Oracle® Real-Time Decisions Base Application

Decision Management Applications User's Guide

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Oracle Real-Time Decisions Base Application Decision Management Applications User's Guide, Release 3.1

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A Decision Manager User Interface Reference

Preface

Oracle Real-Time Decisions (Oracle RTD) Decision Management incorporates the Decision Manager tool, a general purpose web interface that allows business professionals to create, update, and delete objects useful for their Decision Management applications.

This guide describes how those Decision Manager features are assembled into a turn-key deployable solution for real-time inbound marketing optimization and collaborative decisions named Oracle Real-Time Decisions for Marketing Optimization (also referred to as the RTD for Marketing Optimization application). The features of this application enable business users to create and manage data for their marketing campaigns in the context of their cross-channel deployments.

This guide also describes the general web options available with the Decision Manager tool for business users of any Oracle RTD Decision Management applications.

Audience

This document is intended for business users of the RTD for Marketing Optimization application and other Oracle RTD Decision Management applications.

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Related Documents

For more information, see the following documents in the Oracle Real-Time Decisions platform version 3.0 documentation set and the Oracle Real-Time Decisions Base Application Release 3.1 documentation set:

- *Oracle Real-Time Decisions Installation and Administration Guide*
- *Oracle Real-Time Decisions Platform Developer's Guide*
- *Oracle Real-Time Decisions Decision Center User's Guide*
- *Oracle Real-Time Decisions Release Notes*
- *Oracle Real-Time Decisions Base Application Installation and Reference Guide*
- *Oracle Real-Time Decisions Base Application Decision Management Installation and Configuration Guide*

Conventions

The following text conventions are used in this document:

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

1

Introduction to Oracle RTD Decision Management

This chapter introduces Oracle RTD Decision Management and Oracle RTD Decision Management applications in general.

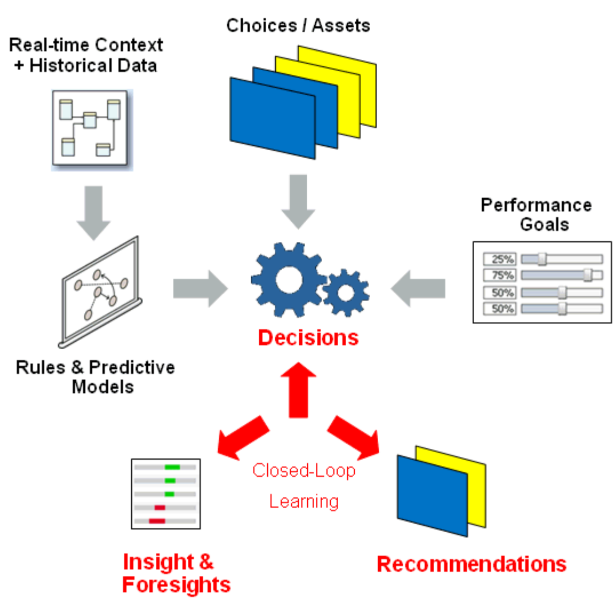
This chapter contains the following topics:

- Section 1.1, "Oracle RTD Decisioning Process Framework"
- Section 1.2, "Oracle RTD Decision Management Features"

1.1 Oracle RTD Decisioning Process Framework

The heart of Oracle RTD is a decisioning process framework that takes into account the overall performance goals with which an organization is trying to optimize, the performance metrics that measure those goals, the action required to score each of the available choices, and a weighting of those scores based on segments of the population.

The following shows an overview of how the elements feed into the general Oracle RTD decisioning process:



Any business organization can use Oracle RTD to decide which are the best products to offer to their customers, based on intelligence collected from previous campaigns and how that can be applied for different customer segments and in different demographics.

Marketing organizations, for example, could have a variety of different campaigns and offers within these campaigns. The choices are then - which campaign to recommend, and which offer within each campaign? The Oracle RTD decisioning process uses its built-in intelligence to make the best choices for the marketing recommendations.

1.2 Oracle RTD Decision Management Features

Oracle RTD Decision Management extends the Oracle RTD decisioning process framework, by extending the scope of the decision framework itself and also by providing an application development environment for creating business user friendly applications for managing the lifecycle choices available for recommendation.

This section contains the following topics:

- Section 1.2.1, "Oracle RTD Decision Management Applications"
- Section 1.2.2, "Inter-Choice Relationships"

1.2.1 Oracle RTD Decision Management Applications

Oracle RTD Decision Management applications enable business users to easily create, update, and delete the choices that they want to be made available for Oracle RTD choice recommendations in their business processes.

The Decision Management components released with Oracle RTD Base Application are as follows:

- An Oracle RTD Decision Management general purpose application infrastructure that enables you to build and use your own Oracle RTD Decision Management applications.

  The framework consists of:

  - Decision Designer

    Decision Designer is the combination of design tools built on top of the Oracle JDeveloper platform and includes the metadata files that you use to create the Oracle RTD Decision Management application. In addition to the metadata configured in Decision Designer, each Oracle RTD Decision Management application also includes an Inline Service that is deployed through the Oracle RTD platform component Decision Studio.

    With Decision Designer, you generate web-based enterprise applications for business users to manage their choices in external choice repositories as referential business data. Access control to the choices can be configured to enable multi-user concurrent update mode or to restrict access to specific job role users in your business departments.

    For details of how to set up Oracle RTD Decision Management applications, see *Oracle Real-Time Decisions Base Application Decision Management Installation and Configuration Guide*.

  - Decision Manager

    Decision Manager is an end-user oriented web tool that allows business users to control and manage their choices in the external choice repositories.

The Decision Manager interface, as set up in the Oracle RTD Decision Management application, is configured specifically to each organization's own types of choices.

Business users can read, create, update and delete choices and choice rules. When these choices are fed back to the external choice repositories, they then become available to the other applications and transactions that use Oracle RTD for choice recommendations.

Decision Manager also enables users to access select Decision Center analytic reports on their choices directly from the Decision Manager interface.

For more details of how to use general Decision Manager features and options, see Appendix A, "Decision Manager User Interface Reference."

- A specific Oracle RTD Decision Management application, **Oracle RTD for Marketing Optimization** - with its associated Inline Service - oriented to marketing organizations. This application is also referred to as **RTD for Marketing Optimization**.

  The RTD for Marketing Optimization application serves as an application for any marketing organization that is interested in managing their marketing objects of interest as shown in Section 1.2.2, "Inter-Choice Relationships."

  For details of how to install and configure RTD for Marketing Optimization, see *Oracle Real-Time Decisions Base Application Decision Management Installation and Configuration Guide*.

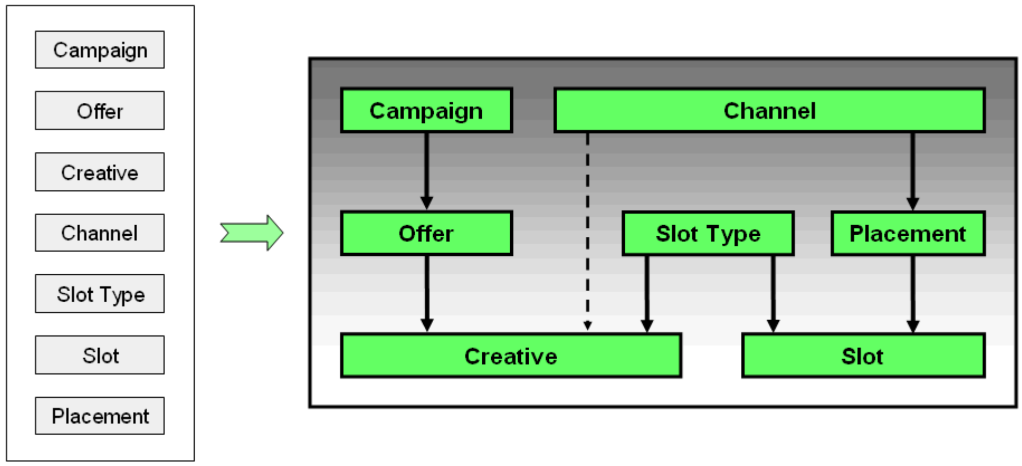
  For details of how to use RTD for Marketing Optimization, see *Section 2.2, "Using Oracle RTD for Marketing Optimization."*

1.2.2 Inter-Choice Relationships

This key decision framework enhancement introduces the ability to define explicit relationships between choices beyond hierarchical relationships. This enables related choices to be actioned and processed together in a way that supports customer workflow operations and procedures.

For example, a marketing organization could have planned their marketing campaigns to be publicized on a variety of external media outlets, and have a number of possible choices to make as to what to recommend, to whom, and how. The choices could be categorized under the general headings of campaigns, offers, channels, placements, and so on. These types of choices could be treated as independent, standalone categories, but that could lead to marketing opportunities being lost due to missing connections between objects during the business intelligence gathering process.

Oracle RTD Decision Management enables relationships to be defined between the choice categories, as shown in the following marketing organization example *(the basis for the Oracle RTD Decision Management application that is released with Oracle RTD Base Application)*:



The inter-related objects shown on the right-hand side of the diagram represent and reflect the following real-world relationships:

- Each campaign consists of zero, one, or more offers
- Each offer must belong to exactly one campaign
- Each offer consists of zero, one, or more creatives

  A creative can be thought of as specific content used to deliver an offer. For example, text content and image content could be two types of creative for the same offer.
- Each channel can have many potential ways (placements) to show an offer on a web page, each of which can break down into slots on the page
- Slots must be of a particular slot type
- Each channel can be related to zero, one, or more creatives
- Each creative must belong to exactly one offer and must be associated with exactly one slot type
- Each creative may be associated with one (and only one) channel, but does not have to be *(creatives are also related to channels through their slot types, slots, and placements, when it is decided how the creatives will appear through their channels)*

The benefits of inter-choice relationships come into play in the decisioning process as follows:

- Enhanced rule evaluation - how choice eligibility is determined

  For example, for a creative in a campaign, if the campaign is deemed ineligible for a particular customer, the creative will become ineligible for this customer due to the propagation of eligibility defined at the campaign-creative relationship level
- Enhanced event propagation - how the success and failure of recommendations are fed back into the Oracle RTD predictive models

  For example, if Oracle RTD recommends a creative, and the creative was presented to the customer, this presentation event will be recorded:
  - For that particular creative in the predictive model associated with creatives
  - For the offer and campaign in which the creative was presented, in the predictive models associated with offers and campaigns

2

Introduction to Oracle RTD for Marketing Optimization

This chapter contains the following topics:

- Section 2.1, "Introduction to Oracle RTD for Marketing Optimization"
- Section 2.2, "Using Oracle RTD for Marketing Optimization"
- Section 2.3, "Allocating Product Features to Marketing Organization Job Roles"
- Section 2.4, "Job Role Oriented Example of Oracle RTD for Marketing Optimization Tasks"

2.1 Introduction to Oracle RTD for Marketing Optimization

This section contains the following topics:

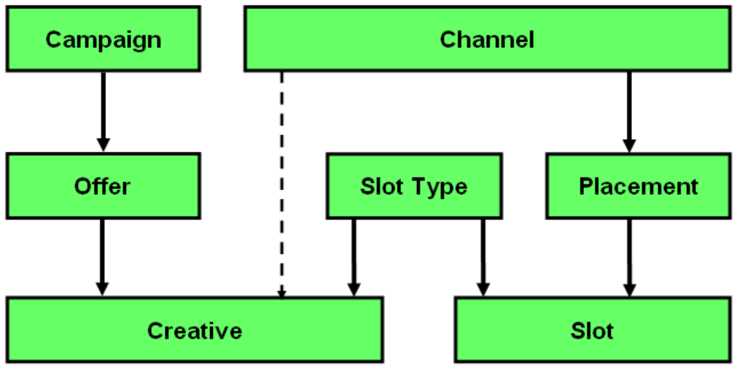
- Section 2.1.1, "Oracle RTD for Marketing Optimization"
- Section 2.1.2, "Oracle RTD for Marketing Optimization Perspectives"

2.1.1 Oracle RTD for Marketing Optimization

In any marketing organization, there can be many requirements to take into consideration when determining what is "the best" offer to present to a given customer. Depending on the scope of the products and services that are being marketed, there could be a considerable number of types and categories of offers, as well as the actual products and services being offered, and in what campaigns. There could also be a number of different ways that these offers could be presented and displayed to customers on web pages, as part of the marketing campaigns.

The Oracle RTD Decision Management application RTD for Marketing Optimization defines a set of marketing concepts and their relationships, as they appear in the following diagram:

Figure 2–1 Marketing Concepts and Relationships



The relationships are represented by the arrowed lines, according to the following conventions:

- The direction of the arrow indicates a one-to-many relationship.
- A solid line represents a mandatory relationship, and a broken line represents an optional relationship

So, for example *(with the relationships described as generically as possible)*:

- Each campaign consists of zero, one, or more offers
- Each offer must belong to exactly one campaign
- Each offer consists of zero, one, or more creatives

  A creative can be thought of as specific content used to deliver an offer. For example, text content and image content could be two types of creative for the same offer.
- Each channel is related to zero, one, or more creatives
- Each creative must belong to exactly one offer and must be associated with exactly one slot type
- Each creative may be associated with one (and only one) channel, but does not have to be

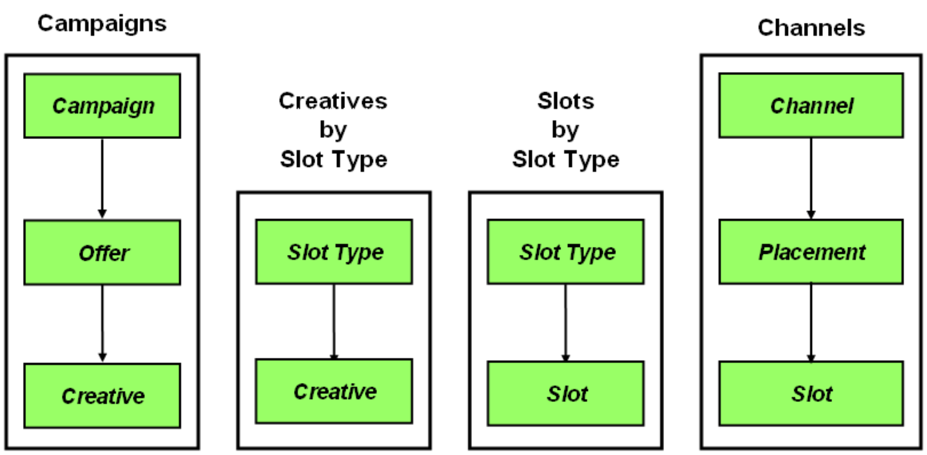
2.1.2 Oracle RTD for Marketing Optimization Perspectives

A perspective is a subset of your marketing objects of interest, which also shows how they are inter-related. Each perspective represents a portion of your data that is convenient to view and process as a unit.

For each object, designers may decide whether all the objects of a particular type are to be available (for example, all campaigns) or a subset of a type (for example, only the campaigns whose approval status is Draft).

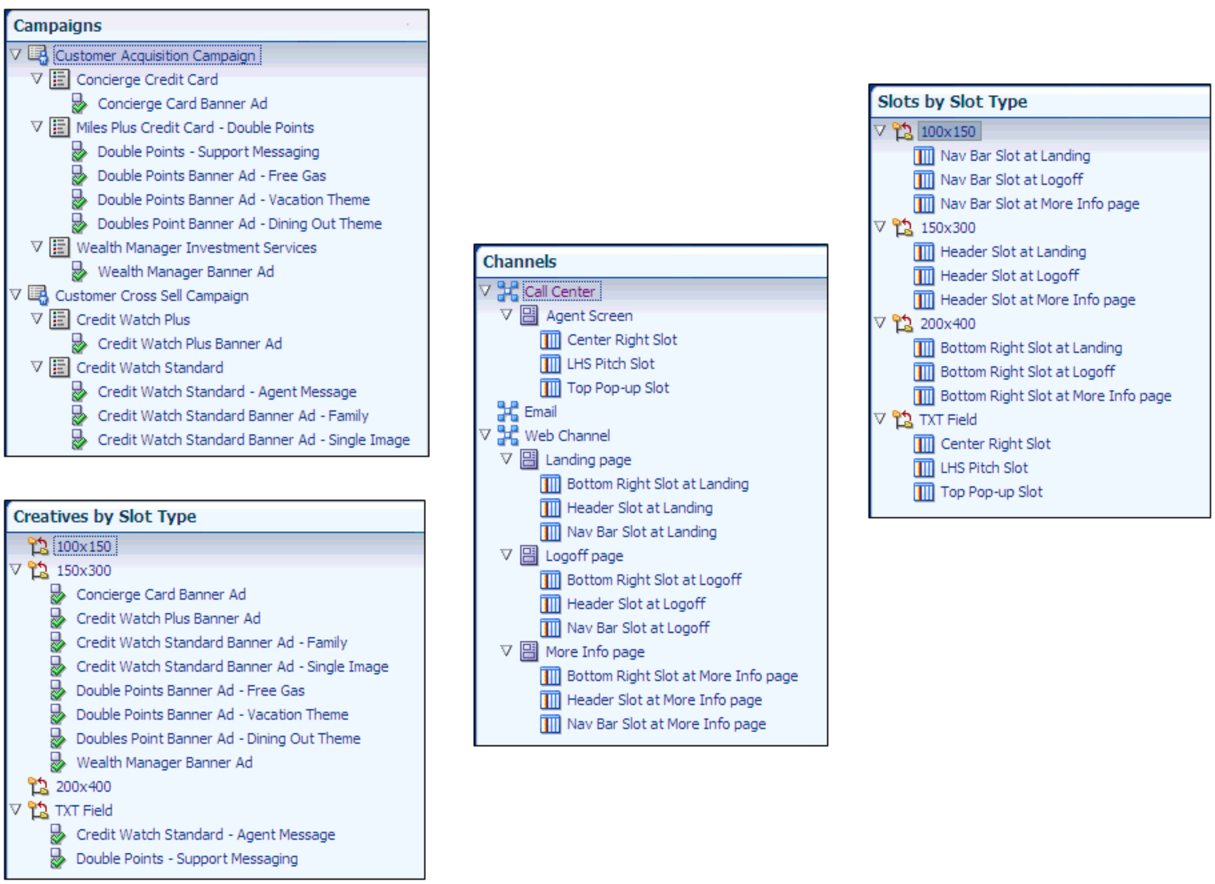
The perspectives defined in the RTD for Marketing Optimization application consist of four "general" subsets of data and three "filtered" subsets.

The four "general" views, with no qualifying conditions on any object, are as shown in the following diagram:

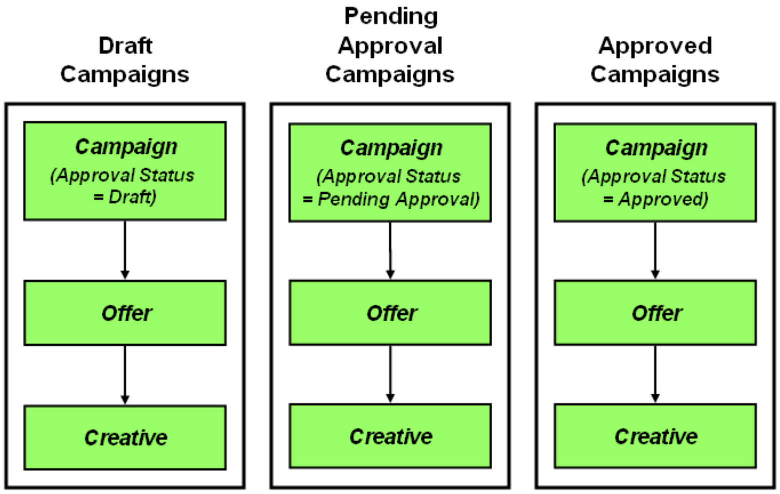


The following diagram shows examples of the four general perspectives, as displayed in Decision Manager:

Figure 2–2 Examples of General RTD for Marketing Optimization Perspectives



The following diagram shows the three "filtered" perspectives, each of which is similar to the Campaigns perspective, except that each filtered perspective only exposes the campaigns with a particular approval status:



Users can be granted permissions to work on different perspectives. In this way, perspectives can be designed and directed towards particular functional roles in your organization. For a possible function-to-job-role breakdown in a marketing organization, see Section 2.3, "Allocating Product Features to Marketing Organization Job Roles."

2.2 Using Oracle RTD for Marketing Optimization

Terminology: The general terms used throughout this section and other sections to cover all the marketing objects of interest are **choices**, **choice types**, and **choice groups** (the latter two terms are used interchangeably).

So, campaigns, offers, channels are all different **choice types** or choice groups. An individual Deep Discount campaign and a Sixty-Percent-Off-Everything offer are examples of specific **choices**.

General Note: This section contains a combination of general choice management options and examples oriented to the choices available in RTD for Marketing Optimization.

The convention used in this section is that the general descriptions appear in standard font, while the examples and descriptions oriented specifically to RTD for Marketing Optimization appear in italics.

More general information is also available in Appendix A.1, "Decision Manager User Interface Schematic."

For each of the functions listed in this section, it is assumed that you have been granted the correct permission or permissions by your Oracle RTD Decision Management administrator to perform the operation described for that function.

For general information about the layout of the user interface screens and screen areas, see Section A.1, "Decision Manager User Interface Schematic."

A Decision Management application can be set so that either multiple users can update a choice, or users can operate in a special "ownership=on" mode, which is basically a "single-user-update" mode.

In this mode, there is a provision for users who are granted the special "own" permission, such as system administrators or managers, to be able to override the single user mode and perform choice updates. In this "ownership=on" mode, the choices appear with an extra attribute Owner. Some of the screenshots in this section show choices with this extra attribute.

The following scenario includes the implicit provision that two different departments/users can edit the same choice. Decision Management application designers can set up applications either to allow multi-user updating of the same choice, or to enforce single-user update mode of a choice.

For more information on ownership, see the section "Config XML File" in *Oracle Real-Time Decisions Base Application Decision Management Installation and Configuration Guide*.

This section contains the following topics:

- Section 2.2.1, "Creating Projects"
- Section 2.2.2, "Viewing and Searching for Projects"
- Section 2.2.3, "Viewing, Searching and Adding Audit Trail Information for Projects"
- Section 2.2.4, "Committing Projects"
- Section 2.2.5, "Discarding Projects"
- Section 2.2.6, "Creating Choices"
- Section 2.2.7, "Viewing and Searching for Choices"
- Section 2.2.8, "Viewing, Searching and Adding to Choice Audit Trail Comments"
- Section 2.2.9, "Editing Choices"
- Section 2.2.10, "Deleting Choices from the Main Repository"

2.2.1 Creating Projects

> **Note:** A project is a unit of work processing, that stores a set of pending changes to the Main Repository.
>
> The Main Repository is the database containing the dynamic choices that may be accessed by and used for processing Oracle RTD decisions in customer applications. This set of choices is updated each time a project is committed.
>
> You can create, edit, and delete choices in a project. While recorded as significant actions *within the project*, these pending changes will only take effect in the Main Repository when you commit the project. If you discard the project (also known as deleting the project), all the changes in that project are discarded.

[For general information about creating projects, see Section A.7, "Create Project."]

Your context can be either Main Repository or an active project.

1. Click New Project.

Note: If you do not see the New Project icon, either expand your Decision Manager window, or click the chevron to the left of "Search" near the top of the screen, and select New Project from the dropdown list that appears.

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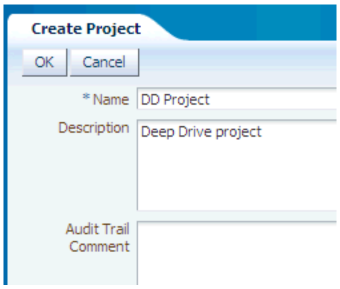
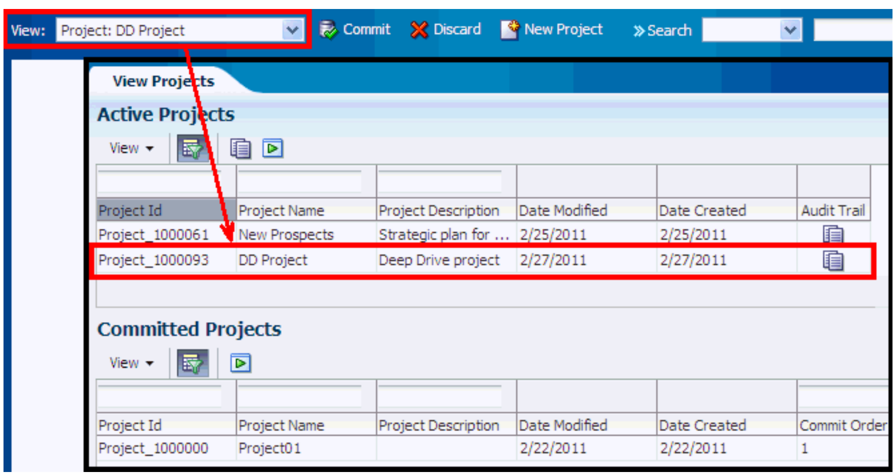
2. In the Create Project window, enter the project Name and optionally Description and Audit Trail Comment.



3. Click OK.

After the project is created, the context is automatically switched to the new project, as displayed in the View box, and appears as an active project in the View Projects tab.

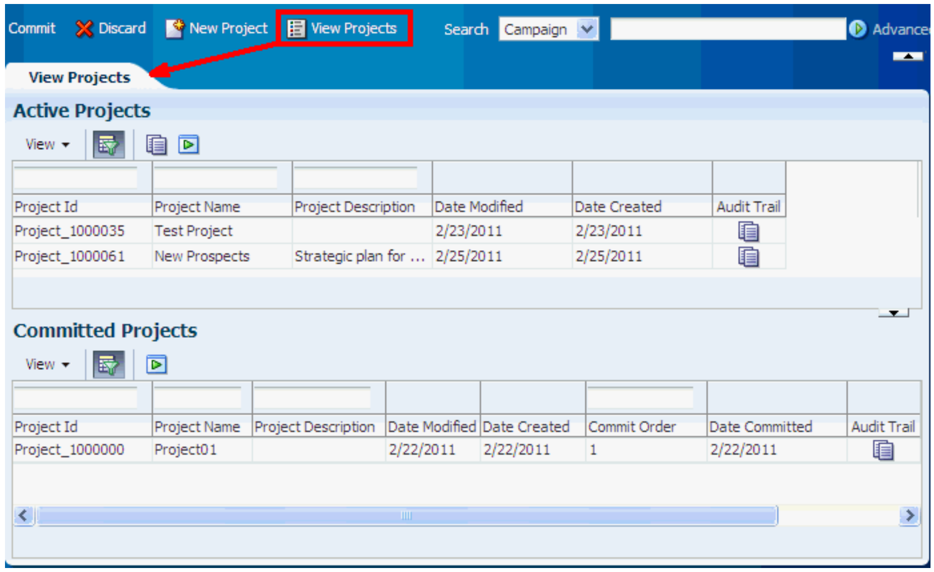


2.2.2 Viewing and Searching for Projects

[For general information about viewing projects, see Section A.8, "View Projects."]

The standard way to access and view projects and project details is through the View Projects.

Note: If you do not see the View Projects icon, either expand your Decision Manager window, or click the chevron to the left of "Search" near the top of the screen, and select View Projects from the dropdown list that appears.



Project Id	Project Name	Project Description	Date Modified	Date Created	Audit Trail
Project_1000035	Test Project		2/23/2011	2/23/2011	
Project_1000061	New Prospects	Strategic plan for ...	2/25/2011	2/25/2011	

Project Id	Project Name	Project Description	Date Modified	Date Created	Commit Order	Date Committed	Audit Trail
Project_1000000	Project01		2/22/2011	2/22/2011	1	2/22/2011	

In both the Active Projects and Committed Projects areas, you can:

- Customize project searches by clicking the appropriate View button, then selecting, suppressing or reordering the project search columns that appear
- Search for projects by entering search parameters in the empty boxes above the column names, then clicking the Search (green arrowhead) icon

  If the search boxes are not visible, click the Query By Example (wineglass) icon.

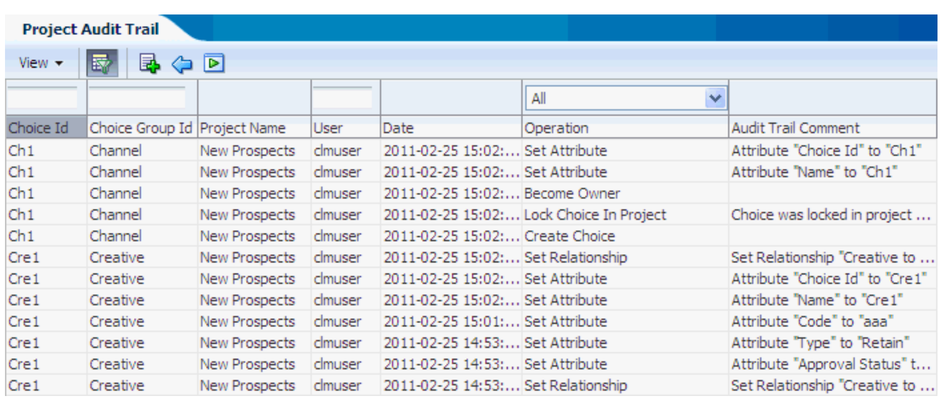
For search parameters, asterisk ("*") acts as a leading wild card, and there is no need to specify a trailing asterisk. So, for example:

- The two character search string ***c** searches for values that contain the letter "c"
- The search string ***c*es** searches for values that contain "c" and later "es"

You can also click on the Audit Trail icon for any active or committed project, to view and search the audit trail comments for that project.

2.2.3 Viewing, Searching and Adding Audit Trail Information for Projects

The standard way to access audit trail comments is to click the Audit Trail icon for either an active or a committed project in the View Projects tab.



Choice Id	Choice Group Id	Project Name	User	Date	Operation	Audit Trail Comment
Ch1	Channel	New Prospects	dmuser	2011-02-25 15:02:...	Set Attribute	Attribute "Choice Id" to "Ch1"
Ch1	Channel	New Prospects	dmuser	2011-02-25 15:02:...	Set Attribute	Attribute "Name" to "Ch1"
Ch1	Channel	New Prospects	dmuser	2011-02-25 15:02:...	Become Owner	
Ch1	Channel	New Prospects	dmuser	2011-02-25 15:02:...	Lock Choice In Project	Choice was locked in project ...
Ch1	Channel	New Prospects	dmuser	2011-02-25 15:02:...	Create Choice	
Cre1	Creative	New Prospects	dmuser	2011-02-25 15:02:...	Set Relationship	Set Relationship "Creative to ...
Cre1	Creative	New Prospects	dmuser	2011-02-25 15:02:...	Set Attribute	Attribute "Choice Id" to "Cre1"
Cre1	Creative	New Prospects	dmuser	2011-02-25 15:02:...	Set Attribute	Attribute "Name" to "Cre1"
Cre1	Creative	New Prospects	dmuser	2011-02-25 15:01:...	Set Attribute	Attribute "Code" to "aaa"
Cre1	Creative	New Prospects	dmuser	2011-02-25 14:53:...	Set Attribute	Attribute "Type" to "Retain"
Cre1	Creative	New Prospects	dmuser	2011-02-25 14:53:...	Set Attribute	Attribute "Approval Status" t...
Cre1	Creative	New Prospects	dmuser	2011-02-25 14:53:...	Set Relationship	Set Relationship "Creative to ...

In the Project Audit Trail area, you can:

- Customize searches by clicking the View button, then selecting, suppressing or reordering the project audit trail search columns that appear
- Search the audit trail by entering search parameters in the empty boxes above the column names, then clicking the Search (green arrowhead) icon.

  If the search boxes are not visible, click the Query By Example (wineglass) icon.

> **Note:** You can search for audit trail comments on particular choices and choice types by entering search parameters for Choice Id and Choice Group Id respectively.

For search parameters, asterisk ("*") acts as a leading wild card, and there is no need to specify a trailing asterisk. So, for example:

- The two character search string ***c** searches for values that contain the letter "c"
- The search string ***c*es** searches for values that contain "c" and later "es"

You can also add an audit trail comment by clicking the green Plus icon and entering your comment. This comment will be associated with the rightmost choice that appears in the breadcrumbs line near the top of the Decision Manager window.

From the Project Audit Trail tab, you can return to the View Projects tab by clicking the blue back arrow icon.

2.2.4 Committing Projects

If you have the necessary permission, you can commit a project. Committing a project will transfer all the pending choice changes in that project to the Main Repository.

To commit a project, select the project from the dropdown View list in the Repository/Context area, then click the Commit button, and confirm that you want to commit the project. You may optionally enter an audit trail comment in the confirmation box.

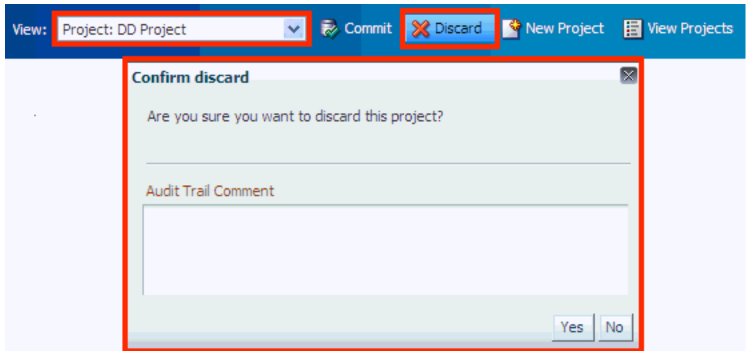
After the project is committed, the context is automatically switched to the Main Repository, as displayed in the View box.

If you click View Projects, the newly-committed project appears in the Committed Projects area. You can click the Audit Trail icon for the project to see a list of all the operations that occurred when the project was active, and the users that performed those operations.

2.2.5 Discarding Projects

If you have the necessary permission, you can discard a project, which discards all changes in the project.

To discard a project, select the project from the dropdown View list in the Repository/Context area, then click the Discard button, and confirm that you want to discard the project. You may optionally enter an audit trail comment in the confirmation box.



After the project is discarded, the context is automatically switched to the Main Repository, as displayed in the View box.

2.2.6 Creating Choices

[For general information about creating choices, see Section A.9, "Create Choice."]

Note: When you create a choice in a project, the choice does not get added to the Main Repository until you commit the project. You can undo the choice creation in the project before you commit the project by discarding the newly-created choice, as described in Section 2.2.6.1, "Discarding Choice Additions in a Project."

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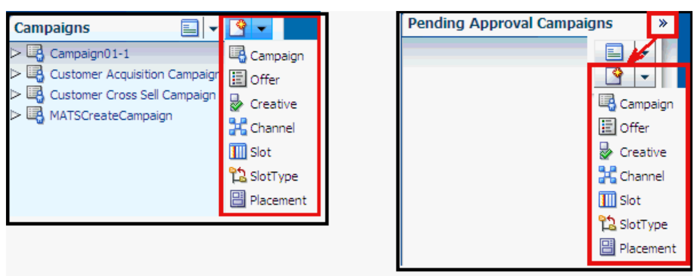
1. Click the Create icon (in the header of the current perspective panel).

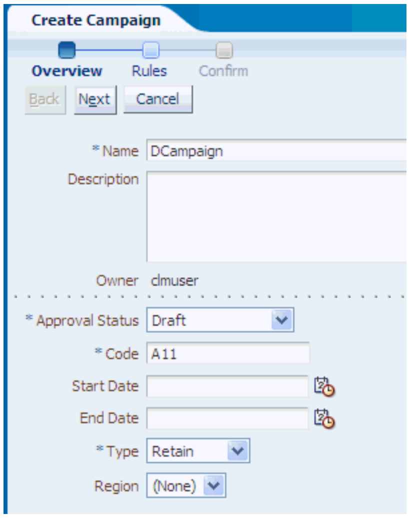


Note: If you do not see the Create icon, either expand your Decision Manager window, or click the chevron to the right of the perspective name, then select the Create icon, which will open a list of the choices.

---

2. In the **Overview** dialog, enter or select values for all mandatory fields (marked with an asterisk), and as many of the optional fields as you require.

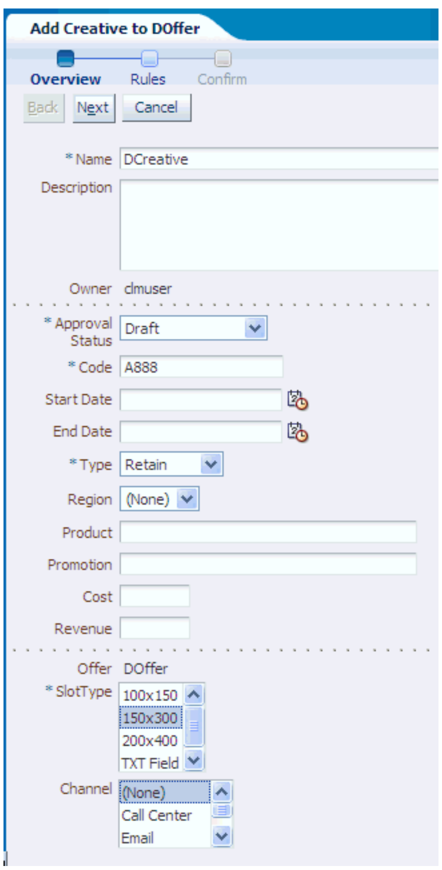
   The following shows a Create Campaign example:



In addition to specifying values for the attributes of the choice you are creating, you may have to select attribute values for choices related to the current choice.

For example, as each Creative choice must have a Slot Type and may be associated with a Channel, you will have to select a SlotType value (which is marked with an asterisk) during the creation of the Creative choice. You may select a Channel at this point, or add the Channel value in a later edit session.

The following shows an example of creating a Creative by adding it to an Offer:

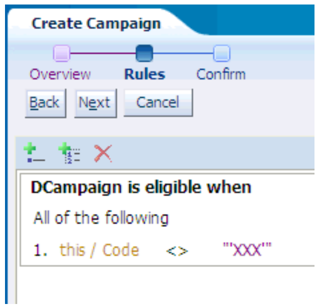


3. Click Next to proceed to the Rules dialog.

4. In the **Rules** dialog, optionally enter the rules for your choice in the Rule Editor frame that appears.

   For detailed information about entering rules, see Section 12.10, "Using Rule Editors" in *Oracle Real-Time Decisions Platform Developer's Guide*.

   The following shows an example of a rule added to a Campaign, specifying that the Code must not be equal to XXX:

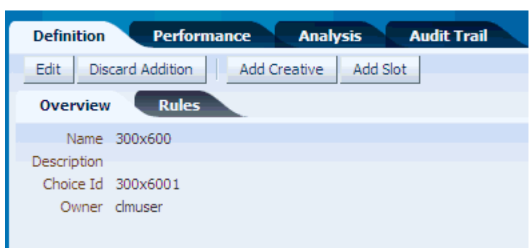


5. Click Next to proceed to the **Confirm** dialog, then click OK.

Depending on the choice you have created, you may continue to add further choices (using steps 2 to 5 as described in this section) as follows:

- *After creating a Campaign choice, click Add Offer*
- *After creating an Offer choice, click Add Creative*
- *After creating a Channel, click Add Creative or Add Placement*
- *After creating a Slot Type, click Add Creative or Add Slot*

The following shows an example of the Choice details area immediately after the successful creation of a Slot Type:



2.2.6.1 Discarding Choice Additions in a Project

When you are working in a project, you can discard the choice that you created in the project, before the project has been committed to the Main Repository - in effect, this "deletes" the choice from the project. This option is known as Discard Addition.

To discard a choice that was added in a project, first access the choice as described in Section 2.2.7, "Viewing and Searching for Choices." The details screen for the choice will include a Discard Addition button.

The following shows an example of the details screen for a campaign HM Campaign:

Click the Discard Addition button, then confirm that you want to delete the choice from the project. You may optionally enter an audit trail comment in the confirmation box.

The net effect of a Discard Addition depends on the configuration of the relationships with other choices:

- For relationships that are "orphan delete", related choices are not deleted, and only the selected choice is deleted
- For relationships that are "cascade delete," then an attempt will be made to delete the choice and all lower-level related choices *(as, for example, deleting a campaign will attempt to delete all of its offers, and all creatives under those offers)*. If any of the choices in the cascade delete hierarchy is locked in another project, the delete will fail. If any of the choices in the cascade delete hierarchy is owned by any other user and you do not have "own" permission on that choice, the delete will fail.

For more information on delete options, see the section "Choice Groups and Relationship Types XML Files" in *Oracle Real-Time Decisions Base Application Decision Management Installation and Configuration Guide*.

Note: After a choice is deleted in a project, you can still view audit trail information about the choice through the project audit trail. For details, see Section 2.2.3, "Viewing, Searching and Adding Audit Trail Information for Projects."

2.2.7 Viewing and Searching for Choices

The standard ways to access and view choices and choice details are either through perspectives or by searching for choices.

Note: You must have the necessary permissions to view and search for choices. For more information of how these are configured, see the section "Security XML Files" in *Oracle Real-Time Decisions Base Application Decision Management Installation and Configuration Guide*.

Using perspectives, you can expand choice hierarchies in the Perspectives panel tree, or select other perspectives and explore their choice tree structure in the Perspectives panel. When you click a choice in the Perspectives panel, and then the Definition tab, this will display the choice details in the main body of the Decision Manager window.

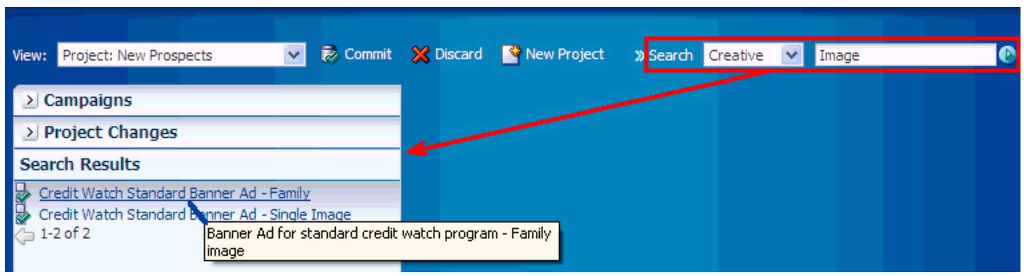
You can search for your choice or choices using one or more of the Search options described in Section A.5, "Search Options Area." If your application is in the special mode "ownership=off", then a basic search searches on name and description. In "ownership=on" mode, the basic search is on name, description, and owner.

The search takes place in the context of either the Main Repository or an active project, as appears in the View box near the top left of the screen:

- A search in an active project context will search in both that project and the Main Repository
- A search in the Main Repository context will search in only the Main Repository

After a successful search, the resulting choices appear in the Search Results panel. You can click any choice there to display the details in the main body of the Decision Manager window.

The following shows an example of the search results for the word "Image" in Creative names and descriptions, in the context of the active project New Prospects:



The second result contains "Image" directly in the Creative name. The first result has "Image" only in the Creative description, which appears if you mouse-hover over the Creative name.

As both search results appear in standard font, this indicates that they were found in the Main Repository (any objects found in the New Prospects project would have appeared in red italics).

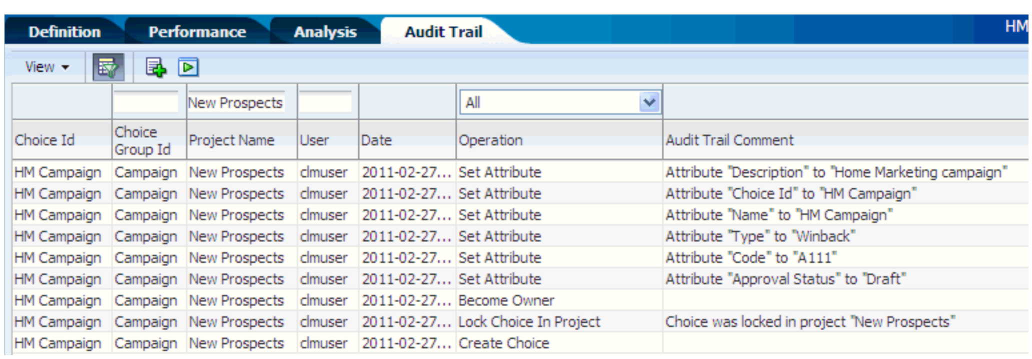
You can also view audit trail information for choices - see Section 2.2.8, "Viewing, Searching and Adding to Choice Audit Trail Comments."

2.2.8 Viewing, Searching and Adding to Choice Audit Trail Comments

You can view audit trail information for choices in two ways:

- You can view audit trail information for choices directly from the choice details screen, by clicking the Audit Trail tab for the choice.

  The following shows an example of the Audit Trail tab just after the creation of a campaign HM Campaign, showing all the audit trail columns:



Choice Id	Choice Group Id	Project Name	User	Date	Operation	Audit Trail Comment
HM Campaign	Campaign	New Prospects	clmuser	2011-02-27...	Set Attribute	Attribute "Description" to "Home Marketing campaign"
HM Campaign	Campaign	New Prospects	clmuser	2011-02-27...	Set Attribute	Attribute "Choice Id" to "HM Campaign"
HM Campaign	Campaign	New Prospects	clmuser	2011-02-27...	Set Attribute	Attribute "Name" to "HM Campaign"
HM Campaign	Campaign	New Prospects	clmuser	2011-02-27...	Set Attribute	Attribute "Type" to "Winback"
HM Campaign	Campaign	New Prospects	clmuser	2011-02-27...	Set Attribute	Attribute "Code" to "A111"
HM Campaign	Campaign	New Prospects	clmuser	2011-02-27...	Set Attribute	Attribute "Approval Status" to "Draft"
HM Campaign	Campaign	New Prospects	clmuser	2011-02-27...	Become Owner	
HM Campaign	Campaign	New Prospects	clmuser	2011-02-27...	Lock Choice In Project	Choice was locked in project "New Prospects"
HM Campaign	Campaign	New Prospects	clmuser	2011-02-27...	Create Choice	

  The audit trail search options are similar to those described in Section 2.2.3, "Viewing, Searching and Adding Audit Trail Information for Projects."

If you add an audit trail comment from the choice Audit Trail tab, it is automatically associated with the current choice in the choice details area.

- You can view audit trail information for choices indirectly, by viewing project audit trail information, then using choice information as a search parameter in the Project Audit Trail tab. For more details, see Section 2.2.3, "Viewing, Searching and Adding Audit Trail Information for Projects."

2.2.9 Editing Choices

Note: When you edit a choice in a project, either a newly created choice or a choice that exists in the Main Repository, all the changes you make are *within the project only* - they do not reach the Main Repository until you commit the project.

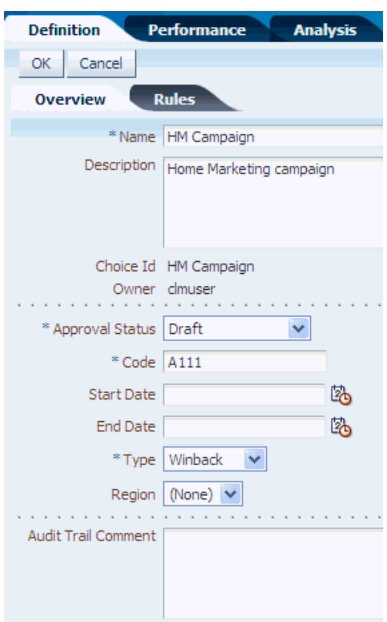
To change a newly created choice, you simply edit the choice. This you can do many times before project committal. If you want to prevent the new choice from going to the Main Repository, you discard the choice addition, as described in Section 2.2.6.1, "Discarding Choice Additions in a Project."

You can also edit a Main Repository choice many times before project committal. If you want to undo all the changes made to that choice in the project, you discard the choice changes, as described in Section 2.2.9.1, "Discarding Changes to a Main Repository Choice."

To edit a choice, access the choice as described in Section 2.2.7, "Viewing and Searching for Choices." The details screen for the choice will include an Edit button.

Click the Edit button.

The following shows an example of the Overview tab for a campaign HM Campaign, ready for editing:



You can edit the choice attributes in the Overview tab, and the rules for the choice in the Rules tab.

For detailed information about editing rules, see Section 12.10, "Using Rule Editors" in *Oracle Real-Time Decisions Platform Developer's Guide*.

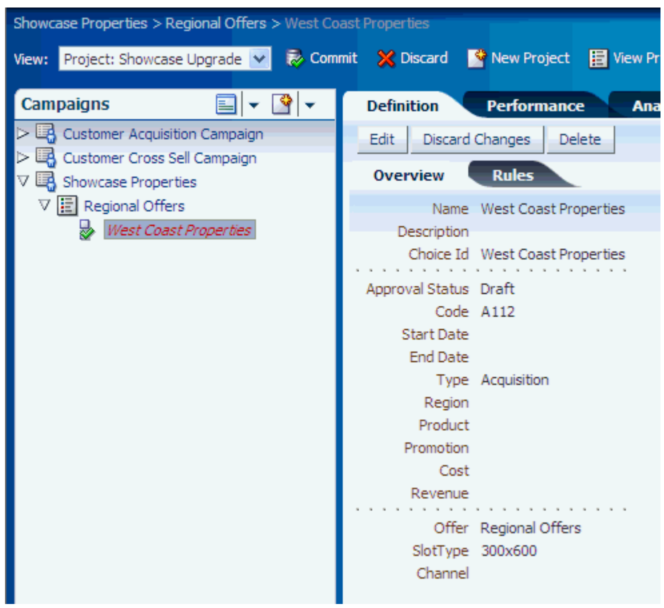
When you have finished, click OK.

2.2.9.1 Discarding Changes to a Main Repository Choice

When you are working in a project, you can edit Main Repository choices. Before you commit these changes to the Main Repository, you may decide to undo the changes you made in that project - this will revert the choice back to its original Main Repository version. This option is known as Discard Changes.

To discard a change to a Main Repository object, first access the choice as described in Section 2.2.7, "Viewing and Searching for Choices." The details screen for the choice will include a Discard Changes button.

The following shows an example of the details screen for a creative West Coast Properties, that exists in the Main Repository, but has just been edited in the Showcase Upgrade project:



Click the Discard Changes button, then confirm that you want to discard the changes made in the project. You may optionally enter an audit trail comment in the confirmation box.

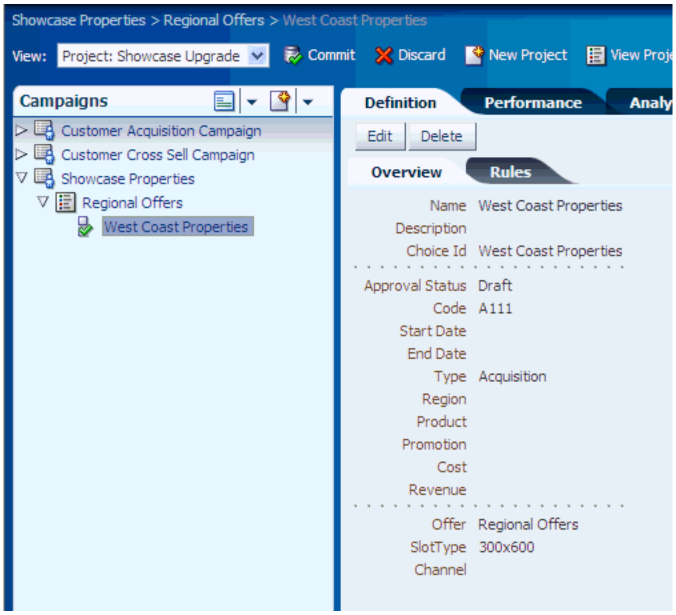
2.2.10 Deleting Choices from the Main Repository

To delete a choice from the Main Repository, you must first be working in an active project. You may have edited the choice in that project or not.

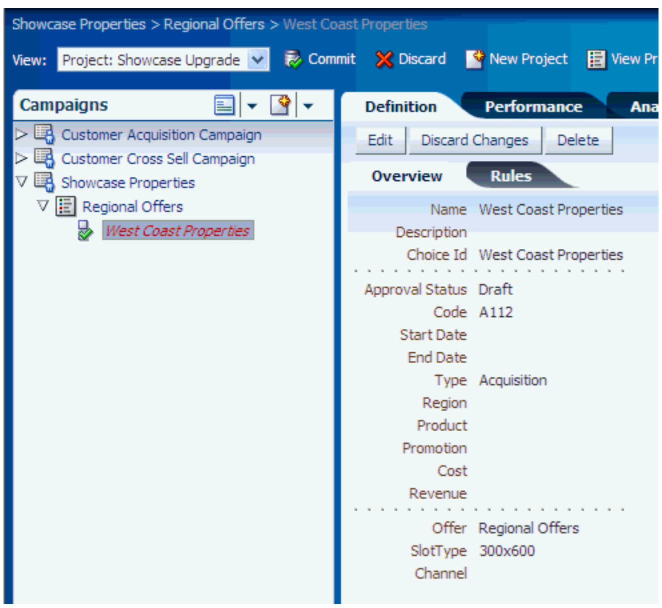
In the project, you effectively *prepare* to delete a choice. As with all changes in a project, the actual choice deletion does not occur in the Main Repository until you commit the project. For example, you may decide to undo your choice deletion before you commit the project (see Section 2.2.10.1, "Discarding Deletions").

To start the process of deleting the choice from the Main Repository, first access the choice as described in Section 2.2.7, "Viewing and Searching for Choices." The details screen for the choice will include a Delete button.

The following shows an example of the details screen for a creative West Coast Properties, that has not yet been edited in the Showcase Upgrade project:



The following shows an example of the details screen for a creative West Coast Properties, after it has been edited in the Showcase Upgrade project:



Click the Delete button, then confirm that you want to delete the choice from the Main Repository. You may optionally enter an audit trail comment in the confirmation box.

The choice deletion does not occur in the Main Repository until the project is committed. The final net effect of an undiscarded delete after the project is committed depends on the configuration of the relationships with other choices:

- For relationships that are "orphan delete", related choices are not deleted, and only the selected choice is deleted
- For relationships that are "cascade delete," then an attempt will be made to delete the choice and all lower-level related choices *(as, for example, deleting a campaign will attempt to delete all of its offers, and all creatives under those offers)*. If any of the choices in the cascade delete hierarchy is locked in another project, the delete will

fail. If any of the choices in the cascade delete hierarchy is owned by any other user and you do not have "own" permission on that choice, the delete will fail.

For more information on delete options, see the section "Choice Groups and Relationship Types XML Files" in *Oracle Real-Time Decisions Base Application Decision Management Installation and Configuration Guide*.

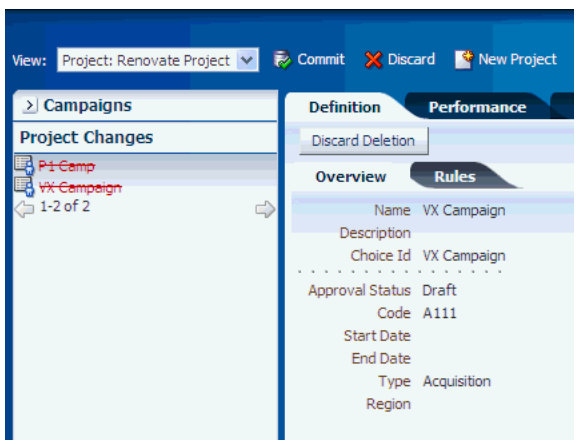
2.2.10.1 Discarding Deletions

If you have signalled your intention to delete one or more choices from the Main Repository, as described in Section 2.2.10, "Deleting Choices from the Main Repository," you can undelete or discard pending choice deletions through the Project Changes panel.

Click the Project Changes bar, to expose the changes you made in the project. The choice deletions appear as red, crossed-out choice names.

To discard a deletion, click the crossed-out choice that you want to undelete. The details window that appears has a Discard Deletion button.

The following shows an example of the Project Changes panel for the project Renovate Project, where two choices, P1 Camp and VX Campaign have been marked for deletion, and the VX Campaign selected for undeletion.



Click the Discard Deletion button.

The choice disappears from the Project Changes tab, and is available once again as a standard unedited choice in all appropriate perspectives.

Note: If you deleted many choices at once as part of a cascade delete, you have to undelete them one by one, starting with the lowest-level choices. For instance, if you deleted a campaign and it deleted offers and creatives under it, first undelete the creatives, then undelete the offers, then undelete the campaign.

2.3 Allocating Product Features to Marketing Organization Job Roles

While each marketing organization has its own unique departmental structure, this section illustrates one possible way by which you can allocate the tasks available for RTD for Marketing Optimization users to job roles in a marketing organization.

The basic principle is that individual users are allocated specific permissions, at several levels: perspective, project and choice type (also known as choice group).

Without the right permissions, you will not be able to perform particular tasks on particular objects in the application.

The details of setting up permissions are not described in this manual, but the basic principles indicate how these permissions could be used in the process of allocating tasks to job roles (for more information about how permissions are configured, see the section "Security XML Files" in *Oracle Real-Time Decisions Base Application Decision Management Installation and Configuration Guide*).

The basic types of permission are as follows:

- Perspective level

  You must have View permission on a perspective to see the perspective. You will need further permissions if you want to create, update, or delete choices in a perspective.

- Choice group level

  For any choice group, you need individual Read, Create, Update, and Delete permissions to perform the associated view, create, update, and delete tasks on a choice of that particular choice type.

- Project level

  The individual permissions at the project level are Create Project, Update Project, Discard Project (this allows you to delete a project, and all the changes in that project), Commit Project (this allows you to commit the project changes to the database).

Assume that there are four departments concerned with the overall process of creating and committing projects to add choices to your database:

- **Administration**

  Responsible for setting up and managing RTD for Marketing Optimization projects

- **Marketing**

  Responsible for setting up and managing choice content for the RTD for Marketing Optimization projects

- **Display Control**

  Responsible for setting up and managing the layout of the external sites that display choice information

- **Approvals**

  Responsible for changing the approval statuses of choices

An example of the breakdown of the permissions for particular organization roles could be as follows:

Note: The following scenario includes the implicit provision that two different departments/users can edit the same choice. Decision Management application designers can set up applications either to allow multi-user updating of the same choice, or to enforce single-user update mode of a choice. *For more details, see the "ownership" option in the section "Config XML File" in Oracle Real-Time Decisions Base Application Decision Management Installation and Configuration Guide*.

The example here assumes that different users (in effect, different departments) can edit the same choice.

- The **Administration** department users will have the following permissions:
  - Create Project, Update Project, Discard Project, Commit Project
  - Read, Create, Update, and Delete permissions on all the choice groups
- The **Marketing** department users will have the following permissions:
  - View permissions on all the perspectives
  - Read, Create, Update, and Delete permissions on the choice groups Campaign, Offer, and Creative
- The **Display Control** department users will have the following permissions:
  - View permissions on the perspectives Channels, Slots by Slot Type, and Creatives by Slot Type
  - Read, Create, Update, and Delete permissions on the choice groups Slot, Slot Type, Channel, and Placement
  - Update permission on the Creative choice group
- The **Approvals** department users will have the following permissions:
  - View permissions on the perspectives Draft Campaigns, Pending Approval Campaigns, and Approved Campaigns
  - Read and Update permissions on the choice groups Campaign, Offer, and Creative

2.4 Job Role Oriented Example of Oracle RTD for Marketing Optimization Tasks

This section illustrates the use of some RTD for Marketing Optimization tasks, following the example of job roles and permissions described in Section 2.3, "Allocating Product Features to Marketing Organization Job Roles."

As an example, assume that the ZaxisZen Corporation wants to expand its core business of marketing large-site properties by running a test Showcase Properties campaign on the West Coast.

The ZaxisZen application design team has allocated the permissions to their specific ZXS department users as outlined in general in Section 2.3, "Allocating Product Features to Marketing Organization Job Roles," and has created the following outline specifications for how the project and choice tasks are to be performed using RTD for Marketing Optimization:

1. **ZXS_Administration department**

- Create the **Web Offers Rollout** (WORP) project

2. **ZXS_Marketing department**
   - Create Campaign **Showcase Properties**, with a rule that the end date is to be **January 1, 2012**
   - Create Offer **Regional Offers**
   - Create Creative **West Coast Properties**, with slot type **200x400**.

     Set the approval status of all three choices to **Draft**
3. **ZXS_Display_Control department**
   - Create Slot Type **300x600**
   - Update Creative **West Coast Properties**, setting slot type to **300x600**
4. **ZXS_Approvals department**
   - View the **Draft campaigns** perspective, and update the campaign **Showcase Properties**, changing the approval status to **Approved**
5. **ZXS_Administration department**
   - Commit the **Web Offers Rollout** (WORP) project changes
   - (Optionally, view audit trail information for Web Offers Rollout Project)

The rest of this section contains the following topics:

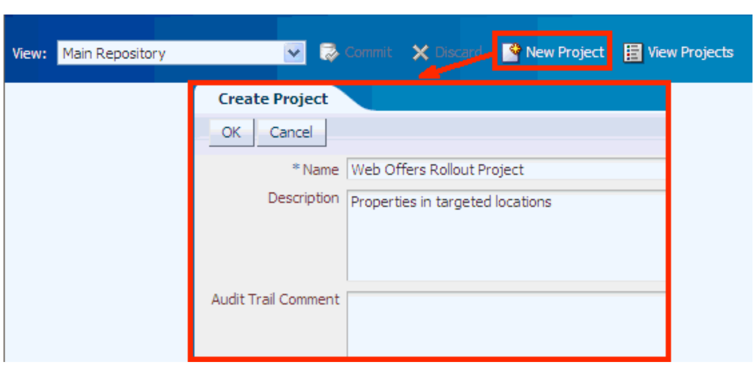
- Section 2.4.1, "Project Setup"
- Section 2.4.2, "Create Campaign Showcase Properties"
- Section 2.4.3, "Create Offer Regional Offers"
- Section 2.4.4, "Create Creative West Coast Properties"
- Section 2.4.5, "Create Slot Type 300x600 and Update West Coast Properties"
- Section 2.4.6, "Approve the Campaign Showcase Properties"
- Section 2.4.7, "Commit the Project"

2.4.1 Project Setup

To set up the project, a ZXS_Administration department user (for example, clmadmin) logs into RTD for Marketing Optimization, and then performs the following steps:

1. Click New Project.

   Enter the Name and optionally a Description for the project.



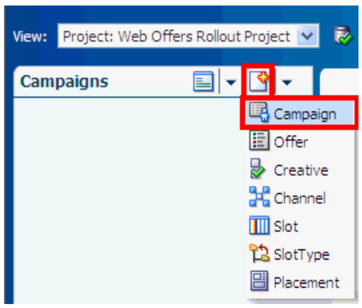
2. Click OK.

   The View box shows the new active project, which also appears in the View Projects tab.

2.4.2 Create Campaign Showcase Properties

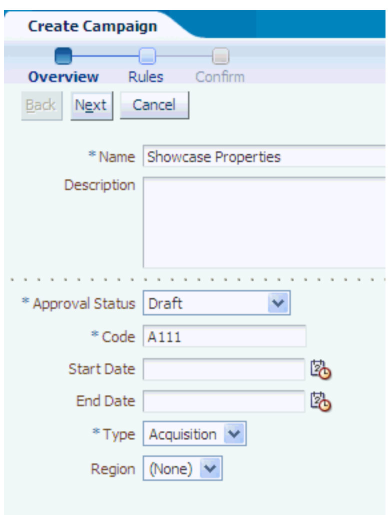
To create the Showcase Properties campaign, a ZXS_Marketing department user (for example, clmadmin1) logs into RTD for Marketing Optimization, and then performs the following steps:

1. For the View, select the project Web Offers Rollout Project.
2. Click the Create icon, and select Campaign.



Stage 1: Overview

3. In the Overview screen of the Create Campaign tab, enter the campaign details for the Showcase Properties campaign, selecting Draft for the Approval Status.



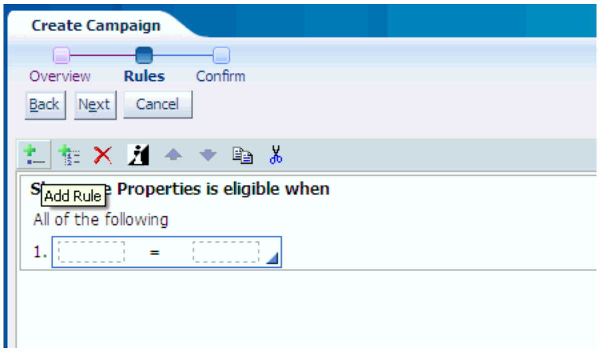
4. Click Next.

   Stage 2: Rules

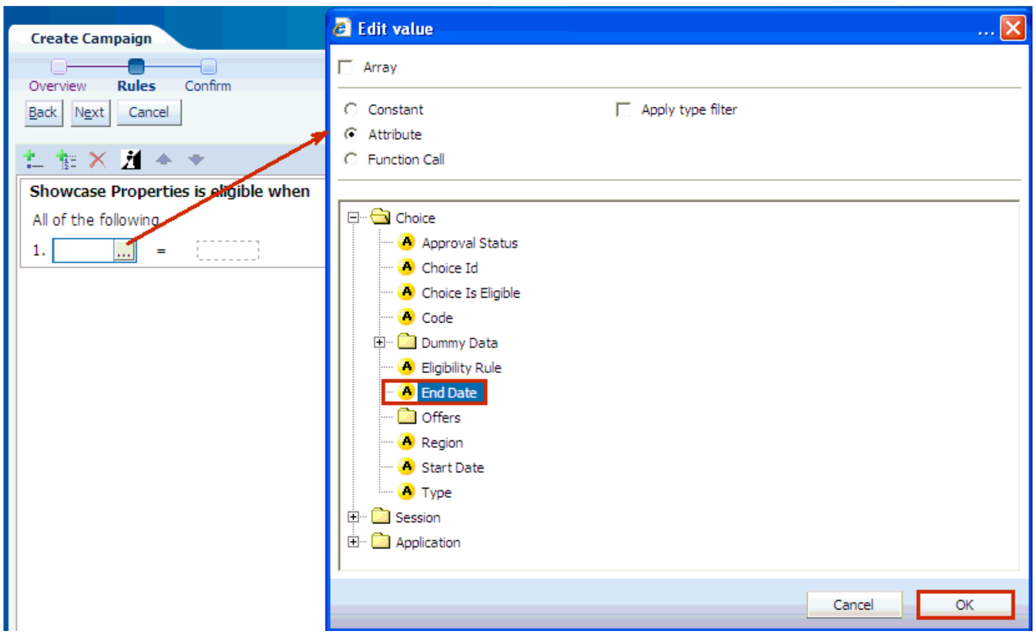
   The Rules screen appears, displaying the Rule Editor.

   In this screen, set up the rule that the campaign End Date is to be 1/1/2012, as follows:

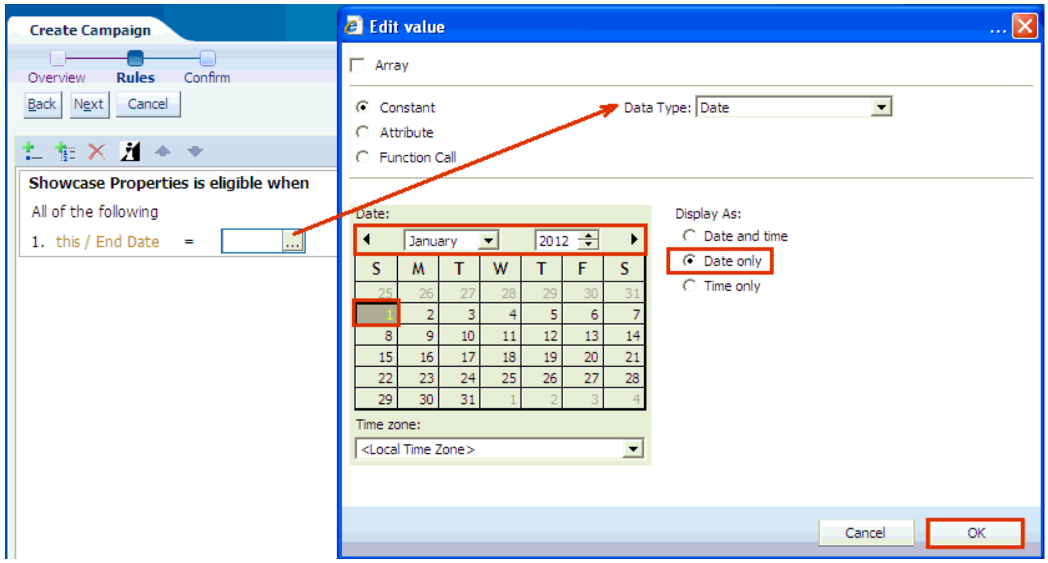
5. Click the Add Rule (leftmost) icon in the Rules Editor toolbar.



6. Click the ... button in the first box, then select Attribute, End Date, and click OK.

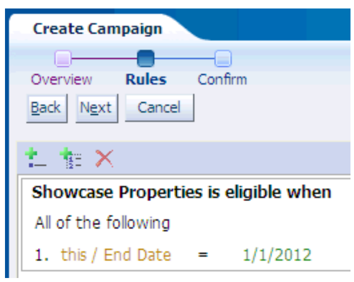


7. Click the ... button in the second box.
8. Select Constant, then Data Type = Date.
9. Select January 1, 2012 in the Date window.
10. For Display As, select Date only.



11. Click OK.

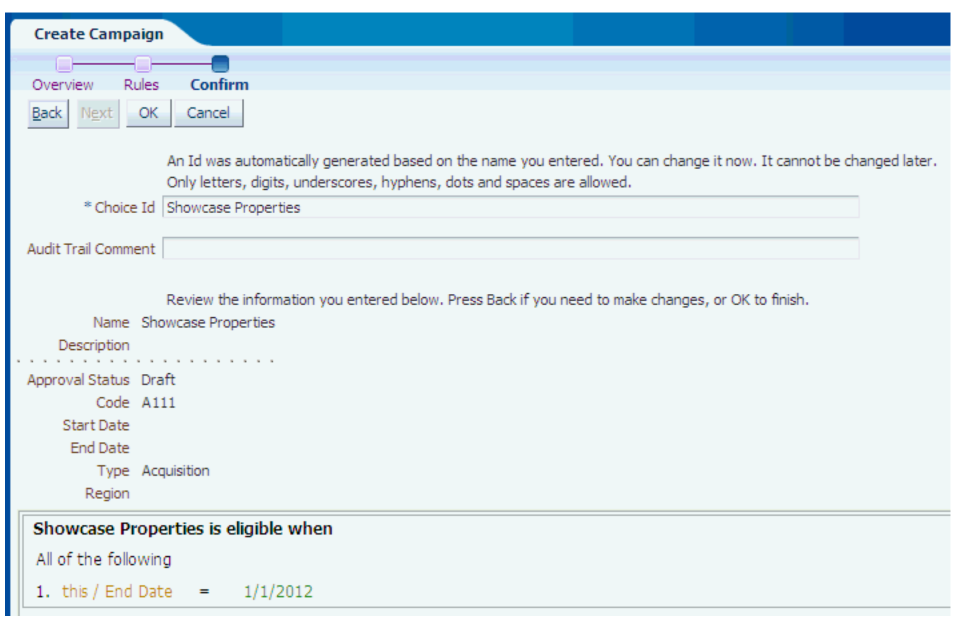
    The full condition appears in the Rule Editor.



12. Click Next.

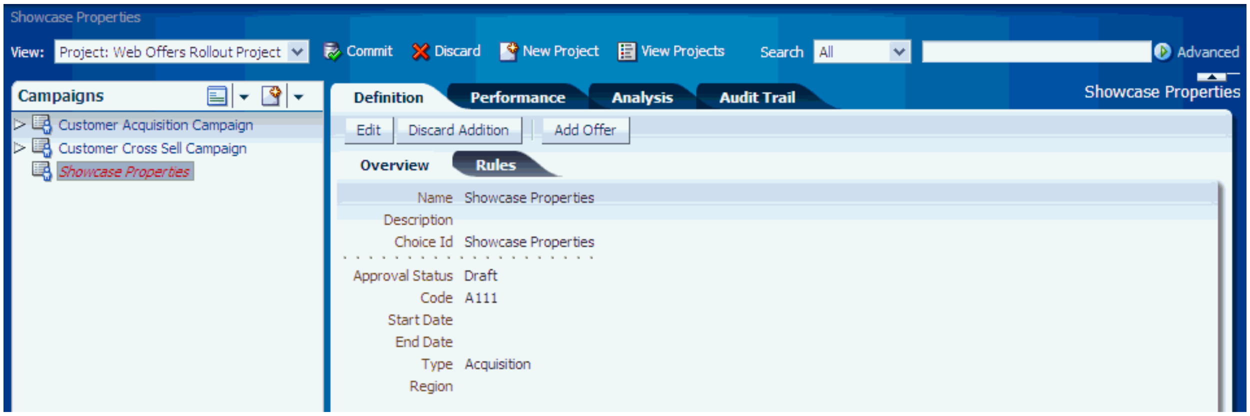
    Stage 3: Confirm

    The Confirm screen appears.



13. Click OK.

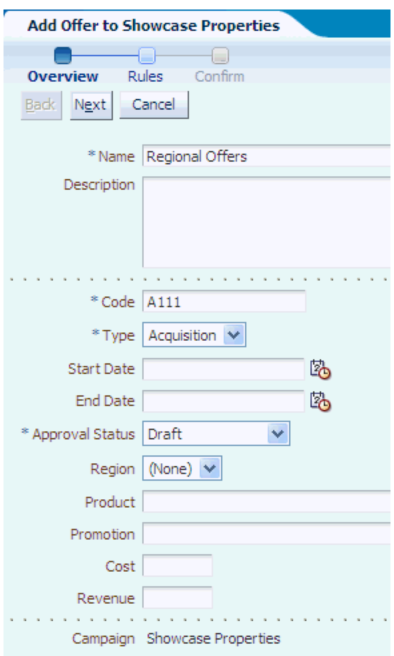
    The newly-created campaign Showcase Properties appears in the left-hand perspective panel, in red italics. The main body of the screen shows the campaign details.



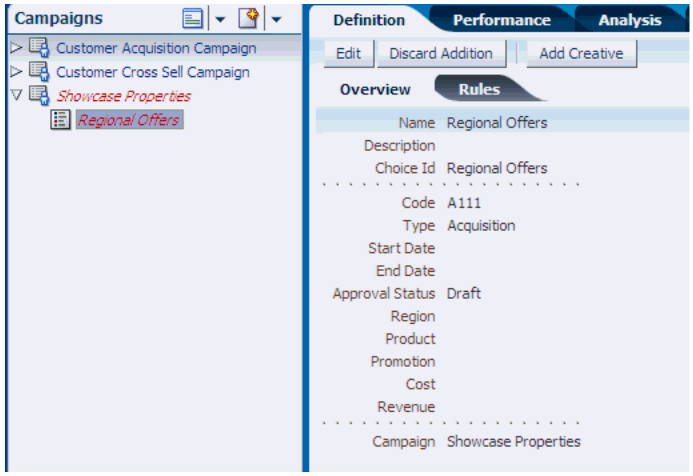
2.4.3 Create Offer Regional Offers

To create the offer Regional Offers, the ZXS_Marketing department user continues by performing the following steps:

1. Click Add Offer.
2. Enter details for the Offer Regional Offers, setting the Approval Status to Draft.



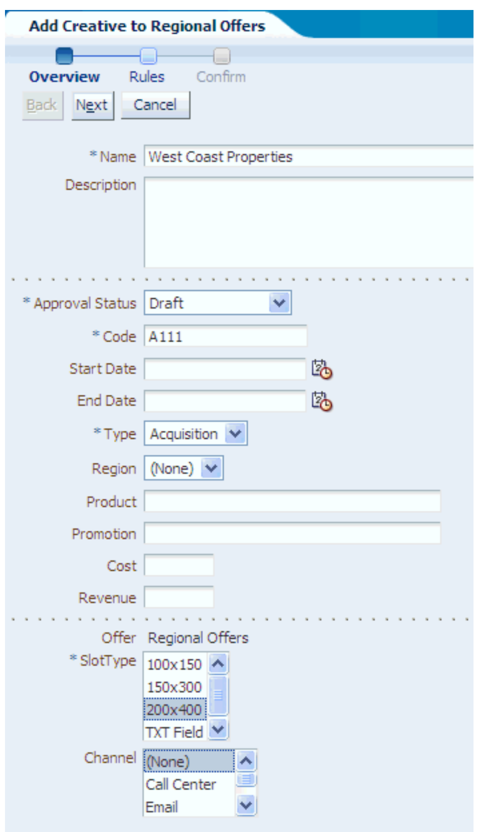
3. Click Next twice, then OK, to complete creating the Offer Regional Offers.



2.4.4 Create Creative West Coast Properties

To create the West Coast Properties creative, the ZXS_Marketing department user continues by performing the following steps:

1. Click Add Creative.
2. Enter details for the Creative West Coast Properties, setting the Approval Status to Draft, and selecting 200x400 for the SlotType.



3. Click Next twice, then OK, to complete creating the Creative West Coast Properties.

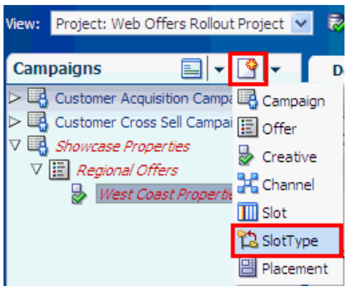
2.4.5 Create Slot Type 300x600 and Update West Coast Properties

To create a new slot type and update the West Coast Properties creative, a ZXS_Display_Control department user (for example, clmauthor) logs into RTD for Marketing Optimization, and then performs the following steps:

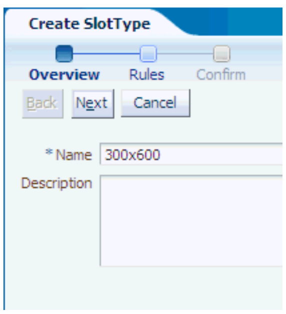
1. For the View, select the project Web Offers Rollout Project.

   Create Slot Type 300x600

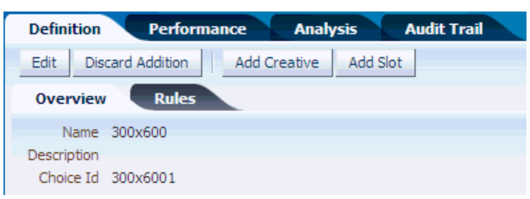
2. Click the Create icon, and select SlotType.



3. Enter 300x600 for the Slot Type Name.

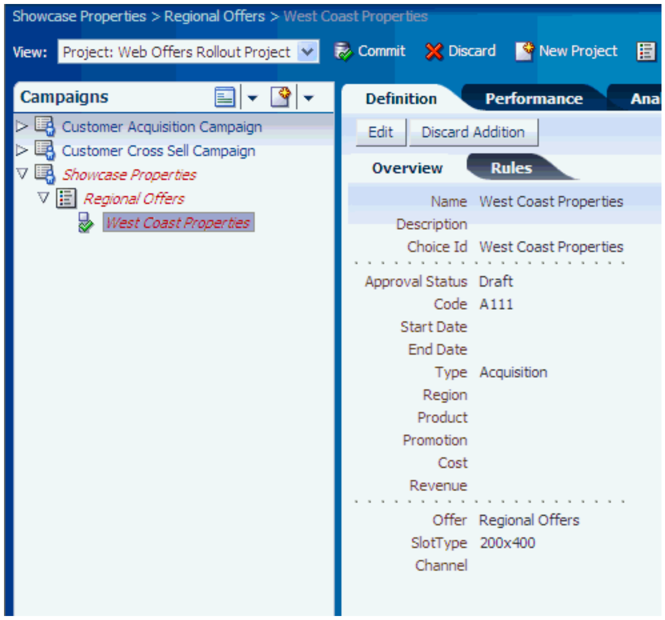


4. Click Next twice, then OK, to complete creating the Slot Type 300x600.

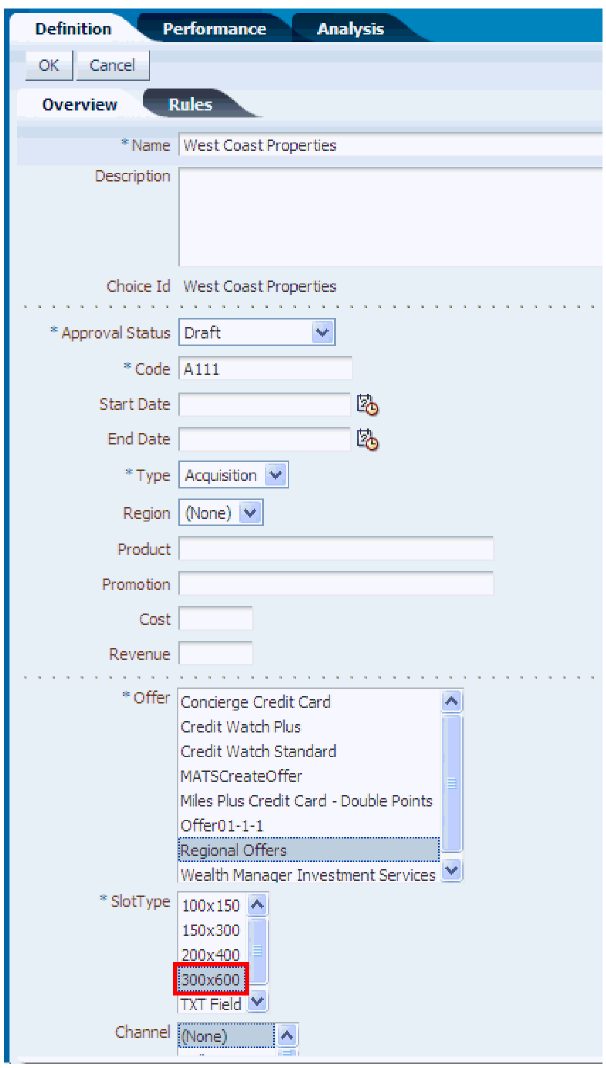


   Change Slot Type of West Coast Properties to 300x600

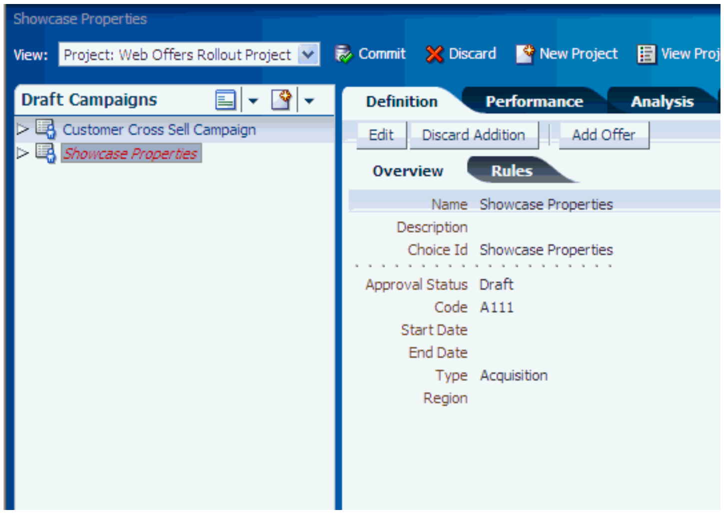
5. To change the slot type of the West Coast Properties choice, first click the West Coast Properties choice in the left-hand perspective panel.



6. Click Edit, then select 300x600 for the SlotType.



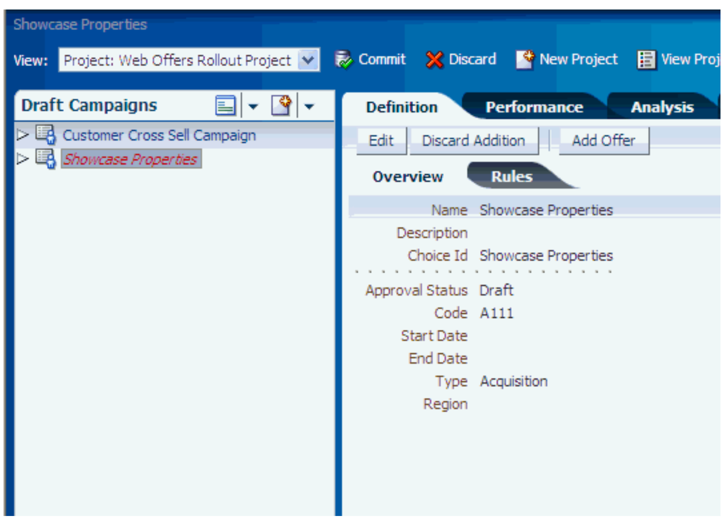
7. Click OK.



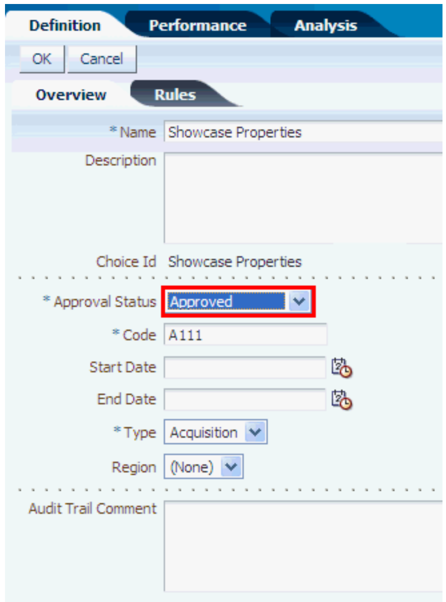
2.4.6 Approve the Campaign Showcase Properties

To approve the Showcase Properties campaign, a ZXS_Approvals department user (for example, clmauthor2) logs into RTD for Marketing Optimization, and then performs the following steps:

1. For the View, select the project Web Offers Rollout Project.
2. For the perspective, select Draft Campaigns.



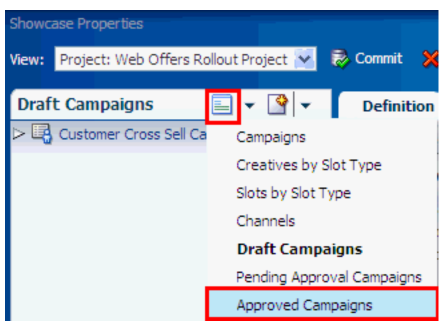
3. Click Edit, then change the Approval Status to Approved.



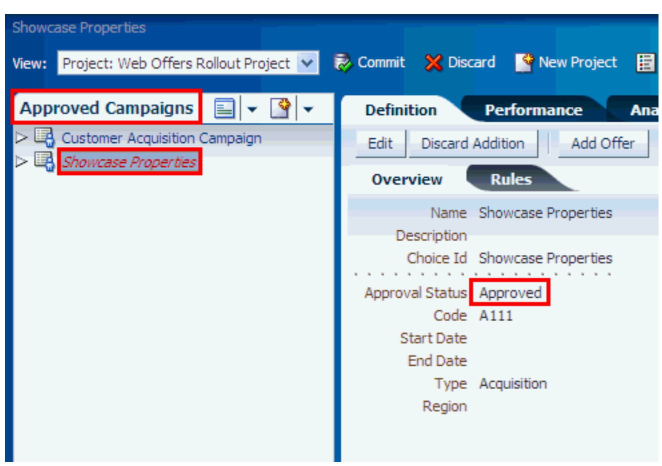
4. Click OK.

   The Showcase Properties choice now does *not* appear in the Draft Campaigns perspective panel.

5. To check that it does appear in the Approved Campaigns perspective panel, select the Perspectives icon, then Approved Campaigns.



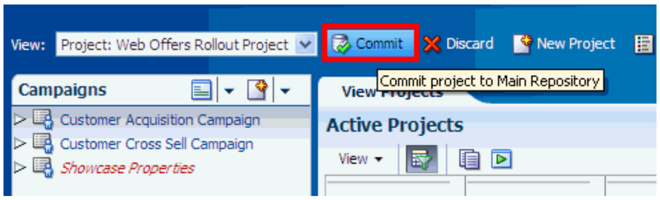
The Showcase Properties choice now appears in the Approved Campaigns perspective panel, with the choice details confirming that the Approval Status is Approved.



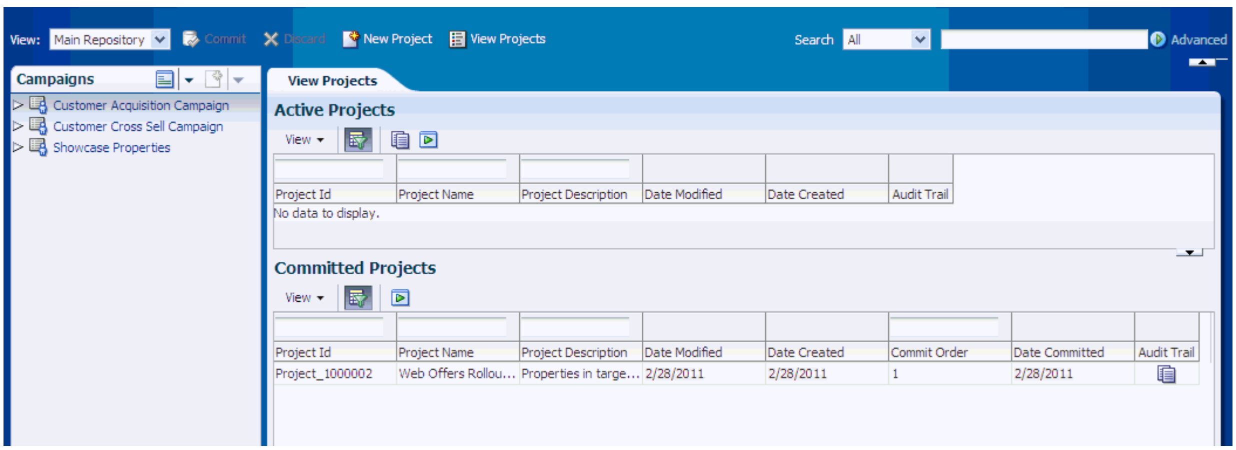
2.4.7 Commit the Project

To commit the project, a ZXS_Administration department user (for example, clmadmin) logs into RTD for Marketing Optimization, and then performs the following steps:

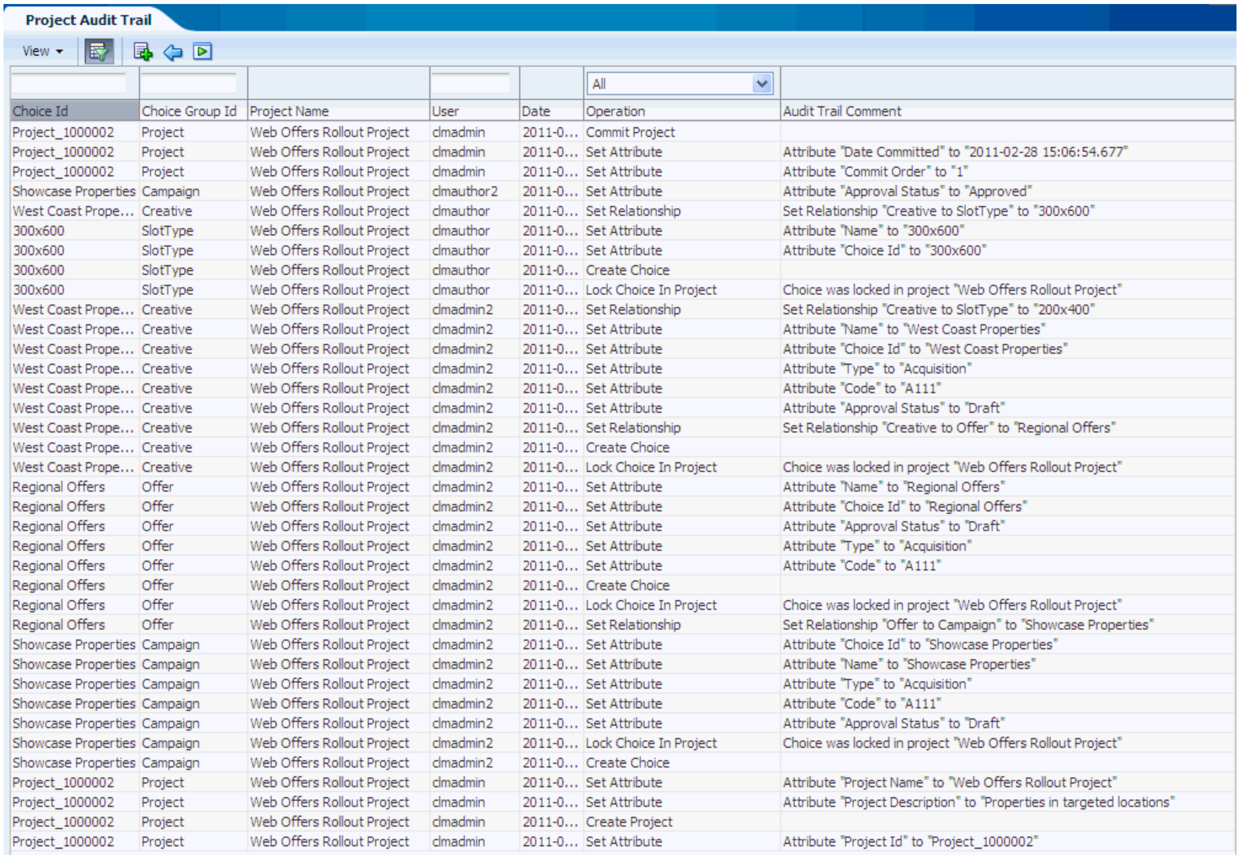
1. For the View, select the project Web Offers Rollout Project, then click Commit.



The project is committed to the Main Repository, the View changes to Main Repository, and the newly-committed project appears in the Committed Projects area of the View Projects tab.



2. To see a history of all the operations performed in Web Offers Rollout Project, click the Audit Trail icon for the project.



Project Audit Trail

View ▾

Choice Id	Choice Group Id	Project Name	User	Date	Operation	Audit Trail Comment
					All	
Project_1000002	Project	Web Offers Rollout Project	clmadmin	2011-0...	Commit Project	
Project_1000002	Project	Web Offers Rollout Project	clmadmin	2011-0...	Set Attribute	Attribute "Date Committed" to "2011-02-28 15:06:54.677"
Project_1000002	Project	Web Offers Rollout Project	clmadmin	2011-0...	Set Attribute	Attribute "Commit Order" to "1"
Showcase Properties	Campaign	Web Offers Rollout Project	clmauthor2	2011-0...	Set Attribute	Attribute "Approval Status" to "Approved"
West Coast Prope...	Creative	Web Offers Rollout Project	clmauthor	2011-0...	Set Relationship	Set Relationship "Creative to SlotType" to "300x600"
300x600	SlotType	Web Offers Rollout Project	clmauthor	2011-0...	Set Attribute	Attribute "Name" to "300x600"
300x600	SlotType	Web Offers Rollout Project	clmauthor	2011-0...	Set Attribute	Attribute "Choice Id" to "300x600"
300x600	SlotType	Web Offers Rollout Project	clmauthor	2011-0...	Create Choice	
300x600	SlotType	Web Offers Rollout Project	clmauthor	2011-0...	Lock Choice In Project	Choice was locked in project "Web Offers Rollout Project"
West Coast Prope...	Creative	Web Offers Rollout Project	clmadmin2	2011-0...	Set Relationship	Set Relationship "Creative to SlotType" to "200x400"
West Coast Prope...	Creative	Web Offers Rollout Project	clmadmin2	2011-0...	Set Attribute	Attribute "Name" to "West Coast Properties"
West Coast Prope...	Creative	Web Offers Rollout Project	clmadmin2	2011-0...	Set Attribute	Attribute "Choice Id" to "West Coast Properties"
West Coast Prope...	Creative	Web Offers Rollout Project	clmadmin2	2011-0...	Set Attribute	Attribute "Type" to "Acquisition"
West Coast Prope...	Creative	Web Offers Rollout Project	clmadmin2	2011-0...	Set Attribute	Attribute "Code" to "A111"
West Coast Prope...	Creative	Web Offers Rollout Project	clmadmin2	2011-0...	Set Attribute	Attribute "Approval Status" to "Draft"
West Coast Prope...	Creative	Web Offers Rollout Project	clmadmin2	2011-0...	Set Relationship	Set Relationship "Creative to Offer" to "Regional Offers"
West Coast Prope...	Creative	Web Offers Rollout Project	clmadmin2	2011-0...	Create Choice	
West Coast Prope...	Creative	Web Offers Rollout Project	clmadmin2	2011-0...	Lock Choice In Project	Choice was locked in project "Web Offers Rollout Project"
Regional Offers	Offer	Web Offers Rollout Project	clmadmin2	2011-0...	Set Attribute	Attribute "Name" to "Regional Offers"
Regional Offers	Offer	Web Offers Rollout Project	clmadmin2	2011-0...	Set Attribute	Attribute "Choice Id" to "Regional Offers"
Regional Offers	Offer	Web Offers Rollout Project	clmadmin2	2011-0...	Set Attribute	Attribute "Approval Status" to "Draft"
Regional Offers	Offer	Web Offers Rollout Project	clmadmin2	2011-0...	Set Attribute	Attribute "Type" to "Acquisition"
Regional Offers	Offer	Web Offers Rollout Project	clmadmin2	2011-0...	Set Attribute	Attribute "Code" to "A111"
Regional Offers	Offer	Web Offers Rollout Project	clmadmin2	2011-0...	Create Choice	
Regional Offers	Offer	Web Offers Rollout Project	clmadmin2	2011-0...	Lock Choice In Project	Choice was locked in project "Web Offers Rollout Project"
Regional Offers	Offer	Web Offers Rollout Project	clmadmin2	2011-0...	Set Relationship	Set Relationship "Offer to Campaign" to "Showcase Properties"
Showcase Properties	Campaign	Web Offers Rollout Project	clmadmin2	2011-0...	Set Attribute	Attribute "Choice Id" to "Showcase Properties"
Showcase Properties	Campaign	Web Offers Rollout Project	clmadmin2	2011-0...	Set Attribute	Attribute "Name" to "Showcase Properties"
Showcase Properties	Campaign	Web Offers Rollout Project	clmadmin2	2011-0...	Set Attribute	Attribute "Type" to "Acquisition"
Showcase Properties	Campaign	Web Offers Rollout Project	clmadmin2	2011-0...	Set Attribute	Attribute "Code" to "A111"
Showcase Properties	Campaign	Web Offers Rollout Project	clmadmin2	2011-0...	Set Attribute	Attribute "Approval Status" to "Draft"
Showcase Properties	Campaign	Web Offers Rollout Project	clmadmin2	2011-0...	Lock Choice In Project	Choice was locked in project "Web Offers Rollout Project"
Showcase Properties	Campaign	Web Offers Rollout Project	clmadmin2	2011-0...	Create Choice	
Project_1000002	Project	Web Offers Rollout Project	clmadmin	2011-0...	Set Attribute	Attribute "Project Name" to "Web Offers Rollout Project"
Project_1000002	Project	Web Offers Rollout Project	clmadmin	2011-0...	Set Attribute	Attribute "Project Description" to "Properties in targeted locations"
Project_1000002	Project	Web Offers Rollout Project	clmadmin	2011-0...	Create Project	
Project_1000002	Project	Web Offers Rollout Project	clmadmin	2011-0...	Set Attribute	Attribute "Project Id" to "Project_1000002"

The Audit Trail for the project displays which operations were performed on which choice, and by which user.

A

Decision Manager User Interface Reference

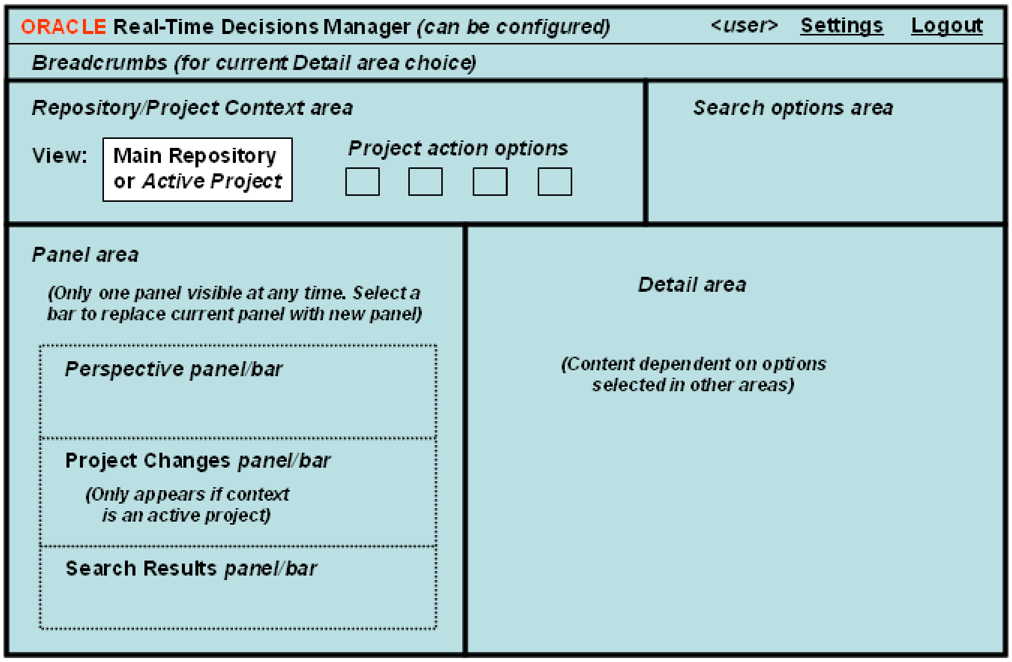
This appendix contains reference information for the main Decision Manager user interface screens and screen areas.

This appendix contains the following topics:

A.1 Decision Manager User Interface Schematic

Figure A–1 shows a general schematic for the Decision Manager user interface screen areas, after login. An annotated example of a Decision Manager screen, showing the details for a choice, appears in Section A.1.1.

Figure A–1 Schematic of the Decision Manager User Interface Screen Areas

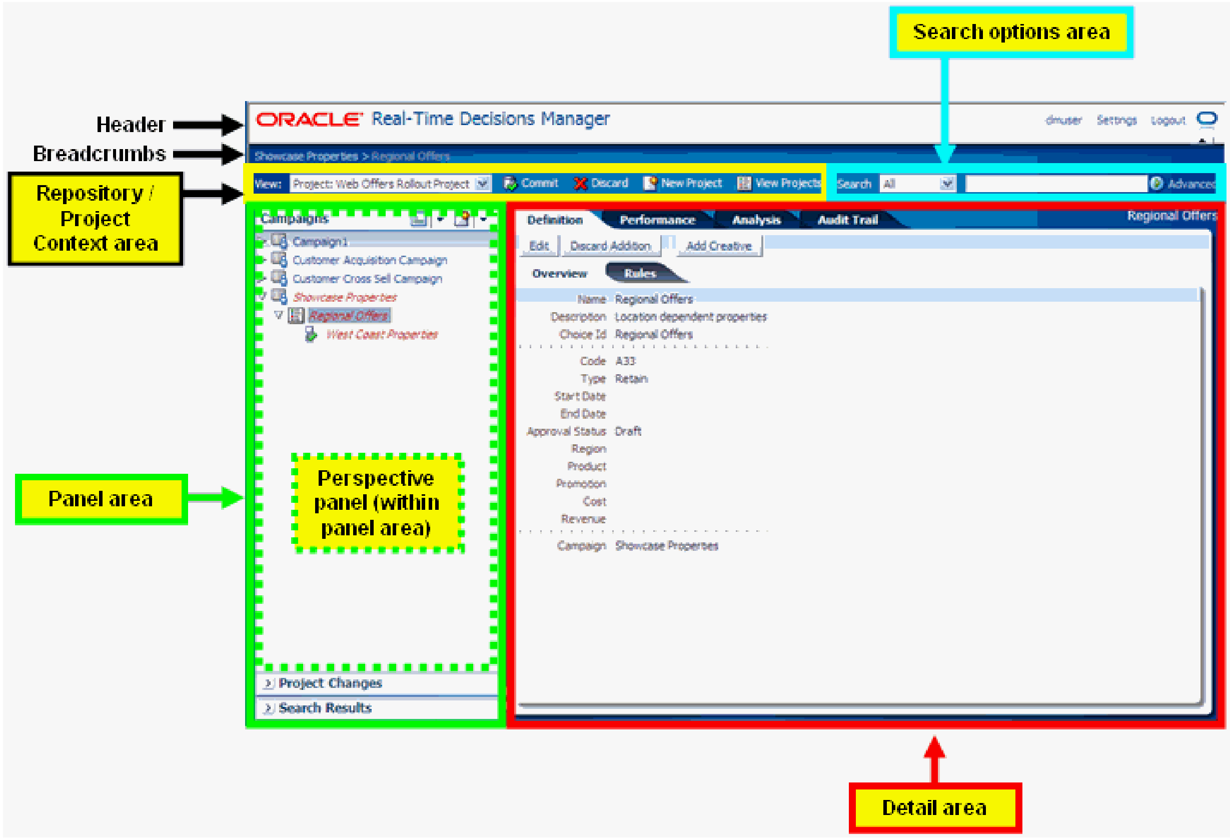


While the relative position of each of the screens areas remains constant in a Decision Manager user session, the content of some screen areas depends on the operation being performed. Details of each of the screens areas, and how they are affected by user operations, appear later in this appendix.

A.1.1 Example of Decision Manager Screen

The Decision Manager screen example, Figure A–2, shows the details for a choice, Regional Offers, with the main screen areas annotated.

Figure A–2 Annotated Example of Decision Manager Screen



Note that the annotations indicate the main generic use of the areas, which in general do not have specific fixed headings.

A.2 Header Area

The header area consists of two lines:

- Header line
- Breadcrumbs line

Header Line

- **Application Name Banner** (can be configured for individual applications)
- **User name**

  Name entered on the Login screen
- **Settings**

  Available only for users with specific administrative permissions.

  One option: Clear RTD cache.

  If you change any type restrictions in the associated Inline Service that are also used in the Oracle RTD Decision Management application, new changes will not appear until the Oracle RTD cache is cleared.
- **Logout**

Breadcrumbs Line

Breadcrumbs are only visible if choice details appear in the detail area, such as when the choice is being viewed or edited.

The parents shown in the breadcrumbs are based on the perspective and the current choice in the Perspective Panel/Bar.

For instance, for a Creative:

- If the perspective is Campaigns, the breadcrumbs will show: *grandparent campaign name* > *parent offer name* > *creative name*
- If the perspective is Channels, the breadcrumbs will show *creative name* only

The parents are based on the current project (the parents can be different in the Main Repository), and clicking a parent displays the parent in the Detail area based on the current project.

A.3 Repository/Project Context Area

The Repository/Project context area has the following components:

- **View**

  This box specifies the context in which the user wants to operate - either the Main Repository or an active project.

  The Main Repository is the database containing the dynamic choices that may be accessed by and used for processing Oracle RTD decisions in customer applications. This set of choices is updated each time a project is committed.

  A Main Repository context is mainly for viewing choices, viewing projects, and, if required, adding audit trail comments. You cannot create, edit, nor delete choices in a Main Repository context. With the correct permission, you can create a project, at which point, the context will automatically become that new project context.

  In a project context, depending on your permissions, you can create, edit, and delete choices. All users can add audit trail comments.

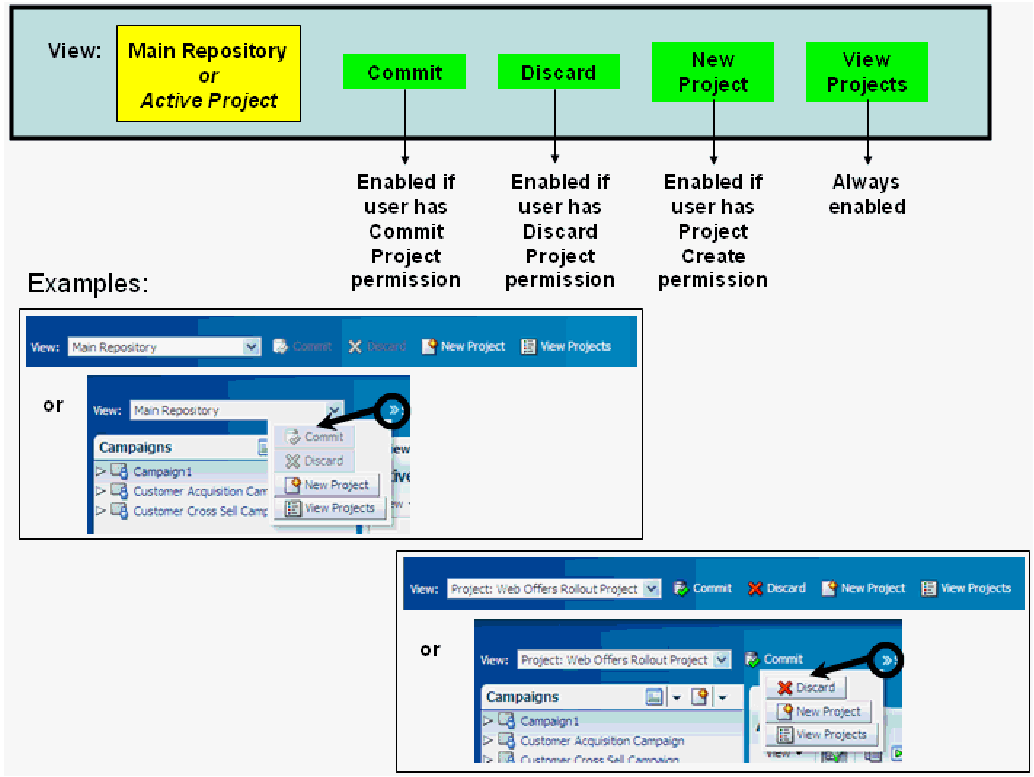
- Project-related operations

  The four possible project-related operations are: Commit, Discard, New Project, and View Projects. The operations are enabled according to the context that is selected and the permissions that you have. See Figure A–3 for an overview of the cases where each operation is enabled.

  If the Decision Manager user interface screen is wide enough, the operations appear as icons with accompanying text. If the screen width is reduced, some or all of the icons and text may not appear; instead, you can click the chevron icon at the right end of the Repository/Project context area (just before the Search area) to expose a dropdown list of the operations that did not appear as icons. Figure A–3 shows examples of both "fullscreen" and "reduced screen" versions of the context area, both for a Repository context and a Project context.

  As **Commit** and **Discard** denote actions to be performed on a specific project, **Commit** and **Discard** are only enabled when the context selected in the **View** box is an active project.

Figure A–3 Repository/Project Context Area Elements



A.4 Panel Area

The panel area displays information about the current perspective choice, the changes in a project (if the current context is an active project), or the results of the most recent search.

Details of only one option appear in a panel, the other options appear as bar entries. You can toggle between the options to select which details to show in panel form.

Typically, most of the time in most Decision Manager user sessions, the panel area displays the choices in the current perspective, and the Project Changes and Search Results options appear as bars at the foot of the panel area.

This section contains the following topics:

- Section A.4.1, "Perspective Panel/Bar"
- Section A.4.2, "Project Changes Panel/Bar"
- Section A.4.3, "Search Results Panel/Bar"

A.4.1 Perspective Panel/Bar

Perspectives allow business users to view a subset of the choices and their relationships defined for the Decision Management application.

As an example, a marketing organization could have campaigns that consist of several offers, and each offer could have several creatives or offerings. For a Decision Management application, a Campaigns perspective could be defined that consists of the three types of choice, Campaign, Offer, Creative, as well as the relationships between the choice types.

The Perspective Panel body displays actual choices of each choice type, initially showing all the actual choices of the "top" choice type of the perspective - following the Campaigns perspective example, these are all the Campaign choices.

In the Perspective Panel body, choices can be expanded to display "lower-level" related choices, and, apart from "lowest-level" choices, collapsed as well. These options are available through right-clicking the icon immediately to the left of the choice.

Figure A–4 shows the general schematic for a perspective panel, with examples of two perspective panels, one for a Main Repository context, and one for an active project context.

The header for a Perspective panel is the perspective chosen from the **Perspectives list** icon. The default perspective is the first perspective in the **Perspectives list**.

When you want to create a choice for a choice group (which does not have to be in the current perspective), you can select your choice group from the **Choice creation list**.

To expand or collapse a choice, right-click the icon immediately to the left of the choice, and select your Expand or Collapse option from the list that appears.

Figure A–4 Perspective Panel Schematic and Examples

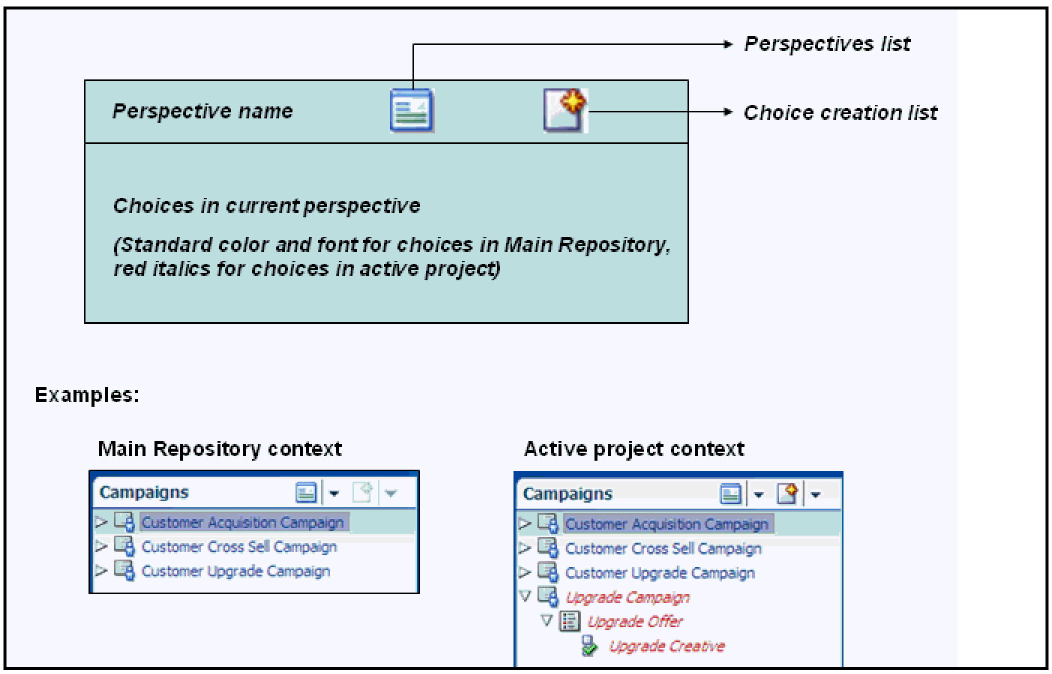
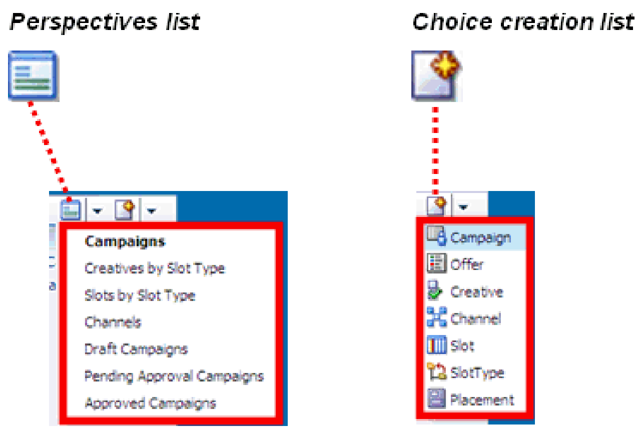


Figure A–5 shows examples of a Perspectives list and a Choice creation list.

Figure A–5 Examples of Perspectives and Choice creation lists



A.4.2 Project Changes Panel/Bar

The Project Changes panel, when selected to be shown, displays a list of the changes in the current project.

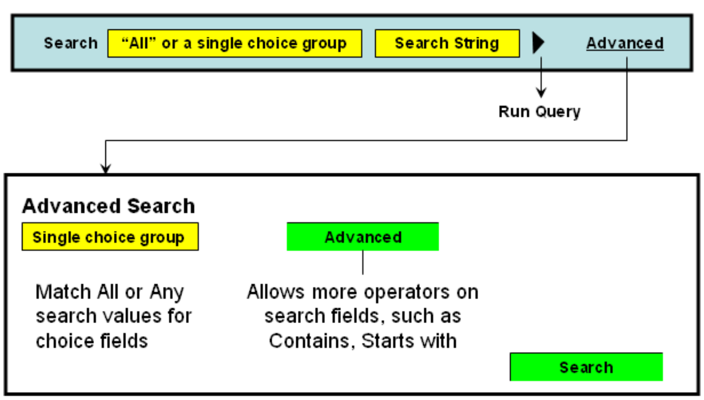
A.4.3 Search Results Panel/Bar

The Search Results panel, when selected to be shown, displays the results of the most recent search.

A.5 Search Options Area

The Search options enable you to perform simple and advanced searches, as summarized in Figure A–6.

Figure A–6 Search Options Area Schematic



Results of a search appear in the Search Results panel which either opens up or refreshes in the panel area. The Detail area and the breadcrumbs are not altered by the search.

Simple Searches

Simple searches are for strings that occur in choice names or choice descriptions (if your application is in the special mode "owership=on", then the search will also search on choice owner).

The context that you are in affects the extent of the search. For Main Repository context, searches are in the Main Repository only. For active project context, searches are in the Main Repository and in the active project.

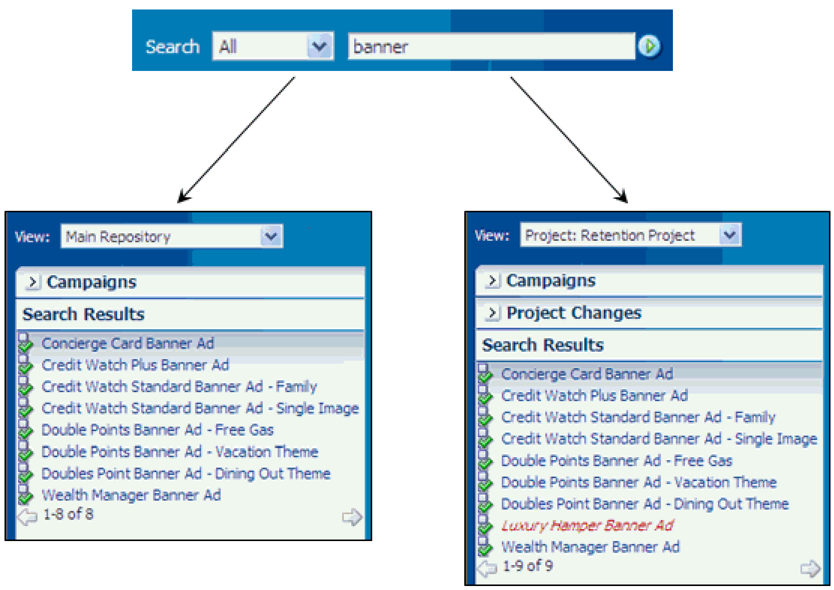
In the first search box, select "All" to select across all choice group types, or select a single choice group to restrict the search to choices of that particular choice group type.

Enter your search parameters in the second box ("%" denotes wildcard), then click the Run Query icon.

By default, any string entered in the second box without "%" is treated as a "contains" search. For example, a search string of "amp" searches for objects that contain the string "amp" in either the choice name or the choice description.

The results appear in the Search Results panel.

The following example shows the effect of two simple searches, one that is restricted to the Main Repository only, the other that is performed in the context of the active project Retention Project.



Advanced Searches

The context that you are in affects the extent of the search. For Main Repository context, searches are in the Main Repository only. For active project context, searches are in the Main Repository and in the active project.

Advanced searches enable you to search on any choice column value, and to include column conditions such as Starts with, Ends with, On or after (for date fields), Between, Does not contain.

Note: Advanced searches are always within a particular choice group type, that is, not across choice group types.

Click Advanced and select a choice group type.

There are two levels of Advanced search. At the first level, enter one or more advanced search parameters and values. To use the wider range of column conditions, click Advanced again, and enter one or more advanced search parameters and values.

When you enter more than one search condition, you can control whether the search should match All or Any (that is, at least one) of your search conditions.

After you click Search, the results appear in the Search Results panel in the Panel area.

Figure A–7 and Figure A–8 show examples of the two levels of Advanced Search for a Campaign search, and the extra options available for the Region field in the second level search.

Figure A–7 Example of First Level Advanced Search Screen

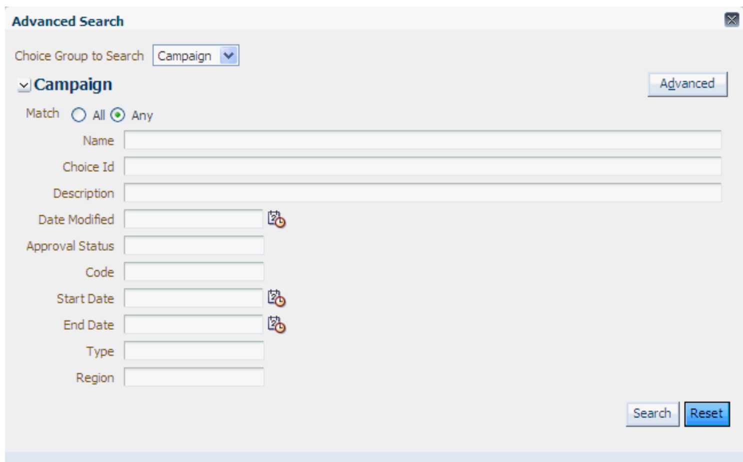


Figure A–8 Example of Second Level Advanced Search Screen

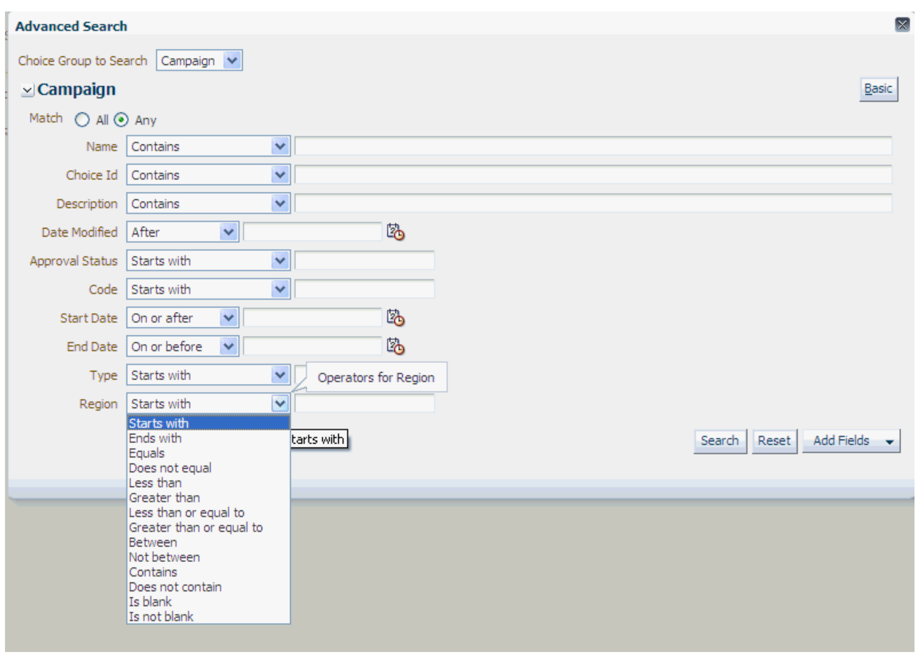
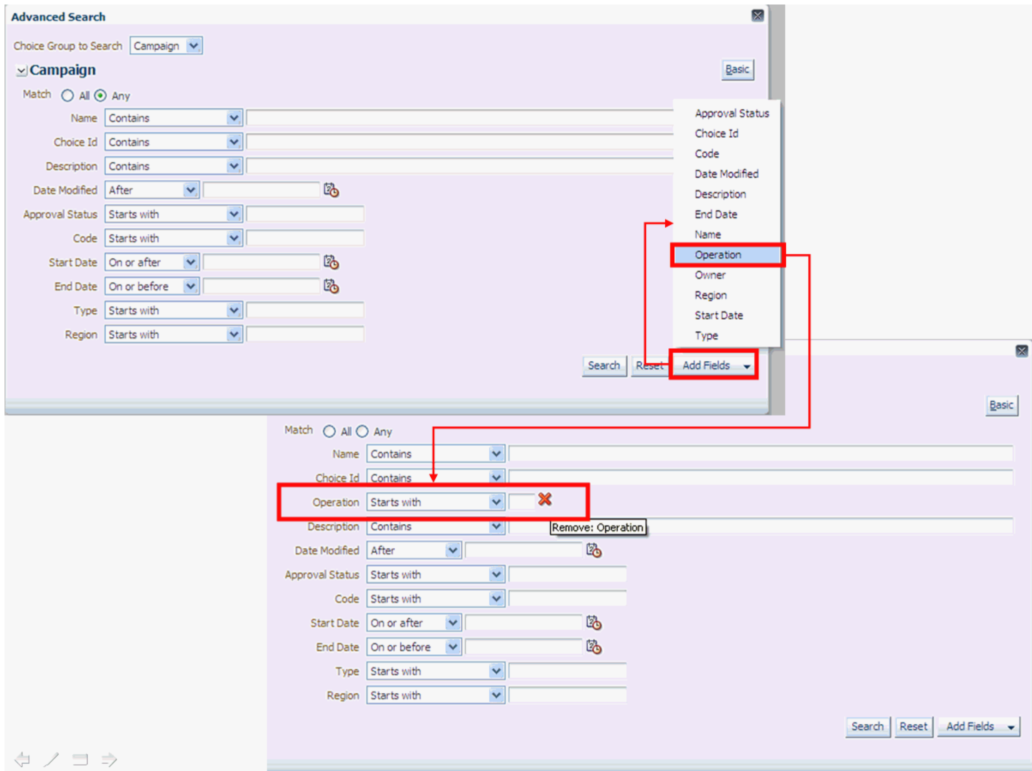


Figure A–9 shows an example of how you can add a field to the Advanced Search screen.

Figure A–9 Example of Adding a Search Field to an Advanced Search



A.6 Detail Area

The detail area is the main work area for a Decision Manager user session. Contents of the detail area depend on options selected in other areas.

The main categories that control the layout and operations in the detail area are:

- Create Project
- View Projects
- Create Choice
- Choice Details

A.7 Create Project

The Create Project tab enables you to create a new project. To create a project, you must have Create Project permission.

How to Access

Click **New Projects** from the Repository/Project context area.

Initial Display

The Create Project tab appears, with empty fields Name, Description, and Note.

What You Can Do

Enter a value for Name, and optionally Description, and Note.

Click OK.

Impact

After successful completion of the project creation, the new project automatically becomes the new context.

The Perspective panel, if open, displays the choices for the current perspective as they exist in the Main Repository. If the Perspective panel is not open, you can click the perspective bar to display the panel and the perspective choices.

A.8 View Projects

The View Projects tab enables you to view details of current active and previously-committed projects.

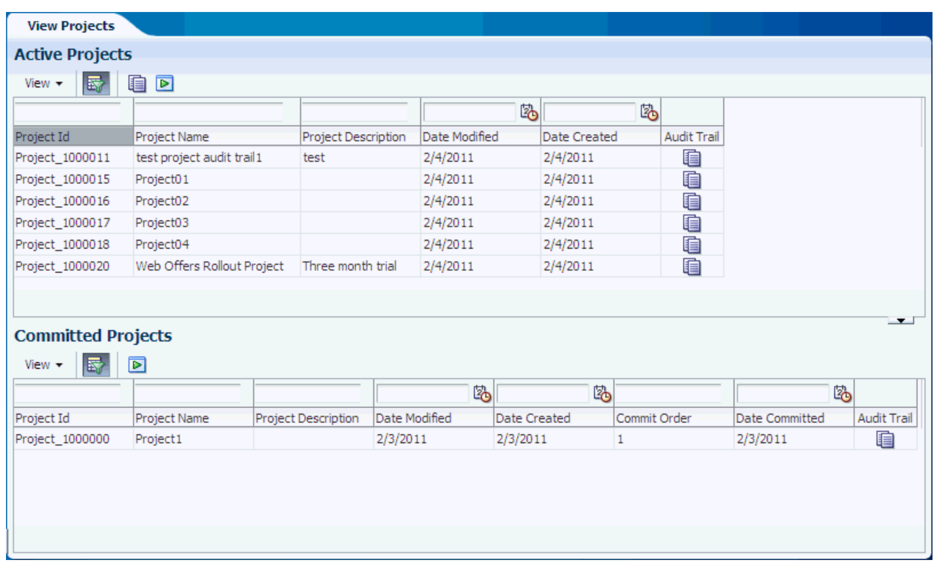
How to Access

The View Projects tab appears when you log on to Decision Manager.

Subsequently, you can access it by clicking View Projects from the Repository/Project context area.

Initial Display

The top and bottom areas of the View Projects tab display information and options for Active Projects and Committed Projects respectively, as in the following example:



What You Can Do

In both the Active Projects and Committed Projects areas, you can search on project fields and project create and modification dates. You can also view choice-level audit trail comments on active projects or on previously-committed projects.

More details about accessing project information appear in the sections that follow:

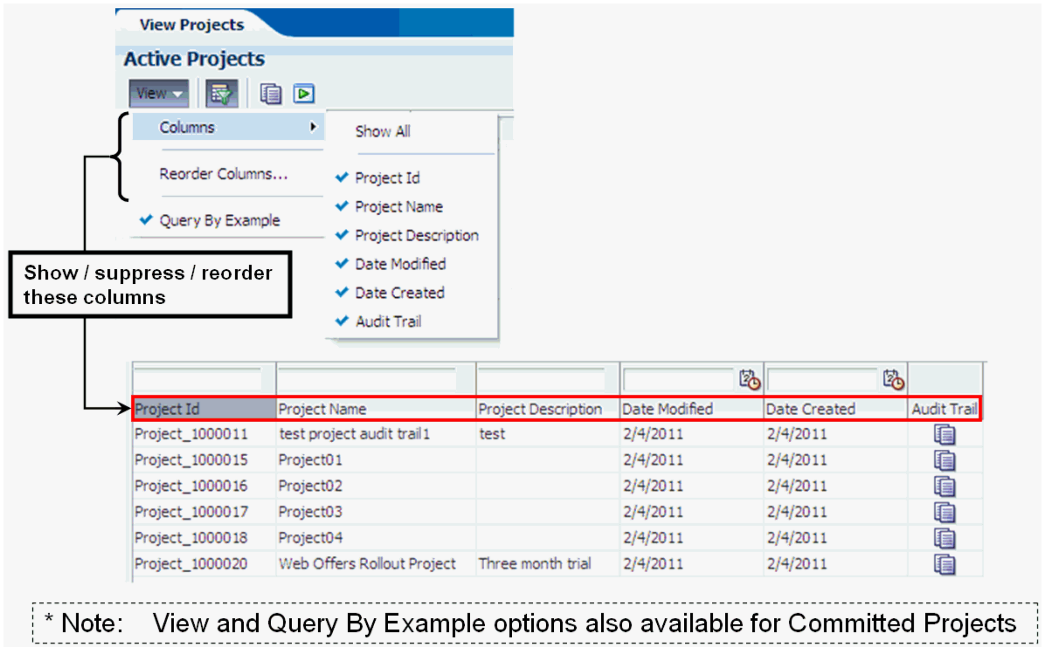
- Project Information Columns
- Project Information - View Main Repository Audit Trail

- Project Information - Query By Example

A.8.1 Project Information Columns

Figure A–10 shows how you can control the columns that you want to appear in the Active Projects or Committed Projects areas.

Figure A–10 Project Search Column Control



A.8.2 Project Information - View Main Repository Audit Trail

Figure A–11 shows the menu option to view choice-level audit trail comments in the Main Repository. This option is only available in the Active Projects menu.

Figure A–11 View Main Repository Audit Trail

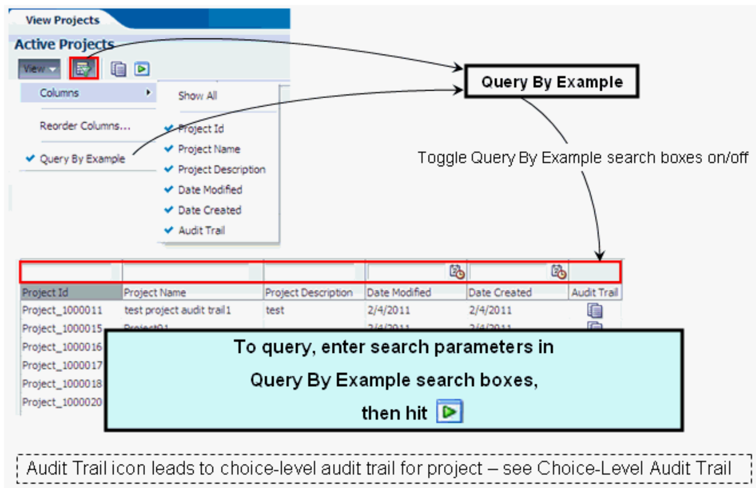
A.8.3 Project Information - Query By Example

Figure A–12 shows:

- How you query projects
- How you can toggle the project search boxes on and off

You can do this either from the View > Query By Example menu option or the Query By Example menu icon.

Figure A–12 Querying Projects



A.9 Create Choice

You can create choices for a choice group, if you have the necessary create permission. You must follow a train of process stages - Overview, Rules, then Confirm.

How to Access

To create a choice, in addition to having the right privilege, you must be in an active project context.

In the Perspective panel, click the Choice creation list icon, and select the choice group for which you want to create your choice.

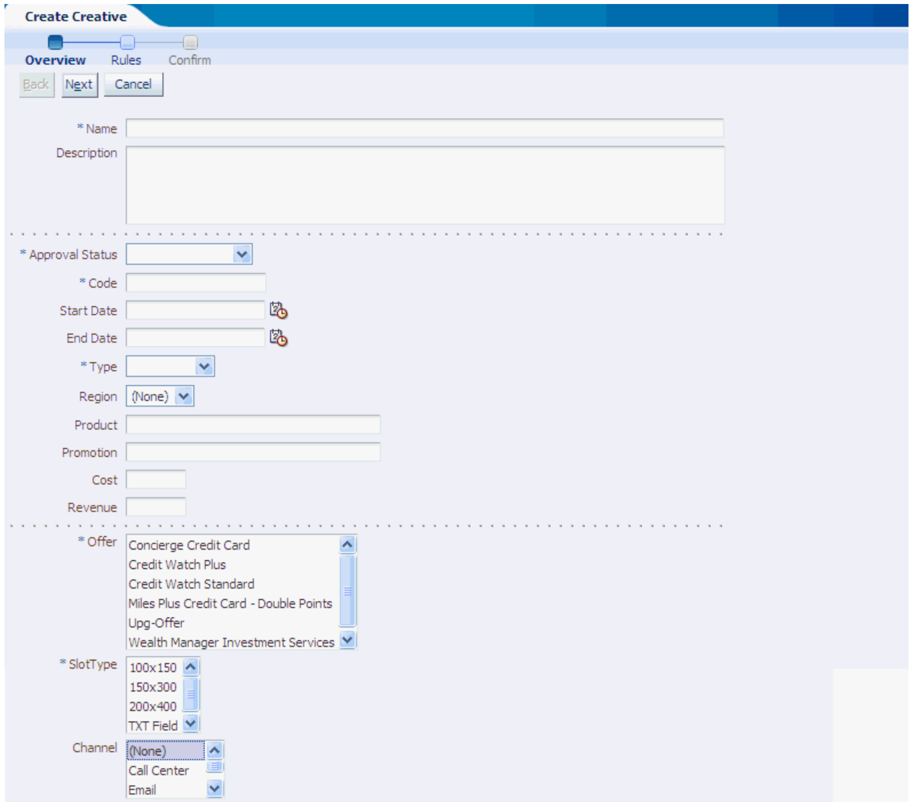
Note that you can select any choice group from the dropdown Choice creation list. Your selection may be in the same perspective as shown in the current perspective panel, but it does not have to be.

Initial Display

The initial display is a Create *selected_choice_group* tab, showing the first stage Overview dialog.

The fields in the Overview dialog for you to fill in or select depend on the choice group attributes and the choice groups related to your selected choice group.

For example, if you selected to create a new Creative from the Campaigns perspective, the detail area initially appears as follows:



Note: If your choice group is a child group in one or more relationships, the fields at the foot of the detail area represent the parent groups related to your choice group.

For each mandatory relationship, represented by a field marked with an asterisk, you must select a value.

What You Can Do

In the Overview dialog, enter or select values for all mandatory fields, and as many of the optional fields as you require.

Click Next to proceed to the Rules dialog.

For detailed information about entering rules, see Section 12.10, "Using Rule Editors" in *Oracle Real-Time Decisions Platform Developer's Guide*.

Optionally enter the rules for your choice in the Rule Editor frame that appears.

Click Next to proceed to the Confirm dialog, then click OK.

Impact

After successful completion of the choice creation, the new choice is added to the Perspective panel, appearing in red italics.

The Detail area displays the Choice Details for the newly-created choice.

Note: If the choice group for your newly-created choice is defined as a parent to other choice groups, the detail area shows extra Add *choice-group* buttons, to enable you to create choices in the associated child choice groups. For example, after creating an Offer, the Offer detail area displays an Add Creative button.

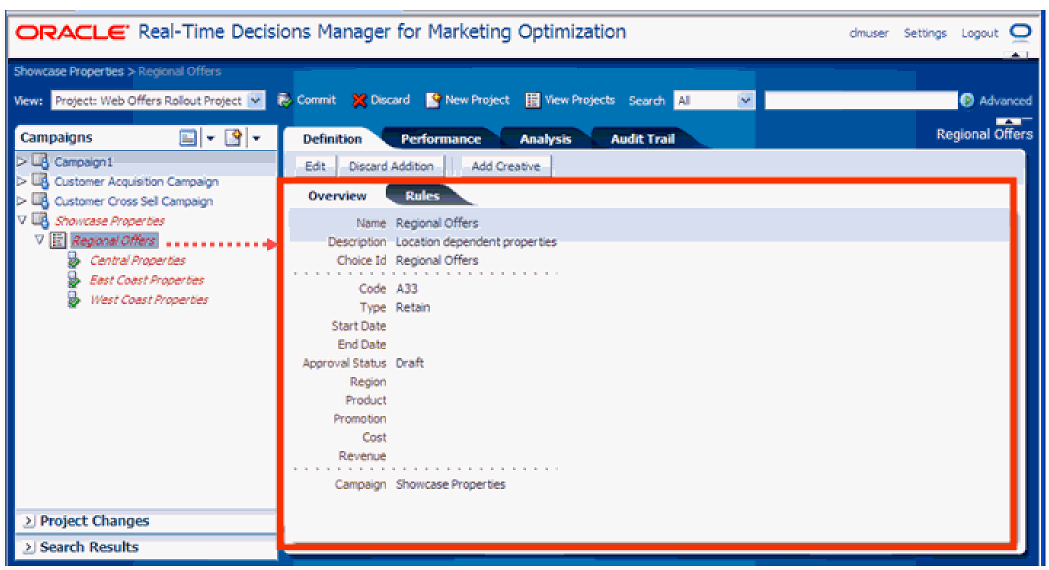
You do not have to create the related choices immediately, you can do so in any later edit session for your choice.

A.10 Choice Details

The Choice details layout of the Detail area is the standard layout for viewing, editing, or deleting an existing choice. The Choice details layout appears for the current choice in the Perspective panel.

The description of the Choice details layout in this section, while largely generic, will use the following Regional Offers choice detail area example as an illustrated reference.

Figure A–13 Choice Details Example



The Choice details layout consists of four tabs:

- Definition
- Performance
- Analysis
- Audit Trail

The Definition tab is where you can view the attributes, relationships, and rules for the current choice, and - in an active project context only - edit them. For more details, see Choice Details - Definition Tab.

In the Performance and Analysis tabs, you can access performance and analysis reports for the current choice. Details of these reports appear in the *Oracle Real-Time*

Decisions Decision Center User's Guide. You can access these reports in both Main Repository and active project contexts.

In the Audit Trail tab, in both Main Repository and active project context, you can view and create audit trail comments. For more details, see Section A.10.2, "Choice-Level Audit Trail."

The rest of this section contains the following topics:

- Section A.10.1, "Choice Details - Definition Tab"
- Section A.10.2, "Choice-Level Audit Trail"

A.10.1 Choice Details - Definition Tab

The Definition tab enables you to view and, if you have the necessary permission, edit and delete choice details. Editing and deletion can only be done in the context of an active project. You can edit attributes, relationships, and rules for the current choice.

> **Note:** All choice creations, edit, and delete operations made in a project are in effect pending changes to the Main Repository. They remain "in the project" and do not change the Main Repository until the project is successfully committed to the Main Repository.
>
> Consider each change in the project as an "intention to change" in the Main Repository, until the project is committed or discarded.

The options available to you depend on whether you have all the necessary permissions and the operation that you are trying to perform.

Assuming you have the necessary permissions, the options are made available through buttons that appear in the Definition tab in different situations, as follows:

- Choice created (and possibly edited further) in the project:
  - **Edit** button allows for further editing of the choice in the project.
  - **Discard Addition** button allows for removal of the choice from the project.
- Main Repository choice not locked in any project and not yet edited in the current project:
  - **Edit** button allows for editing of the Main Repository choice in the project.
  - **Delete** button allows for the (intended) deletion of the choice from the Main Repository.
- Main Repository choice already edited in the current project:
  - **Edit** button allows for editing of the Main Repository choice in the project.
  - **Discard Changes** button allows for the removal of the changes made to the choice in this project only.
  - **Delete** button allows for the (intended) deletion of the choice from the Main Repository.
- Main Repository choice already "deleted" in the current project (through a previous use of the Delete button on this choice in the project):
  - **Discard Deletion** button (visible only when deleted choice is selected in Project Changes panel) allows for undeletion of the choice in the project - the intention is to keep the choice in the Main Repository.

For illustrated examples of these situations, see the following sections:

- Section 2.2.6, "Creating Choices"
- Section 2.2.9, "Editing Choices"
- Section 2.2.10, "Deleting Choices from the Main Repository"

Adding Related Choices

If a choice can become the parent of another choice, as defined by the choice relationships, the Choice Details area displays extra "**Add**..." buttons to enable you to start the process of child choice creation from the Definition tab.

For example, Figure A–13 shows the Add Creative button in the Definition tab for the offer Regional Offers.

A.10.2 Choice-Level Audit Trail

You can access choice-level audit trail comments either when you are working on a project or a choice.

> **Note:** Regardless of whether you are in Main Repository or active project context, you can view, search, and add choice-level audit trail comments.

How to Access from the Projects View

When you click View Projects, you can access audit trail comments from both the Active Projects area and the Committed Projects area.

In the Active Projects area:

- In the top menu of the Active Projects area, you can click the View Main Repository Audit Trail icon
- In each Active Project row, you can click the Audit Trail icon

In the Committed Projects area:

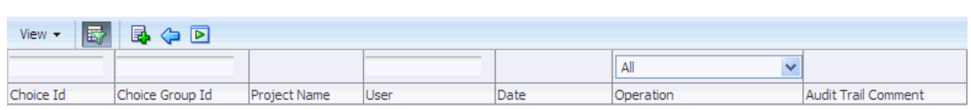
- In each Committed Project row, you can click the Audit Trail icon

How to Access from the Choice Details

When you are viewing the details for a choice, you can select the Audit Trail tab.

Initial Display

The general heading of the Audit Trail area has the following display:

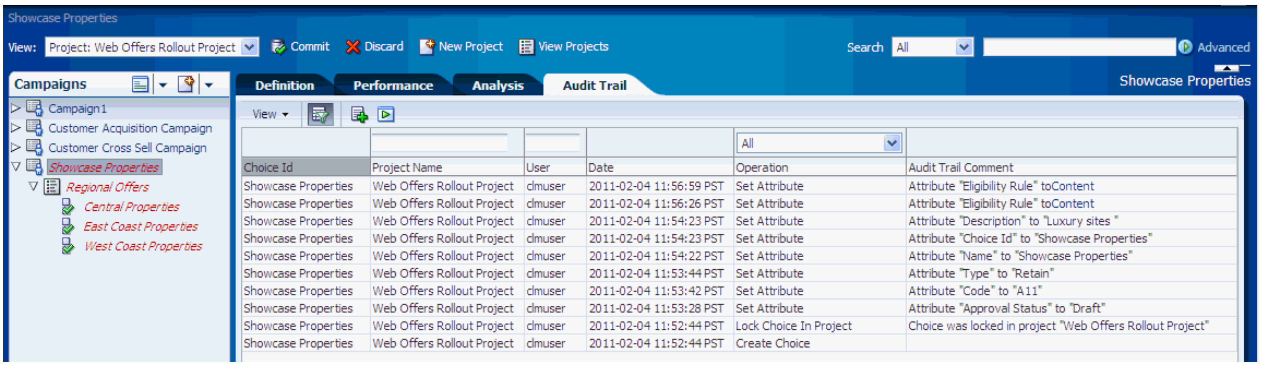


> **Note:** The Back (backwards arrow) icon is only visible if you access the Audit Trail area through View Projects.

When you access the Audit Trail area, a query is automatically performed, and a number of audit trail rows may appear under the column headings.

Figure A–14 shows an example of the audit trail rows for a campaign Showcase Properties.

Figure A–14 Choice Audit Trail Example



What You Can Do

The icons in the Audit Trail area enable you to:

- View, select, and reorder the search columns
- Add an Audit Trail Comment
- Go back to the previous display (visible only when accessed through View Projects)
- Execute (run) the query
- Toggle Query By Example

  Switching Query By Example off means suppressing the search boxes above the column headings.

Figure A–15 shows how you can control the columns that you want to appear in the Audit Trail area.

Figure A–15 Audit Trail Search Column Control

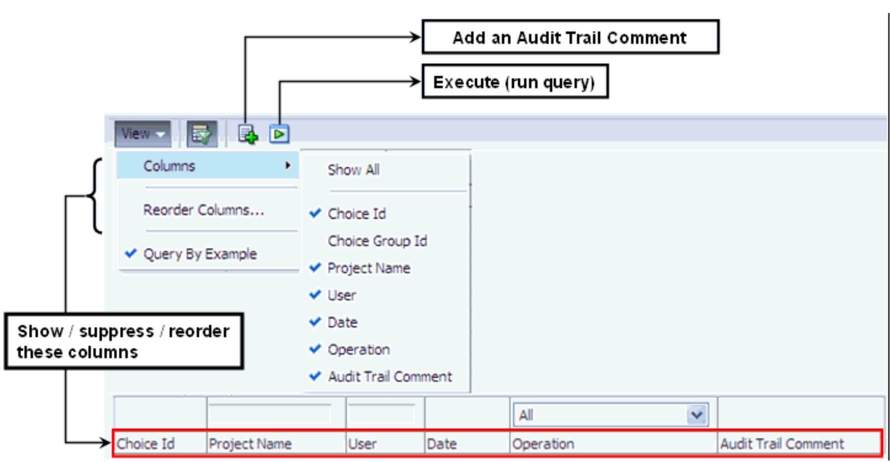


Figure A–16 shows:

- How you query audit trail comments

- How you can toggle the Audit Trail search boxes on and off

  You can do this either from the View > Query By Example menu option or the Query By Example menu icon.

Figure A–16 Querying Audit Trail Comments