | 31,3 | Y |
| ATTRIBUTE6_NUMBER | Attribute Number | Decimal | 31,3 | Y |
| ATTRIBUTE7_NUMBER | Attribute Number | Decimal | 31,3 | Y |
| ATTRIBUTE8_NUMBER | Attribute Number | Decimal | 31,3 | Y |

¹ For Decimal, the requirement is a number of a certain defined length and with a certain number of decimal places. For example, (22,2) is a number that can be up to 22 digits long and that can have two digits after the decimal point.

MH Rename Specification (ASH_MHRENAME_TBL)

Table 2–29 Merchandise Hierarchy Rename Standard Interface Specification

| Field Name | Field Description | Data Type | Maximum Length | Nullable Y/N |
|---------------------|---|-----------|----------------|--------------|
| OLD_MERCHANDISE_KEY | Old unique identifier for merchandise hierarchy | String | 25 | N |
| NEW_MERCHANDISE_KEY | New unique identifier for merchandise hierarchy | String | 25 | N |
| MERCHANDISE_LEVEL | Level within the merchandise hierarchy | String | 50 | N |

Price Ladders Specification (ASH_PRICE_LADDERS_TBL)

Table 2–30 Price Ladders Standard Interface Specification¹

| Attribute | Attribute Description | Data Type | Maximum Length | Nullable Y/N |
|-------------------|--|------------------|-----------------------|---------------------|
| CLIENT_LADDER_ID | Unique identifier for the price ladder (i.e., unique per price ladder string) | Integer | | N |
| MERCHANDISE_KEY | Key for this level of the merchandise hierarchy | String | 25 | N |
| MERCHANDISE_LEVEL | Description of this level of the merchandise hierarchy | String | 50 | N |
| LOCATION_KEY | Key for this level of the location hierarchy | String | 25 | N |
| LOCATION_LEVEL | Description of this level of the location hierarchy | String | 50 | N |
| PRICE_VALUE_TYPE | Percentage Off Original Retail Price (PO), Percentage Off Ticketed Price (PT), or Price Point (PP) | String | 2 | N |
| PRICE_LADDER_DESC | Price ladder name displayed in the UI. | String | 50 | N |
| MODEL_FLAG | A model run indicator. R = price ladder used for optimization. | String | 2 | N |
| ITEM_PRG_FLAG | Indicates if price ladder is used for the optimization of individual items only (ITEM), Pricing Groups only (PRG), or both (BOTH). | String | 4 | N |

Table 2–30 (Cont.) Price Ladders Standard Interface Specification¹

| Attribute | Attribute Description | Data Type | Maximum Length | Nullable Y/N |
|------------------|---|------------------|-----------------------|---------------------|
| ACCOUNTING_TYPE | The accounting type can be either Permanent (PERM) or Temporary (TEMP). | String | 4 | N |
| PRICE_POINT | If price ladder type is PP, then this contains price point values. Note: Either PRICE_POINT or PRICE_PCT_OFF must be Not Null, depending on the value of the PRICE_VALUE_TYPE column. | Decimal | 7,2 | Y |
| PRICE_PCT_OFF | If price value type is PO, then this contains the percentage off (a value between 0 and 1). Note: Either PRICE_POINT or PRICE_PCT_OFF must be Not Null, depending on the value of the PRICE_VALUE_TYPE column. | Decimal | 3,2 | Y |

¹ For Decimal, the requirement is a number of a certain defined length and with a certain number of decimal places. For example, (22,2) is a number that can be up to 22 digits long and that can have two digits after the decimal point.

Promotions Specification (ASH_PROMO_TBL)

Table 2–31 Promotions Standard Interface Specification¹

| Field Name | Field Description | Data Type | Maximum Length | Nullable Y/N |
|-------------------|---|---------------------------|-----------------------|---------------------|
| MERCHANDISE_KEY | Key for this level in the merchandise hierarchy | String | 25 | N |
| MERCHANDISE_LEVEL | The level in the merchandise hierarchy under promotion | String | 50 | N |
| LOCATION_KEY | Key for this level in the location hierarchy | String | 25 | N |
| LOCATION_LEVEL | The level in the location hierarchy under promotion | String | 50 | N |
| PROMOTION_KEY | Some name that identifies the promotion under consideration | String | 50 | Y |
| PROMO_START_DATE | Start date of the promotion | Date in format YYYY-MM-DD | 10 | N |
| PROMO_END_DATE | End date of the promotion | Date in format YYYY-MM-DD | 10 | N |

Table 2–31 (Cont.) Promotions Standard Interface Specification¹

| Field Name | Field Description | Data Type | Maximum Length | Nullable Y/N |
|-------------------|---|------------------|-----------------------|---------------------|
| PROMO_PRICE | Price during the promotion (a value must be provided for either PROMO_PRICE or PROMO_PERC_OFF) | Decimal | 22,2 | Y |
| PROMO_PERC_OFF | Percent off current retail price (a value must be provided for either PROMO_PRICE or PROMO_PERC_OFF). Expressed as a value between 0 and 1. | Decimal | 22,3 | Y |
| PROMO_DESC | Description of the promotion | String | 100 | Y |
| PROMO_TYPE | Type of the promotion (floor, ceiling, or unrestricted). This column is mandatory. | String | 50 | N |
| PROMO_EXCL_FG | Included (1) or excluded (-1) from a promotional event. | Integer | 2 | Y |
| PROMO_NUMBER | Number of the promotion | Integer | 4 | Y |
| ATTRIBUTE1 | Attribute | String | 50 | Y |
| ATTRIBUTE2 | Attribute | String | 50 | Y |
| ATTRIBUTE3 | Attribute | String | 50 | Y |
| ATTRIBUTE4 | Attribute | String | 50 | Y |
| ATTRIBUTE5 | Attribute | String | 50 | Y |

¹ For Decimal, the requirement is a number of a certain defined length and with a certain number of decimal places. For example, (22,2) is a number that can be up to 22 digits long and that can have two digits after the decimal point.

Sales Specification (ASH_SALES_TBL)

Table 2–32 Sales/Inventory/Orders Standard Interface Specification¹

| Attribute Name | Attribute Description | Data Type | Maximum Length | Nullable Y/N |
|-----------------------|--|------------------|-----------------------|---------------------|
| MERCHANDISE_KEY | Key for the lowest level in the merchandise hierarchy. | String | 25 | N |
| LOCATION_KEY | Key for the lowest level in the location hierarchy. | String | 25 | N |
| FISCAL_YEAR | Number of the fiscal year. | Integer | 4 | N |
| FISCAL_WEEK | Number of the fiscal week. | Integer | 2 | N |

Table 2–32 (Cont.) Sales/Inventory/Orders Standard Interface Specification¹

| Attribute Name | Attribute Description | Data Type | Maximum Length | Nullable Y/N |
|-----------------------|---|------------------|-----------------------|---------------------|
| NET_SALES_UNITS | Describes the net number of units sold of the Merchandise at the Location. | Integer | 22 | N |
| NET_SALES_DOLLARS | Describes the net dollar amount of sales for the Merchandise/Location during the fiscal week. | Decimal | 22,3 | N |
| GROSS_SALES_UNITS | Describes the gross number of new units sold of the Merchandise at the Location. | Integer | 22 | N |
| GROSS_SALES_DOLLARS | Describes the gross dollar amount of new sales for the Merchandise/Location during the fiscal week. | Decimal | 22,3 | N |
| POS_SALES_UNITS | Describes the number of units of the Merchandise at the Location sold at a temporary markdown taken at the register. | Integer | 22 | Y |
| POS_SALES_DOLLARS | Describes the dollar amount of sales with a temporary markdown taken at the register for the Merchandise/Location during the fiscal week. | Decimal | 22,3 | Y |
| EOP_INVENTORY_UNITS | Describes the number of units on hand inventory at the end of the fiscal week. | Integer | 22 | N |
| EOP_ON_ORDER_UNITS | Describes the number of units on order at the end of the period (in transit to the store) | Integer | 22 | N |
| STORE_NUM_WITH_INV | Describes the number of locations that have inventory at the end of the fiscal week. | Integer | 22 | N |
| STORE_NUM_WITH_OO | Describes the number of locations that have units on order (but not on hand) at the end of the fiscal week. | Integer | 22 | N |
| CURRENT_RETAIL | Describes the merchandise's retail price. | Decimal | 22,2 | N |
| CURRENT_INV_PRICE | Describes the merchandise's inventory price. | Decimal | 22,2 | N |

¹ For Decimal, the requirement is a number of a certain defined length and with a certain number of decimal places. For example, (22,2) is a number that can be up to 22 digits long and that can have two digits after the decimal point.

Seasonalities Specification (ASH_SEASONALITY_MAPS_TBL and ASH_SEASONALITY_VALUES_TBL)

The seasonalities interface populates two tables in Markdown Optimization.

Table 2–33 Seasonalities (Maps) Standard Interface Specification

| Field Name | Field Description | Data Type | Maximum Length | Nullable Y/N |
|-------------------|--|-----------|----------------|--------------|
| PRIORITY | The search priority for the seasonality. | Integer | | N |
| SEASONALITY_ID | The ID for the seasonality. | Integer | | N |
| MERCHANDISE_LEVEL | Description of this level of the merchandise hierarchy. | String | 50 | N |
| MERCHANDISE_KEY | Key for this level of the merchandise hierarchy. | String | 25 | N |
| LOCATION_LEVEL | Description of this level of the location hierarchy. | String | 50 | N |
| LOCATION_KEY | Key for this level of the location hierarchy. | String | 25 | N |
| ATTRIBUTE_MASK | The search mask that specifies the season code and, optionally, the item attributes of the seasonality curves. | String | 50 | Y |
| AS_VERSION | The version number for the current run. Set by APC and used to track run versions. | String | 20 | Y |

Table 2–34 Seasonalities (Values) Standard Interface Specification¹

| Field Name | Field Description | Data Type | Maximum Length | Nullable Y/N |
|----------------|--|---------------------------|----------------|--------------|
| SEASONALITY_ID | The ID for the seasonality. | Integer | | N |
| CALENDAR_DT | The date for the seasonality | Date in format YYYY-MM-DD | 10 | N |
| SEAS_INDX | The value of the seasonality for the date. | Decimal | 11,4 | Y |

Table 2–34 (Cont.) Seasonalities (Values) Standard Interface Specification¹

| Field Name | Field Description | Data Type | Maximum Length | Nullable Y/N |
|-------------------|---|------------------|-----------------------|---------------------|
| SEAS_ERR | For future use. Set to 0. | Decimal | 11,4 | Y |
| AS_PARAMETER_ID | A number that uniquely identifies the current record and that is used for tracking. | Integer | | Y |
| AS_VERSION | The version number for the current run. Set by APC and used to track run versions. | String | 20 | Y |

¹ For Decimal, the requirement is a number of a certain defined length and with a certain number of decimal places. For example, (22,2) is a number that can be up to 22 digits long and that can have two digits after the decimal point.

Standard Load

The standard load procedure is used to load retailer data into the MDO database.

This chapter contains the following sections:

- [Introduction](#)
- [Standard Load Process](#)
- [Standard Load Error Handling](#)
- [Standard Load Dependency Tree](#)
- [Standard Interface Specifications for One-Time Data](#)
- [Standard Dataset](#)

Introduction

This chapter describes the process to execute the standard load procedure, which transforms and loads retail data into the target database. It also includes standard load error messages and information about one-time data loads that are not part of the standard interface.

Standard Load Process

Markdown Optimization provides two scripts that stage, transform, and load data into the target database tables in the application database. The data must be provided in flat files that meet the standard interface specifications. The variable length data in the files should be pipe-delimited. The files should be named to correspond to the names of the matching specification tables. For example, the calendar file should be named in a meaningful way (such as cal.dat or cal.datafeed) to correspond to ASH_CAL_TBL. No specific file extension is required for the input files.

Table 3–1 Flat Files Names

| Example File Name | File Content |
|-------------------|-----------------------|
| mh.dat | Merchandise Hierarchy |
| lh.dat | Location Hierarchy |
| cal.dat | Calendar |
| items.dat | Items |
| sales.dat | Sales |
| budget.dat | Budget |

Table 3–1 (Cont.) Flat Files Names

| Example File Name | File Content |
|--------------------------|--|
| mdtaken.dat | Markdowns Taken |
| promo.dat | Promotions |
| dci.dat | Warehouse Inventory |
| dc_allocation.dat | Warehouse Allocation |
| mhrename.dat | MH Rename |
| lhrename.dat | LH Rename |
| mh_cda.dat | Merchandise Hierarchy Configurable Data Attributes |
| lh_cda.dat | Location Hierarchy Configurable Data Attributes |
| items_cda.dat | Item Configurable Data Attributes |
| brm_instance.dat | Business Rule Instances |
| parameter_values.dat | Demand Parameters |
| price_ladders.dat | Price ladders |
| seasonality_maps.dat | Seasonality Maps |
| seasonality_values.dat | Seasonality Values |
| merchclusters.dat | Cluster Mapping |
| mvhistmd.dat | MVHistMarkdowns |

The two scripts are located in %INSTALLATION_DIRECTORY%/modules/tools/bin. The first script, **pl_stage_file.sh**, stages the data from the flat files into the ASH staging tables. The second script, **pl_load_data.sh**, loads the staged data into the application database. These two scripts are used if you need to customize the load dependency tree.

Each script contains options that can be customized. You can customize the options in the following ways (which are listed in order of precedence, with the command line having the highest precedence):

- Using the command line options
- Setting the customization values as environment variables in env.sh
- Setting the customization values in the user's environment

If you do not need to customize the load dependency tree, you can use the following two scripts:

- **pl_stage_client.sh** <full_path_to_product_directory> MDODataset
- **pl_load_client.sh** <full_path_to_product_directory>

The **pl_stage_client.sh** script calls **pl_stage_file.sh**. The **pl_load_client.sh** script calls **pl_load_data.sh**.

Environment Customization File

Here is an example of the environment customization file (**env.sh**):

```
#This is the environment customization file.
#Please define all customization values here.

#The mail client and address to send all messages to:
#MAIL=mailx
#REPORT_ADDRESS=error_mail@your_domain.com

#Number of parallel processes to run load procedures:
PARALLEL=2

#Directory with data control files:
#CONTROLDIR=/ASHschema/controlfiles

#Directory to store logs:
#LOGDIR=/tmp/load_logs

#Directory to move old logs to.
#If this variable is not set, the logs will be overwritten.
This folder is not required to exist and will be created at the time
#of archiving the logs.
#
#If all old logs should be preserved, it is possible to
#archive the files into a new unique folder, such as:
#LOGDIR_ARCHIVE=
#/tmp/load_logs/archived_logs_'date +%Y%m%d_%H%M%S'
#
#If only the archive of the previous run is important, then
#archive the files into the same folder, such as:
#LOGDIR=/tmp/load_logs/archived_logs

#Number of errors to allow during load
ERROR_THRESHOLD=50
```

Staging Script: pl_stage_file.sh

Usage: `pl_stage_file.sh [OPTION]... [FILE]...`

Loads the files into the database.

Options:

Table 3-2 *pl_stage_file.sh Options*

| | | |
|--------|----------------------|------------------------------------|
| -a DIR | --logdir_archive=DIR | directory to archive old log files |
| -c DIR | --controldir=DIR | directory with data control files |
| -e NUM | --errorthreshold=NUM | number of errors to allow in load |
| -l DIR | --logdir=DIR | directory to store logs |
| -r DIR | --configroot=DIR | configuration root directory |
| -h | --help | displays help and exits |

Load Script: pl_load_data.sh

Usage: `pl_load_data.sh [OPTION]... [LOADPROCEDURE]...`

Runs the load procedures in the database.

Options:**Table 3–3** *pl_load_data.sh Options*

| | | |
|--------|----------------------|--|
| -a DIR | --logdir_archive=DIR | directory to archive old log files |
| -e NUM | --errorthreshold=NUM | number of errors to allow in load (overwrites the procedure's default limit) |
| -l DIR | --logdir=DIR | directory to store logs |
| -r DIR | --configroot=DIR | configuration root directory |
| -h | --help | displays help and exits |

Load Procedures

Here is a description of each load procedure, which includes the source table and the target table.

Load Merchandise Hierarchy

Procedure: com.profitlogic.db.birch.LoadMerchandiseHierarchy

Source Tables:

- ASH_MHL_TBL
- ASH_MH_TBL
- ASH_MH_CDA_TBL

Target Tables:

- MERCHANDISE_HIERARCHY_TBL
- MERCH_ATTR_TBL
- PRODUCT_ITEMS_TBL

Description: This procedure loads the entire merchandise hierarchy, with the exception of the node (CHAIN) that is seeded by the application during installation. It updates the merchandise hierarchy based on the most recent information in ASH_MH_TBL and the levels specified in ASH_MHL_TBL. It completely re-loads MERCH_ATTR_TBL with the most recent data from ASH_MH_CDA_TBL. It also updates PRODUCT_ITEMS_TBL according to the most recent merchandise hierarchy data.

Load Location Hierarchy

Procedure: com.profitlogic.db.birch.LoadLocationHierarchy

Source Tables:

- ASH_LHL_TBL
- ASH_LH_TBL
- ASH_LH_CDA_TBL

Target Tables:

- LOCATION_HIERARCHY_TBL
- LOCATION_ATTR_TBL

Description: This procedure loads the entire location hierarchy, with the exception of the node (CHAIN) that is seeded by application during installation. It updates the

location hierarchy based on the most recent information in ASH_LH_TBL and the levels specified in ASH_LHL_TBL. It completely re-loads LOCATION_ATTR_TBL with the most recent data from ASH_LH_CDA_TBL.

Load Merchandise Table

Procedure: com.profitlogic.db.birch.LoadMHTbl

Source Table: MERCHANDISE_HIERARCHY_TBL

Target Table: MERCHANDISE_TBL

Description: This procedure completely re-loads MERCHANDISE_TBL from MERCHANDISE_HIERARCHY_TBL. MERCHANDISE_TBL is a horizontally flattened view of the merchandise hierarchy, used to improve the performance of other load procedures and the application UI.

Load Location Table

Procedure: com.profitlogic.db.birch.LoadLHTbl

Source Table: LOCATION_HIERARCHY_TBL

Target Table: LOCATION_TBL

Description: This procedure completely re-loads LOCATION_TBL from LOCATION_HIERARCHY_TBL. LOCATION_TBL is a horizontally flattened view of the location hierarchy, used to improve the performance of other load procedures and the application UI.

Load TClose Table

Procedure: com.profitlogic.db.birch.LoadTCLOSE

Source Tables:

- MERCHANDISE_TBL
- CLIENT_HIERARCHY_LEVELS_TBL

Target Table: TCLOSE_TBL

Description: This procedure completely re-loads TCLOSE_TBL from MERCHANDISE_TBL using merchandise hierarchy levels specified in CLIENT_HIERARCHY_LEVELS_TBL. TCLOSE_TBL is a vertically flattened view of the merchandise hierarchy, containing each merchandise node with all its parents. This table is used to improve the performance of other load procedures and the application UI.

Load LTClose Table

Procedure: com.profitlogic.db.birch.LoadLTCLOSE

Source Tables:

- LOCATION_TBL
- CLIENT_HIERARCHY_LEVELS_TBL

Target Table: LTCLOSE_TBL

Description: This procedure completely re-loads LTCLOSE_TBL from LOCATION_TBL using location hierarchy levels specified in CLIENT_HIERARCHY_LEVELS_TBL. LTCLOSE_TBL is a vertically flattened view of the location hierarchy, containing each

location node with all its parents. This table is used to improve the performance of other load procedures and the application UI.

Load MH Rename

Procedure: com.profitlogic.db.birch.LoadMHKeyRename

Source Table: ASH_MHRENAME_TBL

Target Table: MERCHANDISE_HIERARCHY_TBL

Description: This procedure is responsible for moving merchandise within the merchandise hierarchy. It updates CLIENT_LOAD_ID for a merchandise node, based on the new MERCHANDISE_KEY and LEVEL_DESC in ASH_MHRENAME_TBL.

Load LH Rename

Procedure: com.profitlogic.db.birch.LoadLHKeyRename

Source Table: ASH_LHRENAME_TBL

Target Table: LOCATION_HIERARCHY_TBL

Description: This procedure is responsible for moving locations within the location hierarchy. It updates CLIENT_LOAD_ID for a location node, based on the new LOCATION_KEY and LEVEL_DESC in ASH_LHRENAME_TBL.

Load Calendars

Procedure: com.profitlogic.db.birch.LoadCalendars

Source Table: ASH_CAL_TBL

Target Table: PERIODS_TBL

Description: This procedure updates the PERIODS_TBL, which is seeded by the application during installation. The following columns in PERIODS_TBL are updated:

- FISCAL_YR
- FISCAL_MO
- FISCAL_WK
- FISCAL_QUARTER
- FISCAL_HALF
- CALENDAR_YR
- CALENDAR_MO
- CALENDAR_WK
- CALENDAR_QUARTER
- SEASON (the rows derived from ASH_CAL_TBL)

Load Items

Procedure: com.profitlogic.db.birch.LoadItems

Source Tables:

- ASH_ITEMS_TBL
- ASH_ITEMS_CDA_TBL
- ASH_CP_TBL

Target Tables:

- ITEMS_TBL
- ITEMS_CDA_TBL

Description: This procedure inserts new data and updates existing data in ITEMS_TBL from ASH_ITEMS_TBL, based on the optimization level specified in ASH_CP_TBL (cross products information). It also inserts new data and updates existing data in ITEMS_CDA_TBL from ASH_ITEMS_CDA_TBL.

Load Sales

Procedure: com.profitlogic.db.birch.LoadSales

Source Tables:

- ASH_SALES_TBL
- MERCHANDISE_TBL
- LOCATION_TBL
- ITEMS_TBL
- ASH_CP_TBL
- PERIODS_TBL

Target Table: ACTIVITIES

Description: The sales data is loaded from ASH_SALES_TBL, which is populated at the sales level for merchandise. This procedure loads data that is aggregated to the optimization level. It is stored in the ACTIVITIES table at the optimization level. Any number of weeks of data can be provided in ASH_SALES_TBL. The load procedure processes one week at a time, inserting new data or updating existing data.

Load Markdowns Taken

Procedure: com.profitlogic.db.birch.LoadMarkdownsTaken

Source Tables:

- ASH_MDTAKEN_TBL
- ITEMS_TBL
- MERCHANDISE_HIERARCHY_TBL
- LOCATION_HIERARCHY_TBL
- PERIODS_TBL

Target Tables:

- HIST_MARKDOWNS_TBL

Description: The procedure loads records from ASH_MDTAKEN_TBL into HIST_MARKDOWNS_TBL. It first compares the records from the current week's ASH_MDTAKEN_TBL feed with the records in HIST_MARKDOWNS_TBL. If there are matches in HIST_MARKDOWNS_TBL, the procedure replaces them with the new records from ASH_MDTAKEN_TBL.

Load Budget

Procedure: com.profitlogic.db.birch.LoadBudget

Source Tables:

- ASH_BUDGET_TBL
- ASH_CP_TBL
- MERCHANDISE_HIERARCHY_TBL
- LOCATION_HIERARCHY_TBL
- PERIODS_TBL

Target Table: P4P_BUDGET

Description: Budget data is provided on a monthly basis. (PERIODS_TBL.PERIOD_TYPE='FM' is used in the load query.) This procedure completely re-loads data into the P4P_BUDGET table from ASH_BUDGET_TBL, based on the worksheet level specified in ASH_CP_TBL.

Load Promotions

Procedure: com.profitlogic.db.birch.LoadPromotions

Source Tables:

- ASH_PROMO_TBL
- ITEMS_TBL
- MERCHANDISE_HIERARCHY_TBL
- LOCATION_HIERARCHY_TBL
- TCLOSE_TBL
- LTCLOSE_TBL

Target Tables:

- PLANNED_PROMOS_TBL
- PLANNED_PROMOS_MAPS_TBL

Description: This procedure completely re-loads the data in PLANNED_PROMOS_TBL and PLANNED_PROMOS_MAPS_TBL from ASH_PROMO_TBL.

Load Warehouses Table

Procedure: com.profitlogic.db.birch.LoadWarehouses

Source Table: ASH_DCI_TBL

Target Table: WAREHOUSES_TBL

Description: This procedure completely re-loads the data that describes warehouses (retailer key, type, description, and location) from ASH_DCI_TBL to WAREHOUSES_TBL.

Load Dc Inventory

Procedure: com.profitlogic.db.birch.LoadDcInventory

Source Tables:

- ASH_DCI_TBL
- WAREHOUSES_TBL
- ASH_CP_TBL
- ASH_MHL_TBL

- MERCHANDISE_TBL
- PERIODS_TBL

Target Table: WAREHOUSE_INV_TBL

Description: This procedure inserts new inventory data or updates existing data at the optimization level into WAREHOUSE_TBL from ASH_DCI_TBL. The data in ASH_DCI_TBL is at the merchandise level that corresponds to INTERSECT_NAME = SALES in ASH_CP_TBL.

Load Warehouse Allocation

Procedure: com.profitlogic.db.birch.LoadWarehouseAllocation

Source Tables:

- ASH_DC_ALLOCATION_TBL
- WAREHOUSES_TBL
- ASH_CP_TBL
- MERCHANDISE_HIERARCHY_TBL
- LOCATION_HIERARCHY_TBL

Target Table: WAREHOUSE_ALLOCATION_TBL

Description: This procedure inserts new data or updates existing data at the optimization level from ASH_DC_ALLOCATION_TBL into WAREHOUSE_ALLOCATION_TBL, which contains data about what fraction of a particular item's inventory is stored in which warehouse.

Load Business Rule Instances

Procedure: com.profitlogic.db.birch.LoadBRInstances

Source Tables:

- ASH_BRM_INSTANCE_TBL
- BRM_VALUE_DEFINITIONS_TBL
- BRM_KEY_LEVELS_TBL
- MERCHANDISE_HIERARCHY_TBL
- LOCATION_HIERARCHY_TBL

Target Tables:

- BRM_INSTANCE_TBL
- BRM_INSTANCE_CHANGE_TBL

Description: This procedure re-loads business rule instances from ASH_BRM_INSTANCE_TBL to BRM_INSTANCE_TBL. If existing data is modified or deleted, the old data is written to BRM_INSTANCE_CHANGE_TBL to preserve the change history.

Load Sendbacks

Procedure: com.profitlogic.db.birch.LoadMarkdownsSendback

Source Table: PL_MARKDOWN_SENDBACK view

Target Tables:

- HIST_MARKDOWNS_ARCH_TBL

- HIST_MARKDOWNS_TBL

Description: This procedure compares the records in HIST_MARKDOWNS_TBL with the records in the current week's PL_MARKDOWN_SENDBACK view and archives the matches in HIST_MARKDOWNS_ARCH_TBL. It then replaces the records in HIST_MARKDOWNS_TBL with records from the PL_MARKDOWN_SENDBACK view that match on ITEM_ID and CALENDAR_DT/EFFECTIVE_DT. That is, all the latest information on all item markdowns recorded by the application can be found in HIST_MARKDOWNS_TBL; all information on prior markdowns recorded by the application can be found in HIST_MARKDOWNS_ARCH_TBL.

Load Model Start Date

Procedure: com.profitlogic.db.cdw.LoadModelStartDate

The four possible model start options in the IR_MODEL_START_OPTION view are:

- inventoryRatio – the first date when $(\text{inventory} / (\text{cumulative_sales_to_date} + \text{inventory} + \text{on_order})) > \text{a defined threshold}$
- storeRatio – the first date when $((\text{stores_with_inventory}) / (\text{stores_in_region})) > \text{a defined threshold}$
- plannedStart – the date of the first sale after the planned start date (a business rule value)
- custom – a value defined in the IR_MODEL_START view
- sellThrough – the first date of the fiscal week when the sell-through threshold is greater than or equal to the total inventory (where total inventory = Store OO + Store OH + DC OO + DC OH)

Source Tables:

| | |
|-----------------------|---|
| inventoryRatio option | ACTIVITIES |
| storeRatio option | ACTIVITIES ITEM_ACTUALS_MV LTCLOSE_TBL |
| plannedStart option | ACTIVITIES FIRST_SALE_DT_MV ITEMS view getBRValue function (which retrieves data from BRM_INSTANCE_TBL, TCLOSE_TBL, and LTCLOSE_TBL) |
| custom option | IR_MODEL_START view |
| sellThrough option | ACTIVITIES ASH_BRM_INSTANCE_TBL BRM_INSTANCE_TBL INTERNAL_BIZ_RULES_TBL |

Target Table: ITEMS_TBL

Description: This procedure updates MODEL_START_DT in ITEMS_TBL, based on the model start date option specified in the IR_MODEL_START_OPTION view.

The model start date is the first date that an item is considered to be available for sale. It is always represented as the Sunday preceding the actual specified date.

Load Materialized Views

Procedure: com.profitlogic.db.cdw.LoadMaterializedViews

Source Tables:

- ITEMS_TBL
- PERIODS_TBL
- ACTIVITIES

Target Tables:

- DB_LAST_ACTUAL_MV
- ITEM_HIST_MARKDOWNS_MV
- ITEM_METRICS_TBL

Description: This procedure refreshes DB_LAST_ACTUAL_MV and ITEM_HIST_MARKDOWNS_MV.

It re-loads ITEM_METRICS_TBL from the ACTIVITIES data. If the FIRST_RECEIPT_DT is specified in ITEMS_TBL, then only the data received after that date is loaded. If the FIRST_RECEIPT_DT is not specified, then all the data is loaded.

The ITEMS_METRICS_TBL is the source for the following views:

- FIRST_INVENTORY_DT_MV
- FIRST_SALE_DT_MV
- ITEM_ACTUALS_MV
- ITEM_AVG_COST_MV
- LAST_TICKET_PRICE_DT_MV

Load Scenarios

Procedure: com.profitlogic.db.birch.LoadScenarios

Source Table: ACTIVITIES

Target Table: SCENARIOS_TBL

Description: This procedure deletes and then inserts data from ACTIVITIES into SCENARIOS_TBL, where Scenario_ID = 1.

Load Internal Promos

Procedure: com.profitlogic.db.birch.LoadInternalPromos

Load Parameters

Procedure: com.profitlogic.db.birch.LoadParameters

Source Table: ASH_PARAMETER_VALUES_TBL

Target Table: PARAMETER_VALUES_TBL

Description: This procedure truncates and reloads PARAMETER_VALUES_TBL. It populates client_search_levels_tbl with distinct parameter names and rank ordered sequence based on location and merchandise level sequences.

Load Price Ladders

Procedure: com.profitlogic.db.birch.LoadPriceLadders

Source Table: ASH_PRICE_LADDERS_TBL

Target Tables:

- PRICE_LADDERS_TBL
- PRICE_LADDER_VALUES_TBL

Description: This procedure truncates and reloads PRICE_LADDERS_TBL and PRICE_LADDER_VALUES_TBL. It populates client_search_levels_tbl with "PRICE_LADDERS" search name and rank ordered sequence base on location and merchandise level sequences.

Load Seasonalities

Procedure: com.profitlogic.db.birch.LoadSeasonalities

Source Tables:

- ASH_SEASONALITY_MAPS_TBL
- ASH_SEASONALITY_VALUES_TBL

Target Tables:

- SEASONALITY_MAPS_TBL
- SEASONALITY_VALUES_TBL

Description: This procedure truncates and reloads SEASONALITY_MAPS_TBL and SEASONALITY_VALUES_TBL. It populates client_search_levels_tbl with distinct parameter names and rank ordered sequence based on location and merchandise level sequences.

Load Collections Sendback

Procedure: com.profitlogic.db.birch.LoadCollectionsSendback

Target Tables:

- ITEM_DATA_TBL
- COLLECTIONS_TBL
- COLLECTION_MAPS_TBL

Description: Any changes or additions to pricing groups that users implement via the application UI override the assignment of items to pricing groups that are made by the LoadCollectionsAuto procedure and are processed by the LoadCollectionsSendback procedure. The LoadCollectionsSendback procedure executes before the LoadCollectionsAuto procedure.

Load Collections Auto

Procedure: com.profitlogic.db.birch.LoadCollectionsAuto

Source Tables:

- all items from IR_ITEM_COLLECTION except those that have already been auto-collected

Target Tables:

- COLLECTIONS_TBL

- COLLECTION_MAPS_TBL

Description: This procedure determines how to group items into pricing groups.

Load Merchandise Cluster

Procedure: com.profitlogic.db.birch.LoadMerchCluster

Source Tables:

- ASH_CLUSTER_MAPPING_TBL
- ASH_CP_TBL
- MERCHANDISE_HIERARCHY_TBL
- LOCATION_HIERARCHY_TBL

Target Tables: CDW_MERCH_CLUSTER_XREF_TBL

Description: This procedure maps merchandise IDs to cluster sets.

Intermediate levels between clusters and cluster sets are permitted in the Standard Load. For a CLUSTER implementation alone, this acyclic tree validation is turned OFF for the last level. However, the CLUSTER level should be the $(n-1)$, where n is the deepest level of the hierarchy (STORE). Only the CLUSTERSET is mapped to a merchandise level and is the same for the cluster mapping interface from the retailer. The CLUSTER key (client_load_id) cannot be repeated between cluster sets.

Load MaterializedViewsHistMarkdowns

Procedure: com.profitlogic.db.birch.LoadMaterializedViewsHistMarkdowns

Description: This procedure loads the ITEM_HIST_MARKDOWNS_MV table. This table contains the count of taken markdowns per item after the model start date. This table is used by the default product configuration but may be used in a custom configuration.

Standard Load Error Handling

The Standard Load verifies the records in each staging table. Each record that fails the verification is removed from the staging table and placed in another table so that the load can continue and so that the failed records can be reviewed.

If a load procedure fails and the threshold is exceeded, you will see the message “The specified error threshold has been exceeded for this load procedure.” If this occurs, you should correct the existing data problem and re-run the load procedure as well as any child load procedure.

The table containing the failed records is assigned a name that corresponds to the associated staging table. For example:

Table 3–4 Failed Records Table Names

| Staging Table | Failed Record Table |
|---------------|---------------------|
| ASH_SALES_TBL | ASH_SALES_TBL_BAD |
| ASH_PROMO_TBL | ASH_PROMO_TBL_BAD |

The “BAD” table into which the failed records are inserted has the same structure as the corresponding staging table with the addition of the following four columns:

Table 3–5 Bad Table Columns

| Column Name | Description | Data Type | Maximum Length | Nullable (Y/N) |
|-------------|--|-----------|----------------|----------------|
| ERROR_ROWID | The row ID that corresponds to the row ID in the staging table | Row ID | | N |
| ERROR_CODE | The code for the verification | Integer | | N |
| ERROR_DESC | Description of the error | String | 1000 | |
| ERROR_TIME | The time the error occurred | Timestamp | | N |

It is possible to place a threshold on the number of failed records in any staging table that will trigger a termination of the load. The default threshold values are hard-coded into the application. In order to customize the threshold values, you must create a properties file and load it into the application.

Error Handling Properties File

You can configure the threshold values for error handling in the properties file, **dbError.properties**. The values you set in this file override the corresponding application default values. The default value for the threshold of records failed is 100%. The default value for the total record threshold is 0%. Threshold values are expressed as a percentage. Note that the percentage symbol should not be included. Once you have created this file (which should be stored in **com/profitlogic/db/common/resources/dbError.properties** and called as an argument from there), you need to load it into the database schema using the procedure described on page 3-14.

Here is a sample **dbError.properties** file:

```
#####
#This properties file contains all error customizations
#
#Note:all thresholds should be satisfied in order for the load procedure to succeed
#
#####
#LoadPromotions error customizations
#
#Total error threshold is set to 0% of all records (default is 0%):
LoadPromotions.total.threshold=0
#
#Threshold of records failed with error 1205 should not exceed 100% (default is 100%):
LoadPromotions.1205.threshold=100
#
#Threshold of records failed with error 1207 should not exceed 100% (default is 100%):
LoadPromotions.1207.threshold=100
#####
```

In the **dbError.properties** file, you can set the total error threshold as well as a separate threshold for specific verifications. When configuring the error threshold for specific verifications, you use the error message number, as shown in [Table 3–8, "Standard Load Error Messages"](#) to indicate which verification you are setting the error threshold for. The sum of all the individual thresholds cannot exceed the total threshold.

Loading the dbError.properties File

Once you have created the **dbError.properties** file, you can load it, as follows:

dbpropertiesinstaller.sh <config_root>
 conf/com/profitlogic/db/common/resources/dbError.properties, where config_root
 is the root directory of the Markdown Optimization configuration files.

The format for the file <db_connections_properties> is as follows:

For Oracle:

```
db.type=oracle
db.driver=oracle.jdbc.OracleDriver
db.url=jdbc:oracle:thin:@<db_host>:<db_port>:<db_SID>
db.password=<db_password>
where
```

| | |
|------------------|---|
| <db_username> is | the username for the database connection |
| <db_password> is | the password for the database connection |
| <db_host> is | the host name of the database server |
| <db_port> is | the port number of the database server |
| <db_SID> is | the SID or SERVICE_NAME value for the database from the tnsnames.ora file. |

Custom Errors

As part of the **dbError.properties** file, you can create custom verifications. Custom error codes have a reserved range of 50001 to 50100. You need to provide the text of the error message and a query that defines the verification. The pre-load verification (error messages 50000 and 50001 in the following sample) is run during the pre-load verification step. The post-load verification (error message 50002 in the following sample) is run during the post-load verification step. (For a list of the steps in the load procedure, see See “Standard Load Steps” on page 32.

Once you have modified the **dbError.properties** file to include custom verifications, you must load it into the database schema using the above command.

Here is a sample:

```
#####
#Define custom PRE_LOAD verification errors with code 50000 and 50001
#(list of error codes separated by white spaces)
LoadPromotions.pre-load.custom-errors=50000 50001

#Error message:
LoadPromotions.pre-load.50000=Table ASH_CP_TBL is missing OPTIMIZATION levels
#Threshold (default is 100%):
#Note: the threshold affects only INSERT statements! If the statement is defined as a
#   SELECT, then the error will be triggered only if the query returns at least one row.
#   For any other type of statement amount of rows affected is not checked.
LoadPromotions.pre-load.50000.threshold=0
#INSERT statement should populate the "bad records" table with failed rows
#Note: in cases when the threshold is less than 100%, the INSERT statement should end
#   with a non-empty WHERE clause because the statement will be appended by an
#   additional condition.
LoadPromotions.pre-load.50000.query=           \
      SELECT 1 FROM %{YA_DUAL}%             \
      WHERE not exists (SELECT 1 FROM ash_cp_tbl \
                        WHERE intersect name = 'OPTIMIZATION')
```

#Error message:
 LoadPromotions.pre-load.50000=No promotion is allowed after 01/01/2050

```

#Threshold (default is 100%):
#Note: the threshold affects only INSERT statements!
#   If the statement is defined as a SELECT, then the error will be
#   triggered only if the query returns at least one row.
#   For any other type of statement the number of rows is not checked.
LoadPromotions.pre-load.50001.threshold=0
#INSERT statement should populate the "bad records" table with failed rows
#Note: in cases when the threshold is less than 100%, the INSERT statement should end
#   with a non-empty WHERE clause because the statement will be appended by an
#   additional condition.
LoadPromotions.pre-load.50001.query=
INSERT INTO ash_promo_tbl_bad
  (ERROR_ROWID, ERROR_CODE, ERROR_DESC, ERROR_TIMESTAMP, merchandise_key,
   merchandise_level, location_key, location_level, promotion_key,
   promo_start_date, promo_end_date, promo_price, promo_perc_off,
   promo_desc, promo_type, prono_excl_fg, promo_number, attribute1,
   attribute2, attribute3, attribute4, attribute5)
SELECT ROWID, 50001, 'Promo after 01/01/2050',  %{YA_SYSDATE_AS_TIMESTAMP}%,
   merchandise_key,merchandise_level, location_key, location_level, promotion_key,
   promo_start_date, promo_end_date, promo_price, promo_perc_off,
   promo_desc, promo_type, prono_excl_fg, promo_number, attribute1,
   attribute2, attribute3, attribute4, attribute5)
FROM ash_promo_tbl
WHERE promo_end_date >=  %{YA_TODATE/'2050-01-01'/'YYYY-MM-DD'}%

#####
# Define a custom POST_LOAD verification error with code 50002
# (list of error codes separated by spaces)
LoadPromotions.post-load.custom-errors=50002
LoadPromotions.post-load.50002=No promotion is allowed after 01/01/2050
#Note: If the statement is defined as a SELECT, then the error will be
#   triggered only if the query returns at least one row.
#   For any other type of statement the number of rows affected is not checked.
LoadPromotions.post-load.50002.query=
SELECT 1 FROM  %{YA_DUAL}%
WHERE exists (SELECT 1 FROM planned_promos_tbl
             WHERE end_dt >=  %{YA_TO_DATE/'2050-01-01'/'YYYY-MM-DD'}%)

```

Error Handling Report

The standard load validates the data prior to loading the data into the target tables.

A customizable view, `pl_load_status_vw`, provides a report on the status of data validations. This view has the following default attributes:

Table 3–6 *pl_load_status_vw* Default Attributes

| Attribute | Description |
|------------------------|---|
| LOAD_PROCEDURE | The specific load procedure used |
| SOURCE | The staging table |
| DATA_VALIDATION_STATUS | Success - The number of failed records is less than the threshold set or failure - The number or failed records exceeds the threshold set |
| NUM_BAD_RECORDS | The number of failed records in the failed record table |

Here is a sample validation report:

Table 3-7 Sample Standard Load Data Validation Report

| LOAD_PROCEDURE | SOURCE | DATA_VALIDATION_STATUS | NUM_BAD_RECORDS |
|---------------------------|-----------------------|------------------------|-----------------|
| LoadCHLevels | ASH_MHL_TBL | Success | 0 |
| LoadCHLevels | ASH_LHL_TBL | Success | 0 |
| LoadLocationHierarchyTbl | ASH_LH_TBL | Success | 0 |
| LoadItems | ASH_ITEMS_TBL | Success | 0 |
| LoadCalendars | ASH_CAL_TBL | Success | 0 |
| LoadDcInventory | ASH_DCI_TBL | Success | 0 |
| LoadLocationHierarchy | ASH_LH_CDA_TBL | Success | 0 |
| LoadMerchandiseHierarchy | ASH_MH_CDA_TBL | Success | 0 |
| LoadPromotions | ASH_PROMO_TBL | Success | 0 |
| LoadSales | ASH_SALES_TBL | Success | 0 |
| LoadBudget | ASH_BUDGET_TBL | Success | 0 |
| No transformation of data | ASH_CP_TBL | Success | 0 |
| LoadLHKeyRename | ASH_LHRENAME_TBL | Success | 0 |
| LoadMHKeyRename | ASH_MHRENAME_TBL | Success | 0 |
| LoadMDTaken | ASH_MDTAKEN_TBL | Success | 20 |
| LoadItems | ASH_ITEMS_CDA_TBL | Success | 0 |
| LoadWarehouseAllocation | ASH_DC_ALLOCATION_TBL | Failure | 50 |
| LoadBRInstances | ASH_BRM_INSTANCE_TBL | Success | 0 |

To generate an output file that can be emailed to interested users or integrated into production scripts, use the following script. The script writes to the standard output, which can be redirected to a file. Note that the optional WHERE clause, including the WHERE keyword itself, should be enclosed in quotes.

```
bash pl_load_status.sh -r <configroot> -w <whereclause>
```

where

| | | |
|----------|---------------------|--|
| -r DIR | --configroot=DIR | The configuration root directory |
| -w WHERE | --whereclause=WHERE | An optional clause used to filter specific information in the report |
| -h | --help | Displays help and exits |

Standard Load Error Messages

The following are the error messages that may be generated during the standard load procedure.

Table 3–8 Standard Load Error Messages

| Number | Error Message |
|------------------------------|---|
| System Errors | |
| 0 | The program has completed successfully. |
| 10 | An unspecified error has occurred. |
| 20 | An SQL exception has occurred. |
| 30 | A Java exception has occurred. |
| 40 | The exception limit has been exceeded. |
| 50 | The specified error threshold has been exceeded in this load procedure. |
| Common Errors | |
| 100 | At least one node in the hierarchy has more than one parent. |
| 101 | The number of levels in the levels table does not match the data from the source table. |
| 102 | The CHAIN level does not exist in the target table. |
| 104 | The levels table is empty. |
| 105 | The sequence for the CHAIN level should be defined as 1 in the levels table. |
| 106 | At least one node in the hierarchy has more than one hierarchy ID or description. |
| JdbcHelper Errors | |
| 150 | STATOPER password was not registered in the application. |
| 151 | Failed to decrypt STATOPER password. |
| 152 | At least one table being requested for runstats does not exist. |
| 153 | RUNSTATS failed against at least one table. |
| Load CH Levels Errors | |
| 200 | The cross-products information table (ASH_CP_TBL) does not have all the required records. |
| 201 | In the cross-products information table (ASH_CP_TBL), at least one INTERSECT_NAME has a value of NULL. An INTERSECT_NAME cannot have a value of NULL. |
| 202 | A duplicate INTERSECT_NAME has been found in the cross-products information table (ASH_CP_TBL). |
| 203 | Invalid INTERSECT_NAME has been found in the cross-products information table (ASH_CP_TBL) or not all necessary values (OPTIMIZATION, WORKSHEET, SALES, or CLUSTER) have been supplied. |
| 204 | The cross-products information table (ASH_CP_TBL) is empty. |
| 205 | In the cross-products information table (ASH_CP_TBL), at least one merchandise level has a value of NULL. A merchandise level cannot have a value of NULL. |
| 206 | In the cross-products information table (ASH_CP_TBL), at least one location level has a value of NULL. A location level cannot have a value of NULL. |
| Load Calendars Errors | |

Table 3–8 (Cont.) Standard Load Error Messages

| Number | Error Message |
|------------------------------------|---|
| 1000 | In the calendar table (ASH_CAL_TBL), at least one fiscal year does not have between 52 and 53 weeks. |
| 1001 | In the calendar table (ASH_CAL_TBL), at least one fiscal year does not include twelve fiscal months. |
| 1002 | In the calendar table (ASH_CAL_TBL), at least one fiscal week has an End of Period (EOP) that is not Saturday. |
| 1003 | In the calendar table (ASH_CAL_TBL), at least one fiscal month is not in the range 1 - 12. |
| 1004 | In the calendar table (ASH_CAL_TBL), at least one fiscal week is not in the range 1 -53. |
| 1005 | In the calendar table (ASH_CAL_TBL), at least one fiscal year has a value of NULL. A fiscal year cannot have a value of NULL. |
| 1006 | In the calendar table (ASH_CAL_TBL), at least one fiscal month has a value of NULL. A fiscal month cannot have a value of NULL. |
| 1007 | In the calendar table (ASH_CAL_TBL), at least one fiscal week has a value of NULL. A fiscal week cannot have a value of NULL. |
| 1008 | In the calendar table (ASH_CAL_TBL), at least one fiscal season has a value of NULL. A fiscal season cannot have a value of NULL. |
| 1009 | In the calendar table (ASH_CAL_TBL), at least one End of Period (EOP) has a value of NULL. A End of Period (EOP) cannot have a value of NULL. |
| 1010 | In the calendar table (ASH_CAL_TBL), at least one fiscal quarter has a value of NULL. A fiscal quarter cannot have a value of NULL. |
| 1011 | In the calendar table (ASH_CAL_TBL), at least one week end day does not match the existing week end day. |
| 1012 | Week End Day is NULL. |
| 1013 | Week Begin Day is NULL. |
| Load Markdowns Taken Errors | |
| 1100 | In the markdowns taken table (ASH_MDTAKEN_TBL), if price value type is 'PO' or 'PT', then the price percent off value has to be a non-negative fraction and the price point value has to be null. If the price value type is 'PP', then the price point value has to be a non-negative number and the price percent off value has to be null. |
| 1101 | In the markdowns taken table (ASH_MDTAKEN_TBL), only one markdown can be loaded for a unique combination of merchandise, location, and effective date. |
| 1102 | In the markdowns taken table (ASH_MDTAKEN_TBL), at least one merchandise key has a value of NULL. A merchandise key cannot have a value of NULL. |
| 1103 | In the markdowns taken table (ASH_MDTAKEN_TBL), at least one location key has a value of NULL. A location key cannot have a value of NULL. |
| 1104 | In the markdowns taken table (ASH_MDTAKEN_TBL), at least one effective date has a value of NULL. An effective date cannot have a value of NULL. |
| 1105 | In the markdowns taken table (ASH_MDTAKEN_TBL), at least one accounting type is either null or has a value that is not allowed. Acceptable values are TEMP or PERM. |

Table 3–8 (Cont.) Standard Load Error Messages

| Number | Error Message |
|-------------------------------|---|
| 1106 | In the markdowns taken table (ASH_MDTAKEN_TBL), at least one price value type is either null or has a value that is not allowed. Acceptable values are PT, PO, or PP. |
| 1107 | The MERCHANDISE_KEY in the markdowns taken table (ASH_MDTAKEN_TBL) is not at the optimization level. |
| 1108 | The LOCATION_KEY in the markdowns taken table (ASH_MDTAKEN_TBL) is not at the optimization level. |
| 1109 | In the markdowns taken table (ASH_MDTAKEN_TBL), at least one MARKDOWN_TYPE has a value of NULL. Markdown Type cannot have a value of NULL. |
| 1110 | The MERCHANDISE_KEY in the markdowns taken table (ASH_MDTAKEN_TBL) is not at the required level (COLOR of STYLE). |
| 1111 | In the markdowns taken table (ASH_MDTAKEN_TBL), at least one price value type is either NULL or has a value that is not allowed. Acceptable values are PP, PT, PO, AT, or AO. |
| 1112 | In the markdowns taken table (ASH_MDTAKEN_TBL), at least one merchandise level has a value of NULL. A merchandise level cannot have a value of NULL. |
| Load Promotions Errors | |
| 1200 | A promotion with an end date occurring prior to the last date in the sales history cannot be loaded into the promotions table (ASH_PROMO_TBL). |
| 1201 | A promotion in the promotions table (ASH_PROMO_TBL) cannot be defined in terms of both a specific price point and a percentage off. |
| 1204 | A promotion in the promotions table (ASH_PROMO_TBL) cannot be defined as a negative percent off or be a value > 1. |
| 1205 | The promotion flag in the promotions table (ASH_PROMO_TBL) can have a value of either 1 or -1. |
| 1206 | In the promotions table (ASH_PROMO_TBL), at least one merchandise key has a value of NULL. A merchandise key cannot have a value of NULL. |
| 1207 | In the promotions table (ASH_PROMO_TBL), at least one merchandise level has a value of NULL. A merchandise level cannot have a value of NULL. |
| 1208 | In the promotions table (ASH_PROMO_TBL), at least one location key has a value of NULL. A location key cannot have a value of NULL. |
| 1209 | In the promotions table (ASH_PROMO_TBL), at least one location level has a value of NULL. A location level cannot have a value of NULL. |
| 1210 | In the promotions table (ASH_PROMO_TBL), at least one promotion start date has a value of NULL. A promotion start date cannot have a value of NULL. |
| 1211 | In the promotions table (ASH_PROMO_TBL), at least one promotion end date has a value of NULL. A promotion end date cannot have a value of NULL. |
| 1212 | In the promotions table (ASH_PROMO_TBL), at least one promotion type has a value of NULL. A promotion type cannot have a value of NULL. |

Table 3–8 (Cont.) Standard Load Error Messages

| Number | Error Message |
|---------------------------------|--|
| 1213 | A record in the promotions table (ASH_PROMO_TBL) contains merchandise that is not found in the merchandise hierarchy. |
| 1214 | A record in the promotions table (ASH_PROMO_TBL) contains a location that is not found in the location hierarchy. |
| Load Items Errors | |
| 1300 | More than one record in the items table (ASH_ITEMS_TBL) has the same combination of merchandise and location. |
| 1301 | A record in the items table (ASH_ITEMS_TBL) contains merchandise that is not found in the merchandise hierarchy at the optimization level. |
| 1302 | A record in the items table (ASH_ITEMS_TBL) contains a location that is not found in the location hierarchy at the optimization level. |
| 1303 | In the items table (ASH_ITEMS_TBL), the number of processed rows does not match the original number of input rows. |
| 1304 | In the items table (ASH_ITEMS_TBL), the loading of the locations did not complete. |
| 1305 | In the items table (ASH_ITEMS_TBL), at least one merchandise key has a value of NULL. A merchandise key cannot have a value of NULL. |
| 1306 | In the items table (ASH_ITEMS_TBL), at least one location key has a value of NULL. A location key cannot have a value of NULL. |
| 1307 | In the items table (ASH_ITEMS_TBL), at least one unit cost has NULL value or negative value. A unit cost can only be a positive number. |
| 1308 | In the items CDA table (ASH_ITEMS_CDA_TBL), at least one merchandise key has a value of NULL. A merchandise key cannot have a value of NULL. |
| 1309 | In the items CDA table (ASH_ITEMS_CDA_TBL), at least one location key has a value of NULL. A location key cannot have a value of NULL. |
| 1310 | A record in the items CDA table (ASH_ITEMS_CDA_TBL) contains merchandise that is not found in the merchandise hierarchy on the optimization level. |
| 1311 | A record in the items CDA table (ASH_ITEMS_CDA_TBL) contains a location that is not found in the location hierarchy on the optimization level. |
| 1312 | More than one record in the items CDA table (ASH_ITEMS_CDA_TBL) has the same combination of merchandise and location. |
| Load DC Inventory Errors | |
| 1400 | In the DC inventory table (ASH_DCI_TBL), at least one merchandise key has a value of NULL. A merchandise key cannot have a value of NULL. |
| 1401 | In the DC inventory table (ASH_DCI_TBL), at least one warehouse key has a value of NULL. A warehouse key cannot have a value of NULL. |
| 1402 | In the DC inventory table (ASH_DCI_TBL), at least one fiscal year has a value of NULL. A fiscal year cannot have a value of NULL. |
| 1403 | In the DC inventory table (ASH_DCI_TBL), at least one fiscal week has a value of NULL. A fiscal week cannot have a value of NULL. |

Table 3–8 (Cont.) Standard Load Error Messages

| Number | Error Message |
|--|--|
| 1404 | Cannot determine OPTIMIZATION merchandise level. Check your configuration. |
| 1405 | The MERCHANDISE_KEY in the DC inventory table (ASH_DCI_TBL) is not at the sales level. |
| Load Location Hierarchy Errors | |
| 1500 | In the location hierarchy CDA staging table (ASH_LH_CDA_TBL), at least one location key has a value of NULL. A location key cannot have a value of NULL. |
| 1501 | In the location hierarchy CDA staging table (ASH_LH_CDA_TBL), at least one location level has a value of NULL. A location level cannot have a value of NULL. |
| 1502 | In the location hierarchy levels table (ASH_LHL_TBL), at least one location level has a value of NULL. A location level cannot have a value of NULL. |
| 1503 | In the location hierarchy levels table (ASH_LHL_TBL), at least one level sequence level has a value of NULL. A level sequence cannot have a value of NULL. |
| 1504 | In the location hierarchy levels table (ASH_LHL_TBL) the entries in LEVEL_SQC are not sequential. |
| 1505 | The location hierarchy levels table (ASH_LHL_TBL) should have sequence starting with 1. |
| 1506 | In the location hierarchy levels table (ASH_LHL_TBL), CHAIN is not assigned a sequence value (LEVEL_SQC) of 1. |
| 1507 | In the merchandise hierarchy table (ASH_MH_TBL), null values were detected in the hierarchy stage key columns. |
| Load Location Hierarchy Key Rename Errors | |
| 1600 | In the location hierarchy rename table (ASH_LHRENAME_TBL), at least one old location key has a value of NULL. A location key cannot have a value of NULL. |
| 1601 | In the location hierarchy rename table (ASH_LHRENAME_TBL), at least one new location key has a value of NULL. A location key cannot have a value of NULL. |
| 1602 | In the location hierarchy rename table (ASH_LHRENAME_TBL), at least one location level has a value of NULL. A location level cannot have a value of NULL. |
| 1603 | The old location key in the location hierarchy rename table (ASH_LHRENAME_TBL) contains duplicate values. |
| 1604 | The new location key in the location hierarchy rename table (ASH_LHRENAME_TBL) contains duplicate values. |
| 1605 | The new location key in the location hierarchy rename table (ASH_LHRENAME_TBL) is already present in the location hierarchy. |
| Load Merchandise Hierarchy Errors | |
| 2001 | NOT NULL has already been set for the merchandise hierarchy table (ASH_MH_TBL) stage key columns. |
| 2002 | In the merchandise hierarchy table (ASH_MH_TBL), an error dropping the unique index occurred. |
| 2501 | In the merchandise hierarchy table (ASH_MH_TBL), null values were detected in the hierarchy stage key columns. |

Table 3–8 (Cont.) Standard Load Error Messages

| Number | Error Message |
|----------------------------------|--|
| 2502 | The merchandise hierarchy levels table (ASH_MHL_TBL) is empty. |
| 2503 | In the merchandise hierarchy levels table (ASH_MHL_TBL) the entries in LEVEL_SQC are not sequential. |
| 2504 | The merchandise hierarchy levels table (ASH_MHL_TBL) should contain a sequence starting with 1. |
| 2505 | In the merchandise hierarchy levels table (ASH_MHL_TBL), CHAIN is not assigned a sequence value (LEVEL_SQC) of 1. |
| 2506 | The merchandise hierarchy staging table contains duplicate values at the lowest key level. |
| 2507 | The merchandise hierarchy table (ASH_MH_TBL) contains a child node with more than one parent node. |
| 2508 | The merchandise hierarchy cda staging table (ASH_MH_CDA_TBL) contains at least one combination of MERCHANDISE_KEY and MERCHANDISE_LEVEL that is not unique. |
| 2509 | In the merchandise hierarchy CDA staging table (ASH_MH_CDA_TBL), at least one merchandise key has a value of NULL. A merchandise key cannot have a value of NULL. |
| 2510 | The merchandise hierarchy rename table (ASH_MHRENAME_TBL) contains duplicate values for OLD_MERCHANDISE_KEY. |
| 2511 | In the merchandise hierarchy levels table (ASH_MHL_TBL), at least one merchandise level has a value of NULL. A merchandise level cannot have a value of NULL. |
| 2512 | In the merchandise hierarchy levels table (ASH_MHL_TBL), at least one level sequence level has a value of NULL. a level sequence cannot have a value of NULL. |
| 2513 | In the client hierarchy actions table (Client_Hierarchy_Actions_Tbl), CHAIN is not present in ACTION_NAME for HIER1_LEVEL_SQC = 1 and HIER1_TYPE = MERCHANDISE. |
| 2514 | In the client hierarchy actions table (Client_Hierarchy_Actions_Tbl), CHAIN is not present in ACTION_NAME for HIER2_LEVEL_SQC = 1 and HIER2_TYPE = LOCATION. |
| 2515 | In the client hierarchy actions table (Client_Hierarchy_Actions_Tbl), CHAIN is not present in ACTION_NAME for HIER3_LEVEL_SQC = 1 and HIER3_TYPE = PERIOD. |
| 2516 | In the client hierarchy actions table (Client_Hierarchy_Actions_Tbl), CHAIN is not present in ACTION_NAME for HIER1_LEVEL_SQC = 1 and HIER1_TYPE = PACK. |
| Load MH Key Rename Errors | |
| 2600 | In the merchandise hierarchy rename table (ASH_MHRENAME_TBL), at least one old merchandise key has a value of NULL. A merchandise key cannot have a value of NULL. |
| 2601 | In the merchandise hierarchy rename table (ASH_MHRENAME_TBL), at least one new merchandise key has a value of NULL. A merchandise key cannot have a value of NULL. |
| 2602 | In the merchandise hierarchy rename table (ASH_MHRENAME_TBL), at least one merchandise level has a value of NULL. A merchandise level cannot have a value of NULL. |
| 2603 | The old merchandise key in the merchandise hierarchy rename table (ASH_MHRENAME_TBL) contains duplicate values. |

Table 3–8 (Cont.) Standard Load Error Messages

| Number | Error Message |
|----------------------------------|--|
| 2604 | The new merchandise key in the merchandise hierarchy rename table (ASH_MHRENAME_TBL) contains duplicate values. |
| 2605 | The new merchandise key in the merchandise hierarchy rename table (ASH_MHRENAME_TBL) is already present in the merchandise hierarchy. |
| Worksheet Errors | |
| 3000 | Inference rule IR_WORKSHEET_IDS is not configured correctly and returns more than one row for the same item. |
| 3001 | A worksheet contains duplicate combinations of hierarchies 1, 2, 3, and 4. |
| 3002 | A worksheet contains duplicate combinations of merchandise level and location level. |
| Load Budget Errors | |
| 3501 | The budget table (ASH_BUDGET_TBL) is empty. |
| 3522 | The composite key (MERCHANDISE_LEVEL, LOCATION_LEVEL, FISCAL_YEAR, and FISCAL_WEEK) in the budget table (ASH_BUDGET_TBL) contains null values. |
| 3523 | The composite key (MERCHANDISE_LEVEL, LOCATION_LEVEL, FISCAL_YEAR, and FISCAL_WEEK) in the budget table (ASH_BUDGET_TBL) is not unique. |
| 3524 | In the budget table (ASH_BUDGET_TBL), at least one location key has a value of NULL. A location key cannot have a value of NULL. |
| 3525 | In the budget table (ASH_BUDGET_TBL), at least one fiscal year has a value of NULL. A fiscal year cannot have a value of NULL. |
| 3526 | In the budget table (ASH_BUDGET_TBL), at least one fiscal month has a value of NULL. A fiscal month cannot have a value of NULL. |
| 3531 | PERIODS_TBL is empty. |
| 3541 | MERCHANDISE_HIERARCHY_TBL is empty. |
| 3551 | LOCATION_HIERARCHY_TBL is empty. |
| 3552 | Merchandise found that does not exist in MERCHANDISE_HIERARCHY_TBL at the required level (Worksheet). |
| 3553 | Location found that does not exist in LOCATION_HIERARCHY_TBL at the required level (Worksheet). |
| Load DC Allocation Errors | |
| 3601 | The LOCATION_KEY in the distribution center allocation table (DC_ALLOCATION_TBL) is not at the optimization level. |
| 3602 | The MERCHANDISE_KEY values in the distribution center allocation table (ASH_DC_ALLOCATION_TBL) contain merchandise that is not found in the merchandise hierarchy. |
| 3603 | The value in WAREHOUSE_KEY in the distribution center allocation table (DC_ALLOCATION_TBL) does not exist in WAREHOUSE_TBL. |
| 3604 | The value in MERCHANDISE_KEY in the distribution center allocation table (DC_ALLOCATION_TBL) does not exist in MERCHANDISE_HIERARCHY_TBL. |

Table 3–8 (Cont.) Standard Load Error Messages

| Number | Error Message |
|--------------------------|---|
| 3605 | In the DC allocation table (ASH_DC_ALLOCATION_TBL), at least one warehouse key has a value of NULL. A warehouse key cannot have a value of NULL. |
| 3606 | In the DC allocation table (ASH_DC_ALLOCATION_TBL), at least one merchandise key has a value of NULL. A merchandise key cannot have a value of NULL. |
| 3607 | In the DC allocation table (ASH_DC_ALLOCATION_TBL), at least one location key has a value of NULL. A location key cannot have a value of NULL. |
| 3608 | In the DC allocation table (ASH_DC_ALLOCATION_TBL), at least one fraction has NULL value or negative value. A fraction can only be a positive number. |
| 3609 | The value in MERCHANDISE_LEVEL in the distribution center allocation table (ASH_DC_ALLOCATION_TBL) does not exist in CLIENT_HIERARCHY_LEVELS_TBL. |
| Load Sales Errors | |
| 3701 | NET_SALES_UNITS in the sales table (ASH_SALES_TBL) is mandatory and cannot have a value of null. |
| 3702 | NET_SALES_AMT in the sales table (ASH_SALES_TBL) is mandatory and cannot have a value of null. |
| 3703 | GROSS_SALES_UNITS in the sales table (ASH_SALES_TBL) is mandatory and cannot have a value of null. |
| 3704 | GROSS_SALES_AMT in the sales table (ASH_SALES_TBL) is mandatory and cannot have a value of null. |
| 3705 | EOP_INVENTORY_UNITS in the sales table (ASH_SALES_TBL) is mandatory and cannot have a value of null. |
| 3706 | EOP_ON_ORDER_UNITS in the sales table (ASH_SALES_TBL) is mandatory and cannot have a value of null. |
| 3707 | EOP_STORE_NUM_WITH_INV in the sales table (ASH_SALES_TBL) is mandatory and cannot have a value of null. |
| 3708 | EOP_STORE_NUM_WITH_OO in the sales table (ASH_SALES_TBL) is mandatory and cannot have a value of null. |
| 3709 | CURRENT_RETAIL in the sales table (ASH_SALES_TBL) is mandatory and cannot have a value of null. |
| 3710 | CURRENT_INV_PRICE in the sales table (ASH_SALES_TBL) is mandatory and cannot have a value of null. |
| 3713 | A record in the sales table (ASH_SALES_TBL) contains merchandise that is not found in the merchandise hierarchy. |
| 3714 | A record in the sales table (ASH_SALES_TBL) contains a location that is not found in the location hierarchy. |
| 3715 | In the sales table (ASH_SALES_TBL), at least one merchandise key has a value of NULL. A merchandise key cannot have a value of NULL. |
| 3716 | In the sales table (ASH_SALES_TBL), at least one location key has a value of NULL. A location key cannot have a value of NULL. |
| 3717 | In the sales table (ASH_SALES_TBL), at least one fiscal year has a value of NULL. A fiscal year cannot have a value of NULL. |

Table 3–8 (Cont.) Standard Load Error Messages

| Number | Error Message |
|--|--|
| 3718 | In the sales table (ASH_SALES_TBL), at least one fiscal week has a value of NULL. A fiscal week cannot have a value of NULL. |
| 3719 | In the sales tables (ASH_SALES_TBL), at least one combination of merchandise_key and location_key is not found in ITEMS_TBL. |
| 3720 | The active sales weeks (ActiveSalesWeeks) specified for data archiving is invalid. The value must be a positive integer or zero. |
| 3721 | The ActiveSalesWeeks entry is not found in the P4P_PARAMS table. |
| 3722 | The ACTIVITIES table is empty. |
| 3723 | An error occurred getting a sequence for the SALES level. |
| 3724 | An error occurred getting a sequence for the OPTIMIZATION level. |
| Load BRM Rules Errors | |
| 3801 | The BRM_RULE_DEFINITION_TBL is empty and needs to be populated. |
| Load Flexible Store Clustering Errors | |
| 3901 | Cluster Definition Load has an invalid Location LOCATION_CLIENT_ID. It should match what is defined in CDW_LOC_HIERARCHY_ORIG_TBL <client_load_id>. |
| 3902 | The Cluster Mapping Load has an invalid merchandise MERCHANDISE_CLIENT_ID. It should match what is defined in MERCHANDISE_HIERARCHY_TBL <client_load_id>. |
| 3903 | The Cluster Mapping Load has an invalid cluster set CLUSTER_SET_CLIENT_ID. It should match what is defined in CDW_CLUSTER_SET_TBL <cluster_client_id>. |
| 3904 | Cluster to Location mapping warning: The following cluster set does not contain every location. |
| 3905 | Cluster to Location mapping warning: The following location is not contained in every cluster. |
| 3906 | In the cluster hierarchy levels table (ASH_CSHL_TBL), at least one cluster level has a value of NULL. A cluster level cannot have a value of NULL. |
| 3907 | In the cluster hierarchy levels table (ASH_CSHL_TBL), at least one level sequence level has a value of NULL. A level sequence cannot have a value of NULL. |
| 3908 | In the cluster hierarchy levels table (ASH_CSHL_TBL), the entries in LEVEL_SQC are not sequential. |
| 3909 | The cluster hierarchy levels table (ASH_CSHL_TBL) should have level sequences starting with 1. |
| 3910 | In the cluster hierarchy levels table (ASH_CSHL_TBL), CHAIN is not assigned a sequence value (LEVEL_SQC) of 1. |
| 3911 | The cluster hierarchy levels table (ASH_CSHL_TBL) should have a level ending with 4. |
| 3912 | The item location to merchandise mapping in ASH_ITEM_TBL does not match the cluster mapping defined in the CDW_MERCH_CLUSTER_XREF_TBL. |
| 3913 | The ASH_LH_TBL cluster set has a duplicate location defined within it. |

Table 3–8 (Cont.) Standard Load Error Messages

| Number | Error Message |
|---------------------------------|--|
| 3917 | The ASH_CLUSTER_MAPPING_TBL cluster_set_client_id is NULL |
| 3918 | The ASH_CLUSTER_MAPPING_TBL merchandise_client_id is NULL. |
| 3919 | There is no mapping for clusters in the ASH_CP_TBL. |
| 3920 | The LOCATION_LEVEL in ASH_CP_TBL for CLUSTER is invalid. |
| 3921 | The MERCHANDISE_LEVEL in ASH_CP_TBL for CLUSTER is invalid. |
| 3922 | The following merchandise does not have a cluster mapped to it <merch_client_load_id>. |
| 3923 | The CDW_CLUSTER_SET_TBL is empty. |
| 3924 | The CDW_CLUSTER_TBL is empty. |
| 3925 | There are no level descriptions for clusters in the CLIENT_HIERARCHY_LEVELS_TBL. There must be LOCATION and either CLUSTER or CUST_LOCATION entries to load cluster information. |
| 3926 | There are no level descriptions for clusters in the CLIENT_HIERARCHY_LEVELS_TBL. There must be both LOCATION and CUST_LOCATION entries to load cluster information. |
| 3928 | In a clustered location hierarchy, the cluster key is not unique across cluster sets. |
| Load To Date Metrics | |
| 4001 | The activities information table (ACTIVITIES) is empty. Run the LoadSales procedure to load activities and then re-run LoadToDateMetrics. |
| Load BR Instances Errors | |
| 4100 | A business rule cannot have more than one value definition (BRM_VALUE_DEFINITIONS_TBL) defined. Multi-valued business rules are not supported. |
| 4101 | A business rule key (RULE_NAME, MERCHANDISE_LEVEL, LOCATION_LEVEL, ATTRIB1_VALUE, ATTRIB2_VALUE) in the business rules staging table (ASH_BRM_INSTANCE_TBL) is not legal. |
| 4102 | A business rule value (RULE_VALUE) in the business rules staging table (ASH_BRM_INSTANCE_TBL) is not in the permissible range. |
| 4103 | A business rule value (RULE_VALUE) in the business rules staging table (ASH_BRM_INSTANCE_TBL) is not in the permissible enumeration. |
| 4104 | No business rule definitions exist in table (BRM_RULE_DEFINITION_TBL). |
| 4105 | In the business rule staging table (ASH_BRM_INSTANCE_TBL), at least one merchandise key has a value of NULL. A merchandise key cannot have a value of NULL. |
| 4106 | In the business rule staging table (ASH_BRM_INSTANCE_TBL), at least one merchandise level has a value of NULL. A merchandise level cannot have a value of NULL. |
| 4107 | In the business rule staging table (ASH_BRM_INSTANCE_TBL), at least one location key has a value of NULL. A location key cannot have a value of NULL. |

Table 3–8 (Cont.) Standard Load Error Messages

| Number | Error Message |
|--|---|
| 4108 | In the business rule staging table (ASH_BRM_INSTANCE_TBL), at least one location level has a value of NULL. A location level cannot have a value of NULL. |
| 4109 | In the business rule staging table (ASH_BRM_INSTANCE_TBL), at least one rule name has a value of NULL. A rule name cannot have a value of NULL. |
| 4110 | A record in the business rule staging table (ASH_BRM_INSTANCE_TBL) contains merchandise that is not found in the merchandise hierarchy. |
| 4111 | A record in the business rule staging table (ASH_BRM_INSTANCE_TBL) contains a location that is not found in the location hierarchy. |
| 4112 | A record in the business rule staging table (ASH_BRM_INSTANCE_TBL) contains merchandise that is not found in the merchandise hierarchy. |
| Partitioning Item_Data Conditions | |
| 5010 | ITEM_DATA view does not exist or could not be dropped. |
| 5011 | ITEM_DATA partition could not be dropped. |
| 5012 | ITEM_DATA table is not partitioned or does not exist. |
| 5013 | An index on the partitioned ITEM_DATA table could not be created. |
| 5014 | The ITEM_DATA table is already partitioned. |
| 5015 | The ITEM_DATA table is already non-partitioned. |
| Partitioning Item_Data Errors | |
| 5100 | Invalid input number for number of ITEM_DATA partitions. |
| 5101 | The ITEM_DATA table is empty. |
| 5102 | The ITEM_DATA table could not be distributed across the given number of partitions. |
| 5103 | The ITEM_DATA backup table is missing. |
| 5104 | The worksheet was not assigned a partition. |
| 5105 | The ITEM_DATA table's dependents were not all re-created. |
| 5106 | An error other than a missing base object error occurred when re-creating a dependent object. |
| 5107 | An error occurred dropping dependent other than nested dependencies. |
| Partitioning from LoadSWID | |
| 5108 | The ITEM_DATA table is not partitioned or does not exist. |
| 5109 | The high value of the ITEM_DATA partition key is not MAXVALUE. |
| 5110 | The ITEM_DATA table was not reset to one MAXVALUE partition. |
| 5111 | No submittal worksheets were found. |
| 5112 | The MAXVALUE partition in the ITEM_DATA table could not be dropped. |
| 5113 | The MAXVALUE partition could not be added to the ITEM_DATA table. |
| Load MHTbl Errors | |

Table 3–8 (Cont.) Standard Load Error Messages

| Number | Error Message |
|--|---|
| 6101 | The MERCHANDISE_HIERARCHY_TBL table has no CHAIN record (where PARENT_MERCHANDISE_ID is NULL). |
| 6102 | The MERCHANDISE_HIERARCHY_TBL table has more than one record with PARENT_MERCHANDISE_ID = NULL (multiple CHAIN records). |
| Load Parameters Errors | |
| 8101 | The merchandise key in ASH_PARAMETER_VALUES_TBL cannot be null. |
| 8102 | The merchandise level in ASH_PARAMETER_VALUES_TBL cannot be null. |
| 8103 | The location key in ASH_PARAMETER_VALUES_TBL cannot be null. |
| 8104 | The location level in ASH_PARAMETER_VALUES_TBL cannot be null. |
| 8105 | The item attribute in ASH_PARAMETER_VALUES_TBL cannot be null. |
| 8106 | The parameter name in ASH_PARAMETER_VALUES_TBL cannot be null. |
| 8107 | Merchandise found in ASH_PARAMETER_VALUES_TBL that does not exist in MERCHANDISE_HIERARCHY_TBL. |
| 8108 | Location found in ASH_PARAMETER_VALUES_TBL that does not exist in LOCATION_HIERARCHY_TBL. |
| Load Price Ladders Errors | |
| 8201 | The merchandise key in ASH_PRICE_LADDERS_TBL cannot be null. |
| 8202 | The merchandise level in ASH_PRICE_LADDERS_TBL cannot be null. |
| 8203 | The location key in ASH_PRICE_LADDERS_TBL cannot be null. |
| 8204 | The location level in ASH_PRICE_LADDERS_TBL cannot be null. |
| 8205 | The price ladder ID in ASH_PRICE_LADDERS_TBL cannot be null. |
| 8206 | Merchandise found in ASH_PRICE_LADDERS_TBL that does not exist in MERCHANDISE_HIERARCHY_TBL. |
| 8207 | Location found in ASH_PRICE_LADDERS_TBL that does not exist in LOCATION_HIERARCHY_TBL. |
| 8208 | The found price ladder type is not in PT, PO, or PP. |
| 8209 | The model flag cannot be NULL. |
| 8210 | Accounting type is either NULL or has a value that is not allowed. Acceptable values are TEMP or PERM. |
| 8211 | If the price value type is PO or PT, then the price percent value must be a non-negative fraction and the price point value must be null. If the price value type is PP, then the price point value must be a non-negative number and the price percent off value must be null. |
| 8212 | Found duplicate client ladder ID in the data feed. |
| Load Seasonalities Error Messages | |

Table 3–8 (Cont.) Standard Load Error Messages

| Number | Error Message |
|------------------------------|---|
| 8301 | The merchandise key in ASH_SEASONALITY_MAPS_TBL cannot be null. |
| 8302 | The merchandise level in ASH_SEASONALITY_MAPS_TBL cannot be null. |
| 8303 | The location key in ASH_SEASONALITY_MAPS_TBL cannot be null. |
| 8304 | The location level in ASH_SEASONALITY_MAPS_TBL cannot be null. |
| 8305 | Merchandise found in ASH_SEASONALITY_MAPS_TBL that does not exist in MERCHANDISE_HIERARCHY_TBL. |
| 8306 | Location found in ASH_SEASONALITY_MAPS_TBL that does not exist in LOCATION_HIERARCHY_TBL. |
| 8307 | A NULL priority was found. |
| 8308 | A NULL seasonality ID in maps was found. |
| 8309 | A NULL seasonality ID in values was found. |
| 8310 | A NULL calendar date was found. |
| 8311 | Found NULL AS_VERSION in seasonality maps. |
| 8312 | Found more than one distinct AS_VERSION value in seasonality maps. |
| 8313 | Found NULL AS_VERSION in seasonality values. |
| 8314 | Found more than one distinct AS_VERSION vlaue in seasonality values. |
| Data Archiving Errors | |
| 11001 | Records having a null RUN_ID have been found in the ITEM_DATA table. |

Standard Load Dependency Tree

The load script loads data in the order specified in [Figure 3–1, "Dependency Tree"](#) The load procedures that are shaded are only used with Flexible Store Clustering.

Table 3–9 (Cont.) Dependency Tree Procedures

| Dependency Tree Procedure | Procedure Name |
|------------------------------------|-------------------------|
| Load Location Hierarchy Table | LoadLHTbl |
| Load LT Close | LoadLTCLOSE |
| Load Budget | LoadBudget |
| Load Items (includes Item CDAs) | LoadItems |
| Load Internal Outdates | LoadInternalOD |
| Load Promotions | LoadPromotions |
| Load Sales | LoadSales |
| Load Materialized Views | LoadMaterializedViews |
| Load Model Start Dates | LoadModelStartDate |
| Load Scenarios | LoadScenarios |
| Load Markdown Sendbacks | LoadMarkdownSendback |
| Load Markdowns Taken | LoadMarkdownsTaken |
| Load Internal Historical Markdowns | LoadInternalHM |
| Load Internal Promotions | LoadInternalPromo |
| Load Front End | LoadFrontEnd |
| Load Submitted Worksheet ID | LoadSWID |
| Load Warehouses | LoadWarehouses |
| Load Distribution Center Inventory | LoadDcInventory |
| Load Warehouse Allocation | LoadWarehouseAllocation |
| Load Business Rule Instances | LoadBRInstances |
| Load Parameters | LoadParameters |
| Load Price Ladders | LoadPriceLadders |
| Load Seasonalities | LoadSeasonalities |
| Load Auto-Collections | LoadCollectionsAuto |
| Load Collections Sendback | LoadCollectionsSendback |
| Load Cluster Mapping | LoadClusterMerch |
| Load Cluster Descriptions | LoadClusters |
| Load Cluster Hierarchy Structure | LoadClusterHierarchy |

Standard Load Steps

Each procedure consists of the following sub-procedures:

1. Setup
2. Pre-load Verification. All n processes are run in parallel.
3. Finish Pre-load Verification.
4. Load. All n processes are run in parallel.
5. Post-load Verification. All n processes are run in parallel.
6. Finish Post-load Verification.

- 7. Tear-down.

Standard Interface Specifications for One-Time Data

The following three standard interface specifications are used for data that is loaded once at the beginning of a Markdown Optimization deployment.

Cross Products Information Standard Interface (ASH_CP_TBL)

Items are globally defined to be at a specific level of the merchandise hierarchy and the location hierarchy through the cross products interface.

Technical Notes

The following list provides details to considering regarding the cross products information data.

- The INTERSECT_NAME is the name of the Key, which defines the purpose or feature for the data, and is either OPTIMIZATION, SALES, WORKSHEET, CLUSTER, or DEFAULT LEVEL. Use the value CLUSTER to enable Flexible Clustering. For more information on Flexible Clustering, see the *Oracle Retail Markdown Optimization Configuration Guide*.
- For each Key, identify the defining level of the merchandise hierarchy and location hierarchy.
- The cross products information is generally loaded only once.
- Sales cannot be loaded until optimization level and the sales level are defined. Worksheets must be defined before an model run can occur.

Cross Products Information Specification

Table 3–10 Cross Products Information Standard Interface Specification

| Field Name | Field Description | Data Type | Maximum Length | Nullable Y/N |
|-------------------|--|-----------|----------------|--------------|
| INTERSECT_NAME | The key name (OPTIMIZATION, SALES, WORKSHEET, CLUSTER, or DEFAULT LEVEL) | String | 50 | N |
| MERCHANDISE_LEVEL | The defining level within the hierarchy | String | 50 | N |
| LOCATION_LEVEL | The defining level within the hierarchy | String | 50 | N |

Location Hierarchy Levels Standard Interface (ASH_LHL_TBL)

The location hierarchy levels interface is used to specify the names of a retailer's location levels and their order.

Technical Notes

The following list provides details to consider regarding the lh levels data.

- The Chain level should always be defined as 1.

- The sequence of level numbers must begin with 1 and increase in increments of 1, without any gaps in the sequence.
- The location hierarchy levels information is generally loaded only once.

LH Levels Specification

Table 3–11 Location Hierarchy Levels Standard Interface Specification

| Field Name | Field Description | Data Type | Maximum Length | Nullable Y/N |
|----------------|----------------------------------|-----------|----------------|--------------|
| LOCATION_LEVEL | The name of the location level | String | 50 | N |
| LEVEL_SQC | The sequence number of the level | Integer | 2 | N |

Merchandise Hierarchy Levels Standard Interface (ASH_MHL_TBL)

The merchandise hierarchy levels interface is used to specify the names of a retailer's merchandise levels and their order.

Technical Notes

The following list provides details to consider regarding the mh levels data.

- The Chain level should always be defined as 1.
- The sequence of level numbers must begin with 1 and increase in increments of 1, without any gaps in the sequence.
- The merchandise hierarchy levels information is generally loaded only once.

MH Levels Specification

Table 3–12 Merchandise Hierarchy Levels Standard Interface Specification

| Field Name | Field Description | Data Type | Maximum Length | Nullable Y/N |
|-------------------|--|-----------|----------------|--------------|
| MERCHANDISE_LEVEL | The name of the merchandise level | String | 50 | N |
| LEVEL_SQC | The sequence number of the merchandise level | Integer | 2 | N |

Standard Dataset

The Markdown Optimization standard dataset, located in <productdir>/modules/MDODataset, is a set of raw data provided as flat files with the application that

- is shipped with the application and is copied into the installation directory
- requires the front-end configuration grids in the installation directory
- contains five weeks of data
- contains only valid data, so no validation errors should occur during the standard load

- provides data that is sufficient to verify the installation and initial basic configuration of the product
- does not provide a complete set of data to explore the total functionality of the application
- provides data that can be loaded using the standard load procedures, and, once loaded, can be used to perform a model run
- provides data sufficient to permit the launching of the application and invoke the application UI without any additional configuration after the model run is complete
- does not provide any error conditions
- provides one eligibility query for all the merchandise in the dataset.
- includes the expected results of the model run
- supports markdowns and forecasts
- uses the default error threshold settings for data validation (procedures = 0 and specific validations = 100). This permits the dataset to fail on any validation error. All invalidated rows are store in appropriate “BAD” staged table.
- requires that an empty schema be created before the data is loaded (part of the standard installation)
- is staged and loaded using pl_stage_client.sh and pl_load_client.sh. See the beginning of this chapter for details about staging and loading data.
- is validated using published load validations
- imports the attributes such as promotions, markdowns, and business rules that are hierarchical in application of the attributes
- contains no sendback data. To test sendbacks, markdowns must be taken, which are then processed during the next weekly load.

Dataset Data

The data in the dataset consists of 3,107 items and 156 pricing groups and 4,682 items as part of pricing groups. Details about the data characteristics are shown in the following table. For information about the standard load procedure and the target table for each interface, see the beginning of this chapter.

Table 3–13 *Markdown Optimization Dataset Data*

| Data Interface Table | Data Characteristics |
|--|---|
| Merchandise Hierarchy Levels (ASH_MHL_TBL) | Eight levels: Chain Company Division Department Class Style Color Product Key (Chinese value for) |

Table 3–13 (Cont.) Markdown Optimization Dataset Data

| Data Interface Table | Data Characteristics |
|---|---|
| Location Hierarchy Levels (ASH_LHL_TBL) | Five levels: Chain Company Zone Price zone (Chinese value for) Store |
| Cross Products Information (ASH_CP_TBL) | MH-LH intersections: Optimization Product key (merchandise level - Chinese value) Store Worksheet Department (merchandise level) Chain (location level) Sales Product key (merchandise level- Chinese value) Store (location level) Cluster CHAIN CHAIN DEFAULTLEVEL CHAIN CHAIN |
| Merchandise Hierarchy (ASH_MH_TBL) | 34,444 merchandise items at the product key level - Chinese value |
| Location Hierarchy (ASH_LH_TBL) | 6 price zones (Chinese value) 845 stores |
| Items (ASH_ITEMS_TBL) | 7,789 items |
| Sales (ASH_SALES_TBL) | 5 weeks of data |
| Markdowns Taken (ASH_MDTAKEN_TBL) | 270 external markdowns |
| Promotions (ASH_PROMOS_TBL) | 5,000 promotions (inclusions set as promo_price at the item level) |
| Distribution Center Inventory (ASH_DCI_TBL) | 5 weeks of data |
| Distribution Center Allocation (ASH_DC_ALLOCATION_TBL) | 8,400 allocations |
| Demand Parameters (ASH_PARAMETER_VALUES_TBL) | 160 elasticity values |
| Price Ladders (ASH_PRICE_LADDERS_TBL) | 178 price ladders |
| Seasonalities (ASH_SEASONALITY_MAPS_TBL) and (ASH_SEASONALITY_VALUES_TBL) | 300 seasonality settings |
| Pricing Groups (No interface or staging table) | 200 pricing groups |

Table 3–13 (Cont.) Markdown Optimization Dataset Data

| Data Interface Table | Data Characteristics |
|--|--|
| Business Rule Instances (ASH_BRM_INSTANCE_TBL) | 3,023 instances of default rules: 509 OUT_DT 1,000 INVENTORY_TARGET 1,501 PLANNED_START_DT other |

Modifying the Dataset

You can modify the dataset to change or add data. Here is a sample procedure for changing the unit cost for an item in the worksheet.

1. Load the staged files into the ASH tables.

```
cd <install_base>/modules/tools/bin
```

```
bash ./pl_stage_client.sh full_path_to_product_directory <dataset_name>
```

2. Identify the target table for the item you want to modify. You can trace back from the P4P_DISPLAY_ITEMS view to the ITEM_DATA table (which supplies the unit cost data) to the ITEMS_TBL table (which populates ITEM_DATA). So, the unit cost data must be changed in ASH_ITEMS_TBL.
3. Determine (from ASH_ITEMS_TBL) the merchandise key and the location key for the ITEMID whose unit cost you are changing.
4. Create a script to apply the change directly to the ASH stage table.

Here is a sample script called **pl_update_dataset.sql**.

```
UPDATE ash_items_tbl
   SET unit_cost=16.02
 WHERE merchandise_key='10000009'
    AND location_key='5';
COMMIT
```

5. Run **pl_update_dataset.sql**

using sqlPlus on the target schema.

6. Load the data.
7. To verify that the change was made, view the item in P4P_DISPLAY_ITEMS or in ITEM_DATA.

Sample Model Run Results

Here is a sample of expected model run results using the sample dataset provided with the CD image in an “out-of-the-box” configuration:

```
Stoplight Summary
Yellow      3712
Green       1733
```

Message Breakdown

| Stoplight Category | Resource | Instance Message Count |
|--------------------|----------|------------------------|
|--------------------|----------|------------------------|

| | | | | |
|--------|------------------|--|------|--|
| Yellow | Item Data | engine.status.didyma.noTicketPrice | 146 | This item has not Ticket Price |
| Yellow | Item Data | engine.status.didyma.noStartDate | 146 | This item has no Start Date |
| Yellow | Item Data | engine.status.agorai.noCandidatePrices | 160 | No candidate prices available for markdown: filtered Price Ladder is empty |
| Yellow | Item Data | engine.status.agorai.effectiveDateMustPrecede OutDate | 9 | OutDate precedes Effective Date |
| Yellow | Item Data | engine.status.agorai.badlastStoreCount | 523 | Last week of historical activity does not have a good Store Count |
| Yellow | Inactivity | engine.status.agorai.noUsefulSales | 2135 | Data too dirty to determine demand: zero useful sales found |
| Yellow | Error | engine.status.didyma.itemBuild | 74 | Item contains other errors |
| Yellow | Error | engine.status.didyma.collectionBuild | 28 | Pricing Group contains other errors |
| Yellow | Error | engine.status.agorai.forecasterMissing | 342 | Unable to locate an external forecaster or create an internal forecaster for Item 1023 |
| Yellow | Error | engine.status.agorai.collectionItemErrors | 149 | Pricing Group contains items with errors |
| Green | Markdown Blocked | engine.status.agorai.noMarkdownPricesAtEffectiveDate | 3 | No markdown prices available on Effective Date |
| Green | Not Recommended | engine.status.agorai.sellsOutWithoutChanges | 1412 | Sells to target without changes; Markdown not recommended |
| Green | Not Recommended | engine.status.agorai.notRecommended | 285 | Markdown not recommended for this week |
| Green | Warning | engine.status.agorai.priceAboveFull | 33 | A relative price is higher than the full price: 1.001 |

The Model Run

The Model Run chapter describes the details of the MDO weekly batch process.

It contains the following sections:

- [Introduction](#)
- [The Calculation Engine](#)
- [Model Run Prerequisites](#)
- [Model Run Process](#)
- [Monitoring an Model Run](#)
- [Running Reports and Diagnosing Problems](#)
- [Restarting a Run](#)
- [Performance Considerations](#)
- [Sendback Files](#)
- [Automating Markdown Optimization Processes](#)

Introduction

This chapter provides an overview of the entire model run process and details the steps of the model run process.

The weekly batch process is the entire process of preparing for an model run, including loading data and customizing Markdown model parameters, performing the pre-model run steps, the model run steps, and the post-model run steps.

During an model run, Markdown Optimization analyzes business data and produces markdown recommendations and forecasts.

The Calculation Engine

The Calculation Engine component computes optimizations and forecasts for the application. Functionally, and at a high level, the Calculation Engine consists of Delphi, which is responsible for all database operations, chunk management, the writing of results back to the database, and the calculation of forecast parameters; Agorai, which is responsible for forecasts and for determining optimal pricing strategy; and an RMI server, which exposes the Calculation Engine functionality for use by What If simulations.

The Calculation Engine processes are managed according to the following model. A job, which is identified by a job ID, is a logical unit of work that occurs over a defined

period of time. For example, the weekly batch run process, consisting of the application model run and resultant database changes, is considered a job. Only one job can be open at a time and it remains open until it is explicitly closed using `closeCurrentJob.sh`. Keeping a job in an open state permits the debugging of the batch process.

Once a job is opened, it is assigned a job ID and a work queue is generated. A group of one or more worker processes is started to process the work in the work queue. A worker process consists of three threads: one thread obtains the work chunk (a set of items or pricing groups to be optimized) located at the top of the work queue (that is, with the highest priority), a second thread checks for an infinite loop, and a third thread acts as a heartbeat. If a process fails (for example, because of an infinite loop) its chunk returns to the work queue, but with a lower priority, since the heartbeat will not update the claim on that chunk. The thread responsible for the item processing obtains values via the inference rules, sends a function call to Agorai requesting an optimization calculation, and writes the results to the database. Once a worker process completes a chunk of work, it obtains the next chunk in the queue until all of the chunks have been processed.

Three types of errors can occur during a job: job initialization failures, worker process errors, and item optimization errors. Item-level errors are written to the database in the `rtm` tables.

Calculation Engine Configuration

The following two files, `<ConfigRoot>/Engine/delphi.properties` and `<Configroot/Price/kpi.properties`, should be configured. Note that the properties for `delphi` are loaded from files named `delphi.properties`, which are found by searching the following directories under `configroot` (in order): `Engine/client`; `Engine/environment`; and `Engine/`. If a file named `delphi.properties` is found, it is loaded. This overwrites any `delphi.properties` files that were previously loaded.

Note the following regarding database credentials for both the `kpi.properties` file and the `delphi.properties` file:

The values for the user name and password are used for logging into the database. If `db.alias` is present, then the user and password found in the Oracle wallet are used. If not, then the user name and password found in the properties file are used.

For more information on the Oracle wallet, see the *Oracle Retail Markdown Optimization Installation Guide*.

Settings for `kpi.properties`

- Database credentials
- **chunk.tryLimit** – defines the maximum number of times that the engine tries to process an item before deciding that the item cannot be processed. This value must be set to a value greater than 1. The default reflects the optimal policy according to simulations.
- **chunk.sizes** – defines a sequence of values representing the sequence of chunk sizes that should be used to group items that have had 0, 1, 2... retries. The sequence must
 - consist of a decreasing set of positive integers
 - equal in length the value of `chunk.tryLimit`
 - end with a value of 1

- use semicolons to separate the series of values

The sequencing is used in a progressive manner, starting with a large chunk and retrying with smaller chunks, to determine which items are causing the chunk to fail. (Retries are seldom needed; they happen when processes die.)

The processing of large chunks takes up much of an model run, so the size of largest chunk has an impact on performance. The default sequence of values is recommended for good performance.

When selecting the largest chunk size, consider the following. Since larger chunks require more random access memory per worker, at some point processes will either fail or use virtual memory paging. Smaller chunks are better because they incur less overhead in database access. It is suggested that the largest chunk size be a value between 1,000 and 10,000. The smaller chunk sizes should be much smaller than the largest value in order to capture work before a failure occurs.

Default value = 10,000; 100; 1

- **worker.lifetime** – defines how long in minutes the processor is allowed to run before it is decided that it is in an infinite loop and terminates. This value must be greater than 1 minute. For large pricing groups, it is recommended that you start with a setting greater than 30 minutes.

Default value = 30

- **chunk.active** – defines the maximum time in minutes after a worker is killed that the chunk it was working on can be reclaimed. This value must be greater than 1 minute. This setting rarely needs customizing.

Default value = 3

Settings for delphi.properties

The delphi.properties file should only list values that differ from the default values. If a default value exists, it is listed here. The first two properties, for the Agorai library location and the RMI server port, are required. All others are optional.

Table 4–1 delphi.properties Settings

| Property | Description |
|--|--|
| engine.agorai.lib=installer-supplied-path/libAgorai ijNI.so | The location of the Agorai library. |
| delphi.rmi.port=installer-supplied-port-number | The port used by the RMI server in interactive mode. |
| batch.write.size=100 | The number of items or pricing groups contained in a batch written to the database. |
| optimize.status.tbl=item_status_tbl | The table the optimization status for each item or pricing group is written to. |
| engine.record.directory=pathname | The path of the message capture directory. In order for messages to be logged, a complete path and an existing directory are necessary. |
| engine.record.internals=false | Set this property to false to disable logging for all What-If recalculations. This can be overwritten in the UI for a particular What-If calculation. Set this property to true in order to log internal engine messages. (This assumes engine.record.directory has been created and enabled.) |
| delphi.log4j.properties=delphi.log4j.properties | The file that contains properties for controlling Delphi logging behavior. The path is relative to the path for delphi.properties. |

Table 4–1 (Cont.) delphi.properties Settings

| Property | Description |
|--------------------------------|---|
| strategy.activitydata=list | Used for performance tuning of IR_ACTIVITY_DATA. Values are single, list, and temptable. <i>See</i> Inference Rule Access for more information on all strategy properties. |
| strategy.businesspolicy=list | Used for performance tuning for IR_BUSINESS_POLICY. |
| strategy.distribution=list | Used for performance tuning for IR_PRIOR_DISTRIBUTION. |
| strategy.forcedmarkdowns=list | Used for performance tuning for IR_FORCED_MARKDOWN. |
| strategy.itemdates=list | Used for performance tuning for IR_ITEM_DATES. |
| strategy.itemparameters=list | Used for performance tuning for IR_ITEM_PARAMETERS. |
| strategy.itemprices=list | Used for performance tuning for IR_ITEM_PRICES. |
| strategy.markdowncalendar=list | Used for performance tuning for IR_MARKDOWN_CALENDAR. |
| strategy.modelvalues=list | Used for performance tuning for IR_MODEL_VALUES. |
| strategy.pastticketprices=list | Used for performance tuning for IR_PAST_TICKET_PRICES. |
| strategy.pendingmarkdowns=list | Used for performance tuning for IR_PENDING_MARKDOWN. |
| strategy.plannedpromos=list | Used for performance tuning for IR_PLANNED_PROMOS |
| strategy.priceladder=list | Used for performance tuning for IR_PRICE_LADDER. |

Model Run Prerequisites

Once the application is installed, the following must be configured prior to an model run. Note that \$CONFIGROOT = <install_base>/config.

- Merge any existing customized load statements with the updated **load_statements.sql**. The load statements are used for eligibility filtering and for populating the ITEM_DATA table. **Load_statements.sql** is installed under **\$CONFIGROOT/db.config**.
- Merge any existing customized inference rules (located in **ir.sql**, installed under **\$CONFIGROOT/db.config**) with the updated inference rules.
- Apply **load_statements.sql** and **ir.sql** to the database schema, using either **configdb.sh** or **plconfiguredb.sh**, as follows:
 - copy **ir.sql** and **load_statement.sql** to **\$CONFIGROOT/db.config**
 - **cd <install_base>/modules/tools/bin**
 where <install_base> is the location where Markdown Optimization is installed.
 - **bash plconfiguredb.sh \$CONFIGROOT**
- Business Rule Definitions – Markdown Optimization comes with default values for BRs, set at the highest level (except Outdates and planned Start Dates). Merge any customized business rule definitions with the updated version.
- Business Rule Values – load using **bradmin.sh**.

Environment Variables

Note the following platform-specific details about setting the environment variables:

For all platforms (except AIX) the environment variables `LD_LIBRARY_PATH` and `LD_LIBRARY_PATH_64` must be set to the appropriate folder where the Calculation Engine is available prior to starting the CE or executing the weeklybatch.

For example:

```
export LD_LIBRARY_PATH=<MDO InstallDirectory>/modules/Engine/lib/<architecture_
folder>:$LD_LIBRARY_PATH
export LD_LIBRARY_PATH_64=<MDO InstallDirectory>/modules/Engine/lib/<architecture_
folder>:$LD_LIBRARY_PATH_64
```

For AIX, the environment variable `LIBPATH` must be set before starting the CE or executing the weeklybatch.

```
export LIBPATH =<MDO Install Directory>/modules/Engine/lib/<architecture_
folder>:$LIBPATH
```

The environment variables `LD_LIBRARY_PATH`/`LD_LIBRARY_PATH_64`/`LIBPATH` (see below for platform specific details) must be set to the appropriate folder where the Calculation Engine is available prior to starting the CE or executing the weeklybatch.

For Linux and HP:

```
export LD_LIBRARY_PATH=PATH=<MDO
InstallDirectory>/modules/Engine/lib/<architecture_folder>:$LD_LIBRARY_PATH
```

For AIX:

```
export LIBPATH =<MDO Install Directory>/modules/Engine/lib/<architecture_folder
>:$LIBPATH
```

For Solaris:

```
export LD_LIBRARY_PATH=<MDO InstallDirectory>/modules/Engine/lib/<architecture_
folder>:$LD_LIBRARY_PATH

export LD_LIBRARY_PATH_64=<MDO InstallDirectory>/modules/Engine/lib/<architecture_
folder>:$LD_LIBRARY_PATH_64
```

No special maintenance of tables or indexes is required. All necessary statistics gathering and index rebuilding is handled by the application.

The performance of the model run is affected by the number of candidate prices from the price ladder (those lower than the current price) and candidate markdown calendar (which depends on how far out the out date is). Performance should be considered when choosing prices for the price ladder; if the price ladder is long, performance may be adversely impacted.

Model Run Process

The weekly Model Run consists of the following high-level steps. These steps are all executed by `weeklyBatch.sh`. (The details about each step are provided in subsequent sections.)

Note that since the model run and KPI share `work_queue_tbl`, you should not run KPIs and the model run at the same time.

1. `plfrontendload.sh`, which executes FELOAD

2. **plpremodelrun.sh**, which executes PRERUN
3. **runCalcEngine.sh**, which executes a series of helper scripts responsible for the batch process
4. **runMultiKPI(Item | Collection).sh**, which calculates the key performance indicator metrics
5. **plpostmodelrun.sh**, which executes POSTRUN
6. **refreshSummaryCache.sh**, which refreshes the P4P_WORKSHEET_SUMMARIES cache table
7. **refreshForecastCache.sh**, which refreshes the forecast cache

Model Run Scripts

This section contains details about the scripts used during a model run, listed in alphabetical order.

bashjava.sh

Usage: **bashjava.sh**

Description:

A shell script wrapper around Java that is used by the installer.

checkKPISuccess.sh

Usage: **checkKPISuccess.sh** *<full_path_to_product_directory>*

Description:

Checks to see if the KPI calculations have been performed for all items and all items in pricing groups. It prints the number of items not calculated. It returns a value of 0 if the KPIs have been calculated for all items. It returns a value of 1 if some calculations are missing.

checkRequirements.sh

Usage: **checkRequirements.sh** *<full_path_to_product_directory>*

Description:

Verifies that the directories, class jars, and property files required for the weekly model run have been created. A value of 1 indicates "no go." A value of 2 indicates a failure. A value of 4 indicates a fatal error.

checkRunSuccess.sh

Usage: **checkRunSuccess.sh** *[-dh] <full_path_to_configroot>*

where

- **d** – debug mode (turns on Java asserts)
- **h** – print this message and exit

Description:

Checks to see if the model run completed successfully. It returns a value of 0 if the command completes successfully; however, this exit code provides no information on the status of the model run itself.

The output of this command looks similar to the following:

Success: Run is complete.
Missing: 0 out of 15578, Errors: 2

If the number of optimization is equal to the number of eligible items, then the command outputs "Success: Run is complete." If the number of optimizations does not equal the number of eligible items, then the command outputs "Failure: Run is not complete." The number indicated for Missing is the difference between the number of optimizations and the number of eligible items. The number indicated for Errors is the number of items that have a status of Red.

closeCurrentJob.sh

Usage: **closeCurrentJob.sh** [-dh] <full_path_to_configroot>

where

- d – debug mode
- h – print this message and exit

Description:

Called by **runCalcEngine.sh**. Closes the current job, if one exists. As a result, the worker processes on the batch process exit.

This command closes the job record in the job control database. All worker processes frequently check that their current job is still open, and they exit if it is not. When they exit in such a situation, the auto-restart feature does not restart the process. This command can be executed from any machine and all workers on all machines will shut down.

The commands **kill** and **killall** cannot be used to kill the worker processes, as they will restart.

enginectl.sh

Usage: **enginectl.sh** <full_path_to_configroot> (start | stop | kill | restart | status | help)

where

- start – start the interactive Calculation Engine
- stop – stop the interactive Calculation Engine
- kill – stop the interactive Calculation Engine
- restart – try to stop and then restart the Calculation Engine
- status – display the status
- help – print the usage message

Description:

Starts and stops the RMI server, which is used for What If simulations. For more information, see the *Oracle Retail Markdown Optimization Configuration Guide*.

forecastAnalyzer.sh

Usage: **forecastAnalyzer.sh**

Description: runs a forecast request through the Calculation Engine.

getKPIStatus.sh

Usage: **getKPIStatus.sh** <full_path_to_configroot>

Description:

Obtains the status report for a KPI.

generateErrorWorkQueue.sh

Usage: **generateErrorWorkQueue.sh** [-dh] <full_path_to_configroot>

where

- d – debug mode (turns on Java asserts)
- h – print this message and exit

Description:

Compiles a list of all items and pricing groups that have failed during the current batch job. Once the problems in this list have been corrected, the items and pricing groups that failed can be retried.

getCurrentJobID.sh

Usage: **getCurrentJobID.sh** [-dh] <full_path_to_configroot>

where

- d – debug mode (turns on Java asserts)
- h – print this message and exit

Description:

Called by **runCalcEngine.sh**. Returns the ID of the current batch job to stdout.

getCurrentJobStatus.sh

Usage: **getCurrentJobStatus.sh** [-dh] <full_path_to_configroot>

where

- d – debug mode (turns on Java asserts)
- h – print this message and exit

Description:

Called by **runCalcEngine.sh**. Returns an integer value between 0 and 100 that represents the percentage of the current batch job that has been completed.

getEngineVersion.sh

Usage: **getEngineVersion.sh**

Description:

Prints the build version of the Calculation Engine to *stdout*.

initializeJob.sh

Usage: **initializeJob.sh** [-dh] <full_path_to_configroot>

where

- d – debug mode (turns on Java asserts)
- h – print this message and exit

Description:

Called by **runCalcEngine.sh**. It initializes a new batch job and prints the job ID of the batch job to stdout. It returns a value of 0 if the initialization is successful. If the initialization fails, it prints a reason to *stdout*.

isDone.sh

Usage: **isDone.sh** [-dhv] <full_path_to_configroot>

where

- d – debug mode (turns on Java asserts)
- h – print this message and exit
- v – verbose mode

Description:

If the batch job is complete, it returns a value of 0. If the batch job is not complete, it returns a value of 1.

jobHistory.sh

Usage: **jobHistory.sh** [-dh] <mhNode> <full_path_to_configroot>

where

- d – debug mode (turns on Java asserts)
- h – print this message and exit

Description:

It provides a detailed report about the current batch job.

jobReport.sh

Usage: **jobReport.sh** <full_path_to_configroot>

Description:

Called by **runCalcEngine.sh**. It provides a summary report about the current batch job.

multiChunker.sh

Usage: **multiChunker.sh** [-dh] [-n num_threads] <full_path_to_configroot>

where

- d – debug mode (turns on Java asserts)
- h – print this message and exit
- n – number of threads to be run

Description:

It starts several batch worker processes. If any of its child processes returns a value of 0 (that is, completes successfully), the script itself returns a value of 0. In other words, if one child process completes successfully, it indicates that the entire batch process has completed successfully.

plfrontendload.sh

Usage: **plfrontendload.sh** <configroot> [OracleItemDataPartitioning Flag]

where

- configroot is the output directory for the configuration (suite's configroot)
- OracleItemDataPartitioningFlag specifies ITEM_DATA table partitioning rules in Oracle as follows:
 - -1 – disable partitioning
 - any other value or blank – do range partitioning as one partition per worksheet

Description:

Executes FELOAD.

plpostmodelrun.sh

Usage: **plpostmodelrun.sh** <configroot> [NumItemDataPartitions]

where

- configroot is the output directory for the configuration
- NumItemDataPartitions specifies the ITEM_DATA table partitioning rules as follows:
 - positive integer – use this number of partitions for partitioning
 - 0 – use the default number of partitions for partitioning
 - -1 – disable partitioning
 - any other value or blank – use the default number of partitions for partitioning

Description:

If NumItemDataPartitions is specified, this command simply stores the specified value in the P4P_PARAMS table, which is used to drive the partitioning logic when it is subsequently executed. When a fresh schema is created, this parameter is initialized (that is, seeded in the P4P_PARAMS table) to -1, which means that partitioning is disabled. However, when this script is run, this parameter will be updated according to the NumItemDataPartitions options. Note that to keep partitioning permanently disabled, you always need to specify -1 on every call to this script; otherwise, it will be reset to the default value. Schema upgrades preserve the current value of NumItemDataPartitions.

plpremodelrun.sh

Usage: **plpremodelrun.sh** <configroot>

where

- configroot is the output directory for the configuration (suite's configroot)

Description:

Executes PRERUN.

plsetcurrentmetricsparams.sh

Usage: **plpremodelrun.sh** <configroot> [param_name] [param_value]

where

- configroot is the output directory for the configuration (suite's configroot)

- `param_name` has the following values:
 - `SetCurrentMetricsNotTakenBlank`
 - `SetCurrentMetricsOtherBlank`
- `param_value` has the following values:
 - 0 – seed with Model Run result
 - 1 – seed with Blank

Description: Sets the value of the current metrics parameter in the `p4p_params` table.

refreshForecastCache.sh

Usage: **refreshForecastCache.sh** -s <server> -t <number of threads> [-c]

where

- `s` – the url of the remote application server
- `t` – the number of threads being used
- `c` – processing continues on failure

Description:

The **refreshForecastCache.sh** script refreshes the forecast cache. It operates synchronously. It replaces pinging the `WorksheetForecastServlet`.

refreshSummaryCache.sh

Usage: **refreshSummaryCache** -s

Description:

The **refreshSummaryCache.sh** script causes summary metrics to be recalculated based on current values in the `ITEM_DATA` table. It should be invoked after every model run or when the configuration changes.

resetForKPIItem.sh

Usage: **resetForKPIItem.sh** <full_path_to_product_directory>

Description: During the model run, Job Control keeps track of which chunks have been completed. The script resets the Job Control system after the model run and before the KPIs are calculated. It clears the Job Control database table and populates a KPI status table with the item IDs that will have KPIs calculated. This script should be run before **runMultiKPI.sh** for items.

resetForKPICollection.sh

Usage: **resetForKPICollection.sh** <full_path_to_product_directory>

Description: During the model run, Job Control keeps track of which chunks have been completed. The script resets the Job Control system after the model run and before the KPIs are calculated. It clears the Job Control database table and populates a KPI status table with the pricing group IDs that will have KPIs calculated. This script should be run before **runMultiKPI.sh** for pricing groups.

RmiServer.sh

Usage: **RmiServer.sh** [-e] [-c] [-h] <full_path_to_product_directory>

where

- e – shut down the RMI server.
- c – Check if the RMI server is up. Return a value of 0 if the server is up. Return a value of 1 if the RMI server is not up.
- h – Print this message and exit.

Description:

Starts or shuts down the RMI server.

runCalcEngine.sh

Usage: **runCalcEngine.sh** [-n numWorkers] <full_path_to_product_directory>

Description:

The **runCalcEngine.sh** script calls the following scripts, which are required to complete a batch run. Running the Calculation Engine across more than one application host requires running the scripts comprising **runCalcEngine.sh** independently. Only **multiChunker.sh** should run on more than one host at a time.

- **getCurrentJobID.sh**
- **closeCurrentJob.sh** (if a previous job exists)
- **initializeJob.sh**
- **multiChunker.sh**
- **getCurrentJobStatus.sh**
- **runStatsOnBatchOutput.sh**
- **jobReport.sh**

runChunker.sh

Usage: **runChunker.sh** [-dh] <full_path_to_configroot>

where

- d – debug mode (turns on Java asserts)
- h – print this message and exit

Description:

Starts a single worker process in the foreground.

runInteractiveCE.sh

Usage: **runInteractiveCE.sh** [-p] <full_path_to_configroot>

where

- p – engine starts in failover mode

Description:

Called by **enginectl.sh**. It starts the RMI server and an associated watchdog process that restarts the RMI server if it crashes.

runMultiKPI.sh

Usage: **runMultiKPI.sh** [-n numWorkers] item | collection <full_path_to_product_directory>

where

- n – number of parallel processes
- item | collection – one of these arguments must be selected

Description:

The **runMultiKPI.sh** script calculates performance metrics that are based on Calculation Engine forecasts (key performance indicators). The script confirms that a job is initialized and then it runs the KPI calculations.

The KPI calculations are divided into two separate batch processes, KPI for items and KPI for pricing groups. The script takes either the **item** argument or the **collection** argument. The KPI for items calculation *must* be completed before the KPI for pricing groups calculation.

Before each KPI for items calculation is run, the **resetForKPIItem.sh** command must be run to reset the Job Control queues. Before each KPI for pricing group calculation is run, the **resetForKPICollection.sh** command must be run to reset the Job Control queues.

These calculations can be done in a single process or in multiple parallel processes.

The weekly batch script calls these scripts in the following order:

1. resetForKPIItem
2. runMultiKPI for items
3. resetForKPICollection
4. runMultiKPI for pricing groups

See also **resetForKPIItem.sh** and **resetForKPICollection.sh**.

runReport.sh

Usage: **runReport.sh** [-dh] <full_path_to_configroot>

where

- d – debug mode (turns on Java asserts)
- h – print this message and exit

Description:

It prints a report of the current batch run to *stdout*.

runStatsOnBatchOutput.sh

Usage: **runStatsOnBatchOutput.sh**

Description:

The **runStatsOnBatchOutput.sh** script is called by **runCalcEngine.sh** and is part of **weeklyBatch.sh**. The script runs an “analyze and estimate” utility call RunStats on markdown_activities, forecast_summaries, forecast_activities, rtm_history, rtm_status, and rtm_status_arguments.

weeklyBatch.sh

Usage: **weeklyBatch.sh** [-n] <full_path_to_product_directory> <p4pgui-host> <p4pgui-port>

where

- n – number of chunks

Example: **weeklyBatch.sh** -n 3 /profit ps-app-101 9040

Description: This script encapsulates the weekly batch process. It is best used with small datasets as a tool during the application configuration process; it is not recommended for use in a production environment.

If you do not specify the number of chunks, the Calculation Engine and the KPI calculations both use one thread.

Load_statements.sql

The following are contained in **load_statements.sql** and are part of the model run.

FELOAD

Prior to FELOAD, certain tables are cleaned up in order to improve performance. During the FELOAD portion of the model run, the ITEM_DATA table is updated with new data that has been received from the retailer.

Note that the Mhrename standard interface does not remove inactive cluster sets. So, items that are members of inactive cluster sets are filtered out during the population of the INTERNAL_ITEM_DATA_TBL table.

FELOAD consists of the following steps:

1. Procedures for archiving ITEM_DATA and Forecasts are loaded.
2. The SCENARIOS_TBL table is loaded.
3. The INTERNAL_PROMO table is loaded.
4. The INTERNAL_HIST_MKDNS_TBL table is loaded.
5. The INTERNAL_BIZ_RULES_TBL table is loaded.
6. The IR_WAREHOUSE_ALL_ITEMS_TBL table is loaded.
7. The ITEMS_TBL.model_start_dt is updated.
8. All invalid views are recompiled.
9. The INTERNAL_ITEM_DATA_TBL table is truncated.
10. The INTERNAL_ITEM_DATA_TBL table is populated.
11. All dropped indexes are restored on the internal ITEM_DATA table.
12. Statistics are collected on the internal ITEM_DATA table.
13. The FEDATES tag, which includes updating P4P_PARAMS, is created.
14. The COLLECTIONS tag, which truncates the P4P_COLLECTION table, is created. This step is not called by any other step in **load_statements.sql**.
15. The P4P_COLLECTION table is truncated.

Data Archiving Data in Markdown Optimization is archived in such a manner that data not required for the weekly model run or by the application is cleaned up regularly. Required data is preserved and performance is enhanced.

Two procedures, which are part of the FELOAD portion of **load_statements.sql**, are responsible for archiving:

- **com.profitlogic.db.birch.ArchiveForecasts**
- **com.profitlogic.db.birch.ArchiveItemData**

Prior to archiving, a purging procedure drops all expired partitions and logs the purge data into ARCHIVE_STATUS_TBL.

Archiving occurs once a week. The current data in each table is compared to the data in the archive and only the new records are selected to be appended to the archive.

The archiving tables increase in size over time. In order to manage the size of these tables you can use the retention script to set the length of the retention period for the archive table. The retention period defaults to null so that no archive is truncated by default. The recommended retention period is two years.

Retention Script

Use the following script, available under <install_base>/modules/tools/bin, to set the retention period for the archive tables.

```
plsetarchiveretention.sh <config_root> [archive_table_name [NULL] | nn]] [DEFAULT [NULL | nn]]
```

Arguments:

| | |
|--------------------------------|--|
| <config_root> | path to configuration files |
| archive_table_name [NULL nn] | archive_table_name is the name of the archive table followed by the word NULL or <a positive number representing the number of retention weeks>. |
| DEFAULT [NULL nn] | DEFAULT represents all other tables not listed followed by the word NULL or <a positive number representing the number of retention weeks>. |

Example: plsetarchiveretention.sh \$INSTALL_DIR/config TABLE1_NAME 50 TABLE2_NAME NULL DEFAULT 100

The following table lists the archiving source tables and target tables.

Table 4–2 Archived Tables

| Archive Source Table | Archive Target Table | Populated By | Amount of History Preserved |
|----------------------|--------------------------|----------------------------|-----------------------------|
| FORECAST_ACTIVITIES | FORECAST_ACTIVITIES_ARCH | Model Run | unlimited |
| FORECAST_RUNS | FORECAST_RUNS_ARCH | Model Run | unlimited |
| FORECAST_SUMMARIES | FORECAST_SUMMARIES_ARCH | Model Run | unlimited |
| MARKDOWN_ACTIVITIES | MARKDOWN_ACTIVITIES_ARCH | Model Run | unlimited |
| RTM_HISTORY | RTM_HISTORY_ARCH | Model Run | unlimited |
| RTM_STATUS | RTM_STATUS_ARCH | Model Run | unlimited |
| RUN_HISTORY | RUN_HISTORY_ARCH | Model Run | unlimited |
| ITEM_DATA | ITEM_DATA_ARCH | FELOAD, KPIs, user actions | two years |

Forecast Archiving The forecast archiving process maintains a status table that is truncated at the beginning of each weekly archiving. As each step in the process is successfully completed, its completion status is logged into the status table (ARCHIVING_STATUS_TBL). The cleanup of the source database tables, which is the last step of the procedure, begins only after all required archiving steps have been completed.

ITEM_DATA Forecasting The ITEM_DATA forecasting step preserves all the columns from the ITEM_DATA table. The ITEM_DATA_ARCH table contains one additional column, CURRENT_WEEK, which is populated from the PARAM_NAME column (= CurrentWeek) in the P4P_PARAMS table. The ITEM_DATA archiving step included the truncating of the ITEM_DATA table.

PRERUN

During the PRERUN portion of the model run, the BRPM business rules are cached into ITEM_BRM_RULES at the item level. Each column in the table represents a separate business rule (in correspondence to BRM_RULE_DEFINITION TBL). Each row in the table represents a unique ITEM_ID, with its business rules exploded to the item level. The ITEMS view along with the SEASONALITY_ID are cached in ITEMS_MODELRUN_TBL, which is used as a source for most inference rules.

Note that chunking has been disabled by default in the BRPM caching step. Chunking should only be enabled if processing is too slow. To enable chunking, configure the BRMChunkSize parameter in P4P_PARAM as follows:

Table 4–3 BRMChunkSize Parameter Values

| BRMChunkSize Value | Description |
|--------------------|----------------------------------|
| 0 | No chunking (the default) |
| > 0 | Chunks created of size specified |
| < 0 | Chunking not allowed |

The value can be set manually or by using the script `..\modules\tools\bin\plsetbrmchunksize.sh`. The value is set to the default value of 0 at the time of the initial load.

PRERUN consists of the following steps:

1. Tag added to disable Model Run Indexes.
2. The BRPM business rules are cached into the ITEM_BRM_RULES table.
3. All indexes are dropped on the ITEM_MODELRUN_TBL table.
4. The ITEM_MODELRUN_TBL table is truncated.
5. All What If output tables are truncated.
6. The WIF_SCENARIO_TBL table is populated with the required row of seed data.
7. FULL_PRICE and PRICE_LADDERS are cached for items.
8. The ITEM_MODELRUN_TBL table is populated.
9. All dropped indexes are restored on the ITEM_MODELRUN_TBL table.
10. The IR_WAREHOUSE_CACHE_TBL, which is a cache for IR_WAREHOUSE, is loaded.
11. BRM_ATTRIBUTE_VALUE_TBL is populated.
12. HIST_MARKDOWNS_MODELRUN_TBL (HIST_MARKDOWNS cache) is populated.
13. The PERIODS_MD_CAL_TBL table, which is a subset of PERIOD_TBL, used by the IR_MARKDOWN_CALENDAR view, is populated.

14. The P4P_LADDER_ROLES_TBL is populated.
15. All table statistics are updated.
16. All invalid views and schemas are recompiled.
17. The Model Run indexes and constraints are disabled.
18. The IR_METRICS cache tables are populated.

POSTRUN

During the POSTRUN portion of the model run, the P4P_FORECAST_DATA table is updated with the latest model run results, the ITEM_DATA table is updated with certain metrics, and RECOMMENDED_COLLECTION_FLAG and WORKSHEET_ID in P4P_COLLECTIONS are updated with data from the ITEM_DATA table.

POSTRUN consists of the following steps:

1. All indexes are dropped on the P4P_FORECAST_DATA table.
2. The P4P_FORECAST_DATA and TMP_P4P_FORECAST_DATA tables are truncated.
3. The TMP_P4P_FORECAST_DATA table is loaded.
4. Statistics are collected on the P4P_FORECAST_DATA table.
5. The P4P_FORECAST_DATA table is loaded.
6. All dropped indexes are restored on the P4P_FORECAST_DATA table by the RestoreTable procedure.
7. Statistics are collected on the P4P_FORECAST_DATA table.
8. The TMP_P4P_FORECAST_DATA table is truncated in preparation for the load.
9. All indexes are dropped on TMP_POSTRUN_ITEM_DATA.
10. The TMP_POSTRUN_ITEM_DATA table is truncated.
11. The temp table used in the ITEM_DATA update to populate proj_oh_units_eff_dt is loaded.
12. All dropped indexes on TMP_POSTRUN_ITEM_DATA are restored using the RestoreTable procedure.
13. Statistics are collected on the TMP_POSTRUN_ITEM_DATA table.
14. The COLLECTION_NAME, PROJ_OH_UNITS_EFF_DT, and RECOMMENDED_COLLECTION_FLAG columns in ITEM_DATA are updated, based on the most recent model run results.
15. Statistics are collected on the ITEM_DATA table.
16. The P4P_COLLECTION.RECOMMENDED_COLLECTION_FLAG column is updated with the latest information from ITEM_DATA.
17. Statistics are collected on the P4P_COLLECTION table.
18. All invalid schema objects are recompiled.
19. All invalid views are recompiled.

Summary Metrics

Note that materialized views are not supported and should be removed.

The P4P_WORKSHEET_SUMMARIES table stores the aggregate data for all summary metrics for all worksheets. The P4P_WORKSHEET_SUMMARIES table is indexed after the data is populated, and the name of the index is SummaryCache_IDX.

This table is initially created with one column, the worksheet_ID column, when the application is deployed. The Worksheet Summaries page in the application obtains summary metrics from P4P_WORKSHEET_SUMMARIES. Parameters associated with the worksheet summary cache are stored in P4P_SUMMARYCACHE_PARAMS. The parameters table should always exist. The summary metrics table can be rebuilt or refreshed.

When P4P_WORKSHEET_SUMMARIES table is rebuilt, the existing table is dropped, then recreated and populated with data. When the table is refreshed, all rows in the table are deleted and re-populated.

A refresh of the cache table is triggered when

- the application server is running and the **refreshSummaryCache.sh** command is invoked

The cached table is rebuilt when:

- the application server is running and the configuration has changed and the **refreshSummaryCache.sh** command is invoked.
- the configuration has changed and the application server is restarted.

If the application server is restarted but the configuration has not changed, then the cache table is not rebuilt or refreshed. So, P4P_WORKSHEET_SUMMARIES should be refreshed/rebuilt after every model run and whenever changes are made to XML files in the p4pgui/grids directory, or if a change is made from the UI that affects the summary metrics, that is, taking a markdown via a worksheet.

In addition, grids are refreshed through **p4padmin.jsp** when the application server is running. Clicking on the Grid Configuration link reloads the grids and rebuilds the summary metrics cache.

A link, Worksheet Summary Cache Information, provides the following diagnostic information:

- the names of the cached columns
- the worksheet IDs that are cached
- the SQL statement used to calculate the summary metrics

Monitoring an Model Run

The commands you can use to monitor the progress of the model run include:

- **getCurrentJob.sh**
- **getCurrentJobStatus.sh**
- **isDone.sh**
- **jobHistory.sh**
- **jobReport.sh**
- **runReport.sh**

The model run can be monitored by reviewing the exit codes for the worker processes from **runCalcEngine.sh** and **multiChunker.sh**.

Resource monitoring of the application host that the worker processes are running on and the database host that the worker processes communicate with is also recommended. The saturation or overuse of hardware can indicate a configuration problem, such as the wrong number of worker processes, the wrong number of worker processes per machine, the wrong chunk size, or inappropriate heartbeat times.

The **isDone.sh** utility returns an exit code of 0 if the current batch run is complete; otherwise, it returns an exit code of 1.

The **getCurrentJobStatus.sh** utility prints a number between 0 and 100, which represents the approximate percentage of processing completed. This value is computed as a weighted percentage of completed chunks from the work queue, so the value is less accurate if business rules are more heterogeneous across merchandise or if the chunks are large.

The **jobReport.sh** utility prints a detailed breakdown of the number of items completed, the number of pricing groups completed, and the number of optimizations of each type that have failed.

The **runReport.sh** utility prints the Stoplight Summary. This is available at any time during the batch process, but it does not indicate if the job is complete.

These monitoring scripts provide a database-level view of how the run is proceeding. However, monitoring the exit status of the worker processes for unexpected failures is also recommended. These unexpected failures may indicate a configuration or data problem such as overly aggressive suicide times or problems with inference rule customization. It is also recommended that you redirect *stderr* to a log file in order to view any warning messages.

Running Reports and Diagnosing Problems

The **runReport.sh** utility prints the Stoplight Summary. It is available at any time during the batch job, regardless of the value returned by **isDone.sh**.

The Stoplight Summary section of the report provides a count of all errors, categorized by the level of severity of the error. The red category indicates system or configuration errors that must be fixed. The yellow category includes errors that result from missing data or a possible mis-configuration of the application. The green category indicates no errors.

The Message Breakdown section of the report lists the errors in the order of severity and provides a count of the number of items affected.

If items or pricing groups are missing, the run can stop prematurely or have difficulty writing its results to the database. If this is the case, you can check the application server logs and database logs to determine the cause.

If the problem is not caused by missing data, you should first look at system and model configuration errors (Red category). You should diagnose and fix these problems and then restart using **generateErrorWorkQueue.sh** or run a completely new job.

The frequency of errors in the various categories may supply information that can be useful in diagnosing problems.

If worker processes exit prematurely with an exit code greater than zero, you should examine the item-level status and error messages with **runReport.sh**. You should also review the **worker.lifetime** setting to ensure that it provides enough time for even the longest-running pricing group optimizations. Overly aggressive settings for **worker.lifetime** can cause workers to exit abruptly.

The data structure that Delphi gathers from the inference rules and feeds to Agorai, as well as Agorai's responses, can be saved as an XML file. These messages, which contain the precise information sent to and returned from Agorai, are useful in determining whether a problem is with the data itself or has resulted from a mis-configuration (such as in the business rules).

To save these messages to an XML file, in the **delphi.properties** file set **engine.record.internals=true** and specify a complete path and directory name in **engine.record.directory**. (See [“Settings for delphi.properties” on page 4-3](#) for more information.) Changes to these settings apply when the worker processes or the RMI server are restarted.

The *stderr* stream, if redirected to a log file, can also yield information about the cause of an exit and whether or not it involved worker.lifetime.

Restarting a Run

If some optimizations fail during the model run, you should correct any problems that affected the job and then re-execute the parts that had previously failed. Generate an error work queue, which contains the chunks for which one or more items or pricing groups reports a failure. The chunks themselves contain only those items or pricing groups that have failed. Run **generateErrorWorkQueue.sh** in order to mark these chunks as available for processing again. Then restart the model run as normal.

Performance Considerations

The items in a batch run are grouped into chunks, which are processed together. This design improves performance; however, if an item fails because of a programming or configuration error, then the failure affects the processing of the entire chunk. This situation can be addressed as follows.

Configuration

Three parameters in **job.properties** affect this issue: **chunk.sizes**, **chunk.tryLimit**, and **worker.lifetime**. These parameters are discussed earlier in this chapter. In most cases, the default values for these properties are adequate.

Automatic Restart

Worker processes that terminate before completion are automatically restarted via the **runChunker.sh** script. It restarts processes that have exited with a status *other than* 0 (success) or 1 (unrecoverable failure). This convention should be followed if other custom scripts are used.

Stopping Jobs

Use **closeCurrentJob.sh**, described earlier in this chapter, to stop all worker processes. A new batch job can be started before the old one has completely stopped.

The **kill** and **killall** commands cannot be used to stop worker processes.

Worker Restart Messages

A worker start-up message that displays at the start of a run is a normal occurrence. A worker start-up message during a run indicates that a failure has occurred.

Worker Time-outs

Worker processes detect items whose processing is taking longer than expected. In such a case, a message will be displayed indicating that the worker process has timed out and is being restarted to process the remaining items.

Problem Analysis

The failure of an item does not necessarily indicate that the entire run is bad; however, the run may take longer to complete.

To determine how much of the run has completed, use `getCurrentJobStatus.sh`, which is described earlier in this chapter. The command prints the percentage of the job that is complete and the amount of time that has elapsed. This information can be used to project the completion time for the run.

Failure Diagnosis

To determine what has gone wrong with a run that has completed, do the following:

1. Locate an item that has a status of *missing* (which indicates that the item has not been processed) using the following query:

```
select *
from item_status_tbl t, item_status_labels_tbl l
where t.status_id = l.status_id and l.status_desc = 'open'
```

2. To obtain a description of the item from `ITEM_DATA`, use the following query:

```
select *
from item_data
where item_id in (list from above query)
```

3. Capture the XML file for the item and analyze.

Job Controller

When a batch job is terminated, any worker processes that are working on that job should stop updating it. This is necessary because, if a new job is started and new batch workers are created, then the updates should apply to the new job rather than the job that has just been terminated. It is possible that a worker from an old job can live long enough to save changes into a new job, which is a bad outcome.

Performance

Production performance can vary, depending on a specific retailer customization.

To identify performance problems:

1. Measure performance. Determine whether the database hardware is saturated. It should be close to 100% CPU utilization. If it is not, worker processes can be added to increase throughput.
2. If CPU utilization is at 100% and the batch process cannot be completed within the production window, then verify that the database server (hardware and software) is configured correctly.
3. If the database is configured correctly, determine which Inference Rule is taking the most time by logging into the database server as administrator and examining the execution profile. An IR that is dominating the execution profile may need to be reconfigured.
4. The strategy used to query the database can be configured for an individual IR. For more information, see the "Inference Rule" chapter in the *Oracle Retail Markdown Optimization Configuration Guide*.

5. The chunk size setting in job.properties can be modified. This is discussed earlier in this chapter.

Sendback Files

Sendbacks are used to query the MDO database and extract the forecast and markdown recommendations for all eligible items. Three sendback files are generated that contain the data to be exported. The sendback file contains information about changes made via the service user interface. The file is the mechanism for transmitting the updated markdown information to the retailer. The content of the sendback file is determined by the SQL query.

The schedule for generating and transmitting a sendback file is determined by the needs of the business. Individual retailers may require sendback files at regular intervals during the week or may even require daily sendback files. The script to automate the sendback process should be designed to manage the schedule.

The default shell script, forecastSendback.sh, located in \$INSTALL/modules/tools/bin, generates the following three sendback files in the directory specified as an input parameter in the shell script.

- forecast_activites_sendback.txt
- forecast_summaries_sendback.txt
- markdown_activities_sendback.txt

The following three default sendback tags are created in p4p-gui-config.xml:

- forecast-summ. This tag is used to generate the forecast summary file by querying the f_forecast_summaries pl/sql function. The user can select the full set or a subset of the columns returned by the function.
- forecast-act. This tag is used to generate the forecast activity file by querying the f_forecast_activities pl/sql function. the user can select the full set or a subset of the columns returned by the function.
- markdown-act. This tag is used to generate the markdown activity file by querying the f_markdown_activities pl/sql function. The user can select the full set or a subset of the columns returned by this function.

Sendback File Example

The following example shows the generation of a sendback file with a typical weekly schedule, called the markdown cycle:

Only one sendback file is included in this example; however, retailers may require the generation of more than one sendback file as part of their standard schedule.

To generate a sendback file, you must:

- write one or more SQL queries against the database. A query should specify the name (type) of the sendback file, line ending, file delimiter, and information to be included in the sendback file, such as item, location, value of the new price after markdown, and date of price change. Edit the **p4pgui-config.xml** file in the configuration root directory to include the necessary queries

The following sample query generates information about outdates:

```
<sendback-query name="pl-outdates"
line-endings="unix" result-delimiter="|" "><![CDATA
[select item_id, modified_out_of_stock_date from
```

```
p4p_items where modified_out_of_stock_date is not
null]]></sendback-query>
```

- edit the property, **p4pgui.sendback.dir = pathname** in the **configuration_root/p4pgui/config.properties** file to specify the destination of the generated sendback file.
- create a script to automate the scheduled weekly generation of the sendback file that includes the necessary Markdown Optimization Admin commands.

Accelerated Markdowns

Since the implementation of a markdown decision as a price change visible to the retail retailer can take weeks, it is possible to override the markdown schedule by taking accelerated markdowns. Under such a plan, users assign a new Sendback Date to selected items and a sendback file that captured this information is generated on every day that end users have access to the application user interface, regardless of whether or not end users have made changes. This accelerated markdown process allows a retailer to take markdowns quickly. For more information on how accelerated markdowns are implemented in the application user interface, see the *Oracle Retail Markdown Optimization User Guide*.

Only one accelerated markdown is allowed for any item within a single markdown cycle. So an end-user can add or modify the sendback date for an item until the appropriate worksheet is approved and executed. The item is exported to the sendback file and the Sent Date, Sent Markdown Price, and Sent Price Ladder are updated in the database table. After this, no other accelerated markdowns are permitted for an item until the end of the current markdown cycle, when the week's sales information is loaded into the application database, and the fields for Sendback Date, Sent Date, Sent Markdown Price, and Sent Price Ladder are cleared. These three fields are used to record the date and time that the sendback file was generated, the approved markdown price of the item at the time the sendback file was generated, and the price ladder ID of the item at the time the sendback file was generated.

To implement accelerated markdowns:

1. Write an SQL query to create an accelerated sendback file. A query should update Sent Date, Sent Markdown Price, and Sent Price Ladder in the database. Edit the **p4pgui-config.xml** file in the configuration root directory to include any queries.
2. Create a script to automate the daily accelerated markdown sendback process. Such a process should guarantee that the sendback files are generated. In addition, the process should include a fail safe so that if, for example, the sendback file generation process fails on Wednesday, then the Thursday accelerated markdown sendback generation process picks up any items that have not been sent that have a Sendback Date of Thursday or earlier.

The regular weekly sendback script should include functionality to pick up any items that have not been sent.

Accelerated Markdown Sendback Examples

Here is an example of an accelerated markdown sendback query that collects all accelerated markdowns from the day (or any that have not been collected since the last cutoff):

```
<sendback name="client-markdowns-daily">
<select-query line-endings="unix"
```

```
result-delimiter="|" "> <![CDATA [select i.hierarchy3,
i.hierarchy6, i.proposed_price,
to_char (w.timestamp_approve, 'mm-dd-yyyy hh24:mi:ss')
from p4p_items i, P4P_SUBMITTAL_WORKSHEETS w WHERE
i.SUBMITTAL_WORKSHEET_ID = w.SUBMITTAL_WORKSHEET_ID AND
i.sent_date=SYSDATE]] > </select-query>
```

```
<pre-sendback-update > <![CDATA[UPDATE p4p_items SET
sent_ladder_id=ladder_id, sent_markdown_price =
proposed_price, sent_date = SYSDATE WHERE markdown_flag
> 0 AND sent_date IS NULL AND TRUNC (sendback_date) <=
SYSDATE AND submittal_worksheet_id IN (SELECT
submittal_worksheet_id FROM P4P_SUBMITTAL_WORKSHEETS
WHERE worksheet_status_id = 3)]]> </pre-sendback-update>
```

```
</sendback>
```

To create the sendback file, use the following command:

```
java -cp <bea_home>/weblogic10/server/lib/weblogic.jar:<install_
dir>/modules/tools/lib/PriceAdmin.jar com.profitlogic.adm.price.PriceAdmin
generateSendback -t client-markdowns-daily -o filename.txt
```

The file is overwritten each time the query runs, so rename the file if you want to keep a record of previous daily markdown files.

Here is an example of an accelerated markdown sendback query that collects all non-accelerated markdowns and all accelerated markdowns that were not collected since the last cutoff date:

```
<sendback name="client-markdowns-weekly">
```

```
<select-query line-endings="unix" result-delimiter="|" "><![CDATA[SELECT
item-id, proposed_price FROM p4p_items i, P4P_SUBMITTAL_WORKSHEETS
sw WHERE i.submittal_worksheet_id=sw.submittal_worksheet_id AND
i.markdown_flag='y' AND sw.worksheet_status_id=3 AND i.sent_date IS
NULL]]>
```

```
</select-query>
```

```
</sendback>
```

To create the sendback file, use the generateSendback command as described above.

The file is overwritten each time the query runs, so rename the file if you want to keep a record of previous weekly markdown files.

Automating Markdown Optimization Processes

The following Markdown Optimization processes occur regularly. Most of these processes consist of a sequence of steps. These processes may be suited to scripting/automation and scheduling using an enterprise scheduler. Some processes, such as the standard load and the model run, may benefit from a granular, step-wise process in which each step returns an exit code upon completion. Such a design can help with troubleshooting and recovery.

- **Standard Load.** The application provides two scripts that stage, transform, and load data into the target database tables in the application database.

- **Model Run.** This process takes the raw input data from the retailer, runs the data through the forecasting and Calculation Engine, and writes the results to database tables that are read by the application. This process is discussed in detail in this chapter.
- **RDM Updates.** If the Retail Data Mart is being used, it must be updated with current application data regularly.
- **Sendback Generation.** Sendback files are scheduled according to a retailer's business needs. Sendback generation is discussed in detail in this chapter.

In addition to these standard processes, most Markdown Optimization implementations include customized processes that are tailored to specific retailer requirements. The most common of these involve custom sendback feeds in which a specific file or set of files must be generated in order to feed data to another system.

This chapter provides information about the RDM data loads.

It contains the following sections:

- [RDM Initialization Load](#)
- [RDM Weekly Load](#)
- [RDM Incremental Load](#)

Introduction

The three refresh procedures for the RDM data loads carry a substantial performance overhead and should be run in parallel. You can do this by setting the variable “Number of parallel processes to run load procedures” to either 4 or 6. This variable can be found in the env.sh file, which is located in the following directory: <PL_HOME>/modules/Database/REDWOODSchema/install/oracle/REDWOODSchema/scripts

RDM Initialization Load

The RDM initialization load creates the RDM tables and loads all available historical data. You run the RDM initialization load only once, after you have installed the RDM.

To run the RDM initialization load, run the pl_init_load_rdm.sh script, located in the following directory: <PL_HOME>/modules/Database/REDWOODSchema/install/oracle/REDWOODSchema/scripts This script requires the plexports.sh script, which contains variables configured during installation and is located in the <PL_HOME>/config directory.

RDM Initialization Load Procedures

This section describes the all of the RDM initialization load procedures.

The RDM initialization load has the following load-order dependencies:

Table 5–1 RDM Load Procedures

| Load Step | Description |
|------------------------|--|
| 1. SetRunStartWeekly | Sets up the weekly update. |
| 2. LoadPeriods | Refreshes RDM_PERIODS_TBL. This is a complete refresh and is restartable. Populates the RDM_PERIODS_TBL table with all of your historical data. |
| 3a. InitLoadFA | Runs only once, during the RDM initialization load. This procedure is responsible for the initial load of RDM_FORECAST_ACTIVITIES. This is a complete refresh and is restartable. |
| 3b. LoadFA | Refreshes RDM_FORECAST_ACTIVITIES. This is an incremental refresh and is restartable. If this procedure fails, do not truncate or drop RDM_SYSTEM_DB, RDM_TEMP_FA, or RDM_TEMP_FA_UPD. Populates the RDM_FORECAST_ACTIVITIES table with all of your historical data. |
| 4. LoadBudgets | Refreshes RDM_BUDGETS. This is an incremental refresh and is restartable. |
| 5. LoadItemData | Refreshes RDM_ITEM_DATA. This is an incremental refresh and is restartable. |
| 6. RefreshSummarySetup | This procedure must precede RefreshFA and RefreshAct. It is restartable. |
| 7. RefreshFA | Refreshes RDM_MV_FA_n. This is a complete refresh and is restartable. |
| 8. RefreshAct | Refreshes RDM_MV_ACT_n. This is a complete refresh and is restartable. |
| 9. UpdateLoadStatus | This procedure maintains status during a refresh. |
| 10. SetRunEndWeekly | Finishes the weekly update. |

RDM Weekly Load

The RDM weekly load updates the RDM tables with data from the model run. Run the RDM weekly load after each model run. The RDM weekly load populates the RDM_FORECAST_ACTIVITIES (LoadFA) and RDM_PERIODS_TBL (LoadPeriods) tables with all of your weekly data.

Running the RDM Weekly Load

To run the RDM weekly load, run the `pl_load_rdm.sh` script. The script is located in the following directory: `<PL_HOME>/modules/Database/REDWOODSchema/install/oracle/REDWOODSchema/scripts` It requires the `plexports.sh` script, which contains variables configured during installation and is located in the `<PL_HOME>/config` directory.

RDM Weekly Load Procedures

This section describes the all of the RDM weekly load procedures.

The RDM weekly load has the following load-order dependencies:

Table 5–2 RDM Weekly Load Procedures

| Load Step | Description |
|----------------------|--|
| 1. SetRunStartWeekly | Sets up the weekly update. |
| 2. LoadPeriods | Refreshes RDM_PERIODS_TBL. This is a complete refresh and is restartable. |
| 3. LoadFA | Refreshes RDM_FORECAST_ACTIVITIES. This is an incremental refresh and is restartable. If this procedure fails, do not truncate or drop RDM_SYSTEM_DB, RDM_TEMP_FA, or RDM_TEMP_FA_UPD. |
| 4. LoadBudgets | Refreshes RDM_BUDGETS. This is an incremental refresh and is restartable. |

Table 5–2 (Cont.) RDM Weekly Load Procedures

| Load Step | Description |
|------------------------|---|
| 5. LoadItemData | Refreshes RDM_ITEM_DATA. This is an incremental refresh and is restartable. |
| 6. RefreshSummarySetup | This procedure must precede RefreshFA and RefreshAct. It is restartable. |
| 7. RefreshFA | Refreshes RDM_MV_FA_n. This is a complete refresh and is restartable. |
| 8. RefreshAct | Refreshes RDM_MV_ACT_n. This is a complete refresh and is restartable. |
| 9. UpdateLoadStatus | This procedure maintains status during a refresh. |
| 10. SetRunEndWeekly | Finishes the weekly update. |

RDM Incremental Load

The RDM incremental load updates the RDM item data. Run the incremental load after any markdown activity in Markdown Optimization. The incremental load updates the RDM_ITEM_DATA table.

By default, you should schedule the RDM incremental load to run at least once day, at the end of day. It can also be run more frequently throughout the day, as required by your business practices. You can even run an RDM incremental load even while users are writing reports. However, be aware of potential performance issues.

Running the RDM Incremental Load

To run the RDM incremental load, run the `pl_daily_load_rdm.sh` script. The script is located in the following directory: `<PL_HOME>/modules/Database/REDWOODSchema/install/oracle/REDWOODSchema/scripts` It requires the `plexports.sh` script, which contains variables configured during installation and is located in the `<PL_HOME>/config` directory.

Tuning the RDM Incremental Load Performance

The length of the data load varies, depending on the amount of data being written. A lengthy load may impact the user experience as follows:

- Slow responsiveness. If the incremental load is lengthy, the user interface may appear to hang while generating reports.
- Stale data. When the report finally does completes, it may contain old data from before the load. If the underlying data is in the process of updating while users are trying to generate reports, their reports will contain old data. Note that all data in the report will be at the same state; there is no mix of old and new data.

Avoiding Performance Issues

To avoid potential performance issues, configure the scripts to run as needed for your environment, keeping in mind the following performance guidelines and considerations:

- For the most accurate data, run the RDM incremental load whenever data changes.
- For the best user experience for running reports, avoid running an RDM incremental load when users are online, writing reports.
- Since a load takes approximately 5-15 minutes, schedule loads to occur no more frequently than the time it takes to complete the most time consuming load.

- Updates to the data in the RDM_ITEM_DATA table are particularly resource intensive and take longer to complete.

RDM Incremental Load Procedures

This section describes the RDM incremental load procedures.

The RDM incremental load has the following load-order dependencies:

Table 5–3 RDM Incremental Load Procedures

| Load Step | Description |
|---------------------|---|
| 1. SetRunStartDaily | Sets up the incremental update. |
| 2. LoadItemData | Refreshes RDM_ITEM_DATA. This is an incremental refresh and is restartable. |
| UpdateLoadStatus | This procedure maintains status during a refresh. |
| 4. SetRunEndDaily | Finishes the incremental update. |

Markdown Optimization Tools

The administration tools described in this chapter are used by system administrators who have been assigned the user management action of PRICE_ADMIN_EXEC.

This chapter contains the following sections:

- Markdown Optimization Admin Commands
 - [disableLogin](#)
 - [enableLogin](#)
 - [generateSendback](#)
 - [isSummaryCacheLocked](#)
 - [listSendbackTypes](#)
 - [lockWorksheets](#)
 - [refreshForecastCache](#)
 - [refreshSummaryCache](#)
 - [releaseSummaryCacheLock](#)
 - [unlockWorksheets](#)

Markdown Optimization Admin Commands

The PriceAdmin commands address functions used in model runs and in managing the service. These commands can be used in scripts to automate the weekly batch process.

The commands require the following:

- Java Version (See the Application Server Requirements section of the *Oracle Retail Markdown Optimization Installation Guide*.)
- Client-side Library referenced by the command **PriceAdmin.jar**
- For the following commands (generateSendback, listSendbackTypes, disableLogin, and enableLogin) use http with either service server.

You should invoke the commands from **PriceAdmin.jar** via **com.profitlogic.adm.price.PriceAdmin**.

Here is an example of a command.

```
java -cp <WebLogic_Home>/wlserver_10.3/server/lib/wlclient.jar;<install_dir>/CSM/lib/retail-public-security-api.jar; -Dcsm.home=<location where the password store is installed>;<install_dir>/modules/tools/lib/PriceAdmin.jar
```

```
com.profitlogic.adm.price.PriceAdmin generateSendback -s REMOTE_URL -t SENDBACK_
TYPE -o OUTPUT_FILE -a PRICEADMIN_ALIAS -p PATH_TO_TRUSTSTORE -k TRUSTSTORE_ALIAS
```

In the example above,

- <WebLogic_Home> is the location where the WebLogic Server is installed.
- <install_dir> is the location where the MDO application is installed.
- In order to get user credentials from the wallet file, the retail-public-security-api.jar file is included in classpath.
- -Dcsm.home must point to the location of wallet file.
- REMOTE_URL is the additional protocol information you can use based on whether you send the request using SSL or non-SSL. For example, if the server is enabled with only HTTPS, you must specify https://<host URL>:<PORT>.
- PRICEADMIN_ALIAS is the alias name set up for the user account associated with the PriceAdmin utility.
- PATH_TO_TRUSTSTORE is the location to the trust store that contains certificates a client can trust from servers. This location can point to a ".jks" Java Key Store or a ".pem" base64 encoded certificate.
- TRUSTSTORE_ALIAS is the alias name set up for the trust store. To access a client's truststore, you must provide the password of the trust store file. To maintain security, it is recommended that the truststore password is saved in the wallet file. You then specify the truststore alias name to PriceAdmin utility.

Note: For more information on setting up identity and trust keystores, refer to the *Oracle Retail Markdown Optimization Engine Installation Guide*.

You can access help on each command by using ? or --help. For example, enter enableLogin -?.

disableLogin

Description: The **disableLogin** command prevents all users with the exception of the System Administrator from logging into the application.

Syntax:

For SSL implementation:

```
java -cp /full_path_productdir/modules/tools/lib/PriceAdmin.jar:/full_path_
productdir/modules/CSM/lib/retail-public-security-api.jar - Dcsm.home=$CSM_HOME/
com.profitlogic.adm.price.PriceAdmin disableLogin-s https://<host>:<SSL port> -p
<price_admin_alias> -l <truststorefile_full_path> -k <ssl_truststore_alias>
```

For non-SSL implementation:

```
java -cp /full_path_productdir/modules/tools/lib/PriceAdmin.jar:/full_path_
productdir/modules/CSM/lib/retail-public-security-api.jar - Dcsm.home=$CSM_HOME/
com.profitlogic.adm.price.PriceAdmin disableLogin-s http://<host>:<NonSSL port> -p
<price_admin_alias>
```

Arguments:

| | |
|--|--|
| <code>-s, --server <server url></code> | the url of the remote application server |
| <code>-v, --verbose</code> | displays logging messages as command executes |

Return Values: The command returns 0 if it is successful. The command returns a value other than 0 if it fails.

enableLogin

Description: The **enableLogin** command allows all users to log into the application.

Syntax:

For SSL implementation:

```
java -cp /full_path_productdir/modules/tools/lib/PriceAdmin.jar:/full_path_productdir/modules/CSM/lib/retail-public-security-api.jar - Dcsm.home=$CSM_HOME/com.profitlogic.adm.price.PriceAdmin enableLogin -s https://<host>:<SSL port> -p <price_admin_alias> -l <truststorefile_full_path> -k <ssl_truststore_alias>
```

For non-SSL implementation:

```
java -cp /full_path_productdir/modules/tools/lib/PriceAdmin.jar:/full_path_productdir/modules/CSM/lib/retail-public-security-api.jar - Dcsm.home=$CSM_HOME/com.profitlogic.adm.price.PriceAdmin enableLogin -s http://<host>:<NonSSL port> -p <price_admin_alias>
```

Arguments:

| | |
|--|---|
| <code>-s, --server <server url></code> | the url of the remote application server |
| <code>-v, --verbose</code> | displays logging message as command executes |

Return Values: The command returns 0 if it is successful. The command returns a value other than 0 if it fails.

generateSendback

Description: The **generateSendback** command creates a file containing data for import to an ERP system.

Syntax:

For SSL implementation:

```
java -cp /full_path_productdir/modules/tools/lib/PriceAdmin.jar:/full_path_productdir/modules/CSM/lib/retail-public-security-api.jar - Dcsm.home=$CSM_HOME/com.profitlogic.adm.price.PriceAdmin generateSendback -s https://<host>:<SSL port> -t <sendbacktag> -o <sendback-file> -p <price_admin_alias> -l <truststorefile_full_path> -k <ssl_truststore_alias>
```

For non-SSL implementation:

```
java -cp /full_path_productdir/modules/tools/lib/PriceAdmin.jar:/full_path_productdir/modules/CSM/lib/retail-public-security-api.jar - Dcsm.home=$CSM_HOME/com.profitlogic.adm.price.PriceAdmin generateSendback -s http://<host>:<NonSSL port> -t <sendbacktag> -o <sendback-file> -p <price_admin_alias>
```

Arguments:

| | |
|---------------------------|---|
| -t, --type<sendback type> | the type of sendback file as provided by the listSendbackTypes command. |
| -o, --output <filename> | the directory path and filename where the sendback information should be written. |
| -s, --server <server url> | the url of the remote application server |
| -v, --verbose | displays logging messages as command executes |

Return Values: The command returns 0 if it is successful. The command returns a value other than 0 if it fails.

isSummaryCacheLocked

Description: The **isSummaryCacheLocked** command outputs the status of the summary metrics table.

Syntax:

For SSL implementation:

```
java -cp /full_path_productdir/modules/tools/lib/PriceAdmin.jar:/full_path_productdir/modules/CSM/lib/retail-public-security-api.jar - Dcsm.home=$CSM_HOME/com.profitlogic.adm.price.PriceAdmin isSummaryCacheLocked -s https://<host>:<SSL port> -p <price_admin_alias> -l <truststorefile_full_path> -k <ssl_truststore_alias>
```

For non-SSL implementation:

```
java -cp /full_path_productdir/modules/tools/lib/PriceAdmin.jar:/full_path_productdir/modules/CSM/lib/retail-public-security-api.jar - Dcsm.home=$CSM_HOME/com.profitlogic.adm.price.PriceAdmin isSummaryCacheLocked -s http://<host>:<NonSSL port> -p <price_admin_alias>
```

Arguments:

| | |
|---------------------------|---|
| -s, --server <server url> | the url of the remote application server |
| -v, --verbose | displays logging messages as command executes |

Return Values: The command returns 0 if it is successful. The command returns a value other than 0 if it fails.

listSendbackTypes

Description: The **listSendbackTypes** command provides a list of the types of sendback available.

Syntax:

For SSL implementation:

```
java -cp /full_path_productdir/modules/tools/lib/PriceAdmin.jar:/full_path_productdir/modules/CSM/lib/retail-public-security-api.jar - Dcsm.home=$CSM_HOME/
```

```
com.profitlogic.adm.price.PriceAdmin listSendbackTypes -s <server url> [-v] -a
${PRICEADMIN_ALIAS} -p ${PATH_TO_TRUSTSTORE} -k ${TRUST_ALIAS}
```

For non-SSL implementation:

```
java -cp /full_path_productdir/modules/tools/lib/PriceAdmin.jar:/full_path_
productdir/modules/CSM/lib/retail-public-security-api.jar - Dcsm.home=${CSM_HOME}/
com.profitlogic.adm.price.PriceAdmin listSendbackTypes -s <server url> [-v] -a
${PRICEADMIN_ALIAS}
```

Arguments:

| | |
|---------------------------|---|
| -s, --server <server url> | the url of the remote application server |
| -v, --verbose | displays logging messages as command executes |

Return Values: The command returns 0 if it is successful. The command returns a value other than 0 if it fails.

Output: The command provides a list of the available sendback types.

lockWorksheets

Description: The **lockWorksheets** command prevents all access except read-only access to the worksheets.

Syntax:

For SSL implementation:

```
java -cp /full_path_productdir/modules/tools/lib/PriceAdmin.jar:/full_path_
productdir/modules/CSM/lib/retail-public-security-api.jar - Dcsm.home=${CSM_HOME}/
com.profitlogic.adm.price.PriceAdmin listSendbackTypes -s https://<host>:<SSL
port> -p <price_admin_alias> -l <truststorefile_full_path> -k <ssl_truststore_
alias>
```

For non-SSL implementation:

```
java -cp /full_path_productdir/modules/tools/lib/PriceAdmin.jar:/full_path_
productdir/modules/CSM/lib/retail-public-security-api.jar - Dcsm.home=${CSM_HOME}/
com.profitlogic.adm.price.PriceAdmin listSendbackTypes -s http://<host>:<NonSSL
port> -p <price_admin_alias>
```

Arguments:

| | |
|---------------------------|---|
| -s, --server <server url> | the url of the remote application server |
| -v, --verbose | displays logging messages as command executes |

Return Values: The command returns 0 if it is successful. The command returns a value other than 0 if it fails.

refreshForecastCache

Description: The **refreshForecastCache** command refreshes the forecast cache. It operates synchronously. It replaces pinging the WorksheetForecastServlet.

Syntax:

For SSL implementation:

```
java -cp /full_path_productdir/modules/tools/lib/PriceAdmin.jar:/full_path_
productdir/modules/CSM/lib/retail-public-security-api.jar - Dcsm.home=$CSM_HOME/
com.profitlogic.adm.price.PriceAdmin refreshForecastCache -s https://<host>:<SSL
port> -p <price_admin_alias> -l <truststorefile_full_path> -k <ssl_truststore_
alias>
```

For non-SSL implementation:

```
java -cp /full_path_productdir/modules/tools/lib/PriceAdmin.jar:/full_path_
productdir/modules/CSM/lib/retail-public-security-api.jar - Dcsm.home=$CSM_HOME/
com.profitlogic.adm.price.PriceAdmin refreshForecastCache -s http://<host>:<NonSSL
port> -p <price_admin_alias>
```

Arguments:

- s, --server <server url> the url of the remote application server
- t, --threads <number of threads> the number of threads being used
- c, --continueOnFailure processing continues on failure even if it fails for some items

Return Values: The command returns 0 if it is successful. The command returns a value other than 0 if it fails.

The correct option to continue on failure is -c or --continueOnFailure. What continue on failure means is that an individual item that is being refreshed could fail, but if that option is passed in all the rest of the items it will continue processing. "Continue the process even if it fails for some items" should be sufficient.

refreshSummaryCache

Description: The **refreshSummaryCache** command causes summary metrics to be recalculated based on current values in the ITEM_DATA table. It should be invoked after every model run or when the configuration changes.

Syntax:

For SSL implementation:

```
java -cp /full_path_productdir/modules/tools/lib/PriceAdmin.jar:/full_path_
productdir/modules/CSM/lib/retail-public-security-api.jar - Dcsm.home=$CSM_HOME/
com.profitlogic.adm.price.PriceAdmin refreshSummaryCache -s https://<host>:<SSL
port> -p <price_admin_alias> -l <truststorefile_full_path> -k <ssl_truststore_
alias>
```

For non-SSL implementation:

```
java -cp /full_path_productdir/modules/tools/lib/PriceAdmin.jar:/full_path_
productdir/modules/CSM/lib/retail-public-security-api.jar - Dcsm.home=$CSM_HOME/
com.profitlogic.adm.price.PriceAdmin refreshSummaryCache -s http://<host>:<NonSSL
port> -p <price_admin_alias>
```

Arguments:

- s, --server <server url> the url of the remote application server

Return Values: The command returns 0 if it is successful. The command returns a value other than 0 if it fails.

releaseSummaryCacheLock

Description: The **releaseSummaryCacheLock** command forcibly unlocks the summary metrics table. Cache locking is implemented using a flag that persists in the database, so this command resets the flag to unlocked.

Syntax:

For SSL implementation:

```
java -cp /full_path_productdir/modules/tools/lib/PriceAdmin.jar:/full_path_productdir/modules/CSM/lib/retail-public-security-api.jar - Dcsm.home=$CSM_HOME/com.profitlogic.adm.price.PriceAdmin releaseSummaryCacheLock -s https://<host>:<SSL port> -p <price_admin_alias> -l <truststorefile_full_path> -k <ssl_truststore_alias>
```

For non-SSL implementation:

```
java -cp /full_path_productdir/modules/tools/lib/PriceAdmin.jar:/full_path_productdir/modules/CSM/lib/retail-public-security-api.jar - Dcsm.home=$CSM_HOME/com.profitlogic.adm.price.PriceAdmin releaseSummaryCacheLock -s http://<host>:<NonSSL port> -p <price_admin_alias>
```

Arguments:

-s, --server <server url> the url of the remote application server

Return Values: The command returns 0 if it is successful. The command returns a value other than 0 if it fails.

unlockWorksheets

Description: The **unlockWorksheets** command unlocks the worksheets so they are again readable and writable. (See the lockWorksheets command.)

Syntax:

For SSL implementation:

```
java -cp /full_path_productdir/modules/tools/lib/PriceAdmin.jar:/full_path_productdir/modules/CSM/lib/retail-public-security-api.jar - Dcsm.home=$CSM_HOME/com.profitlogic.adm.price.PriceAdmin unlockWorksheets -s https://<host>:<SSL port> -p <price_admin_alias> -l <truststorefile_full_path> -k <ssl_truststore_alias>
```

For non-SSL implementation:

```
java -cp /full_path_productdir/modules/tools/lib/PriceAdmin.jar:/full_path_productdir/modules/CSM/lib/retail-public-security-api.jar - Dcsm.home=$CSM_HOME/com.profitlogic.adm.price.PriceAdmin unlockWorksheets -s http://<host>:<NonSSL port> -p <price_admin_alias>
```

Arguments:

-s, --server <server url> the url of the remote application server

`-v,--verbose` displays logging messages as
command executes

Return Values: The command returns 0 if it is successful. The command returns a value other than 0 if it fails.

Troubleshooting

This chapter provides some tips for diagnosing and fixing possible problems with MDO.

It contains the following sections:

- [Assessing Optimization Run Problems](#)
- [Guidelines for Fixing Problems](#)
- [Diagnostic Messages](#)
- [FAQs](#)
- [Some Metrics Troubleshooting Tips](#)

Assessing Optimization Run Problems

Problems can occur at any point in the run process. Some errors will prevent the run from completing and others will not. Markdown Optimization provides a report that contains two levels of error messages. this report can be accessed via `runReport.sh`.

Stoplight Summary

The Stoplight Summary section of the report provides a count of all errors, categorized by the level of severity of the error. The red category indicates system or configuration errors that must be fixed. The yellow category includes errors that result from missing data or a possible mis-configuration of the application. The green category indicates no errors. A run can be considered successful if there are no errors in the red category.

Outcome Messages

The Message Breakdown section of the report lists the errors in the order of severity and provides a count of the number of items affected. The outcome messages are categorized according to the following criteria:

- System errors are caused by conditions that should not occur in a properly configured system. These conditions include system-level problems, application inconsistencies, mis-configurations, communication errors, time-outs, and unrecoverable data failures. Any exception with a severity of Fatal is automatically included here. All System errors are included in the red category of the Stoplight Summary and should be immediately corrected.
- Model Configuration errors indicate that the configuration of the model is incomplete or contains errors/inconsistencies. Information supplied during the configuration, such as optimization parameters or stochastic samples, may be

missing, incomplete, or invalid. Errors may also have arisen during the customization of the Inference Rules. All Model Configuration errors are included in the red category of the Stoplight Summary and should be immediately corrected.

- Item Data errors indicate missing or inaccessible retailer data. Either the data is missing, a problem occurred in loading the data, or the data is inaccessible because of a problem with the inference rules.
- Inactivity errors indicate that there is not enough historical information to drive the model as it is currently configured.
- Error indicates problems that are not categorized.
- Markdown Blocked messages indicate that a markdown was not permitted on the effective date because of business rules, promotions, or other factors. A markdown at a later date may have been recommended. This information comes from the inference rules.
- Not Recommended messages indicate that a markdown was possible on the effective date, but it was not recommended. Based on the history, model configuration, and business rules, the application determined that revenue would be maximized by leaving the current price unchanged for at least one more week. This outcome typically occurs because the next markdown price available on the price ladder is lower than the optimal markdown.
- Warning messages indicate a general condition that is less severe than an error and are provided to flag a condition of note, such as a price above the full price.
- Information messages provide general diagnostic information.

Modifying Optimization Run Error Messages

You can change the text of specific error messages that are produced by the Calculation Engine during the run.

The default error messages are located in the file, `config/suite/resources/EngineResources.properties`. You can create a file, also called `EngineResources.properties` that contains the changed text only. This file should be located in either `config/suite/environment/resources` or in `config/suite/client/resources`. Any messages in the `EngineResources.properties` file in either of these two subdirectories will override the default message text.

Guidelines for Fixing Problems

Here are some guidelines for fixing the problems you have diagnosed.

- Correct system errors first.
- Both Model Configuration errors and Yellow-level errors can cause data problems. If the problem is the result of a mis-configuration, you may want to compare the configuration settings to the original, default settings. When making changes to the configuration, use a systematic, incremental approach and record the effect of any configuration changes.
- Yellow-level messages may indicate data problems or may be legitimate. Data may be missing or invalid. Alternatively, an error may have occurred during the run.
- Note changes in the number of error messages from week to week. Significant changes may indicate a problem.

- When analyzing data problems, consider the following causes:
 - Problems loading the data
 - Data missing from database tables
 - A mis-configuration of the inference rules that prevents data from being visible
 - Business rule parameter changes

Diagnostic Messages

Table 7–1 Markdown Optimization Diagnostic Messages

| Message ID/Message Text | Description | Outcome Category | Source | Possible Cause/Solutions |
|---|--|------------------|--------------------|---|
| activityDataNotBuilt | Could not build ActivityData for item. | Error | Data Access layer | Model misconfiguration |
| alreadyInClearance Already in clearance | A markdown is not possible on the effective date because the item is already in clearance, meaning a clearance markdown has already occurred. | Blocked | Calculation Engine | This sort of clearance is from specific retailer definition, and depends on how the retailer is configured. |
| badCollectionPricing Value Invalid collectionPricing valueInvalid Collection Pricing rule value: <val> | Agorai uses the pricing group Pricing value to determine the pricing interdependencies when marking down items in the pricing group. There are three supported values: "MarkdownTogether" (item may be marked down to different prices), "PriceTogether" (items must have same price), or "PercentOffTogether" (items must be the same percentage of the full price). | Model Conf | Calculation Engine | This is likely an error in Didyma customization or data in the business rules table.Should not occur in properly customized system. |
| badDemandStrategy Invalid Demand Strategy Value: | Agorai's heuristic model uses the demandStrategy provided to it to define how it is to use recent activity data to determine demand. It must be one of the following values: "Average", "Maximum", "TrimmedMean", "TrimmedMinMean". | Model Conf | Calculation Engine | Model configuration error. |

Table 7-1 (Cont.) Markdown Optimization Diagnostic Messages

| Message ID/Message Text | Description | Outcome Category | Source | Possible Cause/Solutions |
|--|---|-------------------------|--------------------|---|
| badDispatch Error dispatching to Agorai, details: <details> | This message reports problems interfacing with Agorai - unable to load Agorai, bad Agorai input/output, associated exceptions. | System | Data Access Layer | The path to the AgoraiJNI.so file is incorrect in the job.properties file, or the AgoraiJNI.so file is missing or inaccessible, or the AgoraiJNI.so file could not be loaded because the operating system is not configured properly. |
| badInWarehouseCount Number of In Warehouse quantities doesn't match size of historical Sales data | The number of historical "in warehouse quantity" reports provided to Agorai is different from the number of historical sales. All the historical arrays passed to Agorai must be the same size. | Model Conf | Calculation Engine | Missing historical data not properly handled by Didyma; error in Didyma customization. Should not occur in properly customized system. |
| badLastStoreCount Last week of historical activity does not have a good Store Count | The system requires a positive store count for the last week. Historical sales are normalized using store counts, and we need a proper value here to forecast forward. | Model Conf | Calculation Engine | Lack of good recent data, or error in Didyma customization. |
| badOnHandCount Number of On Hand quantities doesn't match size of historical Sales data | The number of historical "on hand quantity" reports provided to Agorai is different from the number of historical sales. All the historical arrays passed to Agorai must be the same size. | Model Conf | Calculation Engine | Missing historical data not properly handled by Didyma; error in Didyma customization. Should not occur in properly customized system. |
| badOnOrderCount Number of On Order quantities doesn't match size of historical Sales data | The number of historical "on order quantity" reports provided to Agorai is different from the number of historical sales. All the historical arrays passed to Agorai must be the same size. | Model Conf | Calculation Engine | Missing historical data not properly handled by Didyma; error in Didyma customization. Should not occur in properly customized system. |
| badPastTicketPriceCount Number of Past Ticket Prices doesn't match size of historical Sales data | The number of historical "past ticket price" reports provided to Agorai is different from the number of historical sales. All the historical arrays passed to Agorai must be the same size. | Model Conf | Calculation Engine | Missing historical data not properly handled by Didyma; error in Didyma customization. Should not occur in properly customized system. |

Table 7-1 (Cont.) Markdown Optimization Diagnostic Messages

| Message ID/Message Text | Description | Outcome Category | Source | Possible Cause/Solutions |
|---|--|-------------------------|--------------------|--|
| badPriceCount Number of sales different from the number of prices Number of Average Sales Prices doesn't match size of historical Sales data | The number of historical "average sales price" reports provided to Agorai is different from the number of sales reports. All the historical arrays passed to Agorai must be the same size. | Model Conf | Calculation Engine | Missing historical data not properly handled by Didyma; error in Didyma customization. Should not occur in properly customized system. |
| badPriceForHeuristic Price less than or equal to 0 - too small for the Heuristic model Bad Price for heuristic model: <val> | The forecasting engine detected an invalid price. | Model Conf | Calculation Engine | You probably won't see this; it would be caught by an earlier validation. |
| badPriceInterp Price Interpretation out of range: <val> | Historical, promo, and price ladder prices provided to Agorai each have an interpretation to indicate the nature of the price: markdown, promo, and so on. This value is out of range. | Model Conf | Calculation Engine | Bug in Didyma or Didyma customization. Bad data not properly screened by Didyma. |
| badSeasonality Seasonality too small or negative: <val> | A seasonality value provided to Agorai is less than a certain threshold value. | Model Conf | Calculation Engine | This is likely a model misconfiguration. |
| BadSeasonalityForHeuristic Seasonality less than or equal to 0 -- too small for Heuristic model. Bad Seasonality value for heuristic model: <val> | The forecasting engine detected an invalid seasonality value. | Model Conf | Calculation Engine | You probably won't see this; it would be caught by an earlier validation. |
| badStoreCountCount Number of Store Count quantities doesn't match size of historical Sales data | The number of historical "store count" reports provided to Agorai is different from the number of historical sales. All the historical arrays passed to Agorai must be the same size. | Model Conf | Calculation Engine | Missing historical data not properly handled by Didyma; error in Didyma customization. |
| bayesianDataNotBuilt | Could not build BayesianData for item. | Error | Data Access Layer | Model misconfiguration. |
| beforeEffectiveDate Effective Date inconsistency | There is inconsistent data within Agorai, where somehow the effective date is considered out of range. | Model Conf | Calculation Engine | This represents an inconsistency of information within Agorai. Most likely grossly bad data or an Agorai defect. |
| bizPolicyNotBuilt | Could not build BusinessPolicy for item. | Error | Data Access Layer | Model misconfiguration. |

Table 7-1 (Cont.) Markdown Optimization Diagnostic Messages

| Message ID/Message Text | Description | Outcome Category | Source | Possible Cause/Solutions |
|---|--|-------------------------|--------------------|--|
| businessRuleBlocks Markdown prohibited this week due to Business Rule | A business rule prohibits a markdown this week. | Blocked | Data Access Layer | This is defined in the inference_rules. |
| clearanceNotPermitted Model not configured for Clearance markdowns | Model is not configured to permit clearance markdowns. Optional "clearance" tags in the request's business policy section trigger this. | Model Conf | Calculation Engine | Could result from an inconsistency in business rules. Probably clearance rule information was provided without a clearance price ladder. |
| collectionBuild Error building Optimization Request for collection | More information accompanies this to provide detail. | Error | Data Access Layer | Look at the other errors for more info. |
| collectionItemErrors Collection contains items with errors | This is put on the pricing group when errors are found in one or more of its items. It will show for the items without errors as well, to better indicate what occurred. | Error | Calculation Engine | Refer to the item errors to see what occurred. |
| databaseErrorData | Didyma encountered database connectivity problems while trying to create Agorai input. | Model Conf | Data Access Layer | Configuration/customization error or worse. |
| dateInvalidDay Date Error - Invalid day: <val> | Problem with the day portion of a date value. | Model Conf | Calculation Engine | Probably bad data from Didyma, perhaps due to data or customization problems. |
| dateInvalidDayOfWeek Date Error - Invalid day of week: <val> | Problem with a day of week value. | Model Conf | Calculation Engine | Probably bad data from Didyma, perhaps due to data or customization problems. |
| dateInvalidMonth Date Error - Invalid month: <val> | Problem with the month portion of a date value. | Model Conf | Calculation Engine | Probably bad data from Didyma, perhaps due to data or customization problems. |
| dateInvalidWeekNumber Date Error - Invalid week number: <val> | Problem with a week number value. | Model Conf | Calculation Engine | Probably bad data from Didyma, perhaps due to data or customization problems. |
| dateInvalidYear Date Error - Invalid year: <val> | Problem with the year portion of a date value. | Model Conf | Calculation Engine | Probably bad data from Didyma, perhaps due to data or customization problems. |
| DistributionDoesNotSample0First Stochastic Sample distribution does not sample 0 first | The first point of the stochastic sample provided to Agorai must have a multiplier of 0. | Model Conf | Calculation Engine | |

Table 7-1 (Cont.) Markdown Optimization Diagnostic Messages

| Message ID/Message Text | Description | Outcome Category | Source | Possible Cause/Solutions |
|---|---|-------------------------|--------------------|--|
| duplicateTag ERROR: duplicate tag ({0}) at {1}). | Problem parsing the XML. | Model Conf | Calculation Engine | Didyma probably left something malformed. Perhaps due to data or customization problems, or mixed component versions. |
| EffectiveDateMustPrecedeOutDate Out Date precedes Effective Date | The out date for this item has already passed or will pass before our recommendations could take effect. | Item Data | Calculation Engine | Can occur normally. An item with an old out date was still selected by the eligibility query (which defines the items/pricing groups to be included in a run). This could be bad data or an error in database configuration. |
| effectiveDatesDiffer Effective Dates can't differ within collection | All items in a pricing group must have the same effective date. In fact, the effective date should be the same for everything in an entire run. | Model Conf | Calculation Engine | Business rule configuration or Didyma customization error. |
| elementContentError Error in content of XML element (<tag>) at <pos> | Problem parsing the XML. Perhaps a value is the wrong type or missing. | Model Conf | Calculation Engine | Didyma probably left something malformed. Perhaps due to data or customization problems. |
| emptySeasonalities Empty seasonalitiesNo Seasonality values provided | No seasonality values were provided to Agorai. | Model Conf | Calculation Engine | Improper population of seasonality data in the database or an error in Didyma customization. |
| errorOpeningLogFile Error opening log file: <file> | Agorai could not open its log file. | System | Calculation Engine | Problem in Agorai's configuration, or a problem in the file system to which logs are directed. |
| ErrorReadingElementContent Error reading content of XML element (<tag>) at <pos> | Problem parsing the XML. Usually a value is of the wrong type or missing. | Model Conf | Calculation Engine | Didyma provided a value of the wrong type, or it was missing. Perhaps due to data or customization problems. |
| ErrorWritingElementContent Error writing content of XML element (<tag>) | Agorai is having trouble writing a value in its results. Indicates a major malfunction. | System | Calculation Engine | Probably an Agorai defect. |

Table 7-1 (Cont.) Markdown Optimization Diagnostic Messages

| Message ID/Message Text | Description | Outcome Category | Source | Possible Cause/Solutions |
|---|---|-------------------------|--------------------|---|
| histPeriodNotPositive Historical Period must be positive Days Per Historical Interval value is not positive | The daysPerInterval value is not positive. This is the number of days represented by each period of historical data provided to Agorai. It is usually 7 days. Elsewhere where we refer to "weeks of activity" we are usually referring to intervals of this number of days. | Model Conf | Calculation Engine | This is likely an error in Didyma customization or data in the business rules table. Should not occur in properly customized system. |
| internal The message varies depending on what is found. Many such messages are generated by the operating system and passed through unchanged. | This message reports unexpected internal errors that really should not occur. | System | Calculation Engine | This indicates an unexpected situation. It could be a software bug, or it could be that the software is operating outside of its expected parameters in some way that isn't being rigorously validated. In any case, this situation should be reported to Customer Support. |
| invalid Validation error | Appears with other errors that occur during validation. That is, this message groups accumulated validation errors. | Error | Calculation Engine | See the associated messages for the details. |
| InvalidClearanceSellthrough Invalid Clearance Sell-Through rule value: <val> | The clearance sellthrough value provided to Agorai must be between 0 and 1. This is the optional sell-through ratio that triggers a clearance markdown. | Model Conf | Calculation Engine | Business rule configuration or Didyma customization error. |
| invalidClearanceLockout Invalid Clearance Lockout rule value: <val> | The clearance lockout value provided to Agorai must be >= 0. This is the optional number of days before the out date where a clearance markdown is forced. | Model Conf | Calculation Engine | Business rule configuration or Didyma customization error. |
| InvalidCumulativeTotalUnitsSold Invalid cumulative total units sold Sales data contains invalid cumulative total units sold | SalesData contains an invalid total unit sold value. | Item Data | Calculation Engine | Likely a model configuration error. |

Table 7-1 (Cont.) Markdown Optimization Diagnostic Messages

| Message ID/Message Text | Description | Outcome Category | Source | Possible Cause/Solutions |
|---|---|-------------------------|--------------------|---|
| invalidDemandMultiplier Invalid demand multiplier. Check stochastic demand uncertainty and sample multipliers. | Calculation of the demand multiplier involves the product of the demand uncertainty and a stochastic sample's multiplier value. In this case it yielded a number <=0. | Model Conf | Calculation Engine | Most likely a misconfiguration of the model.Should not occur in properly customized system. |
| invalidInterpInPriceLadder Price Interpretation not appropriate for Price Ladder: <val> | A price ladder supplied to Agorai contains at least one price with an interpretation other than 1 (markdown start) or 6 (clearance start). | Model Conf | Calculation Engine | Likely a model configuration error. |
| InvalidInterpretationForPromo Invalid Price Interpretation for Promo: <val> | Promo information provided to Agorai contains prices without a promo interpretation (2, 3, or 9.) | Model Conf | Calculation Engine | Likely a model configuration error. |
| invalidInventoryTarget Invalid Target Inventory value: <val> | The inventory target value provided to Agorai must be >= 0. This is the desired inventory at the target date. | Model Conf | Calculation Engine | Business rule configuration or model configuration error. |
| invalidMaxAbsolutePrice Invalid Maximum Absolute Markdown Price: <val> | The max absolute price value provided to Agorai must be between 0 and 1.A markdown recommendation may not yield a price higher than this. A price relative to ticketPrice. | Model Conf | Calculation Engine | Business rule configuration or model configuration error. |
| InvalidMaxFirstMarkdownPercent Invalid Maximum First Markdown Percentage: <val> | The maximum first markdown percentage value provided to Agorai must be between 0 and 1.This is the maximum markdown percentage (0 to 1) for the first markdown, as compared to the current price. | Model Conf | Calculation Engine | Business rule configuration or model configuration error. |
| InvalidMaxNumberOfMarkdowns Invalid Maximum Number of Markdowns: <val> | The max number of markdowns value provided to Agorai must be > 0.Maximum number of markdowns permitted during item's entire life cycle. This includes markdowns that already occurred in history. | Model Conf | Calculation Engine | Business rule configuration or model configuration error. |

Table 7-1 (Cont.) Markdown Optimization Diagnostic Messages

| Message ID/Message Text | Description | Outcome Category | Source | Possible Cause/Solutions |
|--|---|-------------------------|--------------------|---|
| invalidMaxPrice Invalid Maximum Absolute Markdown Price: <val> | Value supplied for maxAbsolutePrice was not from 0 to 1.A markdown recommendation may not yield a price higher than this. A price relative to ticketPrice. | Model Conf | Calculation Engine | Business rule configuration or model configuration error. |
| InvalidMaxSubsequentMarkdownPercent Invalid Maximum Subsequent Markdown Percentage: <val> | The maximum subsequent markdown percentage value provided to Agorai must be between 0 and 1.Maximum markdown percentage (0 to 1) for all markdowns after the first, as compared to the current price. | Model Conf | Calculation Engine | Business rule configuration or model configuration error. |
| InvalidMinFirstMarkdownPercent Invalid Minimum First Markdown Percentage: <val> | The minimum first markdown percentage value provided to Agorai must be between 0 and 1.This is the minimum markdown percentage (0 to 1) allowed for the first markdown, as compared to the current price. | Model Conf | Calculation Engine | Business rule configuration or model configuration error. |
| InvalidMinMarkdownInterval Invalid Min Markdown Interval value: <val> | The minMarkdownInterval value provided to Agorai was <= 0. | Model Conf | Calculation Engine | |
| InvalidMinMarkdownIntervals Invalid dated Min Markdown Interval value: <val> | A (date-specific) minMarkdownIntervals value provided to Agorai was <= 0. | Model Conf | Calculation Engine | |
| InvalidMinmarkdownIntervalsDates Invalid dates for Min Markdown Intervals: <start> > <end> | A improper date range was supplied in minMarkdownIntervals. | Model Conf | Calculation Engine | |
| InvalidMinMarkdownPercentOfFullPrice Invalid Minimum Markdown Percentage of Full Price: <val> | The minimum markdown percentage of full price value provided to Agorai must be between 0 and 1.Minimum step of each markdown as a percentage (0-1) of the full price. | Model Conf | Calculation Engine | Business rule configuration or model configuration error. |

Table 7-1 (Cont.) Markdown Optimization Diagnostic Messages

| Message ID/Message Text | Description | Outcome Category | Source | Possible Cause/Solutions |
|--|--|-------------------------|--------------------|---|
| InvalidMinSubsequentMarkdownPercent Invalid Minimum Subsequent Markdown Percentage: <val> | The minimum subsequent markdown percentage value provided to Agorai must be between 0 and 1. Minimum markdown percentage (0 to 1) for all markdowns after the first, as compared to the current price. | Model Conf | Calculation Engine | Business rule configuration or model configuration error. |
| InvalidNumberOfUnitsOnHand Sales data contains invalid number of units on hand: <val> | SalesData contains an invalid unit on hand value. | Item Data | Calculation Engine | Didyma customization error or Agorai defect. |
| invalidObjectType Invalid Object Type: <val> | Problem identifying objects for status messages. | System | Calculation Engine | Probably an internal problem. |
| invalidPriceInterpretation Price Interpretation out of range: <val> | Same as badPriceInterp, but in slightly different code. Historical, promo, and price ladder prices provided to Agorai each have an interpretation to indicate the nature of the price: markdown, promo, and so on. This value is out of range. | Model Conf | Calculation Engine | Defect in model configuration. |
| invalidRelativePrice Invalid relative price | A price is less than or equal to zero and not marked as "Bad data". | Model Conf | Calculation Engine | Be suspicious. Bad price data or error in model configuration. |
| invalidSalesInterpretation Sales data contains invalid Interpretation: <val> | SalesData contains an invalid interpretation value. | Model Conf | Calculation Engine | Model configuration error. |
| invalidSeasonalityLength Improper number of Seasonality values provided: <val> days | Agorai needs to be supplied with either 52 or 53 weeks of seasonality. This is by interface contract. | Model Conf | Calculation Engine | Seasonality data or model configuration, most likely the latter. |
| invalidSeverity Invalid Severity: <val> | Problem identifying severity (status level) for status messages. | System | Calculation Engine | Probably an internal problem. Should be reported to Customer Support. |
| invalidStoreCount Sales data contains invalid store count: <val> | SalesData contains an invalid store count value. | Item Data | Calculation Engine | Model configuration error. |
| invalidTicketPrice Invalid Full Price: <val> | The ticket price (full price) provided to Agorai must be ≥ 0 . | Item Data | Calculation Engine | |

Table 7-1 (Cont.) Markdown Optimization Diagnostic Messages

| Message ID/Message Text | Description | Outcome Category | Source | Possible Cause/Solutions |
|---|---|-------------------------|--------------------|---|
| invalidTotalDollarSales Sales data contains invalid total-dollar sales: <val> | SalesData contains an invalid total dollar sales value. | Item Data | Calculation Engine | Model configuration error. |
| itemBlocksMarkdown Item blocks markdown for collection on Effective Date | At least one item in the pricing group does not permit a markdown on the effective date, therefore the pricing group as a whole can not be marked down. | Blocked | Calculation Engine | Look at the associated item messages for more information. |
| itemBuild Error building Optimization Request for item | More information accompanies this to provide detail. | Error | Data Access Layer | Look at the other errors for more info. |
| LastSalesDataDiffersFromStartSimulation End of Sales data <date> differs from Simulation Start Date <date> | Inconsistency in historical data. | Model Conf | Calculation Engine | Model configuration error. |
| MarkdownTogetherAdvanced Item recommended this week due to MarkdownTogether Collection | This item in a "markdown together" pricing group would not have been marked down this week by itself, but is recommended because of the pricing group. | Warning | Calculation Engine | Can occur in normal situations. |
| MarkdownTogetherDelayed Item not recommended for this week due to MarkdownTogether Collection | This item in a "markdown together" pricing group would have been marked down, but was blocked due to the pricing group. | Not Rec | Calculation Engine | Can occur in normal situations |
| missingMarkdownDates | Item is missing markdown dates. | Error | Data Access Layer | Markdown date missing (not start date or out date; those are caught individually). |
| missingTag XML error: Missing tag (<tag>) at <pos> | Problem parsing the XML. | Model Conf | Calculation Engine | Didyma probably left something malformed. Perhaps due to data or customization problems, or mixed component versions. |
| missingTagErrors XML error: Missing tags | Problem parsing the XML. This collects a number of missing tag errors. | Model Conf | Calculation Engine | Didyma probably left something malformed. Perhaps due to data or customization problems, or mixed component versions. |

Table 7-1 (Cont.) Markdown Optimization Diagnostic Messages

| Message ID/Message Text | Description | Outcome Category | Source | Possible Cause/Solutions |
|---|---|-------------------------|--------------------|--|
| needMoreSales Not enough historical Sales data to determine demand | This occurs when the sales history, as trimmed according to the configured demandStrategy, has fewer entries than needed, as determined by demandIntervals. (These are both configurable). | Inactivity | Calculation Engine | Can occur normally. Most likely this is sales inactivity, although it is possible the demandStrategy and/or demandIntervals are misconfigured. |
| NoAdditionalMarkdow nsPermitted No additional mark downs permitted | maxNumberMarkdow ns has already been reached for this item. | Blocked | Calculation Engine | Can occur in normal situations. |
| noCandidatePrices No candidate prices available for markdown: filtered Price Ladder is empty | The price ladder coming in to Agorai is empty. Didyma has filtered the price ladder so it contains only values below the current price and valid according to various business rules, in this case there is nothing left. | Item Data | Calculation Engine | Lack of good recent activity data, or error is Price Ladder data or configuration. |
| noCollectionPricingOr ID | Pricing group is missing pricing group pricing or ID. | Error | Data Access Layer | Model misconfiguration. |
| noDataForForecast No historical Sales and Price data available to determine demand | This occurs when Agorai goes through the sales history to get the normalized demand and does not find any entries that have both "known" (not "unavailable") sales data and "valid" (not unknown) price data (average selling price). | Inactivity | Calculation Engine | Can occur normally. |
| noFullPrice This item has no Full Price | Didyma was unable to obtain a full price for an item. | Item Data | Data Access Layer | Some items without a full price are getting through the eligibility query. It could also be an error in Didyma customization. |
| noGamma This item missing Price Elasticity (gamma) | Didyma was unable to obtain a price elasticity value (gamma) for this item. | Model Conf | Data Access Layer | Model misconfiguration. |
| noInventory There is no inventory to clear | The last week of historical activity provided to activity has no units remaining. | Item Data | Calculation Engine | |
| noItemsFoundForColl ection | No items found for this pricing group. | Error | Data Access Layer | Data configuration not consistent. |

Table 7-1 (Cont.) Markdown Optimization Diagnostic Messages

| Message ID/Message Text | Description | Outcome Category | Source | Possible Cause/Solutions |
|--|---|-------------------------|--------------------|---|
| noItemsInCollection No Items in this Collection | No items in a pricing group. This represents a pricing group-mapping problem prior to Agorai. | Model Conf | Calculation Engine | Should never have been sent to Agorai. Likely a customization problem. |
| NoMarkdownPricesAtEffectiveDate No markdown prices available on Effective Date | There were no legal price candidates to consider for markdowns at the effective date. | Blocked | Calculation Engine | Look at current price, price ladders, business rule price restrictions. |
| noOutDate This item has no Out Date | Didyma was unable to obtain an out date for an item. | Item Data | Data Access Layer | Some items without an out date are getting though the eligibility query. It could also be an error in model configuration. |
| noPriceAtEffectiveDate No price is available on Effective Date | The model was unable to determine the price on the effective date. | Blocked | Calculation Engine | Something occurred in the simulation before the effective date that made this information unavailable. |
| noSampleDistribution No Stochastic Sample distribution provided | There must be at least one point in the stochastic sample supplied to Agorai. | Model Conf | Calculation Engine | |
| noStartDate This item has no Start Date | Didyma was unable to obtain a start date for an item. | Item Data | Data Access Layer | Some items without a start date are getting though the eligibility query. It could also be an error in model configuration. |
| NotEnoughForTrimmedMean Not enough clean Sales history to take a Trimmed Mean | This error occurs because the system got some normalized sales history, but there are fewer entries than required. This problem occurs only occur with the TrimmedMean demandStrategy. | Inactivity | Calculation Engine | Lack of good recent activity data., or demandIntervals/demandStrategy misconfiguration. |
| notEnoughForMean Not enough data to take a mean.Not enough clean Sales history to take an Average | This error occurs because the system got some normalized sales history, but there are fewer entries than required. This problem occurs only occur with the Average demandStrategy. | Inactivity | Calculation Engine | Lack of good recent activity data., or demandIntervals/demandStrategy misconfiguration. |
| NotEnoughForTrimmedMinMean Not enough clean Sales history to take a Trimmed Min Mean | This error occurs because the system got some normalized sales history, but there are fewer entries than required. This problem occurs only occur with the TrimmedMinMean demandStrategy. | Inactivity | Calculation Engine | Lack of good recent activity data., or demanIntervals/demandStrategy misconfiguration. |

Table 7-1 (Cont.) Markdown Optimization Diagnostic Messages

| Message ID/Message Text | Description | Outcome Category | Source | Possible Cause/Solutions |
|---|---|-------------------------|--------------------|---|
| noTicketPrice This item has no Ticket Price | Didyma was unable to obtain a ticket price for an item. (ticketPrice tag in request) | Item Data | Data Access Layer | Some items without a ticket price are getting through the eligibility query. It could also be an error in model configuration. |
| notInClearanceCalendar Clearance markdown not permitted by Clearance Markdown Calendar | Business rules are attempting to force a rule-based clearance markdown, but the date is not available in the clearance calendar. | Blocked | Calculation Engine | |
| notInMarkdownCalendar Markdown not permitted by Markdown Calendar | The effective date was not included in the calendar of permitted markdown dates provided to Agorai. The date may not be in the retailer's markdown calendar, or may have been filtered out by Didyma due to a promo or business rule. | Blocked | Calculation Engine | Messages emitted by Didyma may provide more information. |
| notRecommended Markdown not recommended for this week | A markdown was possible this week, but was not deemed optimal. | Not Rec | Calculation Engine | This usually means that the price is set correctly, which is what you were hoping for! But if the item is one that "should" have gotten a markdown, then you might want to check into why it did not. |
| noUsefulSales Data is too dirty to deal with -- zero useful sales found Data too dirty to determine demand: zero useful sales found | Applying the demandStrategy to determine normalized sales yielded a value <= 0 | Inactivity | Calculation Engine | Activity Data values are not adequate for the heuristic model as configured. |
| outDateTooFarAhead Builder Error: outDate must be within 560 days of lastDataDate Out Date cannot be more than <n> days after the Start of Simulation | This error prevents wasting time optimizing items whose out date is wildly in the future. The error occurs when the Out Date is more than 560 days after the Start of the Simulation (first forecasted day). Specifically, this refers to the outDate and startSimulationDate values provided to Agorai in markdownDates. | Item Data | Calculation Engine | Could occur normally, but is cause for suspicion. Could be missing activity data or an erroneous out date. Or an error in Didyma customization yielding same. |
| pastOutDate Already past Out Date | A markdown is not possible on the effective date because the out date will have already passed. | Blocked | Calculation Engine | Can occur normally. |

Table 7-1 (Cont.) Markdown Optimization Diagnostic Messages

| Message ID/Message Text | Description | Outcome Category | Source | Possible Cause/Solutions |
|---|--|-------------------------|--------------------|---|
| pastOutOfStockDate Already past Out Date | A markdown is not possible on the effective date because the out date will have already passed. | Blocked | Calculation Engine | Can occur normally |
| priceAboveFull A relative price is higher than the full price | This is a warning that occurs when a relative price is greater than 1, meaning it is higher than the full price. | Warning | Calculation Engine | Be suspicious. Relative prices are supplied to Agorai in many contexts: Average Sales Prices, Past Ticket Prices, Price Ladders, and Planned Promotions, This may be intrinsic to the retailer's data or an error in customization. |
| promoBlocks Markdown prohibited this week due to Promotion | A promotion prohibits a markdown this week. | Blocked | Data Access Layer | This is defined in the inference_rules. |
| promoStartAfterEnd Promo Start Date later than End Date: <start> > <end> | Bad promo data provided to Agorai. | Item Data | Calculation Engine | Bad data or error in model configuration. |
| SalesDataStartDiffersFromStartDate Date of first Sales data <date> differs from Start Date <date> | Inconsistency in historical data. | Model Conf | Calculation Engine | Bad data or error in model configuration. |
| sellsOutWithoutChanges Sells to target without changes; Markdown not recommended | This simply means that this item or the pricing group it is in sells out to the inventory target without any new markdowns. Given this, we do not attempt any recommendations as they are deemed to be of limited utility. | Not Rec | Calculation Engine | This was introduced in 3.0 to avoid recommending markdowns that appear to be superfluous and have limited value, usually in low inventory situations. |
| StartDateMustPrecedeSimulationStart Builder Error: startDate must precede lastSalesDataStart of Simulation cannot be before Start of historical data | These two dates provided to Agorai do not make sense together. How can the start of our historic sales activity be after the end of it? The Start Date (beginning of history provided to Agorai) is not before the Start Simulation Date (first forecasted day). | Model Conf | Calculation Engine | Bad data or model configuration error. |

Table 7-1 (Cont.) Markdown Optimization Diagnostic Messages

| Message ID/Message Text | Description | Outcome Category | Source | Possible Cause/Solutions |
|---|--|-------------------------|--------------------|---|
| StartSimulationDateMustPrecedeEffectiveDate Builder Error: lastSalesData must precede effectiveDateSimulation Start Date cannot be after the Effective Date | These two dates provided to Agorai do not make sense together. That is, how can we have activity reports after the date our recommendations are to take effect? Specifically, inconsistent startSimulationDate and effectiveDate values have been provided to Agorai in the markdownDates section. | Item Data | Calculation Engine | Bad data or model configuration error. |
| stochasticDataNotBuilt Could not build StochasticData for item. | The data required to build a necessary forecasting feature could not be read from the database. | Error | Data Access Layer | Model misconfiguration. |
| ticketPriceTooLow ticket price too lowFull Price too low: <val> | The ticket price (full price) provided to Agorai in the Activity Data is less than 0.005. | Item Data | Calculation Engine | Bad data or error in Didyma customization. |
| tooFewSales No historical Sales data provided | There were no historical sales provided to Agorai. | Inactivity | Calculation Engine | Can occur normally. |
| tooManymarkdowns No additional markdowns permitted | A markdown is not permitted on the effective date because maxNumberMarkdowns has already been reached for this item. | Blocked | Calculation Engine | Can occur normally. |
| tooManyValidationErrors Too many validation errors | Some validation errors were suppressed because there were too many of them. | Error | Calculation Engine | Look at the other messages. |
| tooSoonForMarkdown Too soon for new markdown | The minimum markdown interval has not passed since the last markdown. See minMarkdownInterval and dated minMarkdownIntervals. | Blocked | Calculation Engine | Can occur normally. |
| topLevelData | This item is missing some item parameters. | Error | Data Access Layer | Something missing from ir_item_parameters. |
| unexpectedTag XML error: Unexpected tag (<tag>) at <pos>. Expected tag (<tag>) | Problem parsing the XML. | Model Conf | Calculation Engine | Didyma probably left something malformed. Perhaps due to data or customization problems, or mixed component versions. |

Table 7-1 (Cont.) Markdown Optimization Diagnostic Messages

| Message ID/Message Text | Description | Outcome Category | Source | Possible Cause/Solutions |
|--|---|---------------------|--------------------|--|
| unknown_resource_key Unknown i18n Engine Resource Key | Indicates no resource value was found for a resource key. For example, a message was generated by resource key in the Engine, but no text for it was defined in the engine resource bundle. | Model Configuration | System | May indicate a version skew with the resource.properties files, or an error is customization or localization of those files. |
| UnknownErrorReadingElementContent Unknown error reading content of XML element (<tag>) at <pos> | Problem parsing the XML. Perhaps a value is of the wrong type or missing. | Model Conf | Calculation Engine | Didyma probably left something malformed. Perhaps due to data or customization problems. |
| unknownTag XML error: unknown tag (<tag>) at <pos>. | Problem parsing the XML. | Model Conf | Calculation Engine | Didyma probably left something malformed. Perhaps due to data or customization problems, or mixed component versions. |
| version Agorai version: <buildid> | Shows the build version number of the Calculation Engine. | Informational | Calculation Engine | Not an error; for diagnostic purposes. |
| version Didyma version: <build> | Shows the build version number of the Data Access Layer | Informational | Data Access Layer | Not an error; for diagnostic purposes. |
| writeResults Didyma error writing results | This groups other errors that occurred during the Calculation Engine's Write Optimization Results step. | Error | Data Access Layer | See associated messages for more info. |

FAQs

This section provides answers to frequently asked questions.

Two levels of solution are provided for each question:

- Verification can be done by anyone with the appropriate level of access to the application and its components as a way to define the scope of the problem.
- Level I support is the responsibility of someone with SQL knowledge who has access to the database tables, front end configuration files, and log files.

If additional support is required to address a problem, contact Oracle Customer Support.

How do I know what these error messages in the Item Details pop-up mean?

The application requires many pieces of information to generate a forecast for any particular item. Key data include:

- item Definition (Merchandise Hierarchy, Location Hierarchy)
- sales
- business Rules

- item Life cycle (Dates, Analytical Parameters)

If any of this data is missing, the model will not be able to generate a forecast and the user may notice an error message in the Item Details pop-up.

Verification.

- Check the item for the exact error message.
- Check the Markdown Optimization User Guide to learn more about the error message.
- Common conditions include:
 - missing start or exit date
 - missing sales data
 - missing analytical information
 - missing price ladder information
 - no inventory to clear
 - item is past exit date
 - bad price information (e.g., \$0, missing full price, missing current price)
 - no eligible date left in markdown calendar

Level 1.

Most items that do not receive forecasts are not currently on sale. For non-forecasted items that are actually being sold, retailer data may be incorrect. Relevant database information can be found as follows:

- start or exit dates in ITEMS view
- sales or inventory data in ACTIVITIES
- items in ITEMS_TBL
- location in LOCATION_HIERARCHY_TBL
- merchandise in MERCHANDISE_HIERARCHY_TBL and MERCHANDISE_TBL
- price ladder information in PRICE_LADDERS_TBL and PRICE_LADDER_VALUES_TBL
- prices in ACTIVITIES and the ITEMS view
- markdown calendar in IR_MARKDOWN_CALENDAR view
- business rules in IR_BUSINESS_POLICY view
- front end information in ITEM_DATA

I do not see a specific item in the application. Where is it?

If data is missing, the item will not be displayed in the front end grids. This is because the eligibility criteria, which set the conditions necessary for an item to go through the model run and be available in Markdowns or Maintaining Merchandise, are configured to filter out old or non-selling items.

Verification.

Do the following:

- Try to locate the item in the Markdowns section of the appropriate worksheet.

- Try to locate the item in Maintaining Merchandise, as the item may not have a recommendation.
- Try to locate the item in the Business Rule Property Manager. The item will appear in the BRPM but not in Markdowns or Maintaining Merchandise if it fails to meet the eligibility criteria.

Level 1.

Do the following:

- Try to locate the item in ITEM_DATA. If the item is in the ITEM_DATA table, it should be available in Markdowns or Maintaining Merchandise.
- Try to locate the item in MERCHANDISE_TBL. The item may be in a different part of the hierarchy than expected.
- The item may be in more than one place. If an item is re-classified but not re-named, then the new item will be created in the new merchandise hierarchy without the associated sales and price history. Such an item fails eligibility criteria.
- Check other eligibility components, including sales or store location thresholds, start date/first receipt date, and exit date.

Why is the value for this metric incorrect?

The application UI is highly configurable and is implemented to a retailer's specifications. Each implementation includes configured metrics for the Worksheet, Worksheet Summary, and Maintaining Merchandise grids. What If is not configurable.

Verification.

Do the following:

- Verify the metric calculation in the requirements document.
- Metrics can vary, depending on the specific conditions.
- Metrics can aggregate in a variety of ways.
- Metrics can require values such as forecasts, recommendations, and markdowns before they populate, so verify that any conditions have been met.

Level 1.

Do the following:

- Verify the derivation of the metric using the front end configuration files. A Metric either comes from ITEM_DATA or is a calculation based on columns in ITEM_DATA. Logic should match requirements specifications.
- Check for logic that handles missing data or for easily confused values such as Perm Ticket Price/Current Ticket Price.
- Verify that the underlying ITEM_DATA values contained what is expected.

A What If scenario does not make sense. What is happening?

What If is designed to provide information about an Item forecast or a Group forecast to the end-of-life. Most What If questions are actually forecast questions, such as "Why does an item's forecast show the incorrect sell through?"

Verification.

Do the following:

- Check the item's Sell Through % and other settings in the BRPM. Check the EOL Unit Inv and EOL Unit Sales in What If. The model is always constrained by the business rules, even if the result is that an item has inventory left over.
- Make sure the item is not already at its lowest possible price.

Level 1.

Do the following:

- Review the forecast and check to see if the model is projecting any markdowns. The absence of price changes usually means that the model is constrained from making a recommendation. Possible reasons for this include:
 - business rule conflicts such as Min MD % Off > Max MD % Off.
 - the Max MD # has been reached.
 - the markdown calendar is too sparse.
 - the price ladder is too sparse.
- If the item does not achieve its Sell Thru target with any valid pricing strategy, the model optimizes Gross Margin using a lower Sell Thru value.
- All business rules always apply, even if this means there are no possible prices left for the model to recommend. Business rule conflicts can be especially complicated in Price Group scenarios.
- When researching forecasting, take price ladder information from IR_PRICE_LADDER. Logic may be built into this view that is used to trim price ladders in order to implement complex rules.
- Markdowns are usually blocked during the last week or two of life. This could be an issue in implementations with sparse markdown calendars.
- The Min MD % Off and Max MD % Off business rules often interact poorly with sparse price ladders. This can cause problems when items have been marked down outside the system in implementations that do not use the Markdowns Taken data feed. Items remain bound by 1st Markdown rules (which can be stricter) even though the user is expecting the item to be impacted by the Subsequent Markdown rules.

Why is my Pricing Group recommendation different than the Item recommendation?

Pricing Groups provide another forecasting option by allowing an item to be forecasted along with similar items (such as other colors in the same style). Pricing groups can be powerful when used appropriately, such as at the beginning of life for a set of items that have the same expected life cycle. Confusing results can occur if pricing groups are not managed correctly.

Verification.

Do the following:

- Check the item recommendation and the pricing group recommendation.
- Check the EOL metrics for the item and the group, if they are available. If both the item and the pricing group hit Sell Thru, then there is usually not a problem. Since a pricing group introduces an additional constraint to a scenario, pricing group results may be less optimal than item results. The optimal path may be different for pricing groups and items.

Level 1.

Do the following:

- Use ITEM_DATA and FORECAST_ACTIVITIES to check item and pricing group forecasts. What If only displays one of the forecasts, and both together can provide additional context.
- A pricing group receives a recommendation for all forecasted items in the same week. However, item recommendations can be staggered or at different depths. For example, if the model expects to make recommendations for two items (for \$14.99 and \$11.99, respectively) in a group in the following week, it may still make sense to make a recommendation for the group as a whole for \$13.99 for the current week.
- A shallow group recommendation and a deep item recommendation in the current week may be offset by a deeper group recommendation and a shallower item recommendation at a later date.
- Check business rules and item prices. Business rule conflicts are more common in Pricing Group scenarios. Business rules must be satisfied for all forecasted items in the group in order for a recommendation to be possible.
- Pricing groups that contain items at different prices can be caught between Min and Max rules (for example, an item at \$20.00 with a 50% Max MD and an item at \$12.99 with a 15% Min MD).
- Items with different full prices may have different minimum prices. Pricing groups cannot project recommendations past the exit date of any forecasted item. However, once the item is past its exit date, it is dropped from the group forecast.
- Check the item history in ITEM_DATA and HIST_MARKDOWNS_TBL. Items in the No Touch period will prevent the group from receiving a recommendation.
- If the Take Advanced Markdown is used on an individual item within a group, then, in subsequent weeks, other items in the group can receive recommendations, but the group as a whole will be blocked from receiving recommendations.

Why doesn't the forecast take my promotion into consideration?

Bad promotion data is a frequent cause of failure. Common problems with promotion data include duplicate promotions at different price points, end dates that occur before start dates, and promotions that occur in the past. From an analytical perspective, promotions can be a source of forecast inaccuracy. If a promotion is created at the last minute, the model may not have time to respond. For some items, the promotional effect can be difficult to evaluate.

Verification.

Do the following:

- Verify that the promotion metrics are populated in the worksheet.
- Verify the promotion information in What If. The promo pop-up should be available and populated. The sales lift should be evident during the promotion period.
- If promotions block markdown recommendations, make sure that the model is correctly timing markdowns.

Level 1.

Do the following:

- Check the PLANNED_PROMOS_TBL to determine if the promotions data has been loaded correctly.

- Promotions may be entered at higher levels of the Merchandise Hierarchy. PLANNED_PROMO_MAPS_TBL maps individual items to promotions.
- Items may have multiple promotion periods and different concurrent promotion types.
- Check ITEM_DATA to determine if the promotion information has been populated. Information includes Lowest_Future_Promote_Price and Lowest_Future_Promo_Date.
- Check FORECAST_ACTIVITIES to make sure that promotions are being considered. Sales_Price should be the promotion price for full week promotions. Sales_price should be between ticket price and the promotion price for partial-week promotions.

Why is the report metric showing X instead of Y?

Reports can provide further insight into the application data.

Verification.

Do the following:

- Check the worksheet in the application and validate the information there against the information in the report. Make sure the data has not changed between the time the worksheet was modified and the time the report was run.
- Check the report requirements. The report may have been designed to show a different view of the data than the worksheet.

Level 1.

Do the following:

- Standard reports are configured in the same way as the UI, so the same considerations apply.
- Common mistakes include inconsistencies between UI derivations and report derivations and aggregation errors.
- Check report templates that use macros or pivot tables.

Did I change the settings in the BRPM correctly?

The BRPM is used to manage retailer-defined business rules at defined levels. Any setting mistakes can impact the recommendations.

Verification.

Do the following:

- Make sure the entered values are correct and are for the correct attribute.
- Make sure the entered values are at the correct level in the Merchandise Hierarchy and Location Hierarchy.

Level 1.

Do the following:

- Query BRM_INSTANCE_TBL for the settings at all levels for a given attribute.
- Evaluate the actual results as soon as possible after the next model run.

Why are the No Touch periods behaving in an unexpected manner?

The No Touch rules govern the amount of time at the beginning of life during which an item is not eligible for a recommendation. This is used so that an item can produce a reasonable sales trend, so that the model does not mis-interpret a partial week of sales or a staggered flow pattern and produce poor recommendations.

No Touch rules also govern the amount of time between a markdown taking effect and an item being eligible for another recommendation.

Verification.

Do the following:

- Check the markdown number in the application. An item may not have received a markdown.
- If the locations for a single item show different markdown numbers, then the item may have been taken in some locations and is currently being recommended in others.
- Make sure the markdown's requirements are valid.
- Check the timing of previous markdown actions.

Level 1.

Do the following:

- Check HIST_MARKDOWN_TBL. If no entries exist for the most recent week, the sendback may not have functioned correctly.
- If no approved markdowns exist for the most recent week for a specific worksheet, then the worksheet may not have been approved before the cutoff time.
- If approved markdowns exist for a specific worksheet but not for particular items, then those items were probably not taken.

My implementation of Markdown Optimization includes a custom weekly process, which seems to have failed. How can I confirm this?

Retailer-specific custom logic is configured using tables, view, and procedures that have a prefix of ISC_.

For example, *forcing* is used to highlight items that have not been taken to markdown and have not received recommendations. These items are added to the worksheet. The status metric is populated to indicate the action. A price point may be chosen. A custom rule could be created that specified that if an item is three weeks from its exit date and only on its second markdown, for it to 75% off. The following steps are recommended if the item is not forced.

Verification.

Do the following:

- Check the logic of the Forcing logic for conditions that include time to exit date, specific cutoff dates, inventory threshold, and markdown number.

Level 1.

Do the following:

- Check ITEM_DATA to determine if the forcing requirements have been met.
- The status flag is usually configured in User_Text_*.

- Non_Recommend_Add_To_Sheet must be populated for an item to appear on the screen.
- A status flag setting without Non_Recommend_Add_To_Sheet may indicate that the item has been removed via Edit Worksheet.

Some Metrics Troubleshooting Tips

Here are solutions to some common metrics issues.

String Calculations

The data type of NULL is character. All the other fields in a derivation are numbers. The application can crash when trying to perform a calculation. To avoid this situation, convert NULL from a character to a number type.

Example of Issue:

```
(DECODE(NVL(EOL_CUM_UNIT_SALES,0) + NVL(ENDING_INVENTORY_UNITS,0), 0, NULL,
NVL(EOL_CUM_UNIT_SALES,0) / (NVL(EOL_CUM_UNIT_SALES,0) + NVL(ENDING_INVENTORY_
UNITS,0))))
```

Example of Fix:

```
(DECODE(NVL(EOL_CUM_UNIT_SALES,0) + NVL(ENDING_INVENTORY_UNITS,0), 0, TO_
NUMBER(NULL), NVL(EOL_CUM_UNIT_SALES,0) / (NVL(EOL_CUM_UNIT_SALES,0) +
NVL(ENDING_INVENTORY_UNITS,0))))
```

Checking for NULL in XML Derivations

When a metric or a where clause in a report is configured, check the use of NULL.

Example of Issue:

```
CURRENT_UNITS_ON_HAND + CURRENT_UNITS_ON_ORDER
```

This will return NULL if one of the fields are NULL/blank.

Example of Fix:

```
(case when CURRENT_UNITS_ON_HAND is null then 0 end) + (case when
CURRENT_UNITS_ON_ORDER is null then 0 end)
```

This will return at least one value, if the other field is NULL/blank.

Division in an XML Derivation

Division by zero should be avoided.

Example of Issue:

```
1-CURRENT_RETAIL_PRICE / ORIGINAL_RETAIL_PRICE
```

This does not avoid a division by 0.

Example of fix:

```
case when ORIGINAL_RETAIL_PRICE <> 0 then 1-CURRENT_RETAIL_
PRICE/ORIGINAL_RETAIL_PRICE end
```

This ensures there is no division by 0.

Weighted Averages in Reports

The weighted average must be handled differently in reports than in regular XML configuration files.

The weighted average in the reports differs from that in regular XML configuration files. In the regular application files, you need to specify P4P_AVG and the argument. In the reports, you need to take additional steps. Basically, the reports use P4P_DIVIDE function, which takes two arguments: numerator and denominator. For example, on the aggregated level, the weighted average for the _price is calculated as $\text{sum}(\text{the_price} * \text{the_inventory}) / \text{sum}(\text{the_inventory})$. (By default, it is $\text{sum}(\dots) / \text{sum}(\dots)$, but it could use other types of aggregations, such as $\text{sum}(\dots) / \text{max}(\dots)$). If you calculate a weighted average for a price, you should use the same type, or amount, of inventory in the numerator and denominator. For example, if you need to specify the taken markdown price on the aggregated level, it should be calculated as $\text{sum}(\text{taken_price} * \text{inventory}) / \text{sum}(\text{taken inventory})$. Note that since this is the taken price, the denominator must also have the sum of inventories for the taken items only, not sum of all inventories.

So, in this example you should do following:

Create a custom column with the derivation="case when markdown_flag='y' then proposed_price * inventory_units end". Let's assume it has rptTakenPriceTimesInv as a key. Most probably, this is a hidden column. Create another custom column with the derivation="case when markdown_flag='y' then inventory_units end". Let's assume it has rptTakenInventory as a key. Most probably, this is also a hidden column, unless you need to specify it explicitly in the report. Specify the newly created columns in your report. On the aggregated level, your taken price metric will have P4P_DIVIDE function with rptTakenPriceTimesInv as the first argument and rptTakenInventory as the second argument.