

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

Configuration Guide

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Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Configuration Guide,  
Release 13.0

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Primary Author: Judith Meskill

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# Preface

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

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

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

## Audience

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

## Related Documents

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

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

## Customer Support

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

When contacting Customer Support, please provide:

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

## Conventions

The following text conventions are used in this document:

<b>Convention</b>	<b>Meaning</b>
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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# Introduction

This chapter contains the following:

- “About the Promotion Intelligence and Promotion Planning and Optimization Configuration Guide” on page 1
- “What’s In This Book” on page 1

## About the Promotion Intelligence and Promotion Planning and Optimization Configuration Guide

The Configuration Guide provides information about configuring the Oracle Retail Promotion Intelligence (PI) and Oracle Retail Promotion Planning and Optimization (PPO) products to meet a customer's specific business requirements. In order to take full advantage of the PI and PPO products and integrate them into your business practices, it is desirable to perform a customization to reflect your own business requirements.

## What’s In This Book

The Configuration Guide contains the following chapters:

- Chapter 1 – Introduction. A list of all the chapters in the Configuration Guide.
- Chapter 2 – User Management. Used to create, modify, and inactivate user accounts.
- Chapter 3 – Configurable Data Attributes. Used to specify custom data that can be viewed through the UI.
- Chapter 4 - PPO UI Configuration - used to configure the UI display.
- Chapter 5 – Template Configuration. Used to configure the xml files for promotion templates.
- Chapter 6 – Database Configuration. Used to configure the database and inference rules.
- Chapter 7 – Reports. Used to configure reports that can be used to view analytical information.



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## User Management

This chapter contains the following:

- “Introduction” on page 2-1
- “About User Roles and User Actions” on page 2-1
- “User Management Bulk Loader Utility” on page 2-4
- “Promote Sample xml Files” on page 2-6

### Introduction

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

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

### About User Roles and User Actions

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

Promote comes with a default set of actions, loaded into ACTION\_TBL:

- PROMO\_CREATE\_CE – add and delete campaigns and events.
- PROMO\_EDIT\_CE – make changes to campaigns and events.
- PROMO\_VIEW\_CE – view campaigns and events.
- PROMO\_CREATE\_MD – add and delete master data.
- PROMO\_EDIT\_MD – make changes to master data.
- PROMO\_VIEW\_MD – view master data.
- PROMO\_CREATE\_PROMO – add and delete promotions.
- PROMO\_EDIT\_PROMO – make changes to promotions.
- PROMO\_VIEW\_PROMO – view promotions.
- PROMO\_MANAGE\_CATEGORY – edit the offers for a promotion.

- PROMO\_MANAGE\_MERCHANDISE – edit Like Item information.
- PROMO\_MANAGE\_VEHICLE – edit the definition and design of the promotion vehicle, category assignments, white space allocation, and workflow.
- PROMO\_EXPORT\_PROMO – provides access to the Export button, which is used to create xml and txt files of promotions. Necessary for access to the Export API functionality.
- PROMO\_VIEW\_REPORTS – launch the Promote Intelligence reports.
- PROMO\_ADMIN\_DOC – only users assigned this action can log into the application when the server is in maintenance mode. Also provides access to the following commands: releaselocks, clearcache, refreshprops, refreshloggin, refreshbundle, refreshconfig, modestage, nodeprod, and modemaint.
- PROMO\_APPROVE\_OFFER – allows ad planners to approve or deny submitted offers.

Promote comes with a default set of roles, loaded into ROLE\_ACTION\_TBL:

- PROMO\_AD\_PLANNER – a member of marketing who is responsible for the entire promotional calendar. This user can create and edit calendar events and create promotions.
- PROMO\_BUSINESS\_ADMIN – a business user who is responsible for activities such as data maintenance and template management.
- PROMO\_CATEGORY\_MANAGER – the person directly responsible for one or more categories of merchandise, assigned at a given level in the merchandise hierarchy.
- PROMO\_EXEC – an executive who monitors promotion performance across all merchandise categories. Such a user would expect to monitor performance at both a high level and a low level, but would not need to edit or execute promotions.
- PROMO\_MERCH\_PLANNER – a merchandise planner who executes merchandising plans. Such a user is assigned responsibility at the Chain level.
- PROMO\_AGENT – configure users to execute forecast and preplanned import tasks.

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

**Table 2–1 Actions Assigned to Roles**

<b>Promote Role</b>	<b>Assigned Actions</b>
PROMO_AD_PLANNER	PROMO_CREATE_CE
	PROMO_EDIT_CE
	PROMO_VIEW_CE
	PROMO_CREATE_MD
	PROMO_EDIT_MD
	PROMO_VIEW_MD
	PROMO_CREATE_PROMO
	PROMO_EDIT_PROMO
	PROMO_VIEW_PROMO
	PROMO_MANAGE_VEHICLE
	PROMO_EXPORT_PROMO
	PROMO_VIEW_REPORTS
	PROMO_APPROVE_OFFER
PROMO_BUSINESS_ADMIN	PROMO_CREATE_MD
	PROMO_EDIT_MD
	PROMO_VIEW_MD
	PROMO_BUSINESS_ADMIN
PROMO_CATEGORY_MANAGER	PROMO_MANAGE_CATEGORY
	PROMO_MANAGE_MERCHANDISE
PROMO_EXEC	PROMO_VIEW_CE
	PROMO_VIEW_MD
	PROMO_VIEW_PROMO
	PROMO_MANAGE_CATEGORY
	PROMO_MANAGE_VEHICLE
	PROMO_EXPORT_PROMO
	PROMO_VIEW_REPORTS
PROMO_MERCH_PLANNER	PROMO_VIEW_CE
	PROMO_VIEW_MD
	PROMO_VIEW_PROMO
	PROMO_EDIT_PROMO
	PROMO_EXPORT_PROMO
	PROMO_VIEW_REPORTS
PROMO_AGENT	PROMO_ADMIN_DOC
	PROMO_VIEW_PROMO
	PROMO_CREATE_PROMO
	PROMO_EDIT_PROMO

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

Promote Role	Assigned Actions
	PROMO_VIEW_CE
	PROMO_CREATE_CE
	PROMO_EDIT_CE
	PROMO_VIEW_MD
	PROMO_CREATE_MD
	PROMO_EDIT_MD
	PROMO_MANAGE_MERCHANDISE
	PROMO_MANAGE_CATEGORY
	PROMO_MANAGE_VEHICLE
	PROMO_EXPORT_PROMO
	PROMO_VIEW_REPORTS

Default actions cannot be deleted.

Roles are assigned to users with restrictions that are defined at or above a specific node of the merchandise hierarchy and the location hierarchy. The scope of actions can be across the merchandise and location hierarchies.

The sample file, "Role Assignment Sample xml File" provides an illustration of defining the scope.

## About User Management Roles

User accounts with user management roles have access to features such as creating users, assigning roles, removing user accounts, resetting passwords.

When a user with a user management role logs on, a link to the User Management utility appears on the Main Menu.

The following list describes the default User Management roles:

- **UM\_READ\_ONLY\_ADMIN** – This role allows read-only access to the User Management utility. This role has privileges to view the list of users and their roles and hierarchy levels, but not to create new user accounts or modify or inactivate existing ones.
- **UM\_ROLE\_ASSIGN\_ADMIN** – This role allows assigning new roles (and related hierarchy levels) to existing user accounts, but it does not allow the creation of new user accounts.
- **UM\_USER\_ADMIN** – This role allows creating new user accounts, but it does not allow the assignment of roles to the new accounts.

## User Management Bulk Loader Utility

If you are creating a small number of user accounts using the default roles, you can create those accounts using the application UI. (For more information on using the User Management utility, consult the application Online Help.) However, if you want to create user accounts for a group of users all at one time, you can use the User Management bulk loader utility.

Prior to running the User Management bulk loader utility, you must:

- Set the `jndi.properties`. The `jndi.properties` file, which is located in `<installed>/modules/tools/conf/jndi.properties`, specifies the initial context factory and the url where the JNDI lookups are carried out.

For WebLogic, typical values are:

```
java.naming.factory.initial=weblogic.jndi.WLInitialContextFactory
java.naming.provider.url=t3://localhost:7001
```

- Make sure that `usermanagement.ear`, `suiteproperties.ear`, and `common4p.ear` are deployed on the running application server.

## Users and Roles

You need to create and validate (using a tool like XML Spy) three xml files containing entries for Users, Roles, and Role Assignments.

**Note:** The actions associated with roles must be created, using `brmadmin.sh` in order for the roles to be successfully created.

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

```
CHAIN COMPANY DIVISION DEPARTMENT merchandise attribute in .xml
-----
0 1 123 8765 1 | 123 | 8765
0 1 22 789 1 | 22 | 789
```

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

## The xml Files

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

**Table 2–2** *User Management xml Files*

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

## Standard Load Prerequisites

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

## Promote Sample xml Files

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

### User Sample xml File

```
<?xml version="1.0" encoding="UTF-8" ?>
- <user-set hash-passwords="true"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:noNamespaceSchemaLocation="user-set.xsd">
- <!-- execs -->
  <user username="rodneyt" password="rodneyt" last-name="Tudor"
first-name="Rodney" middle-initial="R" employeeID="21427" title="CMO" />
  <user username="stevec" password="stevec" last-name="Calhoon" first-name="Steve"
middle-initial="D" employeeID="21426" title="Marketing Director" />
- <!-- IT -->
  <user username="bernarda" password="bernarda" last-name="Allen"
first-name="Bernard" middle-initial="R" employeeID="21990" title="Business IT" />
  <user username="kens" password="kens" last-name="Smith" first-name="Ken"
middle-initial="R" employeeID="8674309" title="CTO" />
- <!-- Marketing -->
  <user username="geofr" password="geofr" last-name="Rogers" first-name="Geof"
middle-initial="L" employeeID="01230" title="Directory, Marketing" />
  <user username="anns" password="anns" last-name="Smith" first-name="Ann"
middle-initial="T" employeeID="21664" title="Marketing" />
  <user username="ann2" password="ann2" last-name="Smith2" first-name="Ann"
middle-initial="T" employeeID="21665" title="Marketing" />
  <user username="vladimiro" password="vladimiro" last-name="Olson"
first-name="Vladimir" middle-initial="D" employeeID="21657" title="Marketing" />
  <user username="bobh" password="bobh" last-name="Hashimoto" first-name="Bob"
middle-initial="E" employeeID="28872" title="Marketing" />
- <!-- Merchants -->
  <user username="jaysonh" password="jaysonh" last-name="Hawthorn"
first-name="Jayson" middle-initial="K" employeeID="88494" title="Category Manager"
/>
  <user username="kerryo" password="kerryo" last-name="O'Leary" first-name="Kerry"
middle-initial="Z" employeeID="21784" title="Category Manager" />
  <user username="josephh" password="josephh" last-name="Hunter"
first-name="Joseph" middle-initial="G" employeeID="21344" title="Category Manager"
/>
  <user username="devinp" password="devinp" last-name="Pritchard"
first-name="Devin" middle-initial="P" employeeID="21344" title="Category Manager"
/>
  <user username="nickb" password="nickb" last-name="Bosworth" first-name="Nick"
middle-initial="P" employeeID="21555" title="Category Manager" />
  <user username="nick2" password="nick2" last-name="Bosworth2" first-name="Nick"
middle-initial="P" employeeID="21556" title="Category Manager" />
  <user username="stephaniet" password="stephaniet" last-name="Tauzell"
first-name="Stephanie" middle-initial="A" employeeID="21432" title="Category
Manager" />
- <!-- Leads -->
  <user username="tonyj" password="tonyj" last-name="Jones" first-name="Tony"
```

```

middle-initial="S" employeeID="12345" title="Promotion Lead" />
  <!-- Automated tasks -->
  <user username="sysid0" password="sysid0" last-name="Runner"
first-name="Background" middle-initial="0" employeeID="0" title="System id"/>
  <user username="sysid1" password="sysid1" last-name="Runner"
first-name="Background" middle-initial="1" employeeID="1" title="System id"/>
  <user username="sysid2" password="sysid2" last-name="Runner"
first-name="Background" middle-initial="2" employeeID="2" title="System id"/>
  <user username="sysid3" password="sysid3" last-name="Runner"
first-name="Background" middle-initial="3" employeeID="3" title="System id"/>
  <user username="sysid4" password="sysid4" last-name="Runner"
first-name="Background" middle-initial="4" employeeID="4" title="System id"/>
  <user username="sysid5" password="sysid5" last-name="Runner"
first-name="Background" middle-initial="5" employeeID="5" title="System id"/>
  <user username="sysid6" password="sysid6" last-name="Runner"
first-name="Background" middle-initial="6" employeeID="6" title="System id"/>
  <user username="sysid7" password="sysid7" last-name="Runner"
first-name="Background" middle-initial="7" employeeID="7" title="System id"/>
  <user username="sysid8" password="sysid8" last-name="Runner"
first-name="Background" middle-initial="8" employeeID="8" title="System id"/>
  <user username="sysid9" password="sysid9" last-name="Runner"
first-name="Background" middle-initial="9" employeeID="9" title="System id"/>
</user-set>
- <!--
  This XML support adding/updating "users" for the User Management subsystem.
  Note:
  1) All user usernames must be unique among all applications.
  2) user-set has a flag indicating whether the password should be hashed
     prior to persistence. This is just to support migration from prior
     implementations of Price. So that users can keep existing passwords

  -->

```

## Roles Sample xml Files

```

<?xml version="1.0" encoding="UTF-8" ?>
- <role-set xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:noNamespaceSchemaLocation="role-set.xsd">
- <role key="PROMO_BUSINESS_ADMIN">
  <action key="PROMO_CREATE_MD" />
  <action key="PROMO_VIEW_MD" />
  <action key="PROMO_EDIT_MD" />
</role>
- <role key="PROMO_AD_PLANNER">
  <action key="PROMO_VIEW_CE" />
  <action key="PROMO_CREATE_CE" />
  <action key="PROMO_EDIT_CE" />
  <action key="PROMO_CREATE_PROMO" />
  <action key="PROMO_EDIT_PROMO" />
  <action key="PROMO_VIEW_PROMO" />
  <action key="PROMO_CREATE_MD" />
  <action key="PROMO_VIEW_MD" />
  <action key="PROMO_EDIT_MD" />
  <action key="PROMO_MANAGE_VEHICLE" />
  <action key="PROMO_EXPORT_PROMO" />
  <action key="PROMO_VIEW_REPORTS" />
</role>
- <role key="PROMO_MERCH_PLANNER">
  <action key="PROMO_VIEW_CE" />

```

```

        <action key="PROMO_VIEW_MD" />
        <action key="PROMO_VIEW_PROMO" />
        <action key="PROMO_EDIT_PROMO" />
    </role>
- <role key="PROMO_CATEGORY_MANAGER">
    <action key="PROMO_MANAGE_CATEGORY" />
    <action key="PROMO_MANAGE_MERCHANDISE" />
</role>
- <role key="PROMO_EXEC">
    <action key="PROMO_VIEW_PROMO" />
    <action key="PROMO_VIEW_CE" />
    <action key="PROMO_VIEW_MD" />
    <action key="PROMO_EXPORT_PROMO" />
    <action key="PROMO_MANAGE_VEHICLE" />
    <action key="PROMO_MANAGE_CATEGORY" />
    <action key="PROMO_VIEW_REPORTS" />
</role>
- <role key="PROMO_AGENT">
    <action key="PROMO_ADMIN_DOC" />
    <action key="PROMO_VIEW_PROMO" />
    <action key="PROMO_CREATE_PROMO" />
    <action key="PROMO_EDIT_PROMO" />
    <action key="PROMO_VIEW_CE" />
    <action key="PROMO_CREATE_CE" />
    <action key="PROMO_EDIT_CE" />
    <action key="PROMO_VIEW_MD" />
    <action key="PROMO_CREATE_MD" />
    <action key="PROMO_EDIT_MD" />
    <action key="PROMO_MANAGE_MERCHANDISE" />
    <action key="PROMO_MANAGE_CATEGORY" />
    <action key="PROMO_MANAGE_VEHICLE" />
    <action key="PROMO_EXPORT_PROMO" />
    <action key="PROMO_VIEW_REPORTS" />
</role>
</role-set>
- <!--
    This XML support adding/updating "roles" for the User Management subsystem.
    Note:
    1) All role keys must be unique among all applications. Names like
        PRICE_APPROVER, PLAN_EDITOR, and PLACE_READER would be expected.
    2) The action key attributes must be present in the DB before bulkloader
        is run. Action key values will also typically be unique among
        all applications. Names like PRICE_APPROVE, PLAN_EDIT,
        PLACE_SUBMIT would be expected.
    3) All elements and attributes are case sensitive and all are lower case.

-->

```

## Role Assignment Sample xml File

```

<?xml version="1.0" encoding="UTF-8" ?>
- <role-assignment-set xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
    xsi:noNamespaceSchemaLocation="role-assignment-set.xsd">
- <role key="PROMO_BUSINESS_ADMIN">
    - <user-assignment username="bernarda">
        <node location="" merchandise="" />
    </user-assignment>
    - <user-assignment username="kens">
        <node location="" merchandise="" />

```

```
    </user-assignment>
  - <user-assignment username="root">
    <node location="" merchandise="" />
  </user-assignment>
</role>
- <role key="PROMO_AD_PLANNER">
  - <user-assignment username="geofr">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="anns">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="ann2">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="vladimiro">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="bobh">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="tonyj">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="kens">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="root">
    <node location="" merchandise="" />
  </user-assignment>
</role>
- <role key="PROMO_MERCH_PLANNER">
  - <user-assignment username="jaysonh">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="kerryo">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="josephh">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="devinp">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="nickb">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="nick2">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="stephaniet">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="tonyj">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="kens">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="root">
```

```
        <node location="" merchandise="" />
    </user-assignment>
</role>
- <role key="PROMO_CATEGORY_MANAGER">
  - <user-assignment username="jaysonh">
    - <!-- games -->
      <node location="" merchandise="1|1 80|2 23" />
    </user-assignment>
  - <user-assignment username="kerryo">
    - <!-- construction toys -->
      <node location="" merchandise="1|1 80|2 55" />
    </user-assignment>
  - <user-assignment username="josephh">
    - <!-- action figures -->
      <node location="" merchandise="1|1 80|2 11" />
    </user-assignment>
  - <user-assignment username="devinp">
    - <!-- puzzles -->
      <node location="" merchandise="1|1 80|2 92" />
    </user-assignment>
  - <user-assignment username="nickb">
    - <!-- barbie and accessories -->
      <node location="" merchandise="1|1 80|2 32" />
    </user-assignment>
  - <user-assignment username="nick2">
    - <!-- barbie and accessories -->
      <node location="" merchandise="1|1 80|2 32" />
    </user-assignment>
  - <user-assignment username="stephaniet">
    - <!-- basic fashion dolls -->
      <node location="" merchandise="1|1 80|2 34" />
    </user-assignment>
  - <user-assignment username="tonyj">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="kens">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="root">
    <node location="" merchandise="" />
  </user-assignment>
</role>
- <role key="PROMO_EXEC">
  - <user-assignment username="stevec">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="rodneyt">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="kens">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="root">
    <node location="" merchandise="" />
  </user-assignment>
</role>
- <role key="PROMO_AGENT">
  - <user-assignment username="sysid0">
    <node location="" merchandise="" />
  </user-assignment>
```

```
- <user-assignment username="sysid1">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="sysid2">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="sysid3">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="sysid4">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="sysid5">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="sysid6">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="sysid7">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="sysid8">
  <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="sysid9">
  <node location="" merchandise="" />
</user-assignment>
</role>
- <role key="UM_READ_ONLY_ADMIN">
  - <user-assignment username="bernarda">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="kens">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="geofr">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="anns">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="ann2">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="vladimiro">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="bobh">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="tonyj">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="jaysonh">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="kerryo">
    <node location="" merchandise="" />
  </user-assignment>
  - <user-assignment username="josephh">
```

```
        <node location="" merchandise="" />
    </user-assignment>
- <user-assignment username="devinp">
    <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="nickb">
    <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="nick2">
    <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="stephaniet">
    <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="stevec">
    <node location="" merchandise="" />
</user-assignment>
- <user-assignment username="rodneyt">
    <node location="" merchandise="" />
</user-assignment>
</role>
</role-assignment-set>
- <!--
    This XML support adding/updating "role assignments" for the User Management
    subsystem.
    Note:
    1) All role keys must be unique among all applications. Names like
        PRICE_APPROVER, PLAN_EDITOR, and PLACE_READER would be expected.
        They must match those already persisted into the DB.
    2) The Users with given username must be present in the DB prior to this
        file being processed by the bulkloader.
    3) The location and merchandise attributes are "pipe" delimited strings of
        client load IDs. The first node is just below the root (Chain-Level)
        node. An empty attribute represents a chain level assignment.
    4) All elements and attributes are case sensitive and all are lower case.

    5) The values of the Merch and Loc hierarchy client load ID are based
        on the TitusTenInc data set.

-->
```

---

---

## Configurable Data Attributes

This chapter contains the following:

- “Introduction” on page 3-1
- “Defining Configurable Data Attributes” on page 3-1

### Introduction

Configurable Data Attributes (CDAs) provide a way for retailers to see, in addition to the default data that is visible through the application interface, custom data that they themselves specify and that is not required by the application. This data can be used in business rules and can be displayed in the application UI.

### Defining Configurable Data Attributes

Configurable Data Attributes are defined in the database using the CDA Administration Utility. The data is then staged and loaded. All client-specified data is included in the standard interface specification in fields with field names beginning with the word ATTRIBUTE.

**Note:** CDAs are disabled by default. The column PL\_DD\_ATTRIBUTES.DISABLED should be set to 1 to disable the CDA and should be set to 0 to enable the CDA.

You can access the CDAs in the database via database queries or change the grid configuration to make them visible in the user interface.

The number of CDAs per entity is limited by the number of database columns pre-allocated in every CDA storage table. Every application schema provides eight data columns of type VARCHAR and DATE, and ten number columns of type NUMBER. When you are creating a new attribute, you can choose the storage columns from the following disassociated columns of the corresponding type:

**Table 3–1 CDA Data Type**

<b>Data Attribute Type</b>	<b>Data Type</b>
String	VARCHAR
Integer	NUMBER
Boolean	NUMBER
Double	NUMBER
Date	NUMBER
Currency	VARCHAR
Currency	NUMBER (2 columns)

The following tables supports extension by the CDA Administrative Utility:

**Table 3–2 Standard Interface Tables with CDAs**

<b>Entity Name</b>	<b>Staging Table</b>	<b>Active Table</b>	<b>CDA Table</b>
Location	ASH_LH_TBL	LOCATION_HIERARCHY_TBL	LH_CDA_TBL
Merchandise	ASH_MH_TBL	MERCHANDISE_HIERARCHY_TBL	MH_CDA_TBL

---

---

## PPO UI Configuration

This chapter contains the following

- “Introduction” on page 4-1
- “<configroot>” on page 4-1
- “PPO Configuration File” on page 4-1
- “Configuring Display Strings” on page 4-10
- “Configuring Export” on page 4-10
- “Integration with Promote Intelligence” on page 4-11
- “Debug Messages” on page 4-12

### Introduction

The PPO product includes a configurable Graphical User Interface (GUI). Several configuration points can be used to modify GUI behavior.

### <configroot>

<configroot> is the entry point directory that is used by the application to look up all the configuration files. This value has to be set at the application server (OAS) level. Refer to the *Promotion Installation Guide* for instructions to set it. It usually points to <install-dir>/config.

### PPO Configuration File

GUI-wide properties are set in the promote.properties file, which is located in <configroot>/promote. This file is pre-populated during the installation process with installation-specific values.

Other properties relate to OAS 10.1.3.0.0 and contain the prefix oas. For example, oas.java.naming.provider.url has to be set to the correct (opmn or non-opmn) url, such as ormi://host:port.

The same is true for the configuration of the User Management application. Its properties are stored in <configroot>/usermanagement/usermanagement.properties.

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

## promote.properties

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

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

**Table 4-1 System Configuration Properties**

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

The export properties are used for mapping between the UI and the export file. These entries can be added to or changed.

**Table 4-2 Export Properties**

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

**Table 4–2 (Cont.) Export Properties**

Property	Description
promote.export.template.AllSKU.csv.promotionoffer=AllSKUExportTemplate.xslt	
promote.export.template.txt.promotionoffer=TxtExportTemplate.xslt	
promote.export.template.xml.promotionoffer=XmlOfferExportTemplate.xslt	
The xml export keys take the form promote.export.template.xml + short name of exported domain class, to lower case.	
promote.export.template.xml.promotionofferpositionsummary=XmlCmdlineExportTemplate.xslt	
promote.export.template.xml.promotionofferfullsummary=XmlCmdlineExportTemplate.xslt	
The txt export keys take the form promote.export.template.txt + short name of the exported domain class, to lower case.	
promote.export.template.txt.promotionofferpositionsummary=PromoOfferPosSumTxtTmpl.xslt	
promote.export.template.txt.promotionofferfullsummary=PromoOfferSumTxtTmpl.xslt	
The filter keys used in the UI take the form promote.filter.columns + short name of the exported domain class, to lower case. The filters are used	
promote.filter.columns.promotionoffercategoryattribute=none,vendorID,retail	
promote.filter.columns.promotionofferfiltercriterionattribute=none,vendorID,retail	

The agent properties are used to configure the scheduling and performance of agents. The agents include ones for the preplanned promotion loader, forecasts, weekly forecasts, email properties, audit trail properties, and formatting for dates and numbers. Ensure that the schedules for the forecast and the weekly forecast do not clash.

**Table 4–3 Agent Properties**

Property	Description
promote.agent.url=http://%{suite.host}:%{suite.port}/promote/export.do	
promote.agent.run.policy=fixed_delay	Policy for submitting agent requests. Values allowed: fixed_rate / fixed_delay. The default is fixed_delay. This is a global setting for all agents and determines the type of delay between agent requests. See also, for example, promote.agent.preplannedpromo.delay.
Each agent requires a user password and the user must have PromoAgent permission. There should be as many as the maximum number of threads for all the agents that have a common schedule. Must be a unique set per node in a cluster. For example, for one thread for preplannedpromo + 2 threads per forecast, you will need at least three users and corresponding passwords.	
promote.agent.user.1=sysid0	
promote.agent.password.1=sysid0	

**Table 4-3 (Cont.) Agent Properties**

<b>Property</b>	<b>Description</b>
promote.agent.user.2=sysid1	
promote.agent.password.2=sysid1	
promote.agent.user.3=sysid2	
promote.agent.password.3=sysid2	
promote.agent.user.4=sysid3	
promote.agent.password.4=sysid3	
promote.agent.user.5=sysid4	
promote.agent.password.5=sysid4	
promote.agent.user.6=sysid5	
promote.agent.password.6=sysid5	
promote.agent.user.7=sysid6	
promote.agent.password.7=sysid6	
promote.agent.preplannedpromo.command=runPreplannedPromoLoad	Calls the preplanned promotion loader.
promote.agent.preplannedpromo.enabled=false	'Defines whether or not the x is enabled. True = enabled; False = not enabled. The default is false.
promote.agent.preplannedpromo.runweeks=1-52	The weeks assigned for the agent to run. Use either a comma-separated list of numbers (1 through 52 in ascending order) for individual weeks or two numbers separated by a hyphen for a range of weeks. (For example, 1,5,9,13... would define a one-week-a-month schedule.) The default is all weeks. The schedules for different instances of the same task should not overlap.
promote.agent.preplannedpromo.rundays=Mon,Tue,Wed,Thu,Fri,Sat,Sun	The day or days of the week assigned for the agent to run. Use a comma-separated list of days of the week (either Mon/Tue/Wed/Thu/Fri/Sat/Sun or the full name of the day). Cannot be localized. The default is all days of the week.
promote.agent.preplannedpromo.start=19:30	The start time for the agent schedule in a 24-hour format of hh:mm. Note that an end date is also required, or the agent will run continuously.
promote.agent.preplannedpromo.end=23:30	The end time for the agent schedule in a 24-hour format of hh:mm.
promote.agent.preplannedpromo.delay=10	Defines the length of the delay in seconds. See also promote.agent.run.policy.
promote.agent.preplannedpromo.max_num_threads=1	Recommended value is 1.
promote.agent.preplannedpromo.storeset=Default	Client-specific value.
promote.agent.preplannedpromo.storesubsets=Central	Client-specific value.
promote.agent.preplannedpromo.forecast=false	Determines whether or not forecast is determined immediately. True = promotion data is not stored, but used immediately for forecast determination.
promote.agent.forecast.command=runForecast	Forecast task

**Table 4–3 (Cont.) Agent Properties**

<b>Property</b>	<b>Description</b>
promote.agent.forecast.enabled=false	Defines whether or not the agent is enabled. True = enabled; False = not enabled. The default is false.
promote.agent.forecast.runweeks=	The weeks assigned for the agent to run. Use either a comma-separated list of numbers (1 through 52) for individual weeks or two numbers separated by a hyphen for a range of weeks. (For example, 1,5,9,13... would define a one-week-a-month schedule.) The default is all weeks.
promote.agent.forecast.rundays=	The day or days of the week assigned for the agent to run. Use a comma-separated list of days of the week (either Mon/Tue/Wed/Thu/Fri/Sat/Sun or the full name of the day). Cannot be localized. The default is all days of the week.
promote.agent.forecast.start=19:30	The start time for the agent schedule in a 24-hour format of hh:mm. Note that an end date is also required, or the agent will run continuously.
promote.agent.forecast.end=23:30	The end time for the agent schedule in a 24-hour format of hh:mm.
promote.agent.forecast.delay=10	Defines the length of the delay in seconds. See promote.agent.run.policy.
promote.agent.forecast.max_num_threads=1	Recommended value is 1.
promote.agent.forecast.fromdate=01/01/2007 00:00:00	Agents search for promotions to forecast that begin on a date that is greater than this date. Format is based on promote.datetime.us.timestamp.
promote.agent.forecast.todate=01/01/2007 00:00:00	Agents search for promotions to forecast that end on a date that is less than this date. The todate must be greater than the fromdate. Format is based on promote.datetime.us.timestamp. If omitted, defaults to sysdate.
promote.agent.forecast.uptodate=03/31/2007 00:00:00	The uptodate must be greater than the todate. If this value is omitted, all future promotions will be forecast. Format is based on promote.datetime.us.timestamp.
promote.agent.forecast.phase=	Indicates which workflow. If no value - all phases will be included.
promote.agent.forecast.type=0	Indicates which type. 0 = promotion created in UI. 4 = historical promotion. 5 = preplanned promotion received from client. If no value - all types will be included.
promote.agent.forecast.refresh=false	Flag that indicates whether SKUs are refreshed before the forecast. If set to true, the SKUs are refreshed, which adds time to the forecast.
promote.agent.forecast.groupby=true	Flag that indicates whether to not to do multiple promotions. The default - true - groups promotions.
promote.agent.forecast.status=	Values include forecast (to do), current (in process), outofdate (re-forecast), failed, and expired. An empty or non-force value produces forecast for only Out-of-date and No forecast.

**Table 4–3 (Cont.) Agent Properties**

<b>Property</b>	<b>Description</b>
<code>promote.agent.forecastweekly.command=runForecast</code>	Weekly forecast task
<code>promote.agent.forecastweekly.enabled=false</code>	Defines whether or not the agent is enabled. True = enabled; False = not enabled. The default is false.
<code>promote.agent.forecastweekly.runweeks=</code>	The weeks assigned for the agent to run. Use either a comma-separated list of numbers (1 through 52) for individual weeks or two numbers separated by a hyphen for a range of weeks. (For example, 1,5,9,13... would define a one-week-a-month schedule.) The default is all weeks.
<code>promote.agent.forecastweekly.rundays=</code>	The day or days of the week assigned for the agent to run. Use a comma-separated list of days of the week (either Mon/Tue/Wed/Thu/Fri/Sat/Sun or the full name of the day). Cannot be localized. The default is all days of the week.
<code>promote.agent.forecastweekly.start=23:35</code>	The start time for the agent schedule in a 24-hour format of hh:mm. Note that an end date is also required, or the agent will run continuously.
<code>promote.agent.forecastweekly.end=06:30</code>	The end time for the agent schedule in a 24-hour format of hh:mm.
<code>promote.agent.forecastweekly.delay=10</code>	Defines the length of the delay in seconds. See <code>promote.agent.run.policy</code> .
<code>promote.agent.forecastweekly.max_num_threads=1</code>	Recommended value is 1.
<code>promote.agent.forecastweekly.fromdate=01/01/2007 00:00:00</code>	Agents search for promotions to forecast that begin on a date that is greater than this date. Format is based on <code>promote.datetime.us.timestamp</code> .
<code>promote.agent.forecastweekly.todate=01/01/2007 00:00:00</code>	Agents search for promotions to forecast that end on a date that is less than this date. The todate must be greater than the fromdate. Format is based on <code>promote.datetime.us.timestamp</code> . If omitted, defaults to <code>sysdate</code> .
<code>promote.agent.forecastweekly.uptodate=03/31/2007 00:00:00</code>	The uptodate must be greater than the todate. If this value is omitted, all future promotions will be forecast. Format is based on <code>promote.datetime.us.timestamp</code> .
<code>promote.agent.forecastweekly.phase=</code>	Indicates which workflow. If no value - all phases will be included.
<code>promote.agent.forecastweekly.type=</code>	Indicates which type. 0 = promotion created in UI. 4 = historical promotion. 5 = preplanned promotion received from client. If no value - all types will be included.

**Table 4–3 (Cont.) Agent Properties**

<b>Property</b>	<b>Description</b>
promote.agent.forecastweekly.refresh=false	Flag that indicates whether SKUS are refreshed before the forecast. If set to true, the SKUs are refreshed, which adds time to the forecast.
promote.agent.forecastweekly.groupby=true	Flag that indicates whether to not to do multiple promotions. The default - true - groups promotions.
promote.agent.forecastweekly.status	Values include forecast (to do), current (in process), outofdate (re-forecast), failed, and expired. An empty or non-force value produces forecast for only Out-of-date and No forecast.

The email properties are used to configure system email.

**Table 4–4 Email Properties**

<b>Property</b>	<b>Description</b>
promote.mail.smtp.host	The IP address of the SMTP host.
promote.mail.smtp.port	The number of the SMTP port.
promote.mail.username	The username to use when connecting to the email server.
promote.mail.password	The password to use when connecting to the email server.
promote.mail.subject	Used for the email sent to a user whose offer has been rejected. Supports: {0} as approver; {1} as promotion name; {2} as offer name; {3} Approval Notes
promote.mail.body	Used for the email sent to a user whose offer has been rejected. Supports: {0} as approver; {1} as promotion name; {2} as offer name; {3} Approval Notes

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

**Table 4–5 Audit Trail Properties**

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

The miscellaneous properties are used to identify system URLs.

**Table 4–6 Miscellaneous Properties**

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

The date properties define the formatting for dates.

**Table 4–7 Date Properties**

Property	Description
promote.datetime.dateformatpolicy=configured	<p>Values are:</p> <ul style="list-style-type: none"> <li>metadata = the format coded by the server developer for the class (currently there are none), reserved for future use.</li> <li>bean = the format coded by the server developer for the instance (currently there are none), reserved for future use.</li> <li>request = the default format of the java virtual machine for the locale specified in the browser.</li> <li>system = the default format of the java virtual machine for the locale specified in the server.</li> <li>configured (the default) = uses the format configured in promote.properties.</li> </ul>
promote.datetime.sysdateformat=us	
promote.datetime.eu.date=dd/MM/yyyy	
promote.datetime.us.date=MM/dd/yyyy	
promote.datetime.iso.date=yyyy-MM-dd	
promote.datetime.us.time=HH:mm:ss	
promote.datetime.iso.time=HH:mm:ss	
promote.datetime.eu.time=HH:mm:ss	
promote.datetime.us.timestamp=MM/dd/yyyy HH:mm:ss	If the date and time formats are known, but the timestamp is missing, it will be created by concatenating (separated by a space) the date and time formats.
promote.datetime.iso.timestamp=yyyy-MM-dd HH:mm:ss	If the date and time formats are known, but the timestamp is missing, it will be created by concatenating (separated by a space) the date and time formats.
promote.datetime.eu.timestamp=dd/MM/yyyy HH:mm:ss	If the date and time formats are known, but the timestamp is missing, it will be created by concatenating (separated by a space) the date and time formats.

The number properties must be valid Java number formats.

**Table 4–8 Number Properties**

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

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

**Table 4–9 Data Properties**

Property	Description
promote.data.maxrows=1000	
promote.data.caselessSearch=true	Case is ignored.
promote.data.wildcardSearch=true	Searches use wildcards.
promote.data.likeSearch=true	
promote.data.caselessSort=false	
promote.data.sortDepth=2	
promote.pagesize.lookahead=1	
promote.offer.criterion.filternum=2	
promote.unpositioned.offer.rollup=false	Offer rollups include unpositioned values.

The reports properties define MicroStrategy access.

**Table 4–10 Reports Properties**

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

The sessions properties define the duration of the keepalive.

**Table 4–11 Sessions Properties**

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

## Configuring Display Strings

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

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

The `promoteResources.properties` file also provides limited functionality to configure the columns and rows that appear in certain screens. You can configure the following.

- Which columns or rows are displayed.
- The sort order, descending (-) or ascending (+), of specified columns. For example, `sort.Offer=+position` sorts the grid in ascending order based on the position column.
- Which metrics are displayed. You can select from two lists of available metrics: `BASE_METRIC_COLUMNS`, which is a list of common metrics, and `METRIC_COLUMNS`, which is a list of additional available metrics.
- Column locking (defined using a pipe symbol).
- User defined fields can be added to the Offer Definition and Notes grids. Different types of fields, such as text or date) can be selected and client-defined labels can be specified for the fields.

## Configuring Export

The following stylesheets are shipped with Promote Planning:

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

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

The following values must be specified:

**Table 4–12** *Export Configuration Values*

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

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

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

## Pull Export Configuration

Two files must be configured for a pull export:

- `promo-pullclient.properties` – defines the defaults for the pull client
- `promo-pullclient.log4j.properties` – defines the Log4j configuration

These files are located in `<installdir>/modules/tools/conf`.

### Example `promo-pullclient.properties` File

```
promote.pullclient.servlet.contextroot=promote
promote.pullclient.servlet.appname=export.do
promote.pullclient.protocol=http
promote.pullclient.host=localhost
promote.pullclient.port=8888
promote.pullclient.datemask=MM/dd/yyyy_HH:mm:ss
promote.pullclient.format=xml
promote.pullclient.command=list
promote.pullclient.timeout=10
```

No spaces are permitted for any of the assigned values. The date mask specifies only the input arguments format. The output format is specified in `promote.properties`.

## Integration with Promote Intelligence

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

### Auto Authentication Flag

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

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

### Report Links Configuration

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

This configuration includes:

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

The following XML attributes are used in promote.xml:

- Connect attributes used in the construction of the URL for all links (protocol://server:port/webapp\_path).
- Each reporting group has its own node. The name is used for the resource file mapping. The report request uses the param tag.
- For all report tags in group, sub-nodes are created in the GUI for the reporting area, using name, params and the common configuration from connect tag. A group with no reports does not have sub-nodes.
- If there is no params tag inside the group or report tag, then no link is provided.
- Groups cannot be nested inside other groups or reports.

## Display Strings

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

Here is an example, using "My Reports":

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

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

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

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

## Debug Messages

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

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## Template Configuration

This chapter contains the following:

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

### Introduction

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

### Using the Promote Template

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

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

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

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

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

### Loading the Template

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

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

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## Database Configuration

This chapter contains the following:

- “Summary Configurations” on page 6-1
- “CLIENT\_HIERARCHY\_ACTIONS\_TBL” on page 6-2
- “IR Views” on page 6-2

### Summary Configurations

Several configurations must be included in ASH\_CP\_TBL. These configurations specify the level of aggregation in the merchandise hierarchy that Promote and the RDM require.

**Table 6–1 Summary Configurations**

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

The following non-Promote entries are required for compatibility reasons:

**Table 6–2 Intersect Names**

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

The Cust\_Parameter\_Levels PL/SQL package provides an interface to the following values. For examples, see “IR Views” on page 6-2.

- getMerchandiseLevelDesc(in\_intersect\_name)
- getMerchandiseLevelSqc(in\_intersect\_name)
- getLocationLevelDesc(in\_intersect\_name)
- getLocationLevelSqc(in\_intersect\_name)

## CLIENT\_HIERARCHY\_ACTIONS\_TBL

The Client\_Hierarchy\_Actions\_Tbl must be modified according to the levels of inventory aggregation required.

**Table 6–3 Actions for Client Hierarchy Actions Table**

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

## IR Views

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

**Table 6–4 Modifying Inference Rules**

View	Description
IR_PR_MERCH_SUMMARY_X_VW	These views map each merchandise summary level to its SKU.
IR_PR_LOCATION_SUMMARY_X_VW	These views map each location summary level to its SKU.
IR_PR_PROMOTIONS_VW	This view exposes the attributes needed by the PCE for modeling.
IR_PR_PROMO_ITEM_VW	This view exposes the attributes needed by the PCE for modeling.

Update the views using the following guidelines:

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

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

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

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



This chapter contains the following:

- “Introduction” on page 7-1
- “Available Reports” on page 7-1
- “Configuration Report Details” on page 7-2
- “Changing MicroStrategy Summary Levels” on page 7-3

## Introduction

Use the Standard Reports GUI to create and share new reports. All reports are based on a standard template. Several pre-defined reports are available, including reports that provide information on General Trends, Product Categories, and Individual Products.

## Available Reports

Promote provides the following reports. Because of rounding issues, the calculations in reports may be inaccurate. Metrics are calculated using full precision numbers; however, the reports only display two decimals. Validating these values manually using the metrics displayed in the reports can result in different results that are caused by the rounding of numbers. To prevent this, increase the number of decimals displayed in the reports.

- Ad Page Allocation – contains an analysis of the impact of page allocation on return on investment (ROI). This report is based on a Circular promotion.
- Ad ROI – contains an analysis of the return on investment (ROI) for all ad events that occurred during a specified time period. Also provides a comparison between ROIs from different time periods.
- All Affinities – provides information about the affinities between items that sell together. The report displays all the affinity rules produced by the ARM application.
- Model Accuracy Scorecard – provides information to help evaluate the efficiency of the predictive model.
- Promotion Scorecard – contains an analysis of the effect of individual items that are included in a promotion on the success of that promotion. The report can be filtered by promotion and merchandise hierarchy level.
- TAE Assessment Report – provides information that can be used to evaluate the accuracy and completeness of the data generated by TAE.

- Top Affinities – provides information about affinity products. It displays the top affinity rules, based on the confidence factor or likelihood. The affinity rules are produced by the ARM application.

## Configuration Report Details

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

### Model Accuracy Scorecard Report

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

#### Report Prompts and Display

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

**Table 7-1 Model Accuracy Scorecard Report**

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

### TAE Assessment Report

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

#### Report Prompts and Display

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

**Table 7–2 TAE Assessment Report**

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

## Changing MicroStrategy Summary Levels

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

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

## Summary Configurations

The PROMOTE\_PROMO\_OFFER\_MH\_SUMMARY parameter is a value for the INTERSECT\_NAME in the ASH\_CP\_TBL standard interface. It specifies the level of aggregation for the merchandise hierarchy that is used to generate the totals for the scorecard by Offer/Department. The merchandise level should be the level that corresponds to the Department. The location level is not relevant to this aggregation.

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

<b>INTERSECT_NAME</b>	<b>MERCHANDISE_LEVEL</b>	<b>LOCATION_LEVEL</b>
PROMOTE_SCORECARD_MERCH_OFF_AMT_SUMM_3	DEPT	STORE
PROMOTE_SCORECARD_MERCH_OFF_AMT_SUMM_1	SUBCLASS	STORE
PROMOTE_SCORECARD_MERCH_OFF_AMT_SUMM_2	CLASS	STORE

## MB Counts

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

