



BEA AquaLogic HiPer Workspace for Retail

Administrator Guide

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Welcome

This book describes how to manage HiPer for Retail users and security, how to customize the user interface and available data to suit the needs of your company, and how to maintain HiPer for Retail. HiPer for Retail administrators should read this book and create a solid strategy before performing the tasks described within. This allows you to use HiPer for Retail to create a stable, useful system that can grow with your company without having to be reorganized or recreated every time the company changes.

Note: HiPer for Retail supports products that have been renamed between the versions supported. We will use the new names to discuss the products (the renamed version as well as the previous version). Any information that applies to only one version will include the proper version name and number.

Audience

This book is written for IT and HiPer for Retail administrators. The user of this guide should have strong knowledge of the platform operating system, database, Web and application servers, and any other third-party software required for HiPer for Retail.

Organization

This book includes the following chapters:

- [Chapter 2, “Managing HiPer for Retail”](#) provides instructions on configuring a Profile Web Service to import user information for HiPer for Retail, assigning HiPer for Retail activity rights to provide users access to HiPer for Retail features, setting security on HiPer for Retail objects, and migrating HiPer for Retail objects from one system to another.
- [Chapter 3, “Defining Rule Templates in the ALI HiPer BAM System”](#) provides instructions for creating rule templates on which to base HiPer for Retail rules.
- [Chapter 4, “Customizing the User Interface”](#) provides instructions on customizing the HiPer for Retail user interface.
- [Chapter 5, “Maintaining HiPer for Retail”](#) provides instructions on maintenance tasks such as synchronizing tips, synchronizing the flat hierarchy, synchronizing dynamic notification lists, and changing HiPer for Retail configuration settings.

Typographical Conventions

This book uses the following typographical conventions.

Table 1-1 Typographical Conventions

Convention	Typeface	Example
<ul style="list-style-type: none"> • File names • Folder names • Screen elements 	bold	<ul style="list-style-type: none"> • Upload Procedures.doc to the portal. • Open the General folder. • To save your changes, click Apply Changes.
<ul style="list-style-type: none"> • Text you enter 	<code>computer</code>	<ul style="list-style-type: none"> • Type <code>Marketing</code> as the name of your community.
<ul style="list-style-type: none"> • Variables you enter 	<i>italic</i> <code>computer</code>	<ul style="list-style-type: none"> • Enter the base URL for the Portlet Server. For example, <code>http://my_computer/</code>.
<ul style="list-style-type: none"> • New terms • Emphasis • Portal object example names 	<i>italic</i>	<ul style="list-style-type: none"> • <i>Portlets</i> are Web tools, embedded in your portal. • The URI <i>must</i> be a unique number. • The example Knowledge Directory displayed in Figure 5 shows the <i>Human Resources</i> folder.

BEA Documentation and Resources

This section describes the documentation and resources provided by BEA.

Table 1-2 BEA Documentation and Resources


Resource	Description
Installation and Upgrade Guide	This book describes how to install or upgrade AquaLogic HiPer Workspace for Retail and the accompanying Business Activity Management (BAM) system. It is available in electronic form (PDF) in the release package and on edocs.bea.com .
Release Notes	These files are written for HiPer for Retail administrators. They include information about new features and known issues in the release. They are available in electronic form (HTML) on edocs.bea.com .
Online Help	The online help is written for all levels of HiPer for Retail users. It describes the user interface for HiPer for Retail and gives detailed instructions for completing tasks in HiPer for Retail. To access online help, click  Help in the upper-right corner of the banner or dialog box.
Developer Guides, Articles, API Documentation, Blogs, Newsgroups, and Sample Code	These resources are provided for developers on the BEA dev2dev site (dev2dev.bea.com). They describe how to build custom applications using AquaLogic User Interaction and how to customize AquaLogic User Interaction products and features.
Deployment Guide	This document is written for business analysts and system administrators. It describes how to plan your BEA AquaLogic User Interaction deployment. It is available in electronic form (PDF) on edocs.bea.com .

Table 1-2 BEA Documentation and Resources

Resource	Description
AquaLogic User Interaction Support Center	<p>The AquaLogic User Interaction Support Center is a comprehensive repository for technical information on AquaLogic User Interaction products. From the Support Center, you can access products and documentation, search knowledge base articles, read the latest news and information, participate in a support community, get training, and find tools to meet most of your AquaLogic User Interaction-related needs. The Support Center encompasses the following communities:</p> <p>Technical Support Center</p> <p>Submit and track support incidents and feature requests, search the knowledge base, access documentation, and download service packs and hotfixes.</p> <p>News & Events</p> <p>The News & Events Center features information on rolling-out a successful deployment. Visit the Super User Group page to collaborate with peers and view upcoming meetings.</p> <p>Product Center</p> <p>Download products, read Release Notes, access recent product documentation, and view interoperability information.</p> <p>Developer Center</p> <p>Download developer tools and documentation, get help with your development project, and interact with other developers via BEA's dev2dev Newsgroups.</p> <p>Education Center</p> <p>Find information about available training courses, purchase training credits, and register for upcoming classes.</p> <p>If you do not see the Support Center when you log in to http://portal.plumtree.com, contact ALUISupport@bea.com for the appropriate access privileges.</p>

Table 1-2 BEA Documentation and Resources

Resource	Description
dev2dev.bea.com	Download developer tools and documentation, get help with your development project, and interact with other developers via BEA's dev2dev Newsgroups.
Technical Support	<p>If you cannot resolve an issue using the above resources, BEA Technical Support is happy to assist. Our staff is available 24 hours a day, 7 days a week to handle all your technical support needs.</p> <p>E-mail: ALUISupport@bea.com</p> <p>Phone Numbers:</p> <p>U.S. and Canada+1 415.263.1696 or +1 866.262.PLUM (7586)</p> <p>Asia Pacific+61 2.9931.7822</p> <p>Europe and U.K.+44 (0)1628 589124</p> <p>France+33 1.46.91.86.79</p> <p>Singapore+65 6832.7747</p>

Welcome

Managing HiPer for Retail

Initial Set Up

There are some steps you must perform after you install HiPer for Retail before users can start using the application. Perform the following steps after you complete the steps in the *Installation and Upgrade Guide for AquaLogic HiPer Workspace for Retail*:

1. Configure and run a Profile Web Service to import user information into the portal for use by HiPer for Retail. For details, see [“Configure the Profile Web Service \(PWS\)” on page 2-2](#).
2. Configure activity rights to give users access to HiPer for Retail features. For details, see [“Assign HiPer for Retail Activity Rights” on page 2-3](#).
3. Create any necessary groups and set security on imported HiPer for Retail portal objects. For a list of portal objects for which you might want to change security, see [“HiPer for Retail Portal Objects” on page 2-5](#).
4. Create any necessary subportals to display the appropriate HiPer for Retail user interface to your users. There are two sample subportals imported with the HiPer for Retail portal objects. For details on creating a subportal, refer to portal online help.
5. Create rule templates on which to base rules in HiPer for Retail. For details, see [“Defining Rule Templates in the ALI HiPer BAM System” on page 3-1](#).
6. Optionally, you can customize the HiPer for Retail user interface. For details, see [“Customizing the User Interface” on page 4-1](#).

Configure the Profile Web Service (PWS)

HiPer for Retail depends heavily on user properties. These properties include the hierarchical level of the user, the user's role, and the store name. You must create one or more Profile Web Services (PWSs) to import that information into the portal.

Note: There is a sample PWS that can import the appropriate properties from an Excel file.

You need to map User Extended Object Data (EOD) to HiPer-for-Retail-specific user properties. HiPer for Retail uses these properties to build the geographic hierarchy and the organizational hierarchy and to complete dynamic group selection. Here are the HiPer for Retail user properties you can map (bolded properties are required):

Table 2-1 HiPer for Retail User Properties

HiPer for Retail User Property	Map to...
HiPer ID	any unique user ID you choose. For example, if your company uses employee IDs, you probably want to map to those. HiPer for Retail uses this value to identify the user.
HiPer Manager ID	the HiPer ID of the person to which this user reports.
HiPer Level 1	the top level in your company's geographic hierarchy. All HiPer for Retail users must have the same Level 1 value. HiPer for Retail uses the values for the geographic levels to create notification lists. These values display on the Summary page.
HiPer Level 2	the second level in your company's geographic hierarchy.
HiPer Level 3	the third level in your company's geographic hierarchy.
HiPer Level 4	the fourth level in your company's geographic hierarchy.
HiPer Level 5	the fifth level in your company's geographic hierarchy.
HiPer Level 6	the sixth level in your company's geographic hierarchy.
HiPer Level 7	the seventh level in your company's geographic hierarchy.
HiPer Level 8	the eighth level in your company's geographic hierarchy.
HiPer Role	the role the user plays within the organization (for example, Operations Manager, General Manager). This value displays in the Select Users and Groups dialog box.

Table 2-1 HiPer for Retail User Properties

HiPer for Retail User Property	Map to...
HiPer Store Department	the department in which the user works within the store. This value displays in the Select Users and Groups dialog box.
HiPer Store ID	the unique store ID for the store in which the user works. HiPer for Retail uses this value to roll up task information.
HiPer Store Name	the name of the store in which the user works. This value displays the HiPer for Retail user interface.
HiPer Store Type	the type of store in which the user works. HiPer for Retail uses this value for additional categorization in the Select Users and Groups dialog box.

Assign HiPer for Retail Activity Rights

You must assign the activity rights in the portal to give your users access to HiPer for Retail features.

To assign activity rights:

1. In the portal, click **Administration**.
2. In the Select Utility menu, select **Activity Manager**.
3. Click the activity right you want to assign and grant the appropriate groups the right.

The following activity rights are available:

Table 2-2 HiPer for Retail Activity Rights

Activity Right	Description
HiPer: Administer HiPer	Allows users to access the HiPer Administration Utility (with which they can configure HiPer for Retail system settings and migrate objects).
HiPer: Administer Announcement Folders	Allows users to create and modify announcement folders. This right does not affect the ability to create announcements. If a user does not have this activity right the create folder button will not be displayed in the Announcements hierarchy.

Table 2-2 HiPer for Retail Activity Rights

Activity Right	Description
HiPer: Administer Object Folders	Allows users to create, edit, and delete object folders (for system notifications, rules, and task list templates). If a user does not have this activity right the create folder, edit, and delete buttons will not be displayed in the associated hierarchy.
HiPer: Administer Rules	Allows users to manage Rules from the notifications page. This includes creating, editing, and deleting rules. If a user does not have this activity right the Rules folder will not be displayed on the Notifications tab page.
HiPer: Administer System Notifications	Allows users to create system notifications. This includes creating, editing, and deleting system notifications. If a user does not have this right the System Notifications folder will not be displayed on the Notifications tab page.
HiPer: Administer Task List Templates	Allows users to create task list templates. This includes creating, editing, and deleting task list templates. If a user does not have this right the Task List Templates folder will not be displayed on the Notifications tab page.
HiPer: Approve Tips	Allows users to approve tips created by users below them hierarchically. If a user does not have this right the Manage Tips folder will not be displayed on the Tips tab page.
HiPer: Create Announcements	Allows users to create and publish announcements. If a user does not have this right the Announcements tab will not be displayed.
HiPer: Create Documents	Allows users to upload documents. If a user does not have this right the Upload button will not be displayed on the Documents tab page.
HiPer: Create Manual Notifications	Allows user to create and send manual notifications. If a user does not have this right the Create Manual Notification button will not be displayed on the Notifications tab page.
HiPer: Create Tips	Allows users to create tips. These tips need to be approved before they display to other users. If a user does not have this right the My Tips folder will not be displayed on the Tips tab page.
HiPer: View Low Resolution Page	Allows users to view pages designed for low resolution displays. If a user does not have this right, the standard display page will be shown.
HiPer: View Summary Page	Allows users to view the Summary page. If a user does not have this right the Summary tab will not be displayed.

HiPer for Retail Portal Objects

The following are some of the portal objects you might need to work with. They were created in the **Application Spaces : HiPer** portal folder when you imported the HiPer for Retail .pte files into the portal.

Table 2-3 HiPer for Retail Portal Objects

Object	Description
HiPer Portal Remote Server	Points the portal to the location of the machine that hosts the HiPer for Retail software.
HiPer Dynamic Group Update External Operation and Job	Synchronizes users with the dynamic notification lists in HiPer for Retail. The job runs nightly (it is process intensive). For more information, refer to “Synchronize the Dynamic Notification Lists” on page 5-3 .
HiPer Flat Hierarchy Update External Operation and Flat Hierarchy Update Job	Builds the organizational hierarchy for each user in the HiPer for Retail application. For more information, refer to “Synchronize the Flat Hierarchy” on page 5-2 .
HiPer Notification Delivery External Operation and Send Notifications Job	Sends system and manual notifications. For more information, refer to “Send Notifications” on page 5-3 .
Run Tip Synchronization Job	Searches the Publisher repository and synchronizes the tips with the HiPer for Retail database. For more information, refer to “Synchronize Tips” on page 5-2 .
Communities Folder (contains communities, and their associated community templates and page templates)	
The communities in this folder provide the structure and portlets for the HiPer for Retail pages.	
Users and Groups Folder	
hiperannounceuser	User that performs internal search to display the appropriate announcements to HiPer for Retail users.
All HiPer Users	Group of all users that have access to HiPer for Retail.
HiPer Dynamic Group Administrators	Only the hiperannounceuser should be in this group. This folder must exist to store dynamic groups.
HiPer Store Operations Users	Provides access to all HiPer for Retail features (displays the Summary page and grants all HiPer activity rights).

Table 2-3 HiPer for Retail Portal Objects

Object	Description
Dynamic Groups Folder (in the Users and Groups Folder)	
	When users send announcements to a notification list, dynamic portal groups are created (in the background) and stored in this folder. The HiPer Dynamic Group Administrators group should have edit rights to this folder so it can create these dynamic groups.
Subportal Manager	
HiPer Store Manager Subportal	Displays the Notifications page as the home page.
HiPer Store Operations Manager	Displays the Summary page as the home page.

Celequest Reportlets

Celequest reportlets can be added to the Summary page like any other portlet. Reportlets are Flash objects that can be embedded into a custom portlet. HiPer for Retail includes the following samples to help you create your own reportlets:

- `hiperportlets/portlets/reportlets/reportlet.jsp`
This file supplies sample reportlet code.
- `hiperportlets/portlets/reportlets/celequest_reportlet_user_prefs.jsp`
This file supplies a sample user preferences page to select a given reportlet and set the Celequest connection information.

For more information on reportlets and how to set up the samples, refer to Celequest documentation.

Defining Rule Templates in the ALI HiPer BAM System

This chapter describes how to create rule templates in the ALI HiPer BAM System to be used as the basis for rules created in HiPer for Retail.

About BAM Alerts and Rule Templates

There are several pieces involved in defining rule templates. The following definitions are adapted from the Celequest documentation:

Events drive the ALI HiPer BAM System internal processing. Events are data produced by external business applications that record transactions, identify changes in business state, and synthesize the details about the business activities. The ALI HiPer BAM System receives events in event tables. Business views built on the tables then aggregate the event information and drive the rules that look for exceptional business conditions.

Contexts support event processing by providing meaningful information about the event. Contexts are the business information stored in databases, data warehouses, or are provided by Web services. Context tables receive data from agents that know how to communicate with information sources. When you define a context table, you also instruct the agent how to identify the information from the source.

Views are data models that provide a real-time picture of a business activity. Records of changes and transactions in your business enter the ALI HiPer BAM System as events. Each new event drives an immediate update of the views — the business models — derived from that event, thereby providing a real-time picture of the business metrics. Further, after a view has been updated, the system evaluates the rules associated with the view looking for exceptional business conditions that require attention.

A View is a virtual table that resides in memory and whose contents come from one or more sources as defined by a C-SQL SELECT query statement. You define views with the graphical user interface in the Application Workbench. The system then constructs a well-formed SELECT statement before passing it to the ALI HiPer BAM System for execution and maintenance.

A **Scenario** is a combination of rules, alerts and reportlets.

Rules monitor business activities by analyzing business views looking for metrics that meet specific conditions. Rule conditions are spreadsheet-like formulas that evaluate the changing business metrics looking for exceptional conditions. When a condition is found to exist the system executes any associated action.

Alerts are the notifications of exceptional events sent to users or external systems. They can be simple messages indicating that an event has occurred, or they can be more detailed and include context information about the event (for example, describe why it happened or describe what you can do about it).

Note: The alerts that are created in the ALI HiPer BAM System for HiPer for Retail send information to a HiPer for Retail Web Service that then processes the information accordingly. HiPer for Retail stores additional alert information in its database, which it uses to send the associated notification and tasks to the appropriate users. The ALI HiPer BAM System acts as the rules engine that notifies HiPer for Retail when a particular rule is triggered. However, when we refer to *alerts* in this section we are referring to the ALI HiPer BAM System alerts. The alerts in HiPer for Retail are referred to as *notifications*.

Reportlets describe the contents of a view and present that information in a report that is either attached to an alert message, or sent to an external system. Frequently reportlets provide information about an event that puts the event into context. For example, when an important customer opens a trouble ticket with the customer support center, an alert might notify managers of that activity, and an attached reportlet might list the other problem tickets that the customer has open. Reportlets are attached to all subscribers of the associated alert.

Alerts and reportlets are merely a mechanism for the ALI HiPer BAM System to pass necessary information to HiPer for Retail to provide more information about what happened. The basis for the interaction between HiPer for Retail and the ALI HiPer BAM System are rule templates. Rule templates are built out of all of the components of a scenario (rule, alert, and reportlet). By creating the rule template in the ALI HiPer BAM System, you allow business users to fill in parameters to monitor without having to have knowledge of the system integration setup and without having to define the logic of the rule's conditions or its alert message. Instead, the user chooses the rule template and provides the values that the rule will test for. For example, with the template condition `order_total>[amount]` a user provides the value of the amount parameter, and later receives notifications when that condition is true.

Defining the template once in the ALI HiPer BAM System allows users in HiPer for Retail to create multiple, unique business rules that use the same logic but test for different values. For example, one user might use a template to look for orders greater than \$10,000, while another looks for orders over \$66,000.

Business rules are based on the definition of the rule template at the time of creation. Any subsequent changes to the template (including its alert message or reportlet) do not affect the existing business rules created from that template.

You can create a rule template that monitors either a view or cube. For views, the rule monitors every event that enters the view. For cubes, the rule monitors the results in a specific dimension level only. Additionally for cubes, alerts attached to rules cannot incorporate reportlets.

For more information on creating these objects, refer to Celequest documentation and online help.

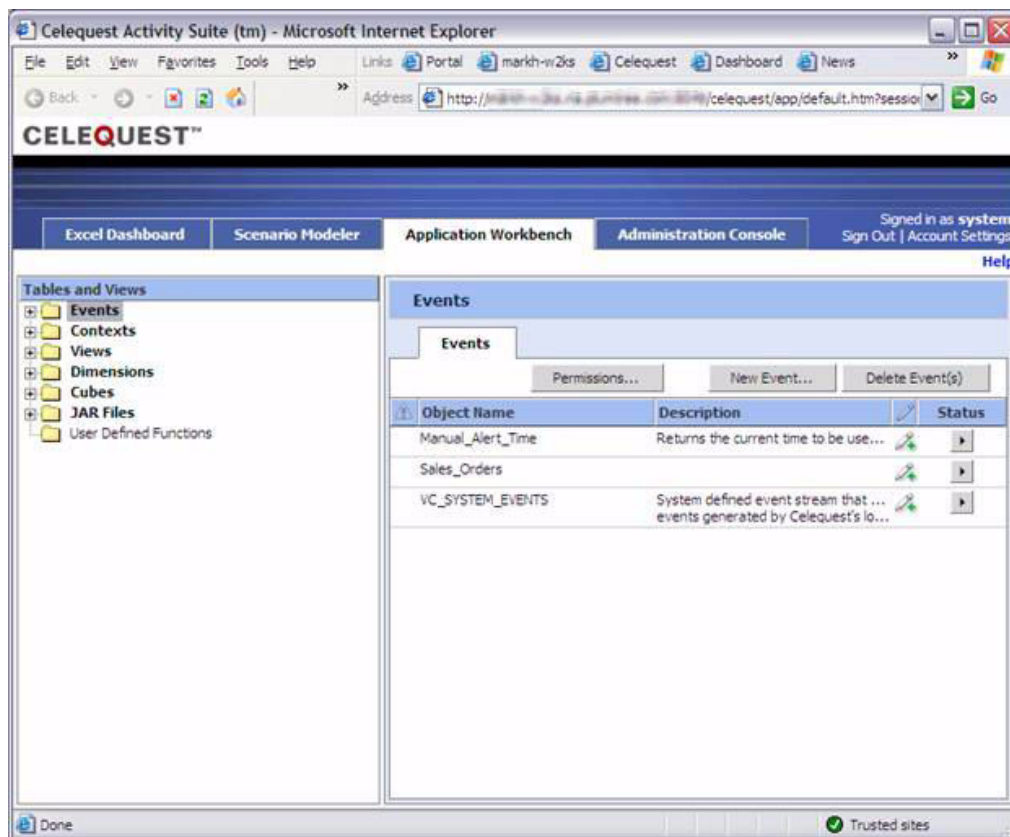
Define Rule Templates

Note: For more information on any of the steps in this section, refer to the Celequest documentation and online help

To define a rule template:

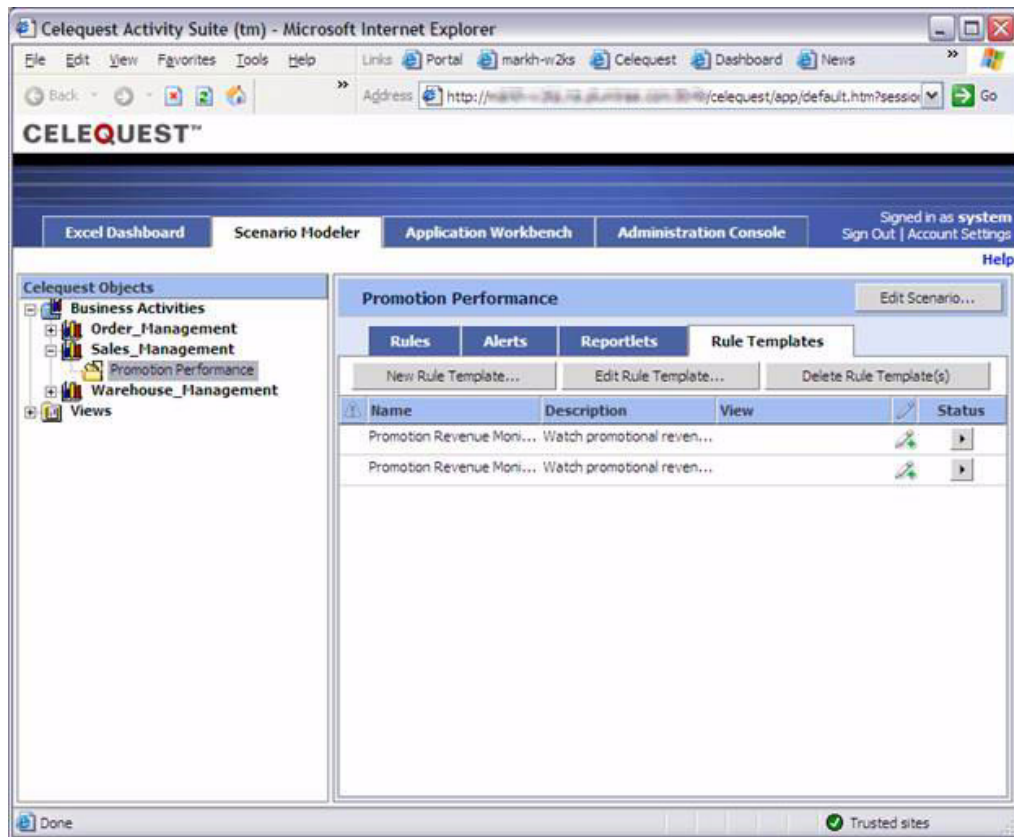
1. In the ALI HiPer BAM System, click the **Application Workbench** tab and set up the appropriate events, contexts, and views for your rule template.

Figure 3-1 Application Workbench



2. Click the **Scenario Modeler** tab to create a rule template.

Figure 3-2 Scenario Modeler



3. Click **New Rule Template**.
4. Select a data source that represents a ALI HiPer BAM System view.

Defining Rule Templates in the ALI HiPer BAM System

5. Define the Activation Condition. For example, the condition in [Figure 3-3](#) will monitor the $\text{Inventory_onHand} < [\text{Inventory_Target}] \text{ AND } \text{Product_Name} = [\text{Product}]$ where $[\text{Inventory_Target}]$ and $[\text{Product}]$ are template parameters that will be entered by the business user in HiPer for Retail. If the Inventory On Hand is less than the Inventory Target for a specific product name the rule is triggered.

Figure 3-3 Activation Condition

Celequest Activity Suite -- Web Page Dialog

Edit Rule Template Help

Current Data Source:

	Order_Date	Product_Name	Warehouse_Name	Inventory_onHand	Mi
1	2004-01-01 00:00:00.0	HP Pavilion M380b	Southwest DC1	400	
2	2004-01-01 00:00:00.0	Sony VAIO RS410	Central DC2	600	
3	2004-01-01 00:00:00.0	eMachines 2.7GHz Desktop	Central DC1	900	
4	2004-01-01 00:00:00.0	iPod 10GB	Central DC1	99	

Step One: Activation Condition for your Business Rule Template

Function Browser

* / + - < > <= >= = <> () And Or Not

Inventory_onHand < [Inventory_Target] AND Product_Name = [Product]

Add Fields Insert Template Parameter

☐ Holds for:

- Define a Reset Condition to automatically reset this rule (for example, if the inventory goes back above the threshold).

Figure 3-4 Reset Condition

Celequest Activity Suite -- Web Page Dialog

Edit Rule Template

Current Data Source:

	Order_Date	Product_Name	Warehouse_Name	Inventory_onHand	Mi
1	2004-01-04 00:00:00.0	Sony VAIO RS410	Central DC2	600	
2	2004-01-04 00:00:00.0	eMachines 2.7GHz Desktop	Central DC1	900	
3	2004-01-04 00:00:00.0	PowerMac G5 2Ghz	Southeast DC1	1100	
4	2004-01-04 00:00:00.0	HP Pavilion v4315	Southeast DC1	1100	

Step Two (Optional): Reset Condition for your Business Rule Template

Resets the activation condition. Omit this condition to make the activation condition a fire alert instead.

Inventory_onHand > [Inventory_Target] AND Product_Name = [Product]

☐ Holds for:

7. Define the input parameters you want displayed along with the rule condition.

Figure 3-5 Details for Templatized Parameters

Celequest Activity Suite -- Web Page Dialog

Edit Rule Template Help

Step Three: Enter details for your templated parameters.
Enter prompts in question form for each template parameter listed below.

Activation Condition: Inventory_onHand < [Inventory_Target] AND Product_Name = [Product]

Reset Condition: Inventory_onHand > [Inventory_Target] AND Product_Name = [Product]

Required Parameters:

Target Inventory Level	Inventory_Target
Select Product Name	Product

Would you like to display the condition(s) to the template user? ☒ Yes ☐ No

Back Continue Cancel

8. Add a subject and alert text. This text is included in the alert and displays in the rule in HiPer for Retail.

Note: We recommend that you include a data field (for example, `store_id`) in the subject so that the message is more meaningful to users. For example, in an alert about low inventory, the subject is more meaningful if it includes the store: “Store 123 has Low Inventory.”

Caution: You must include a reportlet in the message body because the only way HiPer for Retail knows which rule was triggered is by collecting that information from the reportlet (the rule template name is sent in the reportlet).

Figure 3-6 Alert Text

Celequest Activity Suite -- Web Page Dialog

Edit Rule Template

Current Data Source:

	Order_Date	Product_Name	Warehouse_Name	Inventory_onHand	Mi
1	2004-01-04 00:00:00.0	eMachines 2.7GHz Desktop	Central DC1	900	
2	2004-01-04 00:00:00.0	iPAQ - Pocket PC	Northeast DC2	180	
3	2004-01-04 00:00:00.0	eMachines 2.7GHz Desktop	Central DC1	900	
4	2004-01-04 00:00:00.0	Palm Tungsten T3	Northeast DC1	200	

Step Four: Define an Alert Message for your Business Rule Template

Enter a subject for your alert message:

Create a body for your alert message:(Optional)

Arial 1 (8 pt) **B** *I* U [List Bulleted] [List Numbered] [List None] [Text Color] [Background Color] [Table]

Inventory Alert
 The inventory level of product **Product_Name** is current at **Inventory_onHand!**

Inventory Positions

9. Name the rule template and indicate whether a separate alert should be sent for each row, or if it should be combined for the entire event.

Figure 3-7 Alert Detail

Celequest Activity Suite -- Web Page Dialog

Edit Rule Template Help

Step Five: Define Business Rule Template Properties

Enter a name for your new Business Rule Template:

Enter a description for your new Business Rule Template: (Optional)

Alert messages for this Business Rule should be marked

When a single event generates multiple exceptions:

☒ Send separate alert messages for each exception.

☐ Send a single alert message for whole event.

Activate separately for each unique:

Name
<input checked="" type="checkbox"/> Area
<input type="checkbox"/> Inventory_onHand
<input type="checkbox"/> Max_Threshold

Reset separately for each unique:

Name
<input checked="" type="checkbox"/> Area
<input checked="" type="checkbox"/> Product_Name

Back Save Cancel

After you define the rule template in the ALI HiPer BAM System, inform the business user who requested the template that he or she can create the associated rule in HiPer for Retail.

Defining Rule Templates in the ALI HiPer BAM System

Customizing the User Interface

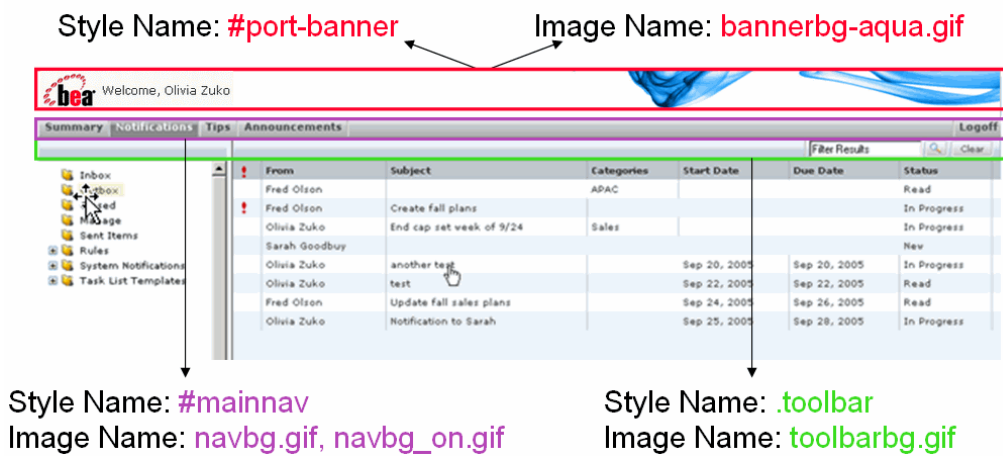
You can change the look of the HiPer for Retail user interface (UI) by customizing a few styles and images used in the following HiPer for Retail style sheets:

- <Image_Service_Home>\plumtree\common\custom\retail\css\mainstyle.css
- <Image_Service_Home>\plumtree\common\custom\retail\css\portlets.css

Banner, Navigation, and Toolbar

Figure 4-1 shows some of the styles and images used to display the banner, navigation and toolbar in HiPer for Retail.

Figure 4-1 HiPer for Retail User Interface Customization



Object Lists

Figure 4-2 shows some of the styles and images used to display the HiPer for Retail object lists.

Figure 4-2 Object List Styles

From	Subject	Categories	Start Date	Due Date	Status
Fred Olson	Create fall plans	APAC			Read
Fred Olson					In Progress
Olivia Zuko	End cap set week of 9/24	Sales			In Progress
Sarah Goodbuy					New
Olivia Zuko	another test		Sep 20, 2005	Sep 20, 2005	In Progress
Olivia Zuko	test		Sep 22, 2005	Sep 22, 2005	Read
Fred Olson	Update fall sales plans		Sep 24, 2005	Sep 26, 2005	Read
Olivia Zuko	Notification to Sarah		Sep 25, 2005	Sep 28, 2005	In Progress

Style Name: `.list .listheader td`
 Image Name: `navbg.gif, navbg_on.gif`

Style Name: `.list .row1`

Customizing the User Interface

Maintaining HiPer for Retail

This chapter describes the tasks you might have to perform to maintain your HiPer for Retail deployment.

Create Additional Custom Categories

You might need to create additional categories for notifications and tips in the HiPer for Retail database as your HiPer for Retail deployment matures. For details, refer to the *Installation and Upgrade Guide for AquaLogic HiPer Workspace for Retail*.

Update the Mapping of Your Company's Hierarchical Levels

If your company's hierarchical structure changes, you might have to update the mappings in the HiPer for Retail database. For details, refer to the *Installation and Upgrade Guide for AquaLogic HiPer Workspace for Retail*.

Synchronize Tips

Occasionally the tips that display in HiPer for Retail might not match the tips that are stored in Publisher. If this occurs, you can run the Run Tip Synchronization job to synchronize the systems again.

The Run Tip Synchronization job is located in the **Application Spaces : HiPer** portal folder. It is not set to run on a regular basis because you should rarely have to run the job. Here are some of the reasons you might need to run the Run Tip Synchronization job:

- You rescript your HiPer for Retail database but do not rescript Publisher. Because tips are stored in both locations, this job will synchronize the Publisher tips into HiPer for Retail.
- You import Publisher tips from a development system to a production system and the HiPer for Retail production system does not have the newly imported tips in the system. You will lose all associated comments and ratings when importing these tips because there is no reference to them in the Publisher import package.
- Publisher publishing of content items might result in errors with the Search Service that may not be indexed properly. These discrepancies may be cleared up by running the synchronizer.

Synchronize the Flat Hierarchy

If you change the configuration setting for Top Level Manager (refer to [“HiPer Configuration Settings” on page 5-3](#)), you must perform the following steps to make sure that your users receive correct hierarchy information:

1. In the HiPer for Retail database, delete all rows from the RTFLATHIERARCHY table.
2. Run the Flat Hierarchy Update Job (located in the **Application Spaces : HiPer** portal folder).

Running the job without deleting all rows performs a simple update. However, changing the Top Level Manager changes the entire organization hierarchy, so by deleting all rows from the table, you are essentially forcing a resynchronization of the entire Flat Hierarchy.

Synchronize the Dynamic Notification Lists

The notification lists in HiPer for Retail are dynamic lists of users created by filtering user lists by selected user properties. Notification lists must occasionally be updated, adding and removing users as appropriate. The update is accomplished through the HiPer Dynamic Group Update Job (located in the **Application Spaces : HiPer** portal folder). Because this job is resource intensive, it is set to run every two hours.

Send Notifications

When a user sends a manual notification or a system notification is triggered, the notification is put into a queue. The queued notifications are sent when the Send Notifications job runs. The Send Notifications job is located in the **Application Spaces : HiPer** portal folder. By default, the job is set to run every thirty minutes.

HiPer Administration

When you run the HiPer for Retail installer on the machine that hosts HiPer for Retail, a new option displays in the Select Utility menu in the Administration area of the portal—HiPer Administration. HiPer Administration allows you to configure certain global settings for HiPer for Retail and allows you to migrate HiPer for Retail information from one system to another.

HiPer Configuration Settings

The HiPer Configuration Settings page allows you to configure certain global settings for HiPer for Retail.

To display the HiPer Configuration Settings page:

1. Click **Administration**.
2. In the Select Utility menu, select **HiPer Administration**.

Main Settings

After initial set up, you will only need to change these settings if your organization hierarchy changes.

1. In the **Top Level Manager** box, type the HiPer Manager ID (this is not the same as the HiPer ID) of your company's highest level employee (for example, your CEO). A user with this manager ID has no managers and is considered the 'root' of the organization.

Caution: Changing the Top Level Manager changes the entire organization hierarchy. Therefore, you must update the database when you change this setting. For details, see [“Synchronize the Flat Hierarchy” on page 5-2](#).

2. In the **Level 1 Value** box, type the name of the Level 1 user property. All HiPer for Retail users must have this value set.

Celequest Administrative Preferences

You must configure these settings after you install HiPer for Retail. You will only need to change them if you change the location of the ALI HiPer BAM System (Celequest) or change the ALI HiPer BAM System user or password.

1. In the **Celequest Server** box, type the location of the ALI HiPer BAM System (for example, <http://servername:8083/bam>).
2. In the **User Name** box, type the user name for the ALI HiPer BAM System.
3. In the **Password** and **Confirm Password** boxes, type the password for the ALI HiPer BAM System user.

Document Administrative Preferences

These settings determine what the document hierarchy looks like on the Documents page of HiPer for Retail. You will only need to change these settings if you want to change the Documents hierarchy in HiPer for Retail.

1. In the **Document Folder UUID** box, type the UUID for the top level document folder in the Documents hierarchy.
2. In the **Max Number of Folders** box, type the maximum number of folders that should display in the Documents hierarchy.
3. In the **Max Number of Files** box, type the maximum number of documents that should display in the Documents hierarchy.

4. In the **Minutes** box, type the number of minutes the Documents hierarchy should display before requesting updated information from the portal.

Announcements

You will only need to change these settings if you change the Announcements user or password.

1. In the **User Name** box, type the user name for the Announcements user (the default is `hiperannounceuser`). For more information, refer to [“HiPer for Retail Portal Objects” on page 2-5](#).
2. In the **Password** and **Confirm Password** boxes, type the password for the Announcements user.

Archive Preferences

HiPer for Retail can automatically move closed notifications from a user’s Manage folder to the Archive folder. By default, any closed notifications with a due date older than six months are archived. To change the duration before archiving, in the **Archive notifications older than** box and drop-down list, type a number and select a period specifying the new duration.

Pagination Preferences

If a list in HiPer for Retail spans multiple pages, users see page links at the bottom of the list to access more items. The number of page links that display depends on the pagination preferences. By default, 10 page links display. To change the number of links displayed, in the **Display pages to a maximum of** box, type a number corresponding to the number of page links you want to display. For example, assume there are 15 pages of items, if you specified that you want to display a maximum of 10 pages, users will see links for pages 1 through 10 and a Next link to display the next group of pages.

HiPer Migration Utility

The HiPer Migration Utility allows you to migrate objects from one HiPer for Retail system to another.

To display the HiPer Migration Utility:

1. Click **Administration**.
2. In the Select Utility menu, select **HiPer Administration**.
3. Click the **HiPer Migration Utility** tab.

Important Migration Considerations

Before you migrate HiPer for Retail objects, consider the following:

- You must migrate dependent objects (for example, a system notification needs a rule and it might also include tasks or tips). When you select an object that has dependent objects, the dependent objects are automatically selected.
- The HiPer Migration Utility only migrates the *association* between a tip and a system notification. Tips themselves must be migrated with the Portal Migration Utility or the Portal Export Utility. You must import the tips *before* you import the tip associations if you want to preserve the associations.
- Tasks can only be migrated as dependencies of system notifications or task list templates.
- Users cannot be migrated. You must reassociate users with system notifications after import.

Migrating an Entire HiPer for Retail System

HiPer for Retail makes use of its own objects as well as other portal objects. Therefore, you must migrate those additional portal objects for the migrated HiPer for Retail objects to work correctly.

To migrate an entire HiPer for Retail system, perform the following steps:

1. Migrate content items and dynamic groups used by HiPer for Retail. You must migrate the **HiPer Content Items** folder from Publisher and the following portal groups folder from the portal administrative objects directory: **Application Spaces : HiPer : Users and Groups : Dynamic Groups**.
 - If you are running Plumtree Content Server 6.1, use the Portal Migration Utility. Refer to the migration instructions in the *Administrator Guide for Plumtree Content Server 6.1*.
 - If you are running Plumtree Publisher 6.2, use the Portal Export Utility. Refer to the migration instructions in the *Administrator Guide for Plumtree Publisher 6.2*.

The migration package will contain a .zip file with the content items and a .pte file with the dynamic groups. Follow the migration instructions to import the content into the target portal.

2. In the destination portal, run the Tip Synchronizer job to synchronize any new and existing tips.
3. In the source portal, use the HiPer Migration Utility to export the HiPer for Retail objects. Refer to online help for instructions on using the HiPer Migration Utility.
4. In the destination portal, use the HiPer Migration Utility to import the HiPer for Retail objects. After the objects have been imported, the import status displays. Read through the status carefully to understand what actions were taken and if there is anything more you must do (for example, if you import a rule that does not exist in the target system, the HiPer Migration Utility attempts to create the rule from the associated rule template in the target ALI HiPer BAM System. If the associated rule template is not found, the import status informs you that you must manually create the rule template in the BAM system and repair the rule in HiPer for Retail. Remember that you must reassociate users with any imported system notifications.

Caution: If any objects fails, the entire import is aborted.

5. In the destination portal, run the Hiper Dynamic Group Update job.

Note: If you are only migrating HiPer for Retail objects, no portal objects (no tips or announcements) you can skip steps 1, 2, and 5.

Maintaining HiPer for Retail

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