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Oracle Retail Category Management Implementation Guide, Release 14.0.1

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- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

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Preface

The Oracle Retail Category Management Implementation Guide describes post-installation tasks that need to be performed in order to bring Category Management online and ready for production use.

Audience

The Implementation Guide is intended for Oracle Retail Category Management application integrators and implementation staff, as well as the retailer’s IT personnel. This guide is also intended for business analysts who are looking for information about processes and interfaces to validate the support for business scenarios within Category Management and other systems across the enterprise.

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Related Documents

For more information, see the following documents in the Oracle Retail Category Management Release 14.0.1 documentation set:

- Oracle Retail Category Management Installation Guide
- Oracle Retail Category Management Release Notes
- Oracle Retail Category Management User Guide

For more information about Oracle Retail Predictive Application Server (RPAS) and the RPAS Fusion Client, see the RPAS documentation set.
Customer Support

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https://support.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

Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 14.0) or a later patch release (for example, 14.0.1). If you are installing the base release or additional patch releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch releases can contain critical information related to the base release, as well as information about code changes since the base release.

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http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html

An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number E123456-02 is an updated version of a document with part number E123456-01.

If a more recent version of a document is available, that version supersedes all previous versions.

Oracle Retail Documentation on the Oracle Technology Network

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

http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html
(Data Model documents are not available through Oracle Technology Network. These documents are packaged with released code, or you can obtain them through My Oracle Support.)

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

## Conventions

The following text conventions are used in this document:

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
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<tbody>
<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.</td>
</tr>
<tr>
<td><em>italic</em></td>
<td>Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.</td>
</tr>
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</table>
Effective category management (also referred to as merchandising) is the cornerstone of a successful retail business because it determines the variety and presentation of merchandise. This determination defines the customer’s in-store experience. Category management involves managing individual product or merchandise categories as though they were independent business units, each playing a specific role in the retailer’s goal to achieve their established business objectives. Broadly, this practice facilitates the determination of the following:

- Roles, strategies, and tactics and their designation into categories and sub-categories across the location hierarchy.
- Pricing and promotion strategies for different categories and sub-categories across the location hierarchy.
- Inventory-related decisions across categories and sub-categories across the retail chain.
- The retailer’s standing in the market as compared to the competition.
- Key consumer segments contributing to the retailer’s business and plan management of product categories as a result.
- Merchandise-mix or product-mix (also referred to as assortments) for a merchandise category (also known as class in Oracle Retail Merchandising System (RMS) terminology) and a sub-category (also known as sub-class in RMS terminology) across the retail chain - including the cluster and store level across the location hierarchy.
- Space-allocation at the micro and macro-level for different categories and sub-categories at the store and cluster level.

In recent years, retailers have experienced increased difficulty in achieving desired levels of same store sales growth, gross margin, and inventory productivity. This is partly due to smaller buying staffs, shorter product life cycles, increasingly savvy and demanding customers, and cutthroat competition.

In light of these issues, retailers are looking to service their customers better, drive profitable growth, and further differentiate themselves from the competition by tailoring their product offerings to the needs of their local customers. In the past, micro-merchandising or local market assortments were extremely complex, labor intensive, and yielded marginal results.

Oracle Retail Category Management (RCM) brings in the contemporary best-practices from the retail industry as part of its functionality. RCM is based on the RPAS platform. Key differentiating factors of RCM, that facilitate decision making in the category management business practice, include the following:
■ A platform to facilitate end-to-end implementation of planning and tracking of Category Management practices based on retail industry best practices.

■ Assortment Planning, for store clusters and stores, sometimes referred to as Assortment Rationalization.

■ Assortment clusters, commonly referred to as clusters, to group stores across the geography to create category and assortment plans.

■ Consumer segment perspectives based on the market’s, or trading area’s, demographics and psychographic data from third-party syndicated data suppliers.

■ Insight into consumer buying patterns through Household Panel Data from third-party syndicated data suppliers.

■ Market and competition perspectives based on external data sourced from third-party syndicated data suppliers.

■ Consumer Decision Trees to understand the consumer’s buying process (consumer segment-wise) in order to align the retailer’s product, pricing, and promotional offerings accordingly.

■ Item Performance Index (IPI) to rank an item’s and a category’s performance and derive custom assortments at the cluster and store level.

■ Market coverage to understand the retailer’s standing in the market from a product-mix perspective and derive custom assortments.

■ Demand Transference driven by advanced science to fine-tune assortments.

■ Incremental Curve driven by advanced science to derive assortments.

RCM consists of the following tasks:

■ Category Planning - Used for analyzing a retailer's business from a market, competition, and consumer perspective. Category Planning is used to set targets and assign roles, strategies, and tactics for individual product categories. Category Plans are created at the sub-category level.

■ Assortment Planning Analysis - Used to analyze an assortment’s historic performance from a market, competition, and consumer perspective.

■ Assortment Planning @ Cluster - Used to create Assortment Plans at the cluster level utilizing the concepts of IPI, Market Coverage, Incremental Curve, and Demand Transference.

■ Assortment Planning @ Store - Used to create Assortment Plans at the store level utilizing the concepts of IPI and Demand Transference.

The Category Planning task enables the retailer to perform higher-level category planning activities and Assortment Planning tasks that facilitate the creation of SKU/Item-level Assortment Plans at the cluster and store level.

This solution supports the development of category business plans and assortment plans. It broadly follows the traditional eight-step Category Management business process with the inclusion of the consumer dimension in a few steps to provide the following:

■ Analysis of market structure in terms of target shoppers/consumers and evaluation of trading area opportunity

■ Performance analysis of individual product categories, based on various retail business parameters, as compared to the market in general and to the competition in particular
Key Features of Category Management

- Role assignment to individual product categories
- A blueprint for strategic and tactical action within a category and across categories
- The ability to analyze by consumer segments (sometimes called the ninth step in the Category Management business process)
- A structured, measured set of activities designed to produce specified output, that is, the development and implementation of a written category business plan
- Consumer insight, which is core to this application, brought in by utilizing external market and consumer data sourced from third-party syndicated data suppliers

Consumer segmentation and store clustering can be utilized to tailor assortments to specific markets and consumer segments by providing a profile mix of who is shopping the store and trading area. Store clusters are typically created for each product category in a trading area based upon similarity in consumers, stores, product attributes, sales profiles, and demographics so that assortments can be generated at the store cluster level. Assortments can also be generated at the store level.

Visibility into category roles, strategies, tactics, and financial objectives ensure that SKU/Item level assortments align back to overall category-level objectives.

Contents of this Guide

This implementation guide addresses the following topics:

- Implementation Considerations
- Build Scripts
- Data Flow
- Script Integration
- Configuration Considerations
- Batch Processing
- Internationalization
- Data

Key Features of Category Management

Category Management is a disciplined process for retailers and their supplier partners to treat each category as a business unit with defined strategies and tactics, leveraging multiple data sources, consumer insights and segmentations, to improve the customer experience while delivering increased sales and profits.

Category Management provides the following features:

- Packaged POV on leading edge retail business process concerning category management
- Supports consumer-centric and customer-centric category planning and assortment processes
  - Leverages consumer decision trees
- Embedded forecasting capabilities
  - Enables forward-looking insights to drive planning decisions
Skills Needed for Implementation

The implementer needs an understanding of the following applications and technical concepts.

Applications

The implementer should understand the interface requirements of the integrated applications and data sources for the master data, demand, and inventory history. For Category Management, the implementer needs this knowledge for the following applications:

- Oracle Retail Predictive Application Server (RPAS)
- Oracle Retail Assortment and Space Optimization (ASO) (optional)

Technical Concepts

The implementer should understand the following technical concepts:

- UNIX system administration, shell scripts, and job scheduling
- Performance constraints based on the retailer’s infrastructure
- Technical architecture for Category Management
- Retailer’s hierarchical (SKU/store/day) data
- Category Management batch processes
- Setting up an RPAS domain
- A basic understanding of RPAS configuration and how to use the RPAS Configuration Tools
- Understanding of how RPAS rule language works
- Understanding of measures and dimension constructs
- Understanding of how Fusion Client works

Guides category roles and strategies-driven pricing and promotion tactics
Implementation Considerations

The following information needs to be considered before implementing Category Management:

- Historical Data
- Hardware Space Impacts
- Partitioning
- Formatting
- Patch Considerations
- Batch Scheduling
- Security
- Alert Manager
- Internationalization

Historical Data

It is recommended that you have at least two years of historical sales data. Less data can be used, but the more data that is available, the better picture a retailer can obtain of category and assortment performance over time.

Hardware Space Impacts

The following factors can affect size requirements:

- SKU—number of items. An item is a specific product that a consumer can purchase. Examples include a specific model of flat screen television, or a particular size, weight, flavor, and packaging of yogurt.
- Store—number of physical, internet, and other distinct retail outlets.
- Product Attributes—in Category Management, every item is associated with one or more attributes. The attributes are used to construct consumer decision trees. These consumer decision trees capture how consumers in a particular segment make their buying decisions for products in a given category.
- Consumer Segments—consumers with similar buying habits are grouped into segments. These segments form the basis of constructing consumer decision trees.

Category Management hosts sales data from a merchandising system, market, loyalty, and other third-party data from commercial data aggregators. During batch processing, Category Management also needs temporary data storage for intermediate
Partitioning

The total data storage space requirements for Category Management are estimated to be at least double the storage space of the combined sales, market, loyalty, and other third-party data.

Partitioning

Partitioning is done to avoid contention for resources. Building a workbook and committing data are two processes that can cause contention.

How data is partitioned has an impact on the business process. The Category Management domain is defined as a global domain. For performance reasons, a single domain is not recommended. There should be an even distribution of users across a set of local domains.

It is recommended that the domain be partitioned above the category level, to allow several related categories to be analyzed, compared, and processed in a single local domain. This allows category planners and assortment managers to focus on relevant data sets, and does not affect other users working in other categories when building or committing workbooks.

Consider the following questions when defining the partitioning of the domain:

- How do I partition to meet my business needs?
- How do I partition my users?
- How do I create groups of users to further partition the solution?

Domain partitioning is supported on any Product hierarchy (PROD) or Location hierarchy (LOC) dimension. These hierarchies are standard RPAS hierarchies.

Note: The partitioning level in the Category Management configuration is Department. It is recommended that this not be changed.

Formatting

Formatting can be done in the configuration or the workbook after the domain is built.

- Each worksheet in the Category Management configuration has a measure order as well as measure styles that have been preconfigured. The measures can be displayed in the pre-configured order through the user interface. That format can then be saved to the template.

An implementer can create generic styles for the measures and assign them to measure components or realized measures. For each measure, these styles can be overridden on each workbook template. Formatting can only be changed by using the RPAS Configuration Tools. For more information, see the Oracle Retail Predictive Application Server Configuration Tools User Guide.

- Once the domain is built, the implementer can set up worksheet sizes and placements, exception value formatting, gridlines, and other formatting. The
implementer instantiates a workbook of the template to set up specific formatting by using the Format menu. The updated format is then saved to the template so that it is available to all users for any newly created workbooks. For information on how to use the Format menu, see Oracle Retail Predictive Application Server User Guide for the Fusion Client.

**Patch Considerations**

There are two types of patches that can affect the Category Management domain:

- **Changes to the code in the RPAS libraries**
  
  The configuration is not affected by this type of patch. For these types of changes, applying the patch is a straightforward process.

- **Changes to the configuration**
  
  These types of changes can be more complex. If you have customizations in the configuration, you can use the ConfigMgr utility to determine the differences between your existing configuration and the new one. Then, you can use the utility to merge the two configurations. Any changes that cannot be applied are written to a change log. For more information, see the Oracle Retail Predictive Application Server Configuration Tools User Guide.

**Batch Scheduling**

Batch scripts are lists of commands or jobs that are run without manual intervention. A batch window is the time frame in which the batch process must run. It is the upper limit on how long the batch can take. Batch scripts are used for importing and exporting data. The retailer needs to decide the best time for running batch scripts within the available batch window.

How often to upload updated sales and inventory data needs to be determined. You have to consider at what interval to load the latest sales and inventory data. It is recommended that this is done on a weekly basis.

For more information on batch scripts, see Chapter 7.

**Security**

To define workbook template security, the system administrator grants individual users, or user groups, access to specific workbook templates. Granting access to workbook templates provides users the ability to create, modify, save, and commit workbooks for the assigned workbook templates. Users are typically assigned to groups based on their user application (or solution) role. Users in the same group can be given access to workbook templates that belong to that group alone. Users can be assigned to more than one group and granted workbook template access without belonging to the user group that typically uses a specific workbook template. Workbook access is either denied, read-only, or full access. Read-only access allows a user to create a workbook for the template, but the user is not be able to edit any values or commit the workbook. The read-only workbook can be refreshed.

When users save a workbook, they assign one of three access permissions to the workbook:

- **World**–Allow any user to open and edit the workbook
- **Group**–Allow only those users in their same group to open and edit the workbooks
Alert Manager

- User—Allow no other users to open and edit the workbook

**Note:** A user must have access to the workbook template in order to access the workbook, even if the workbook has world access rights.

For more information on security, see the *Oracle Retail Predictive Application Server Administration Guide for the Fusion Client*.

Alert Manager

No alerts are pre-configured in the Category Management solution. However, users may configure alerts normally in a Category Management domain.

For more information on configuring Alert Manager, see the *Oracle Retail Predictive Application Server Administration Guide for the Fusion Client*.

Internationalization

For information on translation for Category Management, see Chapter 8.
This chapter describes the setup that must be done before building the Category Management domain and the batch script that must be run to build the domain.

Installation Dependencies

RPAS infrastructure (including the server and fusion client) and Category Management must be installed before setting up and configuring Category Management.

For information on installing RPAS server and fusion client, see the Oracle Retail Predictive Application Server Installation Guide.

Environmental Setup

Before downloading the installation package to the UNIX server, a central directory structure to support the environment must be created. This central directory is referred to as <CM_HOME>. Set <CM_HOME> to the full path name to RCM home.

RPAS Installation

The Java-based RPAS installation programs that are included with the installation package are used to install the server-side RPAS components on UNIX operating systems.

The RPAS Installer performs the following functions:

- Installs the server.
- Installs the Configuration Tools on the server.
  On Windows, an InstallShield package is used to install the Configuration Tools.
- Defines the DomainDaemon port.

RPAS Fusion Client Installation

The RPAS server installation package also includes the following RPAS client:

- RPAS Fusion Client–A web-based client developed using Oracle Application Development Framework (ADF).

Each RPAS client installation package includes a separate installer to help you install the client. For more information on installing the RPAS clients, refer to the Oracle Retail Predictive Application Server Installation Guide.
Category Management Installation

The Category Management installer performs the following functions:

- Downloads the configuration and batch scripts into the `<CM_HOME>/config` and `<CM_HOME>/bin` directories
- Downloads a set of sample hierarchy and data files into the `<CM_HOME>/input` directory
- Builds a sample domain at `<CM_HOME>/domain/catman`

Custom Domain Build

To do a custom build of a domain, perform the following steps:

1. Update the `globaldomainconfig.xml` file with the correct domain paths.
2. If needed, update the default environment variables in `environment.ksh`.
3. Run the `build.ksh` script:
   ```
   ./build.ksh
   ```

Handling Common Hierarchy Files in the Fashion Planning Bundle Applications

The following hierarchy files contain the superset of all the dimensions along the product, location, and calendar hierarchies:

- `prod.hdr.csv.dat`
- `loc.hdr.csv.dat`
- `clnd.csv.dat`

Each `hdr.csv.dat` (HDR) hierarchy file contains a header line that lists all the dimensions for which position information is contained in the file. The RPAS build process handles these HDR files so that every application extracts the position information relevant to itself and ignores dimensions not configured in the application.

The `filterHier` utility is run on the HDR files to convert them into standard hierarchy files that are then passed to `loadHier`. The build process, which uses `rpasInstall`, can differentiate between standard and HDR hierarchy files. There is no need for the implementer to make any changes in the domain build process.

If using HDR files, the implementer needs to run `filterHier` before running `loadHier`. The `filterHier` utility converts the HDR files into standard hierarchy files that can be processed by `loadHier`. Note that there is no need to run `filterHier` if the standard hierarchy files are already available.

**Note:** The HDR files must reside outside the domain input directory before running `filterHier`. By default, the `filterHier` utility puts the newly created filtered hierarchy files into the input folder of the domain.

See the Oracle Retail Predictive Application Server Administration Guide for the Fusion Client for details on the RPAS utilities.
Environment Variables

In addition to the regular RPAS environment variables, including RPAS_HOME, you must export the following environment variables:

All platforms:

```bash
```

**Note:** Additional Java environment variables must be set for your particular operation system. These variables are the same for all applications on RPAS. See the “Java Environment” section of the Oracle Retail Predictive Application Server Installation Guide for these environment variables.

Files Required to Build the Category Management Domain

Before building the domain, set up the following types of files, which are described below:

- Standard RPAS Hierarchy files
- Category Management-specific Hierarchy files
- Data files

Standard RPAS Hierarchy Files

The following hierarchy files are needed:

- Calendar hierarchy files
- Product hierarchy files
- Location hierarchy files

**Note:** As with all standard RPAS hierarchies, these hierarchies are configurable as long as they adhere to the RPAS requirements on hierarchy structures.

Calendar Hierarchy File

**File name:** clnd.csv.dat

**File format:** comma-separated values file

**Fields:** Day, Week, Month, Quarter, Season, Year

The following table describes the fields in this file.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day</td>
<td>Day or date in YYYYMMDD format</td>
</tr>
<tr>
<td>Week</td>
<td>Week number</td>
</tr>
<tr>
<td>Month</td>
<td>Month number</td>
</tr>
</tbody>
</table>
Files Required to Build the Category Management Domain

Example:

```
```

Product Hierarchy File

**File name:** prod.csv.dat

**File format:** comma-separated values file

**Fields:** SKU, Vendor, Style/Color, Style, Sub-Category, Category, Department, Group, Division, Company, Sub-Brand, Brand

The following table describes the fields in this file.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SKU</td>
<td>Unique Stock-keeping Unit Identifier</td>
</tr>
<tr>
<td>Vendor</td>
<td>Product Vendor. Vendor is an alternate roll-up from SKU.</td>
</tr>
<tr>
<td>Style/Color</td>
<td>Style/Color</td>
</tr>
<tr>
<td>Style</td>
<td>Style</td>
</tr>
<tr>
<td>Sub-category</td>
<td>Sub-category</td>
</tr>
<tr>
<td>Category</td>
<td>Category</td>
</tr>
<tr>
<td>Department</td>
<td>Department</td>
</tr>
<tr>
<td>Group</td>
<td>Group</td>
</tr>
<tr>
<td>Division</td>
<td>Division</td>
</tr>
<tr>
<td>Company</td>
<td>Company</td>
</tr>
<tr>
<td>Sub-brand</td>
<td>Sub-Brand. Sub-Brand and Brand are alternate roll-ups from SKU.</td>
</tr>
<tr>
<td>Brand</td>
<td>Brand</td>
</tr>
</tbody>
</table>

**Example:**

```
3375772212,3375772212 CTL_BR_NATURAL_RTE_CEREAL_14_OUNCE,11,11 STCO_Cardboard,1,1 STYLE_Cardboard,SCLS_BOX,BOX,CLSS_CEREAL,CEREAL,901,901 Cold Foods,31,31 Breakfast,30,30 Grocery,1,1 Acme Home,V2,V2 H thru P by Air,BRD_PRIVATE_LABEL,BRD_PRIVATE_LABEL,PRIVATE_LABEL
```

---

3-4  Oracle Retail Category Management Implementation Guide
Location Hierarchy File

**File name:** loc.csv.dat

**File format:** comma-separated values file

**Fields:** Store, District, Region, Area, Channel, Chain, Company, Store Cluster, Trading Area, Trading Area Group

The following table describes the fields in this file.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Store</td>
<td>Store</td>
</tr>
<tr>
<td>District</td>
<td>District</td>
</tr>
<tr>
<td>Region</td>
<td>Region</td>
</tr>
<tr>
<td>Area</td>
<td>Area</td>
</tr>
<tr>
<td>Channel</td>
<td>Channel</td>
</tr>
<tr>
<td>Chain</td>
<td>Chain</td>
</tr>
<tr>
<td>Company</td>
<td>Company</td>
</tr>
<tr>
<td>Store Cluster</td>
<td>Store Cluster. This is a group of stores with similar characteristics. Alternate roll-up from Store.</td>
</tr>
<tr>
<td>Trading Area</td>
<td>Trading Area. One or more Store Clusters form a Trading Area.</td>
</tr>
<tr>
<td>Trading Area Group</td>
<td>Trading Area Group</td>
</tr>
<tr>
<td>Store Group</td>
<td>Store Group. This is a user-defined dimension and is not required to be included in the loc.csv.dat load file.</td>
</tr>
</tbody>
</table>

**Example:**

1000,1000 Charlotte,401,401 Southeast,400,Southeast,2,South,1,Brick & Mortar,1,Chain 1,1,Retailer Ltd,A,Store Cluster A,1,Trading Area 1,1,All Trading Areas
1001,1001 Atlanta,400,400 Southeast,400,Southeast,2,South,1,Brick & Mortar,1,Chain 1,1,Retailer Ltd,A,Store Cluster A,1,Trading Area 1,1,All Trading Areas
1003,1003 Boston,201,201 Northeast,200,Northeast,1,North,1,Brick & Mortar,1,Chain 1,1,Retailer Ltd,A,Store Cluster A,1,Trading Area 1,1,All Trading Areas
1009,1009 Albuquerque,300,300 Southwest,300,Southwest,2,South,1,Brick & Mortar,1,Chain 1,1,Retailer Ltd,A,Store Cluster A,1,Trading Area 1,1,All Trading Areas
Category Management-Specific Hierarchy Files

The following are the hierarchy files that are specific to Category Management:

- Right-Hand Side Product Hierarchy File
- Focus Area Attributes Hierarchy File
- Consumer Profile Hierarchy File
- Retail Segment Hierarchy File
- Retailer Hierarchy File
- Consumer Segment Hierarchy File
- Linear Number Hierarchy File
- Tactic Hierarchy File
- Breakpoints Hierarchy File
- Product Attributes Hierarchy File
- Strategy Hierarchy File
- Curve Points Hierarchy File

Right-Hand Side Product Hierarchy File

File name: pror.csv.dat

File format: comma-separated values file

Fields: SKU, Vendor, Style/Color, Style, Sub-Category, Category, Department, Group, Division, Company, Sub-Brand, Brand

The following table describes the fields in this file.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SKU</td>
<td>Unique Stock-keeping Unit Identifier</td>
</tr>
<tr>
<td>Vendor</td>
<td>Product Vendor. Vendor is an alternate roll-up from SKU.</td>
</tr>
<tr>
<td>Style/Color</td>
<td>Style/Color</td>
</tr>
<tr>
<td>Style</td>
<td>Style</td>
</tr>
<tr>
<td>Sub-Category</td>
<td>Sub-Category</td>
</tr>
<tr>
<td>Category</td>
<td>Category</td>
</tr>
<tr>
<td>Department</td>
<td>Department</td>
</tr>
<tr>
<td>Group</td>
<td>Group</td>
</tr>
<tr>
<td>Division</td>
<td>Division</td>
</tr>
<tr>
<td>Company</td>
<td>Company</td>
</tr>
<tr>
<td>Sub-Brand</td>
<td>Sub-Brand. Sub-Brand and Brand are alternate roll-ups from SKU.</td>
</tr>
</tbody>
</table>
Files Required to Build the Category Management Domain

Build Scripts 3-7

Files

Example:

3375772212,3375772212 CTL_BR_NATURAL_RTE_CEREAL_14_OUNCE,11,11 STCO_Cardboard,1,1
STYLE_Cardboard,SCLS_BOX,BOX,CLSS_CEREAL,CEREAL,901,901 Cold Foods,31,31
Breakfast,30,30 Grocery,1,1 Acme Home,V2,V2 H thru P by Air,SBRD_PRIVATE_LABEL,PRIVATE_LABEL_Cereal,PRIVATE_LABEL,PRIVATE_LABEL
223375772213,223375772213 CTL_BR_NATURAL_RTE_CEREAL_14_OUNCE,11,11 STCO_Cardboard,1,1 STYLE_Cardboard,SCLS_BOX,BOX,CLSS_CEREAL,CEREAL,901,901 Cold Foods,31,31 Breakfast,30,30 Grocery,1,1 Acme Home,V2,V2 H thru P by Air,SBRD_PRIVATE_LABEL,PRIVATE_LABEL_Cereal,PRIVATE_LABEL,PRIVATE_LABEL
223375772214,223375772214 CTL_BR_CRNCH_CRNCH_NTRL_NTRL_CRL_GRANOLA,11,11 STCO_Cardboard,1,1 STYLE_Cardboard,SCLS_BOX,BOX,CLSS_CEREAL,CEREAL,901,901 Cold Foods,31,31 Breakfast,30,30 Grocery,1,1 Acme Home,V2,V2 H thru P by Air,SBRD_PRIVATE_LABEL,PRIVATE_LABEL_Cereal,PRIVATE_LABEL,PRIVATE_LABEL
223375772215,223375772215 CTL_BR_NATURAL_RTE_CEREAL_10.5_OUNCE,11,11 STCO_Cardboard,1,1 STYLE_Cardboard,SCLS_BOX,BOX,CLSS_CEREAL,CEREAL,901,901 Cold Foods,31,31 Breakfast,30,30 Grocery,1,1 Acme Home,V2,V2 H thru P by Air,SBRD_PRIVATE_LABEL,PRIVATE_LABEL_Cereal,PRIVATE_LABEL,PRIVATE_LABEL
223375772216,223375772216 CTL_BR_NATURAL_RTE_CEREAL_10.5_OUNCE,11,11 STCO_Cardboard,1,1 STYLE_Cardboard,SCLS_BOX,BOX,CLSS_CEREAL,CEREAL,901,901 Cold Foods,31,31 Breakfast,30,30 Grocery,1,1 Acme Home,V2,V2 H thru P by Air,SBRD_PRIVATE_LABEL,PRIVATE_LABEL_Cereal,PRIVATE_LABEL,PRIVATE_LABEL

Focus Area Attributes Hierarchy File

File name: faah.csv.dat

File format: comma-separated values file

Field: Focus Area

The following table describes the field in this file.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Focus Area</td>
<td>The focus area name</td>
</tr>
</tbody>
</table>

Example:

fa1,Attributes
fa2,Market Basket
fa3,Loyalty
fa4,Performance

Consumer Profile Hierarchy File

File name: cprf.csv.dat

File format: comma-separated values file

Fields: Consumer Profile, Consumer Profile Type

The following table describes the fields in this file.
Files Required to Build the Category Management Domain

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumer profile</td>
<td>This represents the gradations within a particular demographic measure. For example, if the demographic measure is &quot;Household Size&quot;, then the profile represents the breakdown within that information, such as, 1, 2, 3-4, 5-6, and 7+.</td>
</tr>
<tr>
<td>Consumer Profile Type</td>
<td>This is the consumer demographic information, such as Household Income, Head of Household Age, Children's Ages, Life Stage, or Household Size.</td>
</tr>
</tbody>
</table>

**Example:**

cprd100, "$0 - $19,999", cprt0, Household Income  
cprd101, "$20,000 - $29,999", cprt0, Household Income  
cprd102, "$30,000 - $39,999", cprt0, Household Income  
cprd103, "$40,000 - $49,999", cprt0, Household Income  
cprd104, "$50,000 - $69,999", cprt0, Household Income  
cprd105, "$70,000 - $89,999", cprt0, Household Income  
cprd106, "$90,000 - $109,999", cprt0, Household Income  
cprd107, "$110,000 - $149,999", cprt0, Household Income  
cprd108, "$150,000+", cprt0, Household Income  
cprd200, 18-24, cprt1, Head of Household Age  
cprd201, 25-34, cprt1, Head of Household Age  
cprd202, 35-50, cprt1, Head of Household Age  
cprd203, 51-60, cprt1, Head of Household Age  
cprd204, 61-67, cprt1, Head of Household Age  
cprd205, 68+, cprt1, Head of Household Age

**Retail Segment File**  
*File name*: rsgh.csv.dat  
*File format*: comma-separated values file  
*Field*: Retailer Type  
The following table describes the field in this file.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retailer Type</td>
<td>The various broad segments of the retail market.</td>
</tr>
</tbody>
</table>

**Example:**

rsgd1, Grocery  
rsgd2, Convenience/Gas  
rsgd3, Drug  
rsgd4, Super-Centers  
rsgd5, Warehouse Club  
rsgd6, Dollar Stores  
rsgd7, Mass Merch Without Supers  
rsgd8, All Other Channels

**Retailer Hierarchy File**  
*File name*: reth.csv.dat  
*File format*: comma-separated values file  
*Field*: Retailer  
The following table describes the field in this file. 
Files Required to Build the Category Management Domain

**Build Scripts**

Example:

ret1,Retailer 1  
ret2,Retailer 2  
ret3,Retailer 3

**Consumer Segment Hierarchy File**

**File name:** csh.csv.dat

**File format:** comma-separated values file

**Fields:** Consumer Segment Version, Consumer Segment

The following table describes the fields in this file.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumer Segment Version</td>
<td>The version (1, 2, 3,... or Summer, Fall,...) of a given consumer segment.</td>
</tr>
<tr>
<td>ConsumerSegment</td>
<td>A name that identifies a group of consumers with similar buying patterns, such as 'Getting By' or 'Empty Nester'.</td>
</tr>
</tbody>
</table>

Example:

s1CDT1,Soccer Mom CDT Version 1,s1,Soccer Mom  
s1CDT2,Soccer Mom CDT Version 2,s1,Soccer Mom  
s1CDT3,Soccer Mom CDT Version 3,s1,Soccer Mom  
s1CDT4,Soccer Mom CDT Version 4,s1,Soccer Mom  
s1CDT5,Soccer Mom CDT Version 5,s1,Soccer Mom  
s2cdt1,Natural N Healthy CDT Version 1,s2,Natural N Healthy  
s2cdt2,Natural N Healthy CDT Version 2,s2,Natural N Healthy  
s2cdt3,Natural N Healthy CDT Version 3,s2,Natural N Healthy  
s2cdt4,Natural N Healthy CDT Version 4,s2,Natural N Healthy  
s2cdt5,Natural N Healthy CDT Version 5,s2,Natural N Healthy

**Linear Number Hierarchy File**

**File name:** lnmh.csv.dat

**File format:** comma-separated values file

**Field:** Linear Number

The following table describes the field in this file.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>LinearNumber</td>
<td>01, 02, 03,...</td>
</tr>
</tbody>
</table>

Example:

01,01  
02,02  
03,03  
04,04  
05,05
Files Required to Build the Category Management Domain

06,06
07,07
08,08
09,09
10,10

**Tactic Hierarchy File**

**File name:** tcth.csv.dat

**File format:** comma-separated values file

**Field:** Tactic

The following table describes the field in this file.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tactic</td>
<td>The name of an area within Category Management where multiple approaches might be relevant.</td>
</tr>
</tbody>
</table>

**Example:**

1, Assortment
2, Pricing
3, Promotion
4, Space
5, Inventory

**Breakpoint Hierarchy File**

**File name:** pcth.csv.dat

**File format:** comma-separated values file

**Field:** Breakpoint

The following table describes the field in this file.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Breakpoint</td>
<td>A threshold used in calculating information about an assortment, such as fragmentation.</td>
</tr>
</tbody>
</table>

**Example:**

bp1, 50%
bp2, 75%
bp3, 80%
bp4, 85%
bp5, 90%
bp6, 95%
bp7, 99%
bp8, Wif_1
bp9, Wif_2
bp10, Wif_3

**Product Attributes Hierarchy File**

**File name:** attr.csv.dat

**File format:** comma-separated values file
Fields: Attribute Value, Attribute Name

The following table describes the fields in this file.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attribute Value</td>
<td>The various values that an attribute might have. For example, the &quot;package type&quot; attribute might take the values &quot;bag&quot;, &quot;box&quot;, or &quot;convenience&quot;.</td>
</tr>
<tr>
<td>Attribute Name</td>
<td>The name of a product attribute, such as &quot;brand&quot;, &quot;family type&quot;, &quot;flavor&quot;, &quot;grain&quot;, &quot;package type&quot;, &quot;size&quot;, or &quot;temperature&quot;.</td>
</tr>
</tbody>
</table>

Example:

familytype_adult,ADULT,familytype,Family Type
familytype_convenience,CONVENIENCE,familytype,Family Type
familytype_family,FAMILY,familytype,Family Type
familytype_kids,KIDS,familytype,Family Type
flavor_almond,ALMOND,flavor,Flavor
flavor_apple,APPLE,flavor,Flavor
flavor_banana,BANANA,flavor,Flavor
flavor_berrries,BERRIES,flavor,Flavor
flavor_berry,BERRY,flavor,Flavor
flavor_caramel,CARAMEL,flavor,Flavor
flavor_chocolate,CHOCOLATE,flavor,Flavor
flavor_cinnamon,CINNIMON,flavor,Flavor

Strategy Hierarchy File

File name: sgyh.csv.dat

File format: comma-separated values file

Field: Strategy

The following table describes the field in this file.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategy</td>
<td>The name of a category strategy.</td>
</tr>
</tbody>
</table>

Example:

STRTG1,Traffic Building
STRTG2,Transaction Building
STRTG3,Profit Contribution
STRTG4, Cash Generating
STRTG5, Excitement Creating
STRTG6, Image Enhancing
STRTG7, Turf Defending

Curve Points Hierarchy File

File name: curv.csv.dat

File format: comma-separated values file

Field: Curve Number

This hierarchy is used in demand transference calculations. The following table describes the field in this file.
Data Files

Category Management is a data-intensive application. The data files required are listed in Chapter 9.

Building the Category Management Domain

The script used to build or patch the Category Management domain is described in this section. The script is located in the <CM_HOME>/bin directory.

Batch Design

This section contains detailed information on the Building a Domain script:

Script
build.ksh

Usage
build.ksh

Notes

- The script overwrites an existing domain, so it should never be run on top of an existing domain unintentionally. Updating an existing domain should be done through the <CM_HOME>/bin/patch_cm_keepformats.ksh or <CM_HOME>/bin/patch_cm_deleteformats.ksh scripts.
- The script uses the Configuration Tools rpasInstall utility to build a domain. See the Oracle Retail Predictive Application Server Administration Guide for details on this utility.
- The script also uses the following RPAS utilities: mace and loadmeasure. See the Oracle Retail Predictive Application Server Administration Guide for details on these utilities.
- All hierarchy and measure files are placed in the <CM_HOME>/input directory.
- The script also processes all pre-prepared consumer decision tree files. This creates multiple dynamic hierarchies that provide the ability to aggregate information as determined by a consumer decision tree. It expects these pre-prepared consumer decision trees to be in <CM_HOME>/input/ctddata/. Any file in this directory ending with .xml is assumed to be a CDT file and will be processed by the CDT Parser.
Configuration Files for the RPAS Fusion Client

The Category Management installation software enables you to install the activity taskflow and online help files for the RPAS Fusion Client. In order to install the activity taskflow files, the RPAS Fusion Client must already be installed. For more information on installing the RPAS Fusion Client, refer to the Oracle Retail Predictive Application Server Installation Guide.

During the RPAS Fusion Client installation, the installer automatically sets up the RPAS domain connection configurations in the ProfileList.xml file. In case you choose to set up the domain connection after the installation or set up an additional domain, you must manually set up the connection. For more information, refer to the Oracle Retail Predictive Application Server Administration Guide for the Fusion Client.

Creating Users and User Groups

For greater security, users and user groups are not automatically created when you build or patch a domain. To create users and user groups, you must use the usermgr utility. To learn more about usermgr, see the Operational Utilities chapter of the Oracle Retail Predictive Application Server Administration Guide for the Fusion Client.

Loading and Extracting Data

Data is loaded into Category Management using the standard RPAS approach. See the Oracle Retail Predictive Application Server Administration Guide for the Fusion Client for details on formatting the load data files and on the utilities that enable administrators to load data into RPAS. If you are using script integration, see Chapter 5. For information on other batch scripts, see Chapter 7.
This chapter describes the flow of data between RCM and other applications.

Overview of the Category Management Data Flow

Figure 4–1 shows the data flow between Category Management and other applications. It is important to note that the dotted-lines in the data flow diagram indicate that there are no established interfaces between RCM and the respective, connected applications. For a detailed description data flow, see "Data Flow Descriptions".

Figure 4–1 Category Management Data Flow
Overview of the Category Management Data Flow

Data Flow Descriptions

The RCM application is integrated with the Oracle Retail Advanced Science Engine (ORASE) and sources key information that is used in the Category Management process flow. Key integration points include the following:

1. **Import of Assortment Cluster Data**: Stores are grouped into Assortment Clusters or Clusters to be used to create Assortment Plans at the cluster level. ORASE and RCM share a common location hierarchy specifically in terms of Stores and Trading Area mapping. RCM sources assortment clusters in the form of .csv files from the Oracle Retail Modeling Engine (ORME) module, which is part of ORASE. Grouping of stores or Assortment Clustering in ORME is based on various parameters such as Consumer Segment Profiles, Store Attributes, Performance Attributes, Product Attributes, and so on.

2. **Import and Export of Product Attributes**: Product Attributes, or simply Attributes, consist of attribute names and attribute values at the SKU/Item level. RCM sources attributes from ORME in the form of .csv files. RCM provides the facility to add and modify attribute values that map to SKUs/Items. There is an export facility available to communicate the changes to the Master Data Management system and to eventually reach ORME.

3. **Import of Consumer Decision Trees (CDTs)**: CDTs are used to understand the consumer buying process and to identify key product attributes that influence consumer buying decisions from a consumer segment profile perspective. This ensures that key product attribute based products are present in the assortment. The CDT is expected to be in the form of a .XML file and use categories, trading areas, consumer segments, and attributes consistent with those found in RCM. CDTs are sourced from the ORME module of ORASE.

4. **Import of Demand Transference (DT) Data**: An Application Programming Interface (API) consisting of Java libraries is used to perform DT calculations in RCM. This API requires measures such as assortment elasticity for categories, similarity between SKUs/Items, DT-specific Attribute Weights, and Functional Fitment of attributes to categories. This information is sourced from the ORME module of ORASE in the form of .csv files.

5. **Export to ORASE**: RCM exports category plan, assortment plan and space management related information to the Oracle Retail Optimization Engine (OROE) module of ORASE. There are two types of exports provided to OROE:
   - An export with an assortment optimization request to OROE from a space management perspective
   - An update to OROE in the form of a final approved assortment and category plans for eventual implementation

Data Flow from External Sources to RCM

RCM has a special data requirement that brings in consumer-centricity and the retailer's market standing into the Category Management practice. A lot of this data is sourced from third-party syndicated data suppliers, also referred to as external market data providers. Examples of external market data providers include AC Nielsen, Symphony IRI, Axciom, and FICO. The standard RPAS import facility is used to bring this data in from external sources. This is not depicted in Figure 4–1.

Data Flow between Master Data Management System and RCM

RCM is much like other RPAS-based planning products in that it shares information with a Master Data Management System (MDM) or Oracle Retail Merchandising
System (RMS). RMS, in general, acts as an MDM system. This is not depicted in Figure 4–1. Although there are no direct integrations or interfaces available for data flow between RMS and RCM, it sources the foundation data and key operational data from RMS like any other application. The following information is sourced from the MDM system:

- Product and Location hierarchy data
- Operational data such as sales, promotional sales, private label sales, sales by consumer segment, cost, space planning and data, collectively referred to as actuals data
- Product attributes data

Master Data Management system is used in a general sense here, meaning it could be an actual merchandising system or a data warehouse that draws from a merchandising system.
This release of Category Management has defined, supported integration processes for exporting data to and importing data from Oracle Retail Advanced Science Engine (ORASE). These integration processes are detailed in this chapter. In addition, there are basic, supported import and export scripts that can be used as a basis for a customer-defined integration with other systems.

This chapter describes the basic Category Management script import and export.

All Category Management import and export-related scripts and files are located in <CM_HOME>/bin.

### Export Script

The export script is used for exporting data from Category Management. The export consists of a single script along with a control file.

**Script Name:**

exportdata.ksh

**Usage:**

exportdata.ksh <control-file>

**Control File Name:**

exportlist.txt

**Control File Content and Format**

The control file contains a list of measures to be exported and their desired export intersections, separated by a space. The intersections must conform to RPAS standards (four characters per dimension, right padded with underscores if less than length four). For example:

- drtynumfacingsv sku_str_week
- drtysqftv sku_str_week
- drtysqftv sku_str_week
- drtysqftv sku_str_week
- drtysqftv sku_str_week
- drtysqftv sku_str_week
- dtrystclusbl qrtrclsstr
- dtrystclusbl qrtrclsstr

**Output Location and Format**

The output files are written to the <CM_MASTERDOMAIN>/output directory. The output file names are the measure names from the control file. The exportMeasure
utility is used to export data in CSV (comma-separated values) format. This maintains the consistency of start and width attributes across different applications. See the Oracle Retail Predictive Application Server Administration Guide for the Fusion Client for details on this utility.

**Environment Variables**
Only CM_HOME needs to be defined prior to running the script. Other required environment variables are set in the `<CM_HOME>/bin/environment.ksh` script. These may be adjusted to redefine the output directory, and so on.

**Log Files**
Processing logs for this script are written to the `<CM_HOME>/logs/<date_dir>/exportdata.<unique_id>` directory. Here,

- `<date_dir>` is a directory with a name corresponding to the date the script was run, in the format YYYY-MM-DD.
- `<unique_id>` is a system-generated string of numbers that is unique in this context.

Inside this folder, the log file is called `exportdata.log`. Additional folders are created for every invocation of the script.

**Error Codes**
exportdata.ksh detects several error conditions, as shown in Table 5–1.

<table>
<thead>
<tr>
<th>Error Code</th>
<th>Abort Required?</th>
<th>Error Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>Yes</td>
<td><code>&lt;control-file&gt;</code> not passed as an argument to the script.</td>
</tr>
<tr>
<td>13</td>
<td>Yes</td>
<td>Domain not found.</td>
</tr>
</tbody>
</table>

**Import Script**
The import script is used for importing data to Category Management. The import consists of a single script along with a control file.

**Script Name:**
importdata.ksh

**Usage:**

`importdata.ksh <control-file>`

**Control File Name:**
importlist.txt

**Control File Content and Format**
The control file contains a list of measures to be imported. For example:

- drtyattrvaltx
- drtynumfacingsv
- drtynumfacingsv
- drtysqftv
Input Location and Format
The input files are expected to be in the <domain>/input directory. The input file names must match the target measure names in Category Management, suffixed with ".csv.ovr". The loadmeasure utility is used to import data in CSV (comma-separated values) format. See the Oracle Retail Predictive Application Server Administration Guide for the Fusion Client for details on this utility.

Environment Variables
Only CM_HOME must be defined prior to running the script. Other required environment variables are set in the <CM_HOME>/bin/environment.ksh script. These may be adjusted to alter entities such as the log level.

Log Files
Processing logs for this script are written to the <CM_HOME>/logs/<date_dir>/importdata.<unique_id> directory. Here,
- <date_dir> is a directory with a name corresponding to the date the script was run, in the format YYYY-MM-DD.
- <unique_id> is a system generated string of numbers that is unique in this context.

Inside this folder, the log file is called importdata.log. Additional folders are created for every invocation of the script.

Error Codes
importdata.ksh detects several error conditions, as shown in Table 5–2.

<table>
<thead>
<tr>
<th>Error Code</th>
<th>Abort Required?</th>
<th>Error Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>Yes</td>
<td>&lt;control-file&gt; not passed as an argument to the script.</td>
</tr>
<tr>
<td>13</td>
<td>Yes</td>
<td>Domain not found.</td>
</tr>
</tbody>
</table>

ORASE Integration
RCM and ORASE are integrated with an exchange of data. This section describes the RCM exports which ORASE can receive, as well as, the ORASE exports which RCM can receive.

ORASE to RCM
ORASE exports several data files which can be imported into RCM. Following are lists of the files:

Attribute Information:
- Product Attributes Hierarchy - attr.csv.dat. This hierarchy load file contains the Product Attributes definition.
- Loaded Attribute Value ID - drtyattrvaltx.csv.ovr. This measure load file contains the SKU-Product Attributes mapping.

Demand Transference Files:
- Assortment Elasticity - drtyassrtelasv.csv.ovr. This measure load file contains the Assortment Category Elasticity Parameters.
ORASE Integration

- Attribute Weights and Functional Fit - drtyattrwgtv.csv.ovr. This measure load file contains both Category-Attribute Weights and Category-Attribute Functional Fit.
- Similarities - drtysiminv.csv.ovr. This measure load file contains the SKU Similarities Parameters.

**Cluster Information:**
Store Clusters - rsestrclst.csv. This measure load file contains Store Cluster Name and Store Cluster Label data.

**Consumer Decision Trees:**
CDTs - *.xml. Any number of consumer decision tree (CDT) files in XML format.

**RCM to ORASE**
RCM exports several data files using the Export to ASO @ Cluster and Export to ASO @ Store custom menus within the AP workbook, which can be imported into ORASE. Following are lists of the files:

**ASO Exports:**
- Assortment Plan - asrt_plan.txt. This file contains ASO request type, Assortment Type, Role, Tactics, and Strategies.
- Assortment Product - asrt_prod.txt. This file contains the Assortment type and priority for SKUs.
- Assortment Placeholder-Like Product - asrt_ph_like_prod.txt. This file contains the placeholder products included in the assortment.
- Cluster - cluster.txt. This file contains store cluster information.
- Store - store.txt. This file contains the store-cluster mapping.
- Price Cost - price_cost.txt. This file contains price and cost information for SKUs.
- Forecast - forecast.txt. This file contains the forecast for all SKUs.
- New Product Other Attributes - new_prod_attr.txt. This file contains the SKU-Attribute Map for new SKUs.

**Transformation between ORASE and RPAS Format**
The format used by RPAS and ORASE for categories and attributes is not the same. The ORASE format is to add a class prefix before the attribute name ID, attribute value ID, and category ID, but the RPAS format does not utilize this prefix. Table 5–3 describes differences, by way of example, between the two formats.

<table>
<thead>
<tr>
<th>Table 5–3 Transformation Matrix</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>RPAS Format</strong></td>
</tr>
<tr>
<td>Attribute Name ID</td>
</tr>
<tr>
<td>Attribute Value ID</td>
</tr>
<tr>
<td>Category ID</td>
</tr>
</tbody>
</table>

In the table, ORASE format, the class prefix used is "CLS~1000~10000." This is a concatenation of a text string CLS denoting class, in addition to the department ID 1000, and the class ID 10000. RPAS does not utilize this prefix. In addition, when
concatenating the department and class IDs together to form the class position ID, RPAS uses an underscore rather than tilde separator.

The RCM import and export scripts described in the following sections contain code which can be utilized to transform between these formats.

**ORASE to RCM Data Transformation Script**

The flat-file data exported from ORASE and imported into RCM is transformed using a script.

**Script Name**

rcm_t_data_orase.ksh

**Usage**

rcm_t_data_orase.ksh -f <file> -d <delimiter> [-a <field1,field2,…>] -c <field1,field2,…>

<file> is the path and file name of the file to be transformed. The script will look for the file in the path specified.

<delimiter> is the delimiter used to separate fields in the input file.

<fieldx>, when used after the -a option, indicates a field containing attribute name or attribute value IDs to be transformed. If multiple fields contain data needing transformation, specify them in comma-separated format. For example "-a 1,2,3".

<fieldx>, when used after the -c option, indicates a field containing category name IDs to be transformed. If multiple fields contain data needing transformation, specify them in comma-separated format. For example "-c 4,5”.

**Notes**

This script may be called from the command line.

Additionally, this script is invoked from within other integration scripts when called with the -r option. Specifically, import_rse_attributes.ksh, described in "Attributes Data Import Script", when called with the -r option, will call rcm_t_data_orase.ksh to transform the attribute ID fields of the attribute hierarchy and SKU-attribute map before loading the data into the RCM domain. The script import_rse_clusters.ksh, described in "Clustering Data Import Script", when called with the -r option, will call rcm_t_data_orase.ksh to transform the category ID field before loading the data into the RCM domain. The script import_rse_dt.ksh, described in "Demand Transference Data Import Script", when called with the -r option, will call rcm_t_data_orase.ksh to transform the assortment elasticity category ID field and attribute weights and functional fit category and attribute name ID fields before loading into the RCM domain. Each of these three scripts use a delimiter of the comma character ("-, ").

This script will transform the specified fields from ORASE format to RPAS format as detailed in Table 5-3.

**Log Files**

Processing logs for this script, when called from the command line, are written to the <CM_HOME>/logs/<date_dir>/rcm_t_data_orase.<unique_id> directory. If invoked from within another import script, the log for this script will be one level deeper from the calling script. For example, <CM_HOME>/logs/<date_dir>/<calling script>.<unique_id>/rcm_t_data_orase.<unique_id>. Here,
■ <date_dir> is a directory with a name corresponding to the date the script was run, in the format YYYY-MM-DD.

■ <unique_id> is a system-generated string of numbers that is unique in this context.

Inside this folder, the log file is called rcm_t_data_orase.log. Additional folders are created for every invocation of the script.

Error Codes
rcm_t_data_orase.ksh detects the following error condition, as shown in Table 5–4.

<table>
<thead>
<tr>
<th>Error Code</th>
<th>Abort Required?</th>
<th>Error Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Yes</td>
<td>Failure in one of the following commands: mv, touch, or incorrect usage.</td>
</tr>
</tbody>
</table>

ORASE to RCM CDT Transformation Script
The CDT files exported from ORASE and imported into RCM are transformed using a script.

Script Name
rcm_t_cdt_orase.ksh

Usage
rcm_t_cdt_orase.ksh -f <cdtfile>

<cdtfile> is the path and file name of the file to be transformed. The script will look for the file in the path specified.

Notes
This script may be called from the command line. However, it is also invoked from within the processcdts.ksh script when called with the -r option.

This script will transform the <cdt> tag's category element, from ORASE format to RPAS format according to Table 5–3. It will also transform all <attribute> tags' name and value elements, from ORASE format to RPAS format according to Table 5–3.

Log Files
Processing logs for this script, when called from the command line, are written to the <CM_HOME>/logs/<date_dir>/rcm_t_cdt_orase.<unique_id> directory. If invoked from within another import script, the log for this script will be one level deeper from the calling script. For example, <CM_HOME>/logs/<date_dir>/<calling script>..<unique_id>/rcm_t_cdt_orase.<unique_id>. Here,

■ <date_dir> is a directory with a name corresponding to the date the script was run, in the format YYYY-MM-DD.

■ <unique_id> is a system-generated string of numbers that is unique in this context.

Inside this folder, the log file is called rcm_t_cdt_orase.log. Additional folders are created for every invocation of the script.
Error Codes
rcm_t_cdt_orase.ksh detects several error conditions, as shown in Table 5–5.

<table>
<thead>
<tr>
<th>Error Code</th>
<th>Abort Required?</th>
<th>Error Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Yes</td>
<td>Failure in one of the following commands: mv, sed, or incorrect usage.</td>
</tr>
<tr>
<td>3</td>
<td>Yes</td>
<td>The CDT file specified by the -f option is not found.</td>
</tr>
</tbody>
</table>

RCM to ORASE Data Transformation Script

The flat-file data exported from ORASE and imported into RCM is transformed using a script.

Script Name
orse_t_data_rcm.ksh

Usage
orse_t_data_rcm.ksh -f <file> -d <delimiter> [-n <field1,field2,...>] [-v <field1,field2,...>] [-c <field1,field2,...>]

<file> is the path and file name of the file to be transformed. The script looks for the file in the path specified.

<delimiter> is the delimiter used to separate fields in the input file. If the delimiter needed is the pipe character ("|"), specify "-f PIPE".

<fieldx>, when used after the -n option, indicates a field containing attribute name IDs to be transformed. If multiple fields contain data needing transformation, specify them in comma-separated format. For example, "-n 1,2,3".

<fieldx>, when used after -v option, indicates a field containing attribute value IDs to be transformed. If multiple fields contain data needing transformation, specify them in comma-separated format. For example, "-v 1,2,3".

<fieldx>, when used after -c option, indicates a field containing category name IDs to be transformed. If multiple fields contain data needing transformation, specify them in comma-separated format. For example, "-c 4,5".

Notes
Since -n, -v, and -c are optional, if none are specified, the script will exit gracefully with nothing to do.

If -n is specified but -v is not, the script will exit, as an attribute name field is required to correctly prefix the -n field.

This script may be called from the command line.

Additionally, this script can be called by export_so.ksh, which is run during execution of the Export to ASO @ Cluster and Export to ASO @ Store custom menus inside the Assortment Planning workbook. In this context, the script export_so.ksh reads the environment variable (from environment.ksh) TRANSFORM_RMS_FORMAT. If this variable is set to "on," then the orase_t_data_rcm.ksh is invoked. It will be called twice, once for the new_prod_attr.txt file (to transform fields 3 and 4) and a second time for the asrt_plan.txt file (to transform field 2).
This script will transform the specified fields from RPAS format to ORASE format as detailed in Table 5–3.

**Log Files**
Processing logs for this script, when called from the command line, are written to the <CM_HOME>/logs/<date_dir>/orase_t_data_rcm.<unique_id> directory. If invoked from within another script, for example, export_so.ksh, the log for this script will be one level deeper from the calling script. For example, <CM_HOME>/logs/<date_dir>/export_so.<unique_id>/orase_t_data_rcm.<unique_id>. Here:

- `<date_dir>` is a directory with a name corresponding to the date the script was run, in the format YYYY-MM-DD.
- `<unique_id>` is a system-generated string of numbers that is unique in this context.

Inside this folder, the log file is called orase_t_data_rcm.log. Additional folders are created for every invocation of the script.

**Error Codes**
`orase_t_data_rcm.ksh` detects several error conditions, as shown in Table 5–6.

### Table 5–6  Error Codes for orase_t_data_rcm.ksh

<table>
<thead>
<tr>
<th>Error Code</th>
<th>Abort Required?</th>
<th>Error Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Yes</td>
<td>Incorrect usage, or failure in one of the following commands or command-line utilities: exportMeasure, awk, sort, exportHier, head, rm, touch, mv.</td>
</tr>
<tr>
<td>15</td>
<td>Yes</td>
<td>Delimiter not specified, or attribute name field specified with -n but no attribute value field specified with -v.</td>
</tr>
</tbody>
</table>

**Attributes Data Import Script**
The attributes import script is used for importing attributes hierarchy and measure data into Category Management. The data is expected to be generated by ORASE. The import consists of a single script.

**Script Name:**
import_rse_attributes.ksh

**Usage:**
import_rse_attributes.ksh [-r]

The -r option indicates that attribute name IDs and attribute value IDs contained in the processed files should be transformed from ORASE format to RPAS format by removing the Class Prefix.

**Input Files**
The files imported by this script are:

- Product Attributes Hierarchy file: attr.csv.dat
- SKU-Attribute Map file: drtyleattrvaltx.csv.ovr

**Input Location and Format**
The input files are expected to be in the <domain>/input directory.
The Product Attributes Hierarchy file, attr.csv.dat, is described in Chapter 3. The SKU-Attribute Map file is described in "SKU-Attributes Map File".

**SKU-Attributes Map File**

**File Name:**
drtyattrvaltx.csv.ovr

**File format:**
comma-separated values file

**Fields:**
SKU, Product Attribute Name, Product Attribute Value

The following table describes the fields in this file.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SKU</td>
<td>SKU ID in the Product Hierarchy</td>
</tr>
<tr>
<td>Product Attribute Name</td>
<td>Product Attribute Name Position ID</td>
</tr>
<tr>
<td>Product Attribute Value</td>
<td>Product Attribute Value Position ID</td>
</tr>
</tbody>
</table>

**Example:**
'1234615','formatsize','12_oz'
'1234615','manufacturingprocess','non_organic'
'1234615','pl','npl'
'1234615','roast','light_roast'
'1234615','segment','de_caffeinated'

**Note:** The Attribute Name and Attribute Value fields must be the position names (such as non_organic), not the position labels (such as, Non Organic).

**Algorithm**
If the -r option is specified, the rcm_t_data_orase.ksh script is called to remove prefixes from the attribute name and attribute value ID fields. It calls RPAS loadHier to load the Product Attributes hierarchy file, converts the SKU-Attributes map contents to lower case, and calls RPAS loadmeasure to load the SKU-Attributes map file.

**Environment Variables**
Only CM_HOME must be defined prior to running the script. Other required environment variables are set in the <CM_HOME>/bin/environment.ksh script. These may be adjusted to alter entities such as the log level.

**Log Files**
Processing logs for this script are written to the <CM_HOME>/logs/<date_dir>/import_rse_attributes.<unique_id> directory. Here,
- <date_dir> is a directory with a name corresponding to the date the script was run, in the format YYYY-MM-DD.
<unique_id> is a system generated string of numbers that is unique in this context. Inside this folder, the log file is called import_rse_attributes.log. Additional folders are created for every invocation of the script.

**Error Codes**

import_rse_attributes.ksh detects several error conditions, as shown in Table 5–7.

<table>
<thead>
<tr>
<th>Error Code</th>
<th>Abort Required?</th>
<th>Error Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Yes</td>
<td>Failure in one of the following commands: loadHier, loadmeasure, or other Unix shell commands.</td>
</tr>
<tr>
<td>3</td>
<td>Yes</td>
<td>One of the load files is not found in the &lt;CM_MASTERDOMAIN&gt;/input directory.</td>
</tr>
</tbody>
</table>

**Clustering Data Import Script**

The clustering import script is used for importing store to store cluster mapping data into Category Management. The store to store cluster mapping is stored in two measures which are loaded into Dynamic Hierarchy Dimensions for selected Category Management workbooks. The data is expected to be generated by ORASE. The import consists of a single script.

**Script Name:**

import_rse_clusters.ksh

**Usage:**

import_rse_clusters.ksh [-r]

The -r option indicates that category IDs contained in the processed file should be transformed from ORASE format to RPAS format by removing the Class Prefix and changing the separator of the category ID from ~ to _.

**Input Files**

The file imported by this script is:

- Store to Store Cluster map file: rsestrclst.csv

**Input Location and Format**

The input file is expected to be in the <domain>/input directory. The map file is described in "Store to Store Cluster Map File".

**Output Effect**

The input file is split into two entities, one holding the store cluster position and the other holding the store cluster labels. Each is then loaded into the RPAS measures DRTYStrClusTx and DRTYStrClusLbl.

**Store to Store Cluster Map File**

**File Name:**

rsestrclst.csv
File format:
comma-separated values file

Fields:
Effective Start Date, Effective End Date, Category, Store, Store Cluster Position, Store Cluster Label

The following table describes the fields in this file.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Start Date</td>
<td>Effective Start Date in dayYYYYMMDD format</td>
</tr>
<tr>
<td>Effective End Date</td>
<td>Effective End Date in dayYYYYMMDD format</td>
</tr>
<tr>
<td>Category</td>
<td>Category ID in the Product Hierarchy</td>
</tr>
<tr>
<td>Store</td>
<td>Store ID in the Location Hierarchy</td>
</tr>
<tr>
<td>Store Cluster Position</td>
<td>Store Cluster Position ID</td>
</tr>
<tr>
<td>Store Cluster Label</td>
<td>Store Cluster Position Label</td>
</tr>
</tbody>
</table>

Example:
- "day20121221","day20131219","10000","4","200","Cluster Set 1"
- "day20121221","day20131219","10000","2","200","Cluster Set 1"
- "day20121221","day20131219","20000","2","205","Cluster Set 1"
- "day20121221","day20131219","20000","3","205","Cluster Set 1"
- "day20121221","day20131219","40000","148","218","Cluster Set 4"
- "day20121221","day20131219","40000","149","218","Cluster Set 4"

Algorithm:
If the -r option is specified, the rcm_t_data_orase.ksh script is called to remove prefixes from the category ID field.

During processing of the script, the end date is discarded. The remaining data is loaded into two temporary measures with an intersection of day/clss/str. When loading at day, if multiple rows of data for the same intersection exist, the last one will trump the earlier data.

Once the data is loaded into the two temporary measures at day, mace is invoked to aggregate the data into measures at qrtr/clss/str. During aggregation, if multiple records at day roll up to the same quarter, the data for the first row is retained.

Final result of the load is that the quarter, class, store, and store cluster position are written to the store cluster position measure, DRTYStrClusTx. The quarter, class, store, and store cluster label are written to the store cluster label measure, DRTYStrClusLbl.

These measures then become the load files for the Dynamic Hierarchy Dimension positions in the Assortment Planning workbook.

Environment Variables
Only CM_HOME must be defined prior to running the script. Other required environment variables are set in the <CM_HOME>/bin/environment.ksh script. These may be adjusted to alter entities such as the log level.
Log Files
Processing logs for this script are written to the `<CM_HOME>/logs/<date_dir>/import_rse_clusters.<unique_id>` directory. Here,
- `<date_dir>` is a directory with a name corresponding to the date the script was run, in the format YYYY-MM-DD.
- `<unique_id>` is a system generated string of numbers that is unique in this context.

Inside this folder, the log file is called `import_rse_clusters.log`. Additional folders are created for every invocation of the script.

Error Codes
`import_rse_clusters.ksh` detects the following error condition, as shown in Table 5–8.

<table>
<thead>
<tr>
<th>Error Code</th>
<th>Abort Required?</th>
<th>Error Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Yes</td>
<td>Failure in one of the following commands: <code>loadmeasure</code>, <code>regmeasure</code>, <code>mace</code>, or other Unix shell commands.</td>
</tr>
</tbody>
</table>

Demand Transference Data Import Script

The Demand Transference import script is used for importing the data required for Category Management to utilize the ORASE calculations. The data is expected to be generated by ORASE. The import consists of a single script.

Script Name:
`import_rse_dt.ksh`

Usage:
`import_rse_dt.ksh [-r]`

The `-r` option indicates that category IDs contained in the Elasticity and Weights/Functional Fit file should be transformed from ORASE format to RPAS format by removing the Class Prefix and changing the separator of the category ID from ~ to _. Also, the attribute name ID field in Weights/Functional Fit will be transformed from ORASE format to RPAS format by removing the prefix from the Attribute Name ID field.

Input Files
The files imported by this script are:
- Similarities file: `drtysiminv.csv.ovr`
- Elasticity file: `drtysassrtelasv.csv.ovr`
- Weights and Functional Fit file: `drtymattrwgtv.csv.ovr`

Input Location and Format
The input files are expected to be in the `<domain>/input` directory.

The input files are described below.
**Output Effect**
The Similarities and Elasticity files are loaded straight into the RPAS measures DRTYSimInV and DRTYAssrtElasV. The Weights and Functional Fit file is loaded into two RPAS measures DRTYAttrWgtV and DRTYFuncFitB.

**Algorithm:**
The script invokes the importdata.ksh with a control file of import_dt.txt, containing the DT data to be imported. The three data files are loaded into four measures. The first two files are loaded into RPAS Measures DRTYSimInV and DRTYAssrtElasV. The third data file is loaded into two measures by loading the first, second, third, fourth, and fifth fields into the Weights measure DRTYAttrWgtV, and the first, second, third, fourth, and sixth fields into the Loaded Functional Fit measure DRTYFuncFitB. It will then run a rule group to aggregate out the Trading Area and Consumer Segment dimensions in the Loaded Functional Fit data (with intersection cls/s/tdar/csd/atn) to the final measure DRTYFuncFitB used in the calculations (with intersection cls/atn).

For the similarities and elasticity data, the Effective Start and End date fields are ignored.

**Control File Name:**
importlist_dt.txt

**Control File Content and Format**
The control file contains a list of measures to be imported from ORASE for Demand Transference. The contents are:
- drtysiminv
- drtyasrsetasv
- drtyattrwgtv,drhdfuncfitb

**Environment Variables**
Only CM_HOME must be defined prior to running the script. Other required environment variables are set in the <CM_HOME>/bin/environment.ksh script. These may be adjusted to alter entities such as the log level.

**Log Files**
Processing logs for this script are written to the <CM_HOME>/logs/<date_dir>/import_rse_dt.<unique_id> directory. Here,
- <date_dir> is a directory with a name corresponding to the date the script was run, in the format YYYY-MM-DD.
- <unique_id> is a system generated string of numbers that is unique in this context.

Inside this folder, the log file is called import_rse_dt.log. Additional folders are created for every invocation of the script.

**Error Codes**
import_rse_dt.ksh detects the following error condition, as shown in Table 5–9.
**DT Similarities Parameters File**

**File Name:**
drtysiminv.csv.ovr

**File format:**
comma-separated values file

**Fields:**
SKU, Trading Area, Consumer Segment, Similar SKU, Similarity, Effective Start Date, Effective End Date

The following table describes the fields in this file.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SKU</td>
<td>SKU ID in the Product Hierarchy</td>
</tr>
<tr>
<td>Trading Area</td>
<td>Trading Area ID in the Location Hierarchy</td>
</tr>
<tr>
<td>Consumer Segment</td>
<td>Consumer Segment ID in the Consumer Segment Hierarchy</td>
</tr>
<tr>
<td>Similar SKU</td>
<td>SKU ID in the Product Hierarchy</td>
</tr>
<tr>
<td>Similarity</td>
<td>Number indicating the similarity between the two SKUs</td>
</tr>
<tr>
<td>Effective Start Date</td>
<td>Date in YYYY-MM-DD format indicating effective start date of the similarity</td>
</tr>
<tr>
<td>Effective End Date</td>
<td>Date in YYYY-MM-DD format indicating effective end date of the similarity</td>
</tr>
</tbody>
</table>

**Example:**
"1235719", "2", "e3", "1236880", ".4779967", "2013-11-10", ""
"1235719", "2", "e6", "1235572", ".6059371", "2013-11-10", ""
"1235719", "2", "e1", "1235854", ".8803831", "2013-11-10", ""
"1235719", "2", "e7", "1234615", ".4367552", "2013-11-10", ""
"1235719", "2", "e3", "1234753", ".4779967", "2013-11-10", ""
"1235719", "2", "e3", "1234828", ".4779967", "2013-11-10", ""

**DT Assortment Elasticity Parameters File**

**File Name:**
drtyassrtelasv.csv.ovr

**File format:**
comma-separated values file

**Table 5–9 Error Codes for import_rse_dt.ksh**

<table>
<thead>
<tr>
<th>Error Code</th>
<th>Abort Required?</th>
<th>Error Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Yes</td>
<td>Failure in the call to impordata.ksh or in one of the following commands: loadmeasure, mace, or other Unix shell commands.</td>
</tr>
</tbody>
</table>
**Fields:**
Category ID, Trading Area, Consumer Segment, Assortment Elasticity, Effective Start Date, Effective End Date

The following table describes the fields in this file.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category ID</td>
<td>Category ID in the Product Hierarchy</td>
</tr>
<tr>
<td>Trading Area</td>
<td>Trading Area ID in the Location Hierarchy</td>
</tr>
<tr>
<td>Consumer Segment</td>
<td>Consumer Segment ID in the Consumer Segment Hierarchy</td>
</tr>
<tr>
<td>Assortment Elasticity</td>
<td>Number representing the Category Elasticity</td>
</tr>
<tr>
<td>Effective Start Date</td>
<td>Date in YYYY-MM-DD format indicating effective start date of the similarity</td>
</tr>
<tr>
<td>Effective End Date</td>
<td>Date in YYYY-MM-DD format indicating effective end date of the similarity</td>
</tr>
</tbody>
</table>

**Example:**

*10000*, *'3', 's6', ' -.4476855', '2013-11-10', '"'  
*10000*, *'100', 's4', ' -.4954495', '2013-11-10', '"'  
*10000*, *'1', 's3', ' -.2911932', '2013-11-10', '"'  
*10000*, *'4', 's6', ' -.3327132', '2013-11-10', '"'  
*10000*, *'4', 's1', ' -.3327132', '2013-11-10', '"'  
*10000*, *'100', 's6', ' -.4954495', '2013-11-10', '"'  

**Attribute Weights and Functional Fit File**

**File Name:**
drtyattrwgtv.csv.ovr

**File format:**
comma-separated values file

**Fields:**
Category ID, Trading Area, Consumer Segment, Attribute Name, Weight, Functional Fit

The following table describes the fields in this file.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category ID</td>
<td>Category ID in the Product Hierarchy</td>
</tr>
<tr>
<td>Trading Area</td>
<td>Trading Area ID in the Location Hierarchy</td>
</tr>
<tr>
<td>Consumer Segment</td>
<td>Consumer Segment ID in the Consumer Segment Hierarchy</td>
</tr>
<tr>
<td>Attribute Name</td>
<td>Attribute Name in the Attribute Hierarchy</td>
</tr>
<tr>
<td>Weight</td>
<td>Normalized weight for the attribute</td>
</tr>
<tr>
<td>Functional Fit</td>
<td>Boolean where 0 indicates regular attribute and 1 indicates the weight is disregarded</td>
</tr>
</tbody>
</table>
Example:
"10000","2","s6","pl",".1820273","0"
"10000","2","s6","roast",".0641755","0"
"10000","2","s6","segment",".1054169","0"
"10000","2","s6","brandtier",".0554414","0"
"10000","2","s4","tradetype",".1427163","0"
This chapter provides information on the configuration changes that can be made for Category Management. For some retailers, parts of the released version of the Category Management configuration might fit perfectly. However, it is anticipated that changes are needed to make the Category Management configuration match the organization of the retailer.

Hierarchies are limited to the determination of hierarchy aspects that pertain directly to dimensions, attributes, facts, and escalation. Due to RPAS limitations on intersection, distinct hierarchies must exist for the construction of all intersections to support all facts. No more than one dimension from any hierarchy can exist in a measure intersection.

For information on the configuration changes that can be made, see the following sections:

- Calendar (CLND) Hierarchy
- Product (PROD) Hierarchy
- Right-Hand Side Product (PROR) Hierarchy
- Location (LOC) Hierarchy
- Focus Area Attributes (FAAH) Hierarchy
- Consumer Profile (CPRF) Hierarchy
- Retail Segment (RSGH) Hierarchy
- Retailer (RETH) Hierarchy
- Consumer Segment (CSH) Hierarchy
- Linear Number (LNMH) Hierarchy
- Tactic (TCTH) Hierarchy
- Breakpoints (PCTH) Hierarchy
- Product Attributes (ATTR) Hierarchy
- Strategy (SGYH) Hierarchy
- Curve Points (CURV) Hierarchy

### Calendar (CLND) Hierarchy

*Figure 6–1* shows the CLND hierarchy in the RCM configuration.
The Calendar hierarchy represents time in all RPAS solutions. It is a required hierarchy. RPAS requires a dimension named day (Day). This level is not displayed in the solution.

Category Management has many measures with a time component. Most "actuals" data (such as sales, cost, margins, and markdowns) is stored at the week level. Many calculations (such as market share and market growth) and index-type information (loyalty, penetration, and buyer conversion) are used at the quarter level. Basic RPAS functionality allows the user to view time-dependent data at any desired aggregate level.

With this in mind, a retailer implementation can structure the Calendar hierarchy in any way that best suits the retailer's functional needs. Dimensions other than week and quarter have been included in the Category Management configuration for the purpose of illustration. They can be modified or removed without requiring changes to any other elements of the Category Management configuration. Other dimensions and hierarchy branches may also be added without requiring changes to other elements of the Category Management configuration.

**Product (PROD) Hierarchy**

Figure 6–2 shows the PROD hierarchy in the Category Management configuration.
The product hierarchy represents the retailer’s merchandise (that is, merchandise that the retailer sells through its retail channels). Much of the work in Category Management focuses on the category and sub-category levels. Some workbooks and worksheets are focused on working with data at the SKU level. Style and Style-color levels are included in the configuration in between SKU and Sub-category.

A Category Management domain is typically partitioned at Department level or higher. Partitioning the domain above category allows multiple categories to be compared and analyzed side-by-side.

Several alternate rollups are provided for SKU. One relates SKU to Vendor and the other to Sub-brand and Brand. These alternate rollups provide additional insight and options for analysis.
The product hierarchy is also the base on which dynamic hierarchies are built. These dynamic hierarchies are created based on a consumer decision tree (CDT). They form an additional alternate hierarchy based on SKU. The dynamic hierarchies are based on product attributes (see Product Attributes (ATTR) Hierarchy) and can have a varying number of levels. Further, the rollup path can differ for different products.

**Note:** Any changes to this hierarchy must be accompanied by changes to all the elements that employ the particular level that is being modified or removed. Adding levels or branches or changing labels should not require any changes to the Category Management configuration.

Further, any changes to the product hierarchy should be replicated to the right-hand side product hierarchy (PROR). This is important in keeping cross-product information available and up-to-date. For more information, see "Right-Hand Side Product (PROR) Hierarchy".

### Right-Hand Side Product (PROR) Hierarchy

**Figure 6–3** shows the Right-Hand Side Product (PROR) hierarchy in the Category Management configuration.

**Figure 6–3  Right-Hand Side Product Hierarchy**

<table>
<thead>
<tr>
<th>Name</th>
<th>Label</th>
<th>Hierarchy Type</th>
<th>Child</th>
</tr>
</thead>
<tbody>
<tr>
<td>CMMR</td>
<td>Company</td>
<td>Main</td>
<td>DVSR</td>
</tr>
<tr>
<td>DVSR</td>
<td>Division</td>
<td>Main</td>
<td>PGRR</td>
</tr>
<tr>
<td>PGRR</td>
<td>Group</td>
<td>Main</td>
<td>DEPR</td>
</tr>
<tr>
<td>DEPR</td>
<td>Department</td>
<td>Main</td>
<td>CLSR</td>
</tr>
<tr>
<td>CLSR</td>
<td>Category</td>
<td>Main</td>
<td>SCLR</td>
</tr>
<tr>
<td>SCLR</td>
<td>Sub-category</td>
<td>Main</td>
<td>STYR</td>
</tr>
<tr>
<td>STYR</td>
<td>Style</td>
<td>Main</td>
<td>STCR</td>
</tr>
</tbody>
</table>
The right-hand side product hierarchy (RHS Product or PROR) needs to be an exact replica of the main product hierarchy. The purpose of this hierarchy is to allow RCM to store and use various cross-product quantities related to Demand Transference (DT). Examples of these quantities include Item-Item Similarities, Demand Transferred, Substitutable Demand, and so on.

The DT calculations are always related back to SKUs in the main product hierarchy. So there is no partitioning done or dynamic hierarchies built on PROR.

**Note:** Any changes to the main product (PROD) hierarchy must be replicated into the right-hand side product (PROR) hierarchy. This ensures that the demand transference data and calculations are complete and reliable.

### Location (LOC) Hierarchy

*Figure 6–4* shows the LOC hierarchy in the Category Management configuration.

#### Table: Location Hierarchy

<table>
<thead>
<tr>
<th>Name</th>
<th>Label</th>
<th>Hierarchy Type</th>
<th>Child</th>
</tr>
</thead>
<tbody>
<tr>
<td>CMPN</td>
<td>Company</td>
<td>Main</td>
<td>CHN</td>
</tr>
<tr>
<td>CHN</td>
<td>Chain</td>
<td>Main</td>
<td>CHNL</td>
</tr>
<tr>
<td>CHNL</td>
<td>Channel</td>
<td>Main</td>
<td>AREA</td>
</tr>
<tr>
<td>AREA</td>
<td>Area</td>
<td>Main</td>
<td>RGN</td>
</tr>
</tbody>
</table>

---

*Configuration Considerations* 6-5
The Location hierarchy represents the retailer’s retail locations and their rollups. The Category Management configuration imposes few constraints on the structure of this hierarchy. However, the alternate rollup of Store Cluster and Trading Area is integral to Category Management functionality. Store Clusters and Trading Areas allow the retailer to define groups of stores with common characteristics, such as assortments carried, sales patterns, customer segments served, and so on. This alternate rollup need not be tied to geography.

**Focus Area Attributes (FAAH) Hierarchy**

The focus area attributes hierarchy is used to list various facets of a category that a category manager might be interested in. Combined with strategies (another hierarchy), they are instrumental in the setup and calculation of Item Performance Indicators (IPIs).

This hierarchy is intended to be customized for the individual customer’s needs. It is a single dimension hierarchy. The only dimension is Focus Area (FAR).

**Consumer Profile (CPRF) Hierarchy**

The consumer profile hierarchy is used to represent all demographic information about a retailer’s consumers. This hierarchy is intended to be customized for the individual customer’s needs.

The type of information that is intended to be represented in this hierarchy includes:

- Household income
- Head of household age
- Children’s ages
- Lifestage
- Household size

Each demographic measure can have a number of gradations within it. For example, the Lifestage Consumer Profile Type might have the following profiles within it:

- Starting Out
- Young with Toddlers
- Young Family
- Singles/Couples without children
Middle-aged Family
Empty Nesters
Retired Couples
Older Singles

Retail Segment (RSGH) Hierarchy

The retail segment hierarchy is a single dimension hierarchy that contains broad segments of the retail market. This hierarchy is intended to be customized for the individual customer’s needs.

It is a single dimension hierarchy. The only dimension is Retailer Type (RSGD).

Examples of what might be listed in this hierarchy include:
- Grocery
- Convenience/Gas
- Drug
- Super-centers
- Warehouse Club
- Dollar Stores

Retailer (RETH) Hierarchy

The retailer hierarchy is used to maintain a list of competitors. This is used for comparing certain metrics between the retailer and competitors. This hierarchy is intended to be customized for the individual customer’s needs.

It is a single dimension hierarchy. The only dimension is Retailer (RETD).

Consumer Segment (CSH) Hierarchy

The consumer segment hierarchy is used for listing the consumer segments and the versions of each. A consumer segment is a classification of consumers with similar characteristics and buying patterns. Examples of consumer segments include “Soccer Mom” or “Golden Years”. The consumer segment hierarchy is mainly used as the main characteristic of a consumer decision tree, which specifies the buying patterns for each consumer segment. The buying patterns may vary slightly from year to year or season to season, so multiple versions of consumer segments are supported.

Note the following about this hierarchy:
- The consumer segment dimension position must be one of sX, where X equals 1 to 7.
- The consumer segment version dimension position must be one of sXcdtY, where X equals 1 to 7 and Y equals 1 to 5.
The labels for these dimensions are user-choice or the GA labels can be used.

This hierarchy is intended to be customized for the individual customer’s needs. The customer should advance plan how many Consumer Decision Trees (CDTs) they will need for each combination of category, trading area, and consumer segment. The Consumer Segment Hierarchy load file then must include a Consumer Segment Version position for each of these Consumer Segments. As a result, during domain build, the domain will include enough versions to hold the anticipated number of CDTs.

As a point of reference, the GA hierarchy load file contains 5 Consumer Segment Versions for each of the 7 Consumer Segments.

<table>
<thead>
<tr>
<th>Name</th>
<th>Label</th>
<th>Hierarchy Type</th>
<th>Child</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSD</td>
<td>Consumer Segment</td>
<td>Main</td>
<td>CSVD</td>
</tr>
<tr>
<td>CSVD</td>
<td>Version</td>
<td>Main</td>
<td>None</td>
</tr>
</tbody>
</table>

**Linear Number (LNMH) Hierarchy**

The linear number hierarchy is included for utility. It simply consists of a list of numbers. These numbers are used in various places in Category Management wherever a list of items are needed. It is used, for example, in an admin screen to define lists of tactics that will be combined to form a pick list that changes its values based on product, location, and topic.

This hierarchy should be modified with care. Adding new positions to the hierarchy can be done without affecting current functionality. For example, changing or deleting existing positions will cause rules to break. Care should be taken to modify affected rules and measures when modifying or deleting existing positions in this hierarchy.

It is a single dimension hierarchy. The only dimension is Linear Number (LNUM).

**Tactic (TCTH) Hierarchy**

The tactic hierarchy represents areas within Category Management where one or more choices of approach may be relevant. For example, the tactic hierarchy might contain an entry for "Pricing" or "Promotion". Individual tactics within each area (for example, "Pricing" might include "Match competition but do not lead" or "Do not initiate price decreases") are broken out by combining the tactic hierarchy with the linear number hierarchy.

This hierarchy is intended to be customized for the individual customer’s needs.

It is a single dimension hierarchy. The only dimension is Tactic (TCTD).

**Breakpoints (PCTH) Hierarchy**

The breakpoint hierarchy represents thresholds used in the calculation of fragmentation, contribution, and ranking of SKUs within an assortment. Breakpoint positions are typically named to represent a certain numeric level (50%, 75%,...) or could be named to represent scenarios (such as "Base", "High", "What If").

This hierarchy is intended to be customized for the individual customer’s needs.

It is a single dimension hierarchy. The only dimension is Breakpoint (PCTD).
Product Attributes (ATTR) Hierarchy

The product attributes hierarchy represents attributes associated with products. These attributes are used to group products within categories. This grouping is what consumer decision trees are built on and are used when showing dynamic rollups in Category Management.

This hierarchy is intended to capture all product attributes for all product types. The attributes are then assigned to individual products. This assignment is used when processing the dynamic rollups.

This hierarchy is intended to be customized for the individual customer's needs.

<table>
<thead>
<tr>
<th>Name</th>
<th>Label</th>
<th>Hierarchy Type</th>
<th>Child</th>
</tr>
</thead>
<tbody>
<tr>
<td>ATN</td>
<td>Attribute Name</td>
<td>Main</td>
<td>ATV</td>
</tr>
<tr>
<td>ATV</td>
<td>Attribute Value</td>
<td>Main</td>
<td>None</td>
</tr>
</tbody>
</table>

Strategy (SGYH) Hierarchy

The strategy hierarchy represents broad actions designed to enhance a category. Sample strategies might include:

- Traffic building
- Transaction building
- Profit contribution
- Cash generating
- Excitement creating
- Image enhancing
- Turf defending

This hierarchy is intended to be customized for the individual customer's needs.

It is a single dimension hierarchy. The only dimension is Strategy (sgyd).

Curve Points (CURV) Hierarchy

The curve points hierarchy facilitates calculations related to the Incremental Curve functionality within Demand Transference (DT). The incremental curve functionality calculates the aggregate amount of demand transferred based on the number of changed items in the assortment. So, while it is related to SKUs, it is expressed in terms of number of SKUs and is not representative of any one SKU.

It is a single dimension hierarchy. The only dimension is Curve Point (cnum). It should contain as many positions as the number of items that are expected to be substituted in what-if scenarios in planning an assortment.
This chapter contains a summary of the scripts that are used to maintain Category Management through batch processing.

Before the first batch run, the system environment must be set up, along with certain data measures (batch parameters) that control the batch calculations. Pre-batch setup is described in this chapter.

See the Oracle Retail Predictive Application Server Administration Guide for the Fusion Client for details on formatting load data files and on utilities that enable administrators to load data into RPAS.

---

**Note:** Comma-separated values (CSV) files are recommended to reduce the sizes of load files.

---

### Batch Script Summary

The following directories are used by the batch scripts. These directories are subdirectories of the `<CM_HOME>` directory. The `<CM_HOME>` directory is defined by the implementer.

<table>
<thead>
<tr>
<th>Directory Name</th>
<th>Content of the Directory</th>
</tr>
</thead>
<tbody>
<tr>
<td>bin</td>
<td>Batch scripts</td>
</tr>
<tr>
<td>config</td>
<td>Category Management template configuration</td>
</tr>
<tr>
<td>domain</td>
<td>Domains</td>
</tr>
<tr>
<td>input</td>
<td>Input files for building the domain</td>
</tr>
<tr>
<td>logs</td>
<td>Log files from running any of the batch scripts</td>
</tr>
<tr>
<td>temp</td>
<td>Temporary files used by the batch scripts</td>
</tr>
</tbody>
</table>

---

### Batch Script Summary Table

*Table 7–2* summarizes the available batch scripts, rule groups, and custom menu actions. The batch scripts are located in the `<CM_HOME>/bin` directory.

The following information is included in the table:

- Name of the batch operation
- Type (rule group, script, custom menu)
- Suggestion on how often to run the script
Batch Scripts

This section contains detailed information on the batch scripts cm_batch.ksh and processcdts.ksh.

**cm_batch.ksh**

**Notes**

This script is performs many functions related to keeping information within RCM current and consistent. The operations that are performed by this script include the following:

- Calculating the elapsed period, functionality provided by RPAS to ensure historical data is read-only.
- Applying the elapsed period to market and retailer measures within the solution.
- Propagating changes made by administrative updates to various other measures, such as repopulating picklists.
- Refreshing the forecasted sales information.
- Refreshing the timeshifted LY data for market and retailer information.
- Aggregating and pre-calculate information for later, faster use in workbooks.
- Refreshing product attribute values.

The script should be run regularly and frequently - daily or weekly being recommended. It may also be run whenever there are significant updates to data; the updates should be applied to the system.

Note that if RPAS_TODAY is set, the script uses this instead of the current system date. This could be useful, for example, for testing.

The actions the script takes are done by invoking various rule groups within RCM. There are dependencies between the various rule groups, and running the rule groups out of the order specified in cm_batch.ksh can lead to unpredictable results.
Processing logs for this script are written to the `<CM_HOME>/logs/<date_dir>/<calling_script>/cm_batch<unique id>` directory. Here,

- `<date_dir>` is a directory with a name corresponding to the date the script was run, in the format YYYY-MM-DD.
- `<calling_script>` is the name of the script that calls the cm_batch.ksh script, along with a `<unique id>`. Most often, this directory is called "build" or omitted. If the script is called directly from the command line, this will be blank.
- `<unique id>` is a system generated string of numbers that is unique in this context.

Inside this folder, the log file is called cm_batch.log. Additional folders are created for every invocation of the script.

**processcdts.ksh**

**Script**
processcdts.ksh

**Usage**

```
processcdts.ksh -f <cdtfile> [-l <label>]
```

`<cdtfile>` is the name of the XML file that contains a consumer decision tree (CDT). The script expects the CDT file to be in the `<domain>/cdt_interface/import` directory.

`<label>` is an optional label that is stored in the domain for the given CDT.

**Notes**

This script is used to load CDT XML files into the domain. It is called by build.ksh, which performs the initial domain build and the Accept XML custom menu. It parses the XML and translates the structure described in the file into measures that are used to create dynamic workbook hierarchies.

The script calls a java utility to perform the XML parsing and dynamic hierarchy measure construction. The java class files are located in `$RPAS_HOME/applib/aaiCatMan.jar`. This jar file must be present in the correct location for the processcdts.ksh script to run. The script also ensures that the environment variable `RPAS_JAVA_CLASSPATH` contains the path to this jar.

Processed CDTs are stored in the `<domain>/cdt_interface/processed/cdts` directory. The script generates a large number of measure load files, named DHD_Name* and DHD_Label*, and loads them into the domain. The processed DHD_Name* and DHD_Label* measures are copied with other loaded measures to the `<domain>/input/processed` directory.

Processing logs for this script are written to the `<CM_HOME>/logs/<date_dir>/<calling_script>/processcdts<unique id>` directory. Here,

- `<date_dir>` is a directory with a name corresponding to the date the script was run, in the format YYYY-MM-DD.
- `<calling_script>` is the name of the script that calls the processcdts.ksh script, along with a `<unique id>`. Most often, this directory is called "build" or "acceptEditedCdts", after the scripts that most often call processcdts.ksh. If the script is called directly from the command line, this will be blank.
- `<unique id>` is a system generated string of numbers that is unique in this context.

Inside this folder, the log file is called processcdts.log. Additional folders are created for every invocation of the script.
When the domain is first built, a fixed number of versions are allotted for CDTs for each consumer segment. processcdts.ksh loads each CDT into the first available slot for that category/trading area/consumer segment. If there are more CDTs for a particular category/trading area/consumer segment than there are available slots, processcdts.ksh will exit with an error message. New version slots must be created, via Dynamic Position Management. See the Oracle Retail Predictive Application Server Configuration Tools User Guide and the Oracle Retail Predictive Application Server User Guide for the Fusion Client for more information on Dynamic Position Management.

Before Running Category Management Batch Scripts for the First Time

Before running Category Management batch scripts for the first time, do the following:

1. Set the following variables:
   - RPAS_HOME
   - RPAS_JAVA_CLASSPATH
   - LD_LIBRARY_PATH (only for Solaris and Linux Operating Systems)
   - LIBPATH (only for AIX)
   - SHLIB_PATH (only for HP-UX)
   - PATH

2. Update the following variable settings in the file $CM_HOME/bin/environment.ksh to reflect current directory paths and environment:
   - CM_HOME
   - CM_DOMAINHOME
   - CM_MASTERDOMAIN
   - CM_CONFIGNAME
   - CM_CDTSTORE
   - CM_CONFIGHOME
   - CM_EXPORT
   - CM_INPUTHOME
   - CM_LOG_DIR
   - CM_TEMP
   - CM_BATCH
   - RECORDLOGLEVEL
   - RPAS_LOG_LEVEL
   - RPAS_TODAY

The following syntax allows the script to set a default value for each variable when it is not defined, but leaves the value unchanged if the variable has been previously defined in, for example, the user’s .profile:

: ${variable:=value}

The directory $CM_HOME/bin should exist and be added to the PATH variable.
The values for RPAS_LOG_LEVEL and RECORDLOGLEVEL can be any one of the following: all, profile, debug, audit, information, warning, error, or none. These two variables are usually both set to warning or both set to error.

3. Make sure to include both $RPAS_HOME/bin and $CM_HOME/bin in the PATH variable. Also, add the full directory path containing the Batch Script Architecture scripts to the PATH variable. For more information, see the Oracle Retail Batch Script Architecture Implementation Guide.
Internationalization is the process of creating software that can be translated more easily. Changes to the code are not specific to any particular market.

Oracle Retail applications have been internationalized to support multiple languages.

**Translation**

Translation is the process of interpreting and adapting text from one language into another. Although the code itself is not translated, components of the application that are translated include the following:

- Graphical user interface (GUI)
- Error messages

The following components are not translated:

- Documentation (online help, release notes, installation guide, user guide, operations guide)
- Batch programs and messages
- Log files
- Configuration tools
- Reports
- Demonstration data
- Training materials

The user interface has been translated into the following languages:

- Chinese (Simplified)
- Chinese (Traditional)
- Croatian
- Dutch
- French
- German
- Greek
- Hungarian
- Italian
- Japanese
- Korean
- Polish
- Portuguese (Brazilian)
- Russian
- Spanish
- Swedish
- Turkish

**Note:** For information about adding languages for the first time or for translation information in general, see the Oracle Retail Predictive Application Server Administration Guide for the Fusion Client.
A broad and detailed data set is required to use the capabilities of Category Management to their fullest. Some of the data required is relatively easy to obtain, for example, information about sales, cost, space, and the like. Other data is only available from a data aggregator such as Nielsen or Symphony IRI. Examples of this type of data include information on product and category performance for the market as a whole. Still other data might be sliced in a particular way to provide insight about a particular facet of a customer’s buying behavior.

This chapter deals with the data that ideally must be supplied in order to obtain the most benefit from Category Management. Each row represents a measure in Category Management. Data to be loaded into these measures must be supplied at the proper intersection with the proper measure (or file) name.

The optional/required column in the following table is intended to convey the importance of the data to the overall business process of the category management workflow. It does not necessarily indicate that the data feed is required in order to build a domain with success.

<table>
<thead>
<tr>
<th>File Name</th>
<th>Measure Name</th>
<th>Label</th>
<th>Description</th>
<th>Optional or Required</th>
<th>Type</th>
<th>Base Intx</th>
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Data 9-3
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<td>tdar/retd</td>
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<td>Optional</td>
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<td>tdar/retd</td>
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