

IBM OpenLink

*Users' Guide*

**IBM**



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# Contents

## Chapter 1. Introduction . . . . . 1

Audience . . . . .	1
Prerequisite Knowledge. . . . .	1
Translations. . . . .	2
Screen Captures and Illustrations . . . . .	2
Before You Begin . . . . .	2
System Requirements . . . . .	2
About IBM Omni-Channel Merchandising Services . . . . .	3
Logging Into OpenLink. . . . .	4
Logging in as a New User. . . . .	7
Resetting Your Password . . . . .	10
My Account Page . . . . .	10
Logging Out of IBM OpenLink . . . . .	11
OpenLink Overview Page . . . . .	12
Importing Data . . . . .	13
Viewing Import and Export Activity . . . . .	14
Import Dashboard . . . . .	14
Export Dashboard . . . . .	16
User administration permissions . . . . .	17

## Chapter 2. Navigation within the application . . . . . 19

Application Pages . . . . .	19
Actions . . . . .	19
Finding reports . . . . .	20
Searching using quick link search . . . . .	20
Searching to find information on a page. . . . .	20
Selecting items . . . . .	21
Refreshing. . . . .	21
Troubleshooting slow data retrieval . . . . .	21
Clearing the cache . . . . .	21
Moving between applications . . . . .	22
Moving between main pages . . . . .	22
Navigating using breadcrumbs . . . . .	22
Alert inbox . . . . .	22
Using and managing reports. . . . .	23
Editing in a report . . . . .	23
Data aggregation . . . . .	24
Searching . . . . .	24
Moving across multiple pages . . . . .	26
Sorting the items list . . . . .	26
Customizing the reports . . . . .	26
Data maintenance reports. . . . .	29
Using context menus . . . . .	30
Editing user preferences . . . . .	30

## Chapter 3. Importing and exporting data . . . . . 31

Importing data . . . . .	31
Using Excel spreadsheets . . . . .	32
Data File Formats . . . . .	33
Importing data files . . . . .	73
Exporting data . . . . .	75
Checking export status . . . . .	76
Deleting an export . . . . .	76

## Chapter 4. Attributing Overview . . . . . 77

How Attributing Works . . . . .	77
Attributing Process . . . . .	78
Understanding the Category Manager Workspace . . . . .	80

## Chapter 5. Preparing to Attribute . . . . . 83

Viewing Category Changes . . . . .	83
Moving Uncategorized Products to Categories. . . . .	84
Using the Edit Content Page. . . . .	85
Using the Category Workspace Page . . . . .	86
Running Product Status Resolver . . . . .	87

## Chapter 6. Attributing for Modeling . . . . . 91

Exporting the PIF . . . . .	91
Exporting the PIF to Excel . . . . .	93
Auto-Assigning Line Groups and Size Relationships . . . . .	94
Editing Content and Attributing . . . . .	95
Getting Familiar With the PIF . . . . .	96
Understanding the Category . . . . .	100
Dropping Products . . . . .	100
Populating Demand Group Structures . . . . .	101
Equalizing Size and UOM . . . . .	102
Scrubbing Brand Names. . . . .	103
Everyday Price Optimization and Everyday Price Management Attributes . . . . .	103
Importing the PIF . . . . .	111
Conducting Final Checks . . . . .	113
Running Equivalent Units . . . . .	114
Conducting Integrity Checks . . . . .	117
Editing Content . . . . .	119
Viewing Model Health . . . . .	122
Creating Demand Group Relationships. . . . .	124
Assigning to Demand Groups . . . . .	125
Assigning to Categories . . . . .	126
Exporting Demand Group Relationships . . . . .	127
Importing the Demand Group Relationship Matrix. . . . .	128
Marking Categories as Attributed . . . . .	129
Locating New Products . . . . .	131
Notifying Modelers . . . . .	132
Auto-Assigning Demand Groups to New Products . . . . .	133

## Chapter 7. Maintaining Your Category Hierarchy . . . . . 137

Importing the Category Map . . . . .	137
Product Hierarchy Mappings . . . . .	139
Importing and Exporting Product Hierarchy Mappings . . . . .	140
Re-categorizing Products . . . . .	141
Creating a New Optimization Category . . . . .	142
Moving Individual Products to Categories. . . . .	143
Moving Uncategorized Products to Categories . . . . .	144
Attribute New Products . . . . .	145
Setting the Product Hierarchy Override . . . . .	147

Configuring PIF Attribute Columns . . . . .	148
Managing Categories . . . . .	149

**Chapter 8. Task scheduler . . . . . 151**

Creating new tasks . . . . .	151
Editing tasks . . . . .	157
Deleting tasks . . . . .	157
Viewing task execution history . . . . .	158

**Chapter 9. Getting help and support 159**

Release notes . . . . .	159
Online help . . . . .	159
Accessing online help . . . . .	159
Navigating help . . . . .	160
Printable user guide . . . . .	160
Contacting IBM Omni-Channel Merchandising customer support . . . . .	161
Phone support . . . . .	161
Web support . . . . .	161

Disabling pop-up blockers in Internet Explorer . . . . .	166
Single use disable for pop-up blockers . . . . .	168
IBM Omni-Channel Merchandising education and Training . . . . .	168
Documentation questions and comments . . . . .	168

**Chapter 10. Glossary . . . . . 169**

**Chapter 11. Quick Reference Guide 179**

Attributing Process . . . . .	179
Using the PIF vs. the OpenLink UI . . . . .	181
Demand Group Hints . . . . .	182
Size/UOM Hints . . . . .	182
Dropping (not included in model) . . . . .	182
Product Information File (PIF) General Notes. . . . .	183
PIF Details . . . . .	183

**Notices . . . . . 189**

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## Chapter 1. Introduction

IBM OpenLink is a data integration, transformation, cleansing, and maintenance platform that reduces the complexity of integrating back office applications with the IBM Omni-Channel Merchandising suite.

IBM OpenLink is a data integration, transformation, cleansing, and maintenance platform that reduces the complexity of integrating back office applications with the IBM Omni-Channel Merchandising suite.

IBM OpenLink allows DBAs, Pricing Analysts, and Pricing Managers to:

- Integrate to back-office applications and data warehouses seamlessly
- Import, validate, and approve data files provided in customer-specific format
- Aggregate or parse categories to analyze cross-category cannibalistic or complementary relationships
- Content cleanse products to create more accurate data
- Demand model categories to produce coefficients used in predicting optimized results
- Deliver prices to stores efficiently with minimal user intervention

### **Related Topics**

“Audience”

“Prerequisite Knowledge”

“Translations” on page 2

“Screen Captures and Illustrations” on page 2

“Before You Begin” on page 2

“System Requirements” on page 2

“Logging Into OpenLink” on page 4

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## **Audience**

IBM OpenLink is designed for four primary audiences: Merchandising Executives, Category Managers, Account Representatives, and IT Administrators.

IBM OpenLink is designed for four primary audiences: Merchandising Executives, Category Managers, Account Representatives, and IT Administrators.

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## **Prerequisite Knowledge**

Refer to this section for prerequisite knowledge for using IBM OpenLink.

You should have some experience using web browsers, the internet, and the Microsoft Windows operating systems. You should be comfortable with navigating through menus, using a variety of buttons, working with spreadsheets and reports, and navigating through web pages.

As you work through the concepts and tasks, it is assumed that you are familiar with Microsoft Excel.

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## Translations

IBM® Openlink is available in multiple national language versions.

The Openlink application interface is available in the following national languages:

- Brazilian Portuguese
- Chinese
- French
- German
- Japanese
- Russian
- Spanish

IBM OpenLink is multicurrency and supports international currencies in the localized versions.

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## Screen Captures and Illustrations

The screen captures and illustrations are intended to provide a visual representation of what you may see when using this product.

The screen captures and illustrations are intended to provide a visual representation of what you may see when using this product. They may vary depending on your platform, or how your system is customized. It is therefore recommended that you consider these illustrations as examples.

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## Before You Begin

Before you begin using OpenLink, make sure that you review the requirements for your system.

Before you begin using OpenLink, make sure that you review the requirements for your system.

### Related Topics

“System Requirements”

“About IBM Omni-Channel Merchandising Services” on page 3

## System Requirements

Use this reference to learn about the standard system requirements for using IBM Omni-Channel Merchandising services.

The following details standard system requirements for using the IBM Omni-Channel Merchandising services.

**Note:** These resource requirements apply to the IBM Omni-Channel Merchandising services only. Running other applications simultaneously may negatively affect system performance. You may need to refer to their requirements and make additional adjustments on your computer.

	Minimum	Recommended	Not Supported
--	---------	-------------	---------------

RAM	1 GB	1.5 GB	< 1 GB
CPU	1 Ghz	2 Ghz	< 900 Mhz
Free Disk Space	50 MB	100 MB	< 50 MB
OS	Windows XP	Windows XP or Windows 7	Non-Windows, Windows 2000, Windows 95/ME, Windows 8
Browser*	Internet Explorer 11 The browser must have support for 128 bit encryption enabled.	Internet Explorer 11, or Mozilla Firefox The browser must have support for 128-bit encryption enabled.	Netscape, Internet Explorer 11 in Enterprise Mode, Internet Explorer 10 or lower, Opera, Safari
Export Applications	Adobe Acrobat Reader 7  MS Office 2002 (XP) (Excel .xls file format)	Adobe Acrobat Reader 7 or higher  MS Office 2003 or MS Office 2007  (Excel .xls or .xlsx file format)	
Adobe Flash	Adobe Flash 10.3.181	Adobe Flash 11 or higher	Adobe Flash 9 or lower
Screen Resolution	1024 x 768	1024 x 768	> 1900 x 1200
Connection	T1	T1	Dial-up, less than T1
Mouse	Two-button	Three-button with scroll feature	-

**Note:** These browsers are certified and supported for Microsoft Windows operating systems only.

## About IBM Omni-Channel Merchandising Services

The performance of IBM OpenLink can be impacted by the following.

IBM Omni-Channel Merchandising services are accessed through the web browser. Each time a button is clicked in OpenLink, you are sending a request for data via the World Wide Web. As such, the speed of OpenLink can be impacted by the following:

- Volume on the web
- Bandwidth of the retailer's network
- Firewalls or other web-accessibility restrictions imposed by the retailer
- Number of rows displayed on a page

### Related Topics

“Displaying Your Corporate Logo”

## Displaying Your Corporate Logo

IBM can display your corporate logo, or corporate branding, on the top right-hand corner of every application page.

IBM can display your corporate logo, or corporate branding, on the top right-hand corner of every application page. This adds a more personal feel to the applications. To request to display your logo, open a Technical Support issue with the image file attached.



Use the following guidelines for formatting the image file before sending:

- The logo should not be any larger than 24 pixels high.
- All white space around the logo should be removed.
- The background of the logo should preferably be transparent, or can be white.
- GIF and JPG are the preferred image formats.

IBM may make slight adjustments to the image to ensure that it is well-balanced and visually appealing on the application pages.

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## Logging Into OpenLink

Before you start using IBM OpenLink, you must first log into the IBM Omni-Channel Merchandising system with your user name and password.

### About this task

Before you start using IBM OpenLink, you must first log into the IBM Omni-Channel Merchandising system with your user name and password.

If you are a new user without log in information, you can open a support case from the log in page to request a user name and default password. Support will generate a unique user name based on the email address that you submit to IBM. After logging in with the password provided by Support, you will be prompted to change your default password before continuing. See "Logging in as a New User" on page 7 for more information.

**Note:** To comply with your security requirements, IBM Customer Support will specify a range of computer IP addresses from where users in your organization can log in to IBM Omni-Channel Merchandising. Any user attempting to log in from an IP address that is not in the permitted list of IP addresses will be denied access to all IBM Omni-Channel Merchandising applications. Contact Customer Support for more information.

To start OpenLink:

### Procedure

1. Open Internet Explorer.
2. Enter the IBM Omni-Channel Merchandising Products web address (<https://mydt.demandtec.com> or <https://companyname.demandtec.com>) in the address field in the browser, and press Enter. The log in page will display.



**Sign In**

English | Français | 中文 | Español | 日本語

Login

Password

Remember Me

**Sign In**

[Forgot Password](#)

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Don't have a network account?

[New User Login Request](#)

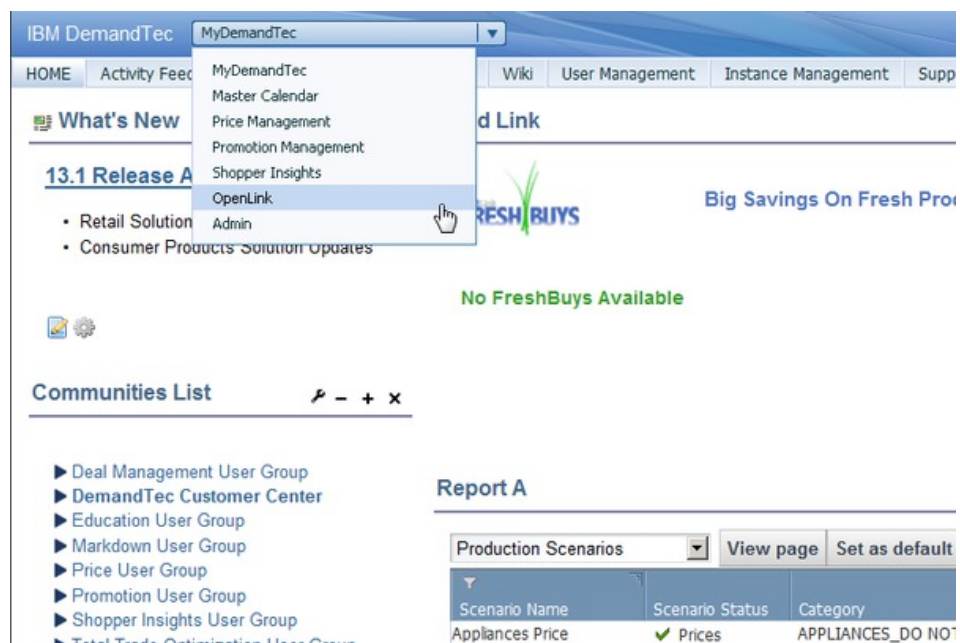
3. Enter your user name and default password in the log in page, and click **Log in**. If you have forgotten your password, see “Resetting Your Password” on page 10.
4. The **My Account** page opens where you are required to change your default password to a password with the following requirements:
  - At least eight characters
  - At least one letter
  - At least one number (0 - 9)
  - At least one symbol (!@#%\_^\_+ ={}[]:;?! ) (*recommended, but not required*)
5. Re-enter your password in the **Enter Again** field.
6. Select a security question, and provide an answer for your question. The answer must have at least four characters.
7. Click **Save**. In the confirmation page that appears, click the **Continue to login** link to navigate back to the log in page.
8. Enter your user name and new password in the log in page, and click **Log in**. If you have access to only one company instance (organization), you will be navigated to one of the following pages:
  - **IBM Omni-Channel Merchandising Home page**

- **Deal Management Home** page for Deal Management users
- **My Account** page for both types of users where the user can select Promotion Planning and Management. See “My Account Page” on page 10 for more information about this page.

However, if you have access to more than one organization, an initial **Select Organization** page will show the organizations that you can access. After selecting an organization, you will then be navigated to one of the pages listed above.

**Note:**

- For security purposes, you will be required to change your password after every 13 weeks. If it is not changed, you will be locked out from using the log in page, and you will need to contact Customer Support for further instructions.
  - IBM recommends that you bookmark the **IBM Omni-Channel Merchandising Home** page to your Internet Explorer Favorites. You can also bookmark a Customer Trade Planning page. When you select a page from your list of Favorites, you will be navigated directly to that page after logging in.
9. In the **IBM Omni-Channel Merchandising Home** page, click **Price, Promotion, Markdown, or OpenLink** in the primary navigation drop-down to open an application.



10. Click **Admin** to navigate to overview pages that contain links to administrative tasks and components common to all the applications.

**Related Topics**

- “Logging in as a New User” on page 7
- “Resetting Your Password” on page 10
- “My Account Page” on page 10
- “Logging Out of IBM OpenLink” on page 11

## Logging in as a New User

If you do not have your log in information, you will need to sign up for a new IBM Omni-Channel Merchandising Network ID from the login page.

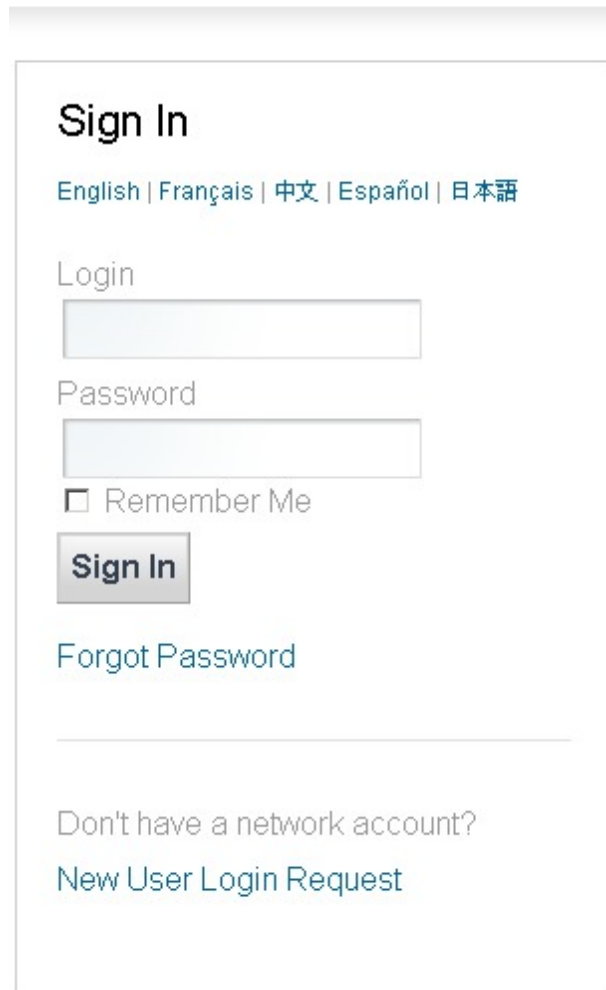
### About this task

If you do not have your log in information, you will need to sign up for a new IBM Omni-Channel Merchandising Network ID from the login page. After signing up for a new account, the Customer Support team will enable your account to access Promotion and any other services your company has purchased and enabled for you.

To sign up for a new account:

### Procedure

1. Open Internet Explorer.
2. Enter the IBM Omni-Channel Merchandising Products web address (<https://mydt.demandtec.com> or <https://companyname.demandtec.com>) in the address field in the browser, and press Enter. The IBM Omni-Channel Merchandising system log in page will display.



The screenshot shows a web page titled "Sign In". At the top, there are language options: English | Français | 中文 | Español | 日本語. Below this, there are two input fields: "Login" and "Password". Under the "Password" field is a checkbox labeled "Remember Me". A "Sign In" button is positioned below the checkbox. Below the button is a link for "Forgot Password". At the bottom of the page, there is a horizontal line, followed by the text "Don't have a network account?" and a link for "New User Login Request".

3. Click the **New User Login Request** link to request a new account.

### Network Login User Request

[English](#) | [français](#) | [中文](#) | [español](#) | [日本語](#)

Please use your corporate email address if possible.

**First Name**

**Last Name**

**Company**

**Email Address**

**Phone**  **Ext**

**Login ID**

[Sign In/Forgot Password](#)

Looking for support ? Visit our [Customer Support](#) page.

4. Enter your contact information, company, and work e-mail address. IBM will send all account-related information to the e-mail address you provide. Choose the Login ID you will use to log in to IBM Omni-Channel Merchandising services.
5. Click **Submit** to create your new account. After submitting your request, you should receive an e-mail with a temporary password for your account at the e-mail address you provided.
6. Read the Terms of Use and click **I Agree** to continue creating your account. You will then be asked to change your password and set a security question.

The screenshot shows a web interface for updating account security. At the top, there is a 'My Account' tab and a 'My Account' header. Below this, a message states: 'Please update the security challenge question and answer for your account. John Doe'. The main form area is highlighted in yellow and contains the following sections:

- Your User Name and Password:**
  - User Name: johndoe
  - Password: [masked]
  - Enter Again: [masked]
- Instructions:**
  - 'The password must consist of at least 8 characters. It must contain at least one character/letter and one number (0-9). We strongly suggest including at least one symbol (!@#%\*^\_+=|[]:;?|) for a stronger password. Please make sure Caps Lock is off before starting.'
  - 'Please make a note of your user name and password. You will need your user name and your password to login.'
  - 'Please select security question and provide answer for that. The answer must be at least 4 characters long.'
- Reminder Query:** 'Please choose a reminder query.'
- Password Reminder:**
  - Question: 'What is your father's middle name?' (selected from a dropdown)
  - Answer: 'John'
  - Email address: johndoe@supervalu.com
  - A 'Save' button is visible at the bottom.

7. Change your randomly generated password, choosing a new password that meets the following requirements:
  - At least eight characters
  - At least one letter
  - At least one number (0 - 9)
  - At least one symbol (!@#%\*^\_+=|[]:;?|) (*recommended, but not required*)
8. Re-enter your password in the **Enter Again** field.
9. Select a security question and provide an answer for it. The answer must have at least four characters.
10. Click **Save**. In the confirmation page that appears, click the **Continue to login** link to navigate back to the login page.
11. Enter your user name and new password in the log in page, and click **Log in**.
12. Once your account has been created, Support will be automatically notified, and will provision your account with all appropriate application permissions. Once this provisioning process is complete, you will receive an e-mail at the address associated with your account.

**Note:**

- For security purposes, you will be required to change your password after every 13 weeks. If it is not changed, you will be locked out from using the log in page, and you will need to contact Customer Support for further instructions.
  - We recommend that you bookmark the **IBM Omni-Channel Merchandising Home** page to your Internet Explorer Favorites. You can also bookmark a IBM Omni-Channel Merchandising Service page. When you select a page from your list of Favorites, you will be navigated directly to that page after logging in.
13. In the **IBM Omni-Channel Merchandising Home** page, click the **OpenLink** section in the primary navigation drop-down to open IBM OpenLink.
  14. Click **Data** or **Admin** to navigate to overview pages that contain links to administrative tasks and components common to all the applications.

## Resetting Your Password

Use this procedure to reset your current password.

### About this task

To reset your current password:

### Procedure

1. In the IBM Omni-Channel Merchandising log in page, click **Forgot Password**. The **Recover Password** page displays.

Recover Password

[English](#) [français](#) [中文](#) [español](#) [日本語](#)

**Screen Name**

jdoe

**hointof materials.**

Type the two words:

hointof materials.

reCAPTCHA™  
stop spam.  
read books.

**Send New Password**

[Sign In](#) [Create Account](#)

2. Enter your user name and type the words in the CAPTCHA image, then click **Send New Password**.

**Note:** If your user name is not recognized or if you are not able to receive e-mail at the specified address, you will need to contact IBM Customer Support.

3. Check your e-mail Inbox for a temporary account password. After you log in with your temporary password, you will be required to choose a new password for your account.

## My Account Page

The **My Account** page is where you can change or modify information related to your account.

### About this task

Once logged in, the **My Account** page is where you can change or modify information related to your account. For example, if you have access to several

instances, you can switch to a different instance. You can also open a IBM Omni-Channel Merchandising service from the list of available products for the instance.

**Note:** Several browser windows may be open at a time but all windows will be accessing the same instance. You cannot access two instances at the same time in a session.

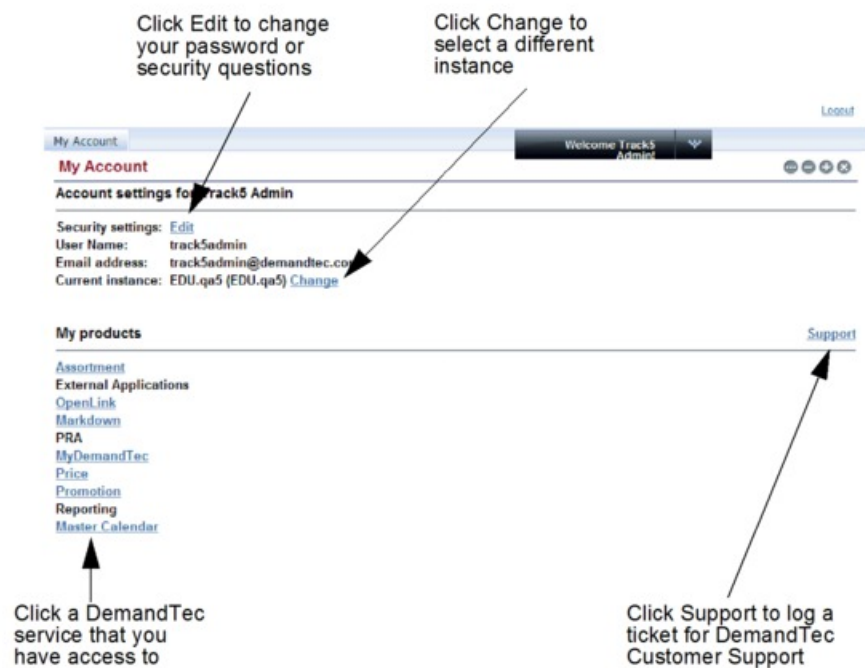
The page includes these additional links:

- An **Edit** link is located next to **Security settings** to enable you to change your existing password or security questions, while remaining logged in to IBM.
- A **Support** link is located on the far right side of the **My Account** page that opens the web support site for entering support tickets for IBM Customer Support.

To change instances or services:

## Procedure

1. Click the **My Account** link at the top of the page to open the **My Account** page.



2. To change the instance, click the **Change** link next to **Current instance**. You will return to the **Select Instance** page to select a different instance.
3. To switch to a different IBM Omni-Channel Merchandising application, select a service from the **My products** list. You will be navigated to the initial page of the application.

---

## Logging Out of IBM OpenLink

You can exit IBM OpenLink by simply clicking the **Logout** link at the top of any page.

You can exit IBM OpenLink by simply clicking the **Logout** link at the top of any page. All saved settings will be preserved for the next log in. After logging out, you will return to the initial log in page.

If you close the browser window or navigate to a different web page instead of logging out, you will be automatically logged out after 30 minutes of inactivity, and will need to log back in from the log in page.

**Note:** IBM Customer Support can configure a different session timeout value, such as 15, 60, 120, or 180 minutes based on your organization's usage patterns and security policies.



**Note:** You should log out when you are not using the applications to maintain security and free up system resources.

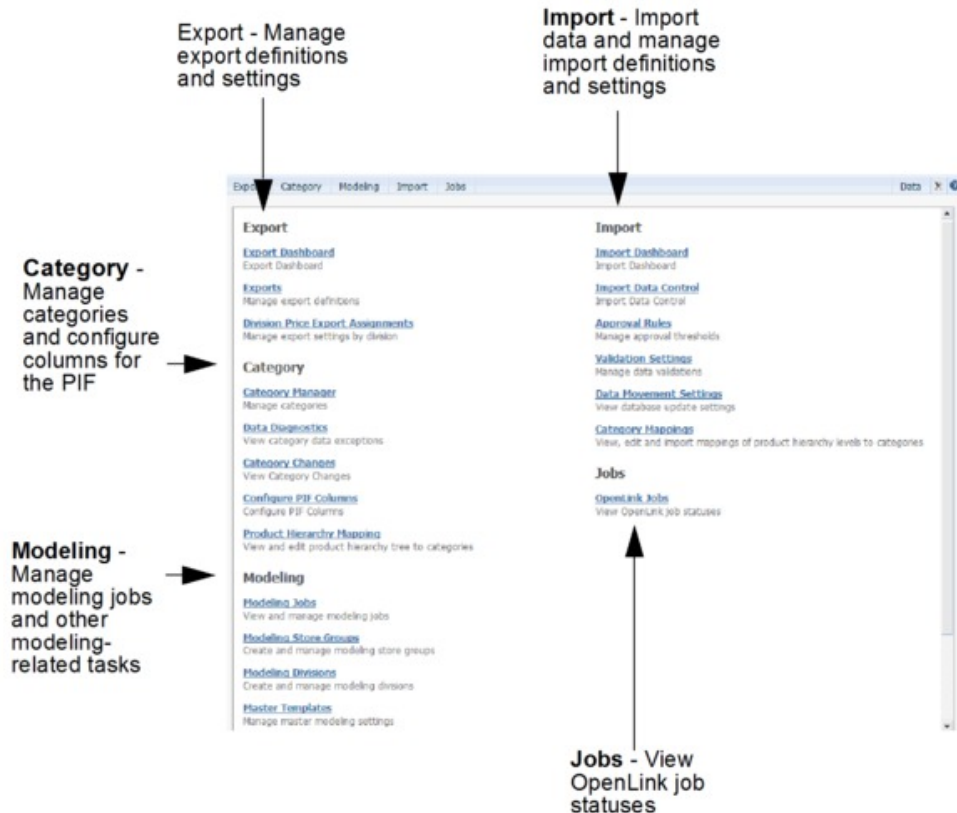
## OpenLink Overview Page

The **Overview** page displays all of the functionality within the OpenLink application, groups the functionality by sub-type, and provides a description of each function.

When you choose **OpenLink** from the services drop-down menu, you are navigated to the OpenLink **Overview** page. The **Overview** page displays all of the functionality within the OpenLink application, groups the functionality by sub-type, and provides a description of each function. You can also access the same pages from the **OpenLink** drop-down menu.

Note that this guide only discusses the pages and tasks necessary for the product attributing process. Attributing is a series of tasks to prepare the product information for the modeling and optimization processes.





## Importing Data

Use this procedure to import data into IBM OpenLink.

### About this task

Data is imported into IBM OpenLink using these methods:

### Procedure

1. Data (in text **.txt** files) is received through the IBM OpenLink application. This is the most common method for importing new data. Customers send their data to IBM Omni-Channel Merchandising each week (through FTP) for sales, locations, products, competitive prices, and product cost changes. This data is received in OpenLink, which uses automated validations to ensure data cleanliness. There is very little manual, or user, intervention in these files. The imported files are monitored using the **Import Dashboard** report. See “Viewing Import and Export Activity” on page 14 for more information.

Larger sets of data should be sent through OpenLink to take advantage of automated data accuracy screening. OpenLink is a tool used to prevent inaccurate or corrupted data from entering the applications. The data is put into a standard format and then validated. The validation checks for errors, and flags the errors. The errors are fixed, and validation is run again. The final output from this process is clean and accurate data.

2. The Product Information File (PIF) export/import process. This process allows you to export the PIF in OpenLink to an MS Excel file, attribute the products,

and re-import the information back to the system. See Chapter 4, “Attributing Overview,” on page 77 for more details.

**Related Topics**

“Viewing Import and Export Activity”

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## Viewing Import and Export Activity

Using OpenLink to import and export files in IBM Omni-Channel Merchandising enables you to manage data files automatically, updating product information as it becomes available.

Using OpenLink to import and export files in IBM Omni-Channel Merchandising enables you to manage data files automatically, updating product information as it becomes available. As your imports and exports become more complex, tracking them can be a complex task.

To address this challenge, OpenLink includes intuitive import and export dashboards, which provide visibility into scheduled and on-demand data transfer activities.

**Note:** The **Import Dashboard** page replaces the **Imports**, **Approved Imports**, and **File Upload** pages in versions 10.1 and earlier.

You can control the cadence and setup of various batch imports using the **Import Data Control** page. This report displays the file patterns, volumes, historical ranges, data load time thresholds, and other import information. Contact your IBM Representative for more information about accessing and using this page.

**Related Topics**

“Import Dashboard”

“Export Dashboard” on page 16

## Import Dashboard

The **Import Dashboard** consolidates all import-related status information onto one page, while allowing for single-file upload.

The **Import Dashboard** consolidates all import-related status information onto one page, while allowing for single-file upload via the **Import File** button. The dashboard shows the real-time status of each import process currently running, as well as successes, failures, and import characteristics of previous imports:

Batch Type	Filename	Batch Status	Sub Status	Staging Batch ID	Total Records	Total Rejected	Lvl 1 Errors	Lvl 2 Errors
Current Retail 1PK	currentretail1PK.txt	Received	Received				0	0
Sellable Logistical Location Map	l2.txt	Received	Received				0	0
Sellable Logistical Location Map	deltest.txt	Received	Received				0	0
Sellable Item	sell.txt	Received	Received				0	0
Competitor Zone	comp zone.txt	Loaded	RAPIDS APPROVED - Approval Complete	125869	4	0	0	0
Competitor Zone	comp zone.txt	Loaded	RAPIDS APPROVED - Approval Complete	125868	4	0	0	0
Competitor Zone	comp zone.txt	Loaded	RAPIDS APPROVED - Approval Complete	125867	4	0	0	0
Competitor Zone	comp zone.txt	Loaded	RAPIDS APPROVED - Approval Complete	125866	4	0	0	0
ABC Cost	UNDX SA.doc	Failed	IMPORT FAILED - DB2 Import Failed	125767			0	0
Location	3.txt	Loaded	approved	125766	1		0	0
Product Location VAT	VAT_RATE_AHOfuib4....	Loaded	RAPIDS APPROVED - Approval Complete	125672	3	0	0	0

As each file is processed by OpenLink, you can use the Import Dashboard to view batch status, import process, and any errors that might have occurred during import. The dashboard is a read-only grid containing information about each import. This grid contains the following columns:

- **Batch Type:** The data type of the data file that is in the pipeline
- **Filename:** The filename of the data file
- **Batch Status:** The state of the data in the pipeline. The values of the status should be:
  - **Received:** The file has been transferred into the appropriate OpenLink folder but has not been picked up by the data load process. There is no batch associated with this file.
  - **Ready for Load (Manual):** This sub-status should show if the file was manually loaded via the 'Import File' button.
  - **Processing:** The file has been picked up by the data loading process and is currently in progress.
  - **Sub status:** Sub-status information within **Processing** can also be shown. Example: Processing – Validation, Processing – DB load.
  - **Loaded:** The file has been successfully loaded into the database. All the records have been successfully loaded.
  - **Loaded with Errors:** Some of the records in the file were not loaded into the database but there were other records that did load successfully. The rejected records are available in the reject file.
  - **Failed:** No records were loaded into the database. This state is a result of a Level 1 error.
- **Staging Batch Id:** The batch ID, if available, for the data file. If the file has not been marked for loading, this field will be empty.
- **Total Records:** The total number of records in the data file that was received
- **Total Rejected:** The total number of records rejected due to errors
- **Level 1 Errors:** Number of records that caused major errors resulting in a failed import
- **Level 2 Errors:** Number of records that caused serious errors, resulting in a failure to load those records
- **Level 3 Errors:** Number of records with minor errors, resulting in warnings
- **Start Date:** Date and time when the data file was picked up by the data load process
- **End Date:** Date and time when the data load process for the file completed
- **Load Time:** The total elapsed time in minutes between the Start Date and End Date

- **Avg. Load Time:** The average load time for data of the same type based on the last N data loads weighted by the number of records in the data file. 'N' is a configurable value that is set in the **Import Data Control** page for each data type. This is an optional field that is not visible in the dashboard by default but can be added through the **Edit Preferences** page.
- **Volume Variance:** The difference in the number of records between the input file and the average number of records for the same data type in the last N data loads. This is an optional field that is not visible in the dashboard by default but can be added through the **Edit Preferences** page.
- **Approved By:** The username that initiated the data load process. If the process was automated, the user will be 'Internal User'.

#### Related Topics

"Importing Data" on page 13

## Export Dashboard

The **Export Dashboard** shows all export activity from OpenLink, allowing you to monitor your company's scheduled and on-demand exports

The **Export Dashboard** shows all export activity from OpenLink, allowing you to monitor your company's scheduled and on-demand exports. To view the Export Dashboard, navigate to **OpenLink > Export Dashboard**. The basic dashboard view is shown below:

Type	Export Name	Division	Status	# Records	Start Time	End Time	Elapsed Time (Min.)
MPerDetail	MC Performance Detail Export		Scheduled		Jul 1, 2010 9:57 PM		
MPerDetail	MC Performance Detail Export		Scheduled		Jul 4, 2010 9:29 PM		
MPerDetail	MC Performance Detail Export		Scheduled		Jul 4, 2010 10:33 PM		
DisplayPlanning	Display Planning Export		Exported	1	Jun 30, 2010 5:37 AM	Jun 30, 2010 5:51 AM	14
DisplayPlanning	Display Planning Export		Exported	3176	Jun 29, 2010 12:35 PM	Jun 29, 2010 1:17 PM	42
MPerDetail	MC Performance Detail Export		Scheduled		Jun 30, 2010 12:55 PM		
MPerDetail	MC Performance Detail Export		Exported	0	Jun 29, 2010 12:55 PM	Jun 29, 2010 12:55 PM	0
MPerDetail	MC Performance Detail Export		Exported	0	Jun 29, 2010 1:55 PM	Jun 29, 2010 1:55 PM	0
MPerDetail	MC Performance Detail Export		Exported	0	Jun 29, 2010 2:55 PM	Jun 29, 2010 2:55 PM	0
MPerDetail	MC Performance Detail Export		Exported	0	Jun 29, 2010 3:55 PM	Jun 29, 2010 3:55 PM	0
MPerDetail	MC Performance Detail Export		Exported	0	Jun 29, 2010 4:55 PM	Jun 29, 2010 4:55 PM	0
MPerDetail	MC Performance Detail Export		Exported	0	Jun 29, 2010 5:55 PM	Jun 29, 2010 5:55 PM	0

All fields in the **Export Dashboard** page are read-only. The dashboard is comprised of the following columns:

- **Type:** The export type: Price, Promotion Details, Markdown, etc.
- **Export Name:** The user-defined name or description for the export
- **Division:** The division that is attached to the export
- **Status:** The state of the data in the pipeline. The **Status** column may display several values:
  - **Scheduled:** The export has been scheduled but not yet executed
  - **Extracting:** The export is extracting data from the database
  - **Exported:** The data has been extracted from the DB and any post-processing scripts attached to the exports have been successfully executed
  - **Error:** The export failed
- **# Records:** The total number of records exported
- **Start Time:** Date and time when the export started

- **End Time:** Date and time when the export completed
- **Elapsed Time:** The total elapsed time in minutes between the Start Date and End Date
- **Exported By:** The username that initiated the data export process. If the process was automated, the user will be 'Internal User'.

"Exporting data" on page 75

"Checking export status" on page 76

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## User administration permissions

User administration permissions are listed here.

- **Administer Calendar Period Definitions** - Allows users to modify default calendar periods in the **Calendar Administration** section of the **Admin** page, and to upload new calendar period definition files.
- **Administer Company Wide UI Preferences**- Allows the user to set default report settings in the **Edit Report** pages for all users within a company.
- **Administer Display Setup** - Allows the user to load display templates, configure the **Display Planning** tool, and manage display characteristics.
- **Administer Job Scheduler** - Allows the user to edit jobs in the Job Scheduler queue. These are the behind-the-scenes processes that run.
- **Administer Notification Aliases**- Allows the user to create, delete, or edit notification aliases for groups of users to receive alerts.
- **Administer Organization** - Allows IBM Omni-Channel Merchandising Support and IBM Omni-Channel Merchandising Operations to set up a new company and edit company information.

**Note: Administer Organization** should be selected for IBM Omni-Channel Merchandising Support and IBM Omni-Channel Merchandising Operations users only. The application may be unstable if the database properties are set improperly.

- **Administer Task Scheduler** - Allows the user to create and manage tasks in the Task Scheduler.
- **Edit Permissions** - Allows the user to edit all user permissions. At least one user in each organization must have this function.
- **Edit System Configuration** - Allows IBM Omni-Channel Merchandising Support and IBM Omni-Channel Merchandising Operations to edit the system configuration for a company.

**Note: Edit System Configuration** should be selected for IBM Omni-Channel Merchandising Support and IBM Omni-Channel Merchandising Operations users only. The application may be unstable if the system properties are set improperly.

- **Edit Users** - Allows the user to create, edit, and delete users.
- **OpenLink Administration** - Allows IBM Omni-Channel Merchandising Support and IBM Omni-Channel Merchandising Operations to administer IBM Omni-Channel Merchandising OpenLink.
- **View Jobs** - Allows the user to view jobs in the Job Scheduler que.



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## Chapter 2. Navigation within the application

The IBM Omni-Channel Merchandising workspace allows you to access all applications for which you have the correct permissions. Most applications and pages share similar navigation features, such as searches, reports, and paging. All features work the same way on every page and in every application.

Your access to certain areas of IBM Omni-Channel Merchandising depends on your permissions.

### Related Topics

- “Finding reports” on page 20
- “Editing in a report” on page 23
- “Data aggregation” on page 24
- “Searching” on page 24
- “Searching within report columns” on page 24
- “Moving across multiple pages” on page 26
- “Sorting the items list” on page 26
- “Customizing the reports” on page 26
- “Adding or removing columns” on page 26
- “Changing column order” on page 27
- “Sorting columns” on page 27
- “Filtering columns” on page 28

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## Application Pages

From many pages in IBM Omni-Channel Merchandising, you can access the features below.

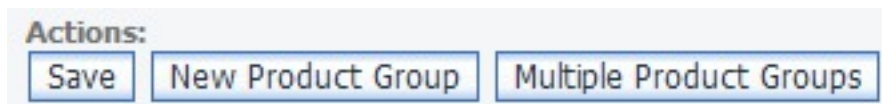
### Related Topics

- “Actions”
- “Finding reports” on page 20
- “Searching to find information on a page” on page 20
- “Selecting items” on page 21
- “Refreshing” on page 21
- “Troubleshooting slow data retrieval” on page 21
- “Clearing the cache” on page 21

## Actions

New activities are executed by clicking on an **Action** button.

New activities are executed by clicking on an **Action** button. For example, you create a new product group by clicking the **New Product Group** action button. You can click the **Save** button to save your new activities and changes.



## Finding reports

Reports are pre-defined ways of filtering information. Different reports are available in different screens.

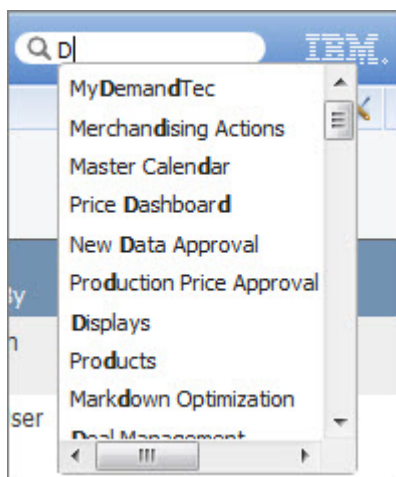
For example, several reports are available in the **Product Group** page including the **Product Groups** report.



## Searching using quick link search

Use the Quick Search to quickly navigate around the application.

You can use the search field to quickly navigate to other areas of the application. As you type in the search box, coinciding pages in the application will automatically populate the drop-down menu. You can click to select a page to navigate to it.



## Searching to find information on a page

IBM Omni-Channel Merchandising offers several ways to find information on a page.

You can perform a search on letters, words, numbers, or characters such as >, <, or =. The wildcard character \* can be used to find items containing certain words. For example, \*Yogurt\* will return Light Yogurt, Plain Yogurt, and Yogurt Drinks.





## Selecting items

The Shift and Ctrl keys are used for selecting multiple items on a page.

To select multiple items, select one or more items, hold down the Shift or Ctrl key, and select another item.

- Shift key: Allows for continuous selection of items
- Ctrl key: Allows for non-continuous selection of items

## Refreshing

Pages within IBM Omni-Channel Merchandising need to be refreshed to update their status.

To refresh the screen, press F5, or click the **Refresh** button in the Internet Explorer browser toolbar.

## Troubleshooting slow data retrieval

Data retrieval in IBM Omni-Channel Merchandising web-based applications is processed when you select buttons such as **OK**, **Save**, or **Sort Ascending**. Sometimes the applications appear frozen while retrieving information. Here are a few troubleshooting tips when pages appear to be frozen during data retrieval.

### Procedure

1. Check the lower left corner of the Internet Explorer browser window to ensure that Ready is displayed. You can also try refreshing the page.
2. If a page cannot be accessed or data cannot be changed, check that you have the correct certificate, the certificate is installed correctly, and the certificate has the correct permissions associated with it.

## Clearing the cache

Use this procedure to clear the cache.

### About this task

As you navigate through the World Wide Web, your computer caches, or saves pages that you have accessed to remember where you have been. Pages are stored as a history, which makes it easier and faster to view the pages on subsequent visits.

As enhancements are made to a page, you may not see the updated page because of the history that your computer has stored.

### Procedure

1. Open Internet Explorer.
2. Choose **Tools > Internet Options**. The **Internet Options** dialog box displays.
3. In the center of the dialog box, click **Delete Files**.
4. Click **OK** in the **Delete Files** message box that appears. This clears the cache. If you have never or rarely cleared the cache, the process may take a few minutes to complete

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## Moving between applications

The application drop-down menu provides quick access to individual applications and areas within each application. Use the cascading menus to navigate to application pages and complete primary tasks.

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## Moving between main pages

The menu bar allows you to move between main pages within an application. The example shown below is from Promotion Planning & Execution.

Your access to specific areas of the application is controlled by permissions.



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## Navigating using breadcrumbs

A breadcrumb trail is a hierarchy of the pages within an application that you navigated through to get to the current page. The breadcrumb trail displays at the top of many pages. You can quickly link directly to a particular page in the hierarchy, or you can navigate back through to your starting point.

The current page is the final element in the hierarchy. You must save any entered data before leaving a page; however, any search criteria that you entered on a previous page will be preserved if you navigate back to that page using the breadcrumb trail.



---

## Alert inbox

The Alert Inbox allows you to view the alerts that you are subscribed to that are generated by various events and activities in the applications.

You can receive alerts for activities that only you have initiated or alerts when anyone in the company has initiated the activity. Examples of events are when new product costs are imported into IBM Omni-Channel Merchandising OpenLink, or a promotion is predicted. The alerts are stored in a message dialog box where they can be viewed.

In addition to receiving alerts in the IBM Omni-Channel Merchandising application, you can also receive alerts via email using the email address stored in your user profile.

A **New Alert** notification icon will display at the top right-side of the IBM Omni-Channel Merchandising application when you have received new messages. The number that displays in the icon indicates the number of new messages.

Move the mouse over the icon, and then click **Go to Inbox** in the pop-up to open the **Alert Inbox** dialog box. If you dismiss the icon instead, the icon will not appear until a new message arrives. The alert inbox is also available as an option in the **Tools** menu.

In the **Alert Inbox** dialog box, double-click a message, or select **Open** from the right-click menu to open and view it in the **Message Details** dialog box. You can also right-click on one or several messages to delete, or mark them as read. The inbox stores a maximum of 100 messages.

Administrators can also subscribe other users within the company from the **Users** page. You must have the **Administer Alert Subscriptions** permission enabled to subscribe users to alerts.

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## Using and managing reports

Reports can be customized to fit your needs. You can search, sort, filter, and customize the reports (add or remove columns).

### Related Topics

- "Finding reports" on page 20
- "Editing in a report"
- "Data aggregation" on page 24
- "Searching" on page 24
- "Searching within report columns" on page 24
- "Sorting the items list" on page 26
- "Customizing the reports" on page 26
- "Adding or removing columns" on page 26
- "Changing column order" on page 27
- "Re-sizing columns" on page 27
- "Sorting columns" on page 27
- "Filtering columns" on page 28
- "Clearing report changes" on page 28
- "Setting company preferences" on page 28
- "Creating personalized reports" on page 29

## Editing in a report

Use this procedure to edit a field from inside a report.

### About this task

Many fields can be edited directly in a report by clicking on the field, and entering a new value. Fields that are editable in this manner will show a small bracket symbol in the upper, right corner of the column heading. Once you have changed a value, you cannot retrieve the previous value.

### Procedure

1. Click on the field you want to edit or select multiple rows using the Shift (for sequential rows) and Ctrl (for non-sequential rows) keys.
2. Enter the new value in the field.

3. Click **Save**. The new value will show in bold typeface until it has been saved.

## Data aggregation

Some reports allow you to view data at different aggregation levels.

To change a report's aggregation, select the level from the **Aggregation** drop-down menu. The page refreshes and the data is shown at the selected level.

## Searching

Use this procedure to search column for words, letters, numbers, or characters.

### About this task

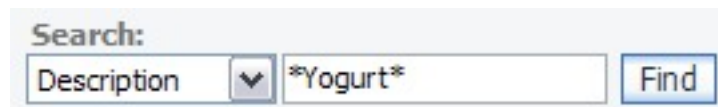
You can perform searches using the (>, <, <=, >=, =) signs to limit the search. You can use a comma to search for multiple items, such as two UPCs (000419392402, 00014124214). In addition, you can use a comma to search for values outside of a specified range, such as items with a volume change > or < 10% (>.10, < -.10). Use quotes to enclose a value that contains a comma, for example, "John, Scenario1".

Searches containing the wildcard character, \*, are also allowed. In this example, the following searches can be conducted for the UPC 00012345678910:

- \*78910 will find the UPC that ends in 78910
- 00012345\* will find all UPCs which start in 00012345. This is useful when searching for all items for a manufacturer or vendor.
- \*5678\* will find all UPCs which contain 5678

### Procedure

1. Select a column from the **Search** drop-down menu. The column you select is where the search will be performed. You can only search on visible columns.
2. Enter the word, letter, or character you want to search for.



The image shows a search interface with a label 'Search:' above a dropdown menu. The dropdown menu is open, showing 'Description' as the selected option. To the right of the dropdown is a text input field containing the text '\*Yogurt\*'. To the right of the input field is a blue button labeled 'Find'.

3. Click **Find**. The search results will appear. You cannot search again within the results. Only one search can be performed at a time. To clear a search, click **Clear Search**. The items list will revert back to the pre-search list of items.

### Searching within report columns

In addition to the **Search** field at the top of the pages, you can use the **Advanced Filter** feature for searching and filtering report items.

### About this task

The **Advanced Filter** is a drop-down list of the values within each report column. This list is accessible from the left-click context menu for column headings in reports that display a filter symbol in the first column heading. You can select one or more values to include in the filter.

Most of the operations that are supported in the **Search** field are also supported. See "Searching" for more information about using the **Search** field.

- The (>, <, <=, >=, =) signs limit the search.

- You can use a comma to search for multiple items, such as two UPCs (000419392402, 00014124214). In addition, you can use a comma to search for values outside of a specified range, such as items with a volume change greater than or less than 10% (>.10, < -.10). You should enclose any values containing a comma (,) with double quotes, for example, "My Scenario February 12, 2007".
- Searches containing the wildcard character (\*) are allowed for values in text columns, including UPCs.

A list of your current search values in the **Advanced Filter** is stored for reference in a separate view. You can keep this list updated by clearing all or individual search values. The page will refresh as the values are updated.

**Note:** To search certain Boolean column types, you must use the **Search** field instead of the **Advanced Filter**. The following lists the Boolean column types that can be searched in the **Advanced Filter**:

- Checkbox (Yes, No appears in **Advanced Filter**)
- Locked checkbox (Yes, No appears in **Advanced Filter**)
- Discontinued/Active (Discontinued, Active appears in **Advanced Filter**)
- Yes/No (Yes, No appears in **Advanced Filter**)
- Warning exclamation point symbols (Yes, No appears in **Advanced Filter**)

To search using the **Advanced Filter**:

### Procedure

1. Left-click on a column heading in a report, and select **Apply Filter**. A separate dialog box opens with the column values that are in the current page of the report.
2. Select one or more values from the list. Use the Shift or Ctrl key to select multiple items. Select the value "(Blank)" in the list to search for blank report cells. IBM Omni-Channel Merchandising considers cells with only Space characters as blank. Select the value "(Not Blank)" to show only report cells which are not blank.
3. Click **OK**. The search results will appear. Click **Cancel** to close the dialog box without performing the search. You can search again within the results. All searches are retained until they are cleared, the report is changed, or the aggregation is changed.
4. To view a list of all the current search values, mouse-over the left-most column with the green filter symbol in the heading. The **Advanced Filter** values will display. Any **Report Filter** values entered in the **Edit Report** page will also display (see "Filtering columns" on page 28). The view will close when you move the pointer away from the filter symbol.
5. To clear the filter values, click the 'x' button in front of an individual filter, or the 'x' button in front of **Advanced Filter Values** to clear all filters at once. The report filters can also be cleared. You can also clear the **Advanced Filter** values by selecting **Clear Filter** in the column heading left-click context menu.

### Related Topics

"Searching" on page 24

"Filtering columns" on page 28

## Moving across multiple pages

Use this procedure to move across multiple pages.

### Procedure

1. Click on the Page arrows. The number of items listed on each page is set in **User Preferences** (**Tools > User Preferences**).



2. Click the double arrow button to go to the last page or first page in the set.

## Sorting the items list

Use this procedure to sort the item list by a column header.

### Procedure

1. Left-click on the column header you want to sort.
2. Choose **Sort Ascending** or **Sort Descending**. The list will refresh and the items will appear in the order you set.

## Customizing the reports

Use this procedure to customize reports.

For each report, you can add or remove columns from the list, change the column order, and sort and filter within each column in the **Edit Report** page. You can also save your customizations into separate, personalized reports. These reports will be available to choose from the report drop-down list in the edited application page.

In addition to setting personal report preferences, administrators can also set default preferences for a company. These preferences will be the default report settings for all users in that company.

### Related Topics

- “Adding or removing columns”
- “Changing column order” on page 27
- “Re-sizing columns” on page 27
- “Sorting columns” on page 27
- “Filtering columns” on page 28
- “Clearing report changes” on page 28
- “Setting company preferences” on page 28
- “Creating personalized reports” on page 29

## Adding or removing columns

Use this procedure to add or remove columns.

### Procedure

1. Click **Edit**, which appears by the report name. The **Edit Report** page appears.
2. Select or deselect the Visible checkbox next to each column name.
  - Selecting the checkbox will make the column visible in the groups list
  - Deselecting it will remove the column

3. Click **Save**. The changes will appear on the page.

### Changing column order

Use this procedure to change the column order.

#### Procedure

1. Click **Edit**, which appears by the report name. The **Edit Report** page appears.
2. Click the order number next to each column name that you want to change. The order text box appears.
3. Enter a number in the order text box. **1** represents the first column that will appear on the left side of the window, **2** represents the second column, for example.
4. Press **Return** after you change one column to automatically adjust the rest of the column order.
5. Click **Save**. The changes will appear on the page.

### Re-sizing columns

Use this procedure to manually re-size a column.

#### About this task

The report columns can be manually re-sized by dragging a column's right boundary back and forth, or can be set to a specific width in pixels that you specify.

In the report, drag the boundary on the right side of the column heading until the column is the width that you want. All other column widths will remain the same. Changes are automatically saved in your preferences for the report.

The specific column width (in pixels) will be automatically set in the **Width** field in the **Edit Report** page for the report. You can adjust the width either manually, or by increasing or decreasing the value of the column width.

#### Procedure

1. Locate the report name.
2. Click **Edit**. The **Edit Report** page appears.
3. Click the **Width** field for each column that you want to re-size, and enter a number between 7 and 500. This value represents the column width in pixels. If any columns were manually re-sized, their column width will also display in the **Width** field.
4. Click **Save**. The changes will appear in the report.

### Sorting columns

Use this procedure to sort columns.

#### Procedure

1. Click **Edit**, which appears by the report name. The **Edit Report** page appears.
2. Click in the **Sort** column next to a report column name. The **Sort** drop-down menu displays.
3. Select **Ascending**, **Descending**, or **None** from the **Sort** drop-down menu.
4. Enter a number in the **Sort** text box for each column that you set a sort type for. **1** is the first sort that will be used; **2** is the second sort that will be used, for example. **0** means that no sort order is used.

5. Click **Save**. The page will appear with the changes.

### Filtering columns

Use this procedure to filter columns.

#### Procedure

1. Click **Edit**, which appears by the report name. The **Edit Report** page appears.
2. Click in the **Filter** column next to a report column name. The **Filter** text box displays.
3. Enter the word, character, or symbol that you want to filter the column by in the **Filter** text box. For example, entering **A** in the **Filter** text box for the column **Name** will filter the column so that only those items with **A** in their name will appear in the groups list.
4. Click **Save**. The page will appear with the changes.
5. Click **Clear Filters** to remove all filters from the report.

### Clearing report changes

Use this procedure to clear changes from a report.

#### Procedure

1. Click **Edit**, which appears by the report name. The **Edit Report** page appears.
2. Click **Reset**. The page saves and refreshes with all the original report settings for the company. If no preferences have been set at the company level, the report will reset with the original system settings. The report will appear with the changes.

### Setting company preferences

Use this procedure to set the default company preferences for reports. The **Administer company wide UI preferences** permission is required for defining default report preferences for a company.

#### About this task

Administrators can set default report preferences for every user within their company at once. All users within that company will view the reports as defined with the selected columns, sorted columns, and the columns in a determined order, for example. Users can overwrite these company settings with their own personal settings in the **Edit Report** pages. However, users can later reset them to the company defaults.

The **Administer company wide UI preferences** permission is required for defining default report preferences for a company. See “User administration permissions” on page 17.

#### Procedure

1. Click **Edit**, which appears by the report name. The **Edit Report** page appears.
2. Click the **Company Preferences** tab to define report preferences for the company. Then, choose one of the following options from the **Save** drop-down list:
  - **Save & Exit** to save the company preferences and navigate back to the report with your personal preferences.



- **Save & View Company Preferences** to save the company preferences and view the report with the company preferences. This is a temporary view of that report, and the report will revert back to your personal preferences when you click away.

You can also reset the company preferences in this tab by choosing one of the following options from the **Reset** drop-down list:

- **Reset to IBM Omni-Channel Merchandising default** to reset the company preferences with the original system settings
  - **Reset to Personal Preferences** to reset the company preferences with your personal preferences
3. Click the **Personal Preferences** tab to set personal report preferences.
  4. Click **Save** to save the changes, or **Reset** to reset the report with the company preferences. If no preferences have been set at the company level, the report will reset with the original system settings.

### Creating personalized reports

Use this procedure to create and save a personalized report.

#### Procedure

1. Click **Edit**, which appears by the report name. The **Edit Report** page appears.
2. After setting up the column format in the **Personal Preferences** tab of the report, such as applying filters, sorts, and setting the column order, enter a unique name in the **Personalize** field, and click **Save As**. The report will appear in alphabetical order at the bottom of the report drop-down list in the application page. You can continue creating multiple versions of the newly created report, or of the original report. The number of reports that can be created is unlimited.

**Note:** Only the edits made to the columns in the **Edit Report** page are persisted to the custom reports. Any entries added to the Advanced Filter in a report will not be copied.

---

## Data maintenance reports

Data in IBM Omni-Channel Merchandising applications can be viewed or updated in reports.

All Data Maintenance reports are available at the Division or Chain level, and many are available at various aggregation levels. The reports are either populated from OpenLink, or from Excel spreadsheets that you create and import.

#### Related concepts:

Price management & optimization reports

Promotion planning & execution reports

Markdown optimization reports

Viewing reports

Product analyzer utility

Reports

---

## Using context menus

Use this procedure to access context menus. Context menus let you quickly access commands related to the workspace you are working in.

### Procedure

1. Right-click in the window. The context menu for the selected window will appear. If you right-click on a report item, the context menu (with commands such as **Edit** or **Delete**) for that item will appear.
2. Left-click on a command from the context menu.

---

## Editing user preferences

Use this procedure to edit user preferences.

### About this task

Editing User Preferences involves setting defaults for the pages, such as the number of rows that appears in the items lists and the default display category.

User preferences are shared across all IBM Omni-Channel Merchandising applications. If you change a user preference in one application, the change will also be applied when you log in to another application.

### Procedure

1. Click the tool icon and select **User Preferences** from the drop-down menu. The **User Preferences** dialog box appears.
2. Enter the number of rows you would like to appear in each item list (such as the number of product groups in the **Product Groups** page). More rows may increase the load time of the page.
3. Choose the default **Ad Zone** to appear in pages.
4. Choose the default **Division**, such as Chain, to appear in pages.
5. Choose the default **Category** to appear in pages.
6. You can set the **Date Range** on the pages and reports to always use your company defaults, or to use the dates from your last session.
7. You can select the IBM Omni-Channel Merchandising application tabs to appear at the top of the home page. You can also change the order in which they appear by clicking in the **Order** column and entering new values.
8. If you want to restore the original settings, click the **Reset** button.



9. Click **OK**. The dialog box closes, and the preferences that you set are applied to all pages in IBM Omni-Channel Merchandising.

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## Chapter 3. Importing and exporting data

Data can be imported into the IBM Omni-Channel Merchandising services and exported to an Excel file to review or edit. You can also track the status of all imports and exports.

### Related Topics

“Importing data”

“Data File Formats” on page 33

“Checking import status” on page 74

“Exporting data” on page 75

“Checking export status” on page 76

“Deleting an export” on page 76

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## Importing data

Use this procedure to import data. Data is imported into the IBM Omni-Channel Merchandising services in one of three ways.

### Procedure

1. Received through the IBM Omni-Channel Merchandising OpenLink application. This is the most common method for importing new data. Customers send their data (in text `.txt` files) to IBM Omni-Channel Merchandising each week (through FTP) for sales, locations, products, competitive prices, and product cost changes. This data is received in IBM Omni-Channel Merchandising OpenLink, which uses automated validations to ensure data cleanliness. There is very little manual, or user, intervention in these files. The imported files are monitored using the **Import Dashboard** report in IBM Omni-Channel Merchandising OpenLink.

Larger sets of data should be sent through IBM Omni-Channel Merchandising OpenLink to take advantage of automated data accuracy screening. IBM Omni-Channel Merchandising OpenLink is a tool used to prevent inaccurate or corrupted data from entering the applications. The data is put into a standard format and then validated. The validation checks for errors, and flags the errors. The errors are fixed, and validation is run again. The final output from this process is clean and accurate data.

**Note:** When new vendor costs or competitive prices come in through IBM Omni-Channel Merchandising OpenLink and exceed thresholds, they are sent to the **New Data Approval** page in the pricing application and must be manually approved.

2. Directly into IBM Omni-Channel Merchandising services using Excel Spreadsheets or DB IV formats, such as Microsoft Access. This is usually done after your data has been imported for editing purposes, or for importing small amounts of new data. Note that importing data directly from an Excel spreadsheet mitigates IBM Omni-Channel Merchandising OpenLink automated data validations. See “Using Excel spreadsheets” on page 32 for more information.

**Note:** When data is imported using a IBM Omni-Channel Merchandising service other than IBM Omni-Channel Merchandising OpenLink, the only validation is to see if the data file conforms to the standard format. As a result, you can potentially import invalid or bad data. Make sure you check the data thoroughly before importing through a IBM Omni-Channel Merchandising service. You will typically export data from the application, edit the data, and then import it back in.

3. Directly into the IBM Omni-Channel Merchandising **Data Maintenance** page using editable fields in **Data Maintenance** reports. For example, if you receive new vendor cost or new competitive data which requires immediate implementation, the new data can be entered directly into the **Price/Cost** or **Competitive Products** report in the **Data Maintenance** page. See “Data maintenance reports” on page 29 for more information.

#### **Related Topics**

“Using Excel spreadsheets”

## **Using Excel spreadsheets**

Using Excel spreadsheets is a quick and easy method for importing records directly into IBM Omni-Channel Merchandising services.

After you manually input records in an Excel spreadsheet, you import the spreadsheet. The data is viewable in the **Data Maintenance** reports and other reports, such as **Product Groups** or **Store Groups**.

Data can be inserted, which adds new data to the database, or it can be updated, which changes data already in the database.

You may not have access to all data imports. You may only be able to import specific sets of data, or none at all. You must have the **Import data to applications** user permission to import data from an Excel file into the application.

#### **Related Topics**

“Creating a spreadsheet example”

## **Creating a spreadsheet example**

Example of an excel spreadsheet.

In an Excel spreadsheet, you enter the column names and data as described in the table in “Data File Formats” on page 33. In most cases, you will create a separate spreadsheet for each data type, such as Store Groups. After it is complete, you import it into IBM Omni-Channel Merchandising services to populate the reports, as described in “Importing data” on page 31.

The following example shows the spreadsheet data columns for the Multiple Price Points data type. In this case, any price between .48 and .52 would automatically recommend 2 for \$1.00. IBM Omni-Channel Merchandising will automatically calculate the per-selling-unit price point as .50.

ProductCategory	MinUnitPrice	MaxUnitPrice	Multiple	PricePoint
Coffee 1	0.48	0.52	2	1

### Related Topics

“Data File Formats”

“Importing data” on page 31

## Additional spreadsheet tips

Here are some additional tips for creating spreadsheets.

- Category names used in the spreadsheet must match the category names in the pricing application, including cases (upper and lower case). Check the category names in IBM Omni-Channel Merchandising (**Edit > Data Maintenance**, choose the **IBM Omni-Channel Merchandising Categories** report) before importing.
- Enter the field names in the top row of the data file. The top row of data is ignored during import.
- Every column must be present in the data file. If you are not importing a column, leave it empty, but still include it in the file.
- Records can be deleted by placing a blank in the column.
- Custom formatted data cells will not import.
- Many of the field names are followed by another name in parenthesis (Store Number (CustomerLocationKey)). The name without parentheses is the name of the field that appears in the IBM Omni-Channel Merchandising service. The name in the parentheses is the actual field name that appears in the database. If there are no parentheses following the name, it is the name used in the database, as well as the service.

## Data File Formats

Each data type has a specific set of fields that the file must contain. Also, the column order must be in a specific order.

Each data type that you can import is listed in the table below with the required fields, column order, unique key, and type of import that can occur (update data, insert new data, or both). For example, for some data types, only new data can be inserted. Records that are currently in a IBM Omni-Channel Merchandising service will not be updated for those data types. The IBM Omni-Channel Merchandising service that requires the data type is also included.

Some fields require a single quote (') before the value to save it in text format in Excel. When you enter a code such as UPC code "000012345678", Excel tries to clean up the data by removing the leading zeros. The resulting value would be "12345678". This would fail in the IBM Omni-Channel Merchandising system because each character is required for UPC codes. Fields that require a single quote (') before the value are noted in the table.

<b>Data Type</b>	<b>Available Actions</b>	<b>IBM Omni-Channel Merchandising Service</b>
Ad execution defaults - product group	Update default headline copy, body copy and images for an existing product group	<ul style="list-style-type: none"> <li>• Promotion Planning &amp; Execution</li> </ul>
Ad execution defaults - promoted product group	Update default headline copy, body copy and images for an existing promoted product group	<ul style="list-style-type: none"> <li>• Promotion Planning &amp; Execution</li> </ul>
Anchor class	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Anchor price	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Anchor price by zone	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Base cost1	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Base cost1 by zone	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Base cost2	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Base cost2 by zone	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Base cost3	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Base cost3 by zone	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Base costs	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> <li>• Markdown Optimization</li> <li>• Promotion Planning &amp; Execution</li> <li>• Customer Trade Planning</li> </ul>
Base costs by zone	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> <li>• Promotion Planning &amp; Execution</li> <li>• Customer Trade Planning</li> </ul>
Base prices	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> <li>• Markdown Optimization</li> <li>• Promotion Planning &amp; Execution</li> <li>• Customer Trade Planning</li> </ul>

<b>Data Type</b>	<b>Available Actions</b>	<b>IBM Omni-Channel Merchandising Service</b>
Base prices by zone	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> <li>• Markdown Optimization</li> <li>• Promotion Planning &amp; Execution</li> <li>• Customer Trade Planning</li> </ul>
Base to Bonus Products Map	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Brand class and family	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Brand rule override	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Category group	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Category-zone competitors	Insert new records Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Competitive prices	Insert new records Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> <li>• Promotion Planning &amp; Execution</li> <li>• Customer Trade Planning</li> </ul>
Comp prices by zone	Insert new records Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> <li>• Promotion Planning &amp; Execution</li> <li>• Customer Trade Planning</li> </ul>
Comp prices by zone - line	Insert new records Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Cost configuration - line/zone	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Cost configuration - SKU/chain	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Cost configuration - SKU/division	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Cost family	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Cost margin (for CP customers)	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> <li>• Customer Trade Planning</li> </ul>

<b>Data Type</b>	<b>Available Actions</b>	<b>IBM Omni-Channel Merchandising Service</b>
Current prices	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> <li>• Markdown Optimization</li> </ul>
Current prices by zone	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> <li>• Markdown Optimization</li> </ul>
Custom relationships	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Express price overrides by store - SKU	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Express price overrides by zone - line	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Express price overrides by zone - SKU	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Last digits	Insert new records Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Line prices	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> <li>• Promotion Planning &amp; Execution</li> <li>• Customer Trade Planning</li> </ul>
Line to line relationship	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Line to line relationship by zone	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Location group class assignment	Update existing records	<ul style="list-style-type: none"> <li>• Promotion Planning &amp; Execution</li> <li>• Customer Trade Planning</li> </ul>
Location group class store mappings	Update existing records	<ul style="list-style-type: none"> <li>• Promotion Planning &amp; Execution</li> <li>• Customer Trade Planning</li> </ul>
Locked prices	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Locked prices by division	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Locked prices by zone	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Markdown data	Update existing records	<ul style="list-style-type: none"> <li>• Markdown Optimization</li> </ul>
Multiple price points	Insert new records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>



<b>Data Type</b>	<b>Available Actions</b>	<b>IBM Omni-Channel Merchandising Service</b>
Other class and family1	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Other class and family2	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Pre-prices flag	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> <li>• Promotion Planning &amp; Execution</li> <li>• Customer Trade Planning</li> </ul>
Price overrides	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Price overrides - line	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Price overrides by zone	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Price overrides by zone - line	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Product group	Insert new records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> <li>• Markdown Optimization</li> <li>• Promotion Planning &amp; Execution</li> <li>• Customer Trade Planning</li> </ul>
Product link	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> <li>• Promotion Planning &amp; Execution</li> <li>• Customer Trade Planning</li> </ul>
Product status	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> <li>• Markdown Optimization</li> <li>• Promotion Planning &amp; Execution</li> <li>• Customer Trade Planning</li> </ul>
Product status by zone	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> <li>• Markdown Optimization</li> <li>• Promotion Planning &amp; Execution</li> <li>• Customer Trade Planning</li> </ul>
Product to product relationship	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>

<b>Data Type</b>	<b>Available Actions</b>	<b>IBM Omni-Channel Merchandising Service</b>
Product to product relationship by zone	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Promoted product group - LU	Create new promoted product groups  Add new logistical units to existing product groups	<ul style="list-style-type: none"> <li>• Promotion Planning &amp; Execution</li> </ul>
Promoted product group - SU	Create new promoted product groups  Add products to existing promoted product groups	<ul style="list-style-type: none"> <li>• Promotion Planning &amp; Execution</li> </ul>
Size class and family	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
SKU attributes	Update existing records  Update existing records with null values	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
SKU/Zone attribute	Update existing records with a maximum of six (6) attributes	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Store attributes	Update existing records  Update existing records with null values	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Store group	Insert new records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> <li>• Markdown Optimization</li> <li>• Promotion Planning &amp; Execution</li> <li>• Customer Trade Planning</li> </ul>
Store price zone	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> <li>• Markdown Optimization</li> </ul>
Tier class and family	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Transfer prices by store	Add or modify transfer price for an existing UPC	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Transfer prices by zone	Add or modify transfer price for an existing UPC	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Zone exception	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Zone group assignment	Insert new records  Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> <li>• Markdown Optimization</li> </ul>

Data Type	Available Actions	IBM Omni-Channel Merchandising Service
Zone override	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> </ul>
Zone-location mapping	Update existing records	<ul style="list-style-type: none"> <li>• Price Management</li> <li>• Price Optimization</li> <li>• Markdown Optimization</li> </ul>

### ABC product direct costs

ABC product direct costs data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before value  20 digit UPC code
Customer Location Key	Required, use single quote (') before value  Store number or identifier
Distribution Center Key	Required, unique key, use single quote (') before value  Distribution center number or identifier
AvgWklyCase	Average number of weekly cases handled by a distribution center
BagCost	Total shopping bag cost for a product in a distribution center's region
Checkout Cost Per Pkg	Cost per package to complete a checkout
DC Inv Cost Per Pkg	Inventory cost per package at a distribution center
DC Labor Cost Per Pkg	Labor cost per package at a distribution center, given the receiving method
SumOfAvgWklyCase	Sum of the average number of weekly cases handled by the distribution center
Count Location	Number of distribution centers
AvgOfDCInvDays	Average number of inventory days
AvgOfCaseCube	Average number of case cubes
DC Space	Calculation of inventory days and number of case cubes
DC Cube	Average amount of space occupied by a given cube at the distribution center
DC Space Cost Per Store	Calculates the space cost of servicing a store depending on the product storage type
HQ Inv Proc	Invoice processing cost divided by product case pack
AvgDeliveryFreq	Average of the location delivery frequency
AvgCaseCube	Average of product case cube
Location Cube	Calculation of product case cube, average weekly case, and location delivery frequency

## Ad execution defaults - product group

Ad Execution Defaults - Product Group data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Product Group Name	Required; if the product group specified does not exist, the row does not import.  Name of product group
Product Group Code	20 character maximum  Code for the product group
Category ID	Identification number for the product category
Headline Copy	Required; if left blank, IBM Omni-Channel Merchandising deletes any existing default.  Default headline copy for the product group
Body Copy	Required; if left blank, IBM Omni-Channel Merchandising deletes any existing default.  Default body copy for the product group
Image 1	Required; if left blank, IBM Omni-Channel Merchandising deletes any existing default.  Default image for the product group
Image 2	Required; if left blank, IBM Omni-Channel Merchandising deletes any existing default.  Default image for the product group
Image 3	Required; if left blank, IBM Omni-Channel Merchandising deletes any existing default.  Default image for the product group

## Ad execution defaults - promoted product group

Ad execution defaults - promoted product group data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Product Group Name	Required; if the promoted product group specified does not exist, the row does not import.  Name of promoted product group
Product Group Code	20 character maximum  Code for the product group
Headline Copy	Required; if left blank, IBM Omni-Channel Merchandising deletes any existing default.  Default headline copy for the promoted product group

Data Column (in order from first to last)	Description
Body Copy	Required; if left blank, IBM Omni-Channel Merchandising deletes any existing default.  Default headline copy for the promoted product group
Image 1	Required; if left blank, IBM Omni-Channel Merchandising deletes any existing default.  Default image for the product group
Image 2	Required; if left blank, IBM Omni-Channel Merchandising deletes any existing default.  Default image for the product group
Image 3	Required; if left blank, IBM Omni-Channel Merchandising deletes any existing default.  Default image for the product group

### Anchor class

The imported set of brand families and brand classes populates the **Anchor Class** report. Only one brand class under the same brand family can be the anchor class. If more than one brand class is set as the anchor in the import file, the anchor class defined last will override the ones previously defined. Anchor class data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Product Category (ProductCategory)	Required  Product category to which the competitor data will apply
Brand Family (BrandFamily)	Use single quote (') before the value  Brand family name
Brand Class (BrandClass)	Use single quote (') before the value  Brand class name
IsAnchor	<b>1</b> means the brand class is anchored; <b>0</b> means the brand class is not anchored

### Anchor price

The imported set of anchor prices populates the **Anchor Price** report. Any existing anchor prices for all products and stores in the category will be overwritten. Anchor price data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code

Data Column (in order from first to last)	Description
Store Number (CustomerLocationKey)	Required, use single quote (') before the value  Store number or identifier
Anchor Price	Anchor prices are a set of prices for a category that you can create a Price Drift rule against. This rule constrains the price to be within a certain range from the anchor price.

### Anchor price by zone

The imported set of anchor prices populates the **Anchor Price** report. Any existing anchor prices for all products and stores in the category will be overwritten. Anchor price by zone data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Division	Required  Division name
Zone	Required  Zone name
Anchor Price	Anchor prices are a set of prices for a category that you can create a Price Drift rule against. This rule constrains the price to be within a certain range from the anchor price.

### Base cost1

Base Cost1 data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Store Number (CustomerLocationKey)	Required, use single quote (') before the value  Store number or identifier
Base Cost1	Unit cost of product (user-defined)

### Base cost1 by zone

Base Cost1 by zone data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Division	Required Division name
Zone	Required Zone name
Base Cost1	Unit cost of product (user-defined)

### Base cost2

Base Cost2 data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Store Number (CustomerLocationKey)	Required, use single quote (') before the value Store number or identifier
Base Cost2	Unit cost of product (user-defined)

### Base cost2 by zone

Base Cost2 by zone data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Division	Required Division name
Zone	Required Zone name
Base Cost2	Unit cost of product (user-defined)

### Base cost3

Base Cost3 data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Store Number (CustomerLocationKey)	Required, use single quote (') before the value  Store number or identifier
Base Cost3	Unit cost of product (user-defined)

### Base cost3 by zone

Base Cost3 by zone data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Division	Required  Division name
Zone	Required  Zone name
Base Cost2	Unit cost of product (user-defined)

### Base costs

Base Costs data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Store Number (CustomerLocationKey)	Required, use single quote (') before the value  Store number or identifier
Avg Unit Cost (UnitCost)	Unit cost of product

### Base costs by zone

Base Costs by zone data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code



Data Column (in order from first to last)	Description
Division	Required Division name
Zone	Required Zone name
Avg Unit Cost (UnitCost)	Unit cost of product

## Base prices

Base Prices data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Store Number (CustomerLocationKey)	Required, use single quote (') before the value Store number or identifier
Multiple	Required Multiple amount; for example, if product is 3 for \$1, you would enter 3 in this column.
MultiplePrice	Required Multiple price; for example, if product is 3 for \$1, you would enter 1 in this column.

## Base prices by zone

Base Prices by zone data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Division	Required Division name
Zone	Required Zone name
Multiple	Required Multiple amount; for example, if product is 3 for \$1, you would enter 3 in this column.
MultiplePrice	Required Multiple price; for example, if product is 3 for \$1, you would enter 1 in this column.

## Brand class and family

Brand class and family data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Brand Class (BrandClass)	Use single quote (') before the value  Brand class name
Brand Family (BrandFamily)	Use single quote (') before the value  Brand family name

## Brand rule override

Brand rule override data columns and descriptions are listed here.

Use this import to override brand rules for specific product pairs.

Data Column (in order from first to last)	Description
Name	Required, use single quote (') before the value  Name of the brand rule you are overriding for these two products
Description	Description of the rule
Product Category (ProductCategory)	The specific product category to which the products belong. To specify "all categories," use null.
Parent Brand Rule (ParentBrandRule)	Name of the parent brand rule (found in the Price Rules page)
LeftUPC	Required  20 digit UPC code
RightUPC	Required  20 digit UPC code
Brand Rule % Lower (MinValue)	Required  Lower bound amount for the price range
Brand Rule % Upper (MaxValue)	Upper bound amount for the price range

## Category group

Category group data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Category Group	Use single quote (') before the value  Category Group name
Product Category (ProductCategory)	Product category in the Category Group

## Category-zone competitors

Category-zone competitors data columns and descriptions are listed here.

You must first enter the competitor names in the **Competitors** page before importing.

Data Column (in order from first to last)	Description
Division	Required Division Name
Product Category (ProductCategory)	Required Product category to which the competitor data will apply
Zone Group	Zone group name
Zone	Required Zone name
Primary Competitor (Primary Comp)	Required, unique key Primary competitor name or ID
Secondary Competitor (Secondary Comp)	Required, unique key Secondary competitor Name or ID
Tertiary Competitor (Tertiary Comp)	Required, unique key Tertiary competitor name or ID

## Competitive prices

You must enter the competitor names in the **Competitors** page before importing. This data set is also used for the compliance prices. Competitive prices data columns and descriptions are listed here.

If the prices are blank in the Excel file, and the records exist for the given UPC/Store/Competitor, IBM Omni-Channel Merchandising deletes the competitive information from the application upon import. A warning message will alert you that the records will be deleted.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Store Number (CustomerLocationKey)	Required, unique key, use single quote (') before the value Customer store number or identifier <ul style="list-style-type: none"> <li>Multiple (SuggestedMultiple)- multiple amount. For example, if product is 3 for \$1, you would put 3 in this column.</li> <li>MultiplePrice</li> <li>(PriceType)- SHELF or 0. Use a single quote (') before the type.</li> <li>StartDate - effective start date of the competitive price you are importing</li> </ul>

Data Column (in order from first to last)	Description
Competitor (CompetitorKey)	Required, unique key Competitor Name or ID
Multiple (SuggestedMultiple)	Multiple amount; for example, if product is 3 for \$1, you would put 3 in this column.
MultiplePrice	Multiple price; for example, if product is 3 for \$1, you would enter 1 in this column.
(PriceType)	Use single quote (') before the value Enter SHELF or 0
StartDate	Effective start date of the competitive price you are importing

### Comp prices by zone

You must enter the competitor names in the **Competitors** page before importing. Comp prices by zone data columns and descriptions are listed here.

If the prices are blank in the Excel file, and the records exist for the given UPC/Division/Zone/Competitor, then the competitive information will be deleted from the application upon import. A warning message will alert you that the records will be deleted.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Division	Required Division name
Zone	Required Zone name
Competitor (CompetitorKey)	Required, unique key Competitor name or ID
Multiple (SuggestedMultiple)	Multiple amount; for example, if product is 3 for \$1, enter 3 in this column.
MultiplePrice	Multiple price; for example, if product is 3 for \$1, enter 1 in this column.
StartDate	Effective start date of the competitive price you are importing

### Comp prices by zone - line

You must enter the competitor names in the **Competitors** page before importing. Comp prices by zone - line data columns and descriptions are listed here.

If the prices are blank in the Excel file, and the records exist for the given UPC/Line/Division/Zone/Competitor, then the competitive information is deleted from the application upon import. A warning message alerts you that the records will be deleted.

Data Column (in order from first to last)	Description
Product Category (ProductCategory)	Required Product category to which the competitor data will apply
Line (LineGroup)	Use single quote (') before the value Name of the line group
Division	Required Division name
Zone	Required Zone name
Competitor (CompetitorKey)	Required, unique key Competitor name or ID
Multiple (SuggestedMultiple)	Multiple amount; for example, if product is 3 for \$1, enter 3 in this column.
MultiplePrice	Multiple price; for example, if product is 3 for \$1, enter 1 in this column.
StartDate	Effective start date of the competitive price you are importing

### Cost configuration - line/zone

Cost configuration - line/zone data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Product Category (ProductCategory)	Required Product category to which the cost type will apply
Division	Required Division name
Line (LineGroup)	Required, use single quote (') before the value Name of the line group
Zone	Required Zone name

Data Column (in order from first to last)	Description
Cost Source	Cost source used for the product at the SKU/chain level

### Cost configuration - SKU/chain

Cost configuration - SKU/chain data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Cost Source	Cost source used for the product at the SKU/chain level

### Cost configuration - SKU/division

Cost configuration - SKU/division data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Division	Required  Division name
Cost Source	Cost source used for the product at the SKU/division level

### Cost family

Cost family data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Cost Family (CostFamily)	Use single quote (') before the value  Cost family name

### Cost margin

This table is for CP customers only. Cost margin data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Product Category (ProductCategory)	Required  Product category name

Data Column (in order from first to last)	Description
Division	Required Division name
Manufacturer	Required Manufacturer name or asterisk (*) for the wildcard character
Brand	Required Brand name or asterisk (*) for the wildcard character
Cost Margin	Required Cost margin percentage value; for example, 5.0%
Use Cost Margin	Required Enter 0 if you do not want to use the entered cost margin until later; enter 1 to use the cost margin

### Current prices

Cost prices data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code
Store Number (CustomerLocationKey)	Required, use single quote (') before the value Store number or identifier
Multiple	Multiple amount; for example, if product is 3 for \$1, enter 3 in this column.
CurrentPrice	Individual product price or multiple price If entering multiples prices, enter the total price for the number of products entered in the Multiple column. For example, if product is 3 for \$1, enter 1 in this column.

### Current prices by zone

Current<sup>®</sup> prices by zone data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value 20 digit UPC code

Data Column (in order from first to last)	Description
Division	Required Division name
Zone	Required Zone name
Multiple	Multiple amount; for example, if product is 3 for \$1, enter 3 in this column.
CurrentPrice	Individual product price or multiple price  If entering multiples prices, enter the total price for the number of products entered in the Multiple column. For example, if product is 3 for \$1, enter 1 in this column.

### Custom relationships

This import creates product relationships that are specific to your company. Users can then utilize these relationships to create Custom Relationship rules to use in pricing actions. Custom relationships data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Relationship Type	Required  User-defined field to set the type of relationship
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Custom Family	User-defined custom family name
Custom Class	User-defined custom class name

**Note:** To delete a Custom Relationships record from the application, re-import the data with the Custom Family and Custom Class fields blank.

### Express price overrides by store - SKU

Express® price overrides by store - SKU data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
( Express Pricing RunID)	Required, unique key  Express pricing run ID; this ID is located in the Express Pricing page for each run and appears automatically if you export first. Do no alter this column.



Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Store Number (CustomerLocationKey)	Required, use single quote (') before the value  Store number or identifier
Override Multiple	Multiple amount associated with the override price; for example, if product is 3 for \$1, enter 3 in this column.
Override Price	Required  Override price that will be used as the Express Price
Override Cost	Required
Price Effective Date	Effective start date of the override price you are importing

### Express price overrides by zone - line

Express price overrides by zone - line data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
(Express Pricing RunID)	Required, unique key  Express pricing run ID; this ID is located in the Express Pricing page for each run and appears automatically if you export first. Do not alter this column.
Product Category (ProductCategory)	Required  Product category name
Line (LineGroup)	Required, use single quote (') before the value  Line group name
Division	Division name
Zone	Required  Zone name
Override Multiple	Multiple amount associated with the override price; for example, if product is 3 for \$1, enter 3 in this column.
Override Price	Required  Override price that will be used as the Express Price
Override Cost	Override cost
Price Effective Date	Effective start date of the override price you are importing

## Express price overrides by zone - SKU

Express price overrides by zone - SKU data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
(Express Pricing RunID)	Required, unique key  Express pricing run ID; this ID is located in the Express Pricing page for each run and appears automatically if you export first. Do not alter this column.
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Zone	Required  Zone name
Override Multiple	Multiple amount associated with the override price; for example, if product is 3 for \$1, enter 3 in this column.
Override Price	Required  Override price that will be used as the Express Price
Price Effective Date	Effective start date of the override price you are importing

## Last digits

Last digits data columns and descriptions are listed here.

Use this import to set specific last digits for prices.

Data Column (in order from first to last)	Description
Name	Required, use single quote (') before the value
Description	Description of the rule
Product Category (ProductCategory)	The specific product category to which the products belong. To specify "all categories," use null.
Multiple	Required  Multiple amount; for example, if product is 3 for \$1, enter 3 in this column.
Last Digits (LastDigitsString)	Use single quote (') before the value  Last digits that prices are allowed to end in; for example, 95, 45

## Line prices

Line prices data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Line (LineGroup)	Use single quote (') before the value  Line group name

## Line to line relationship

Line to line relationship data columns and descriptions are listed here.

This imports line group to line group relationship data used for the Product or Line Relationship rule.

Data Column (in order from first to last)	Description
Product Category (ProductCategory)	Required  Product category to which the Product or Line Relationship rule will apply
Line(1)	Line group name
Line(2)	Line group name
Relationship Type	Enter Multiplier or Relative. <ul style="list-style-type: none"><li>• Multiplier: The value is multiplied with the optimized price of Line(1).</li><li>• Relative: The value is added to the optimized price of Line(2).</li></ul> If the Relationship Type field is blank in the import file, the relationship will not appear in IBM Omni-Channel Merchandising. If the relationship already exists, IBM Omni-Channel Merchandising will delete it.
Relationship Value	Numeric value (greater than zero for multipliers) used to determine the new price of Line(2), as in the following calculations: <ul style="list-style-type: none"><li>• <math>Price\ of\ Line(2) = Price\ of\ Line(1) * Multiplier\ Value</math></li><li>• <math>Price\ of\ Line(2) = Price\ of\ Line(1) + Relative\ Value</math></li></ul>

## Line to line relationship by zone

This imports line group to line group relationship data by zone used for the Product or Line Relationship rule. Line to line by zone relationship data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Product Category (ProductCategory)	Required  Product category to which the Product or Line Relationship rule will apply
Zone	Required  Zone name
Line(1)	Line group name
Line(2)	Line group name
Relationship Type	Enter Multiplier or Relative. <ul style="list-style-type: none"> <li>Multiplier: The value is multiplied with the optimized price of Line(1).</li> <li>Relative: The value is added to the optimized price of Line(2).</li> </ul> <p>If the Relationship Type field is blank in the import file, the relationship will not appear in IBM Omni-Channel Merchandising. If the relationship already exists, IBM Omni-Channel Merchandising will delete it.</p>
Relationship Value	Numeric value (greater than zero for multipliers) used to determine the new price of Line(2), as in the following calculations: <ul style="list-style-type: none"> <li><i>Price of Line(2) = Price of Line(1) * Multiplier Value</i></li> <li><i>Price of Line(2) = Price of Line(1) + Relative Value</i></li> </ul>

### Location group class assignment

Contact an Integration Services representative for assistance updating location groups.

### Location group class store mappings

Contact an Integration Services representative for assistance updating location groups.

### Locked prices

This import locks the prices of all UPCs listed in the file. Locked prices data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Division	

Data Column (in order from first to last)	Description
Zone (Name)	Use single quote (') before the value  Name of the store zone (found in Data Maintenance > Store Zone report)
Store Number (CustomerLocationKey)	Required, unique key, use single quote (') before the value  Store number or identifier
Locked Override (Is UserLocked)	Locks the price; use 0 to unlock and 1 to lock.  A lock icon appears next to locked prices in the IBM Omni-Channel Merchandising user interface.

**Note:** For divisional customers, a fifth data column is required, labeled **Division**.

### Locked prices by division

This import locks the prices of all UPCs listed in the file. Locked prices by division data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Division	Required  Division name
Locked Override (Is UserLocked)	Locks the price; use 0 to unlock and 1 to lock.  A lock icon appears next to locked prices in the IBM Omni-Channel Merchandising user interface.

### Locked prices by zone

This import locks the prices of all UPCs listed in the file. Locked prices by zone data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Division	Required  Division name

Data Column (in order from first to last)	Description
Zone	Required Zone name
Locked Override (Is UserLocked)	Locks the price; use 0 to unlock and 1 to lock.  A lock icon appears next to locked prices in the IBM Omni-Channel Merchandising user interface.

## Markdown data

Markdown data data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Store Number (CustomerLocationKey)	Required, unique key, use single quote (') before the value  Customer store number or identifier
Customer OutDate	Final date that the product is available to sell on the store shelf
Mkd StartDate	Date that the markdown starts for the product-location (MM/DD/YYYY format)
Customer MkdCode	10 character maximum  Indicator of product status; for example, C is candidate for markdown and M is one or more markdowns have occurred.
Inventory	Units available to sell at a location as of the inventory date
Inventory Date	Date on which the inventory amount is applicable (MM/DD/YYYY format)

## Multiple price points

Multiple price points columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Product Category (ProductCategory)	Specific product category into which IBM Omni-Channel Merchandising will insert the multiple price point
Minimum Unit Price (MinUnitPrice)	Lowest new price that is assigned the multiple price point
Maximum Unit Price (MaxUnitPrice)	Highest new price that is assigned the multiple price point
Multiple	Multiple amount; for example, if product is 3 for \$1, enter 3 in this column.

Data Column (in order from first to last)	Description
Price Point (PricePoint)	Price value; for example, if the product is 3 for \$1, enter <b>\$1</b> in this column.

### Other class and family1

Other class and family1 data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Other1 Class (Other1Class)	Use single quote (') before the value  Class name
Other1 Family (Other1Family)	Use single quote (') before the value  Family name

### Other class and family2

Other class and family2 data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Other2 Class (Other2Class)	Use single quote (') before the value  Class name
Other2 Family (Other2Family)	Use single quote (') before the value  Family name

### Pre-priced flag

Pre-priced flag data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
PrePrice (IsPrePriced)	Required  0 means the product is not pre-priced; 1 means the product is pre-priced

### Price overrides

This imports a file that overrides a scenario's optimized prices. Typically, you will export the **Price Overrides** report. Price overrides data columns and descriptions are listed here.

See “Exporting data” on page 75, make price changes, and import the file back into IBM Omni-Channel Merchandising.

<b>Data Column (in order from first to last)</b>	<b>Description</b>
(ScenarioRunID)	Required, unique key  Scenario ID; this ID is contained in the URL on the Scenario Details page and appears automatically if you export first. Do not alter this column.
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Store Number (CustomerLocationKey)	Required, unique key, use single quote (') before the value  Store number or identifier
Multiple (OverOptMultiple)	Multiple associated with the override price; do not alter this column.
Manual Override (OverOptMultiplePrice)	Required  Override price that will replace the optimized price
Price Effective Date	Effective start date of the override price you are importing
Transfer Price Override Multiple	Multiple associated with the override transfer price - visible only to Franchise Pricing users.
Transfer Price Override	Override transfer price specified for the UPC - visible only to Franchise Pricing users.

### **Related Topics**

“Exporting data” on page 75

### **Price overrides - line**

This imports a file that overrides a scenario's optimized prices. Typically, you will export the **Price Overrides** report. Price - line overrides data columns and descriptions are listed here.

See “Exporting data” on page 75, make price changes, and import the file back into IBM Omni-Channel Merchandising.



Data Column (in order from first to last)	Description
(ScenarioRunID)	Required, unique key  Scenario ID; this ID is contained in the URL on the Scenario Details page and appears automatically if you export first. Do not alter this column.
Line (LineGroup)	Use single quote (') before the value  Line group name
Store Number (CustomerLocationKey)	Required, unique key, use single quote (') before the value  Store number or identifier
Multiple (OverOptMultiple)	Multiple associated with the override price; do not alter this column.
Manual Override (OverOptMultiplePrice)	Required  Override price that will replace the optimized price
Price Effective Date	Effective start date of the override price you are importing
Transfer Price Override Multiple	Multiple associated with the override transfer price - visible only to Franchise Pricing users.
Transfer Price Override	Override transfer price specified for the Line Group - visible only to Franchise Pricing users.

### Related Topics

“Exporting data” on page 75

### Price overrides by zone

This imports a file that overrides a scenario's optimized prices. Typically, you will export the **Price Overrides** report. Price overrides by zone data columns and descriptions are listed here.

See “Exporting data” on page 75, make price changes, and import the file back into IBM Omni-Channel Merchandising.

Data Column (in order from first to last)	Description
(ScenarioRunID)	Required, unique key  Scenario ID; this ID is contained in the URL on the Scenario Details page and appears automatically if you export first. Do not alter this column.
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Zone	Required  Zone name
Multiple (OverOptMultiple)	Multiple associated with the override price; do not alter this column.
Manual Override (OverOptMultiplePrice)	Required  Override price that will replace the optimized price
Price Effective Date	Effective start date of the override price you are importing
Transfer Price Override Multiple	Multiple associated with the override transfer price - visible only to Franchise Pricing users.
Transfer Price Override	Override transfer price specified for the UPC/Zone - visible only to Franchise Pricing users.

### Related Topics

"Exporting data" on page 75

### Price overrides by zone - line

This imports a file that overrides a scenario's optimized prices. Typically, you will export the **Price Overrides** report. Price overrides by zone - line data columns and descriptions are listed here.

See "Exporting data" on page 75, make price changes, and import the file back into IBM Omni-Channel Merchandising.

**Note:** IBM Omni-Channel Merchandising is also able to configure automatic loading of override prices at the Line/Zone aggregation level via OpenLink. For details, consult your IBM Omni-Channel Merchandising representative.

Data Column (in order from first to last)	Description
(ScenarioRunID)	Required, unique key  Scenario ID; this ID is contained in the URL on the Scenario Details page and appears automatically if you export first. Do not alter this column.
Line (LineGroup)	Use single quote (') before the value  Line group name
Zone	Required  Zone name
Multiple (OverOptMultiple)	Multiple associated with the override price; do not alter this column.
Manual Override (OverOptMultiplePrice)	Required  Override price that will replace the optimized price
Price Effective Date	Effective start date of the override price you are importing
Transfer Price Override Multiple	Multiple associated with the override transfer price - visible only to Franchise Pricing users.
Transfer Price Override	Override transfer price specified for the Line/Zone - visible only to Franchise Pricing users.

### Related Topics

“Exporting data” on page 75

### Product group

Product group data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Name	Required, 50 character maximum  Product group name

### Product link

Product link data columns and descriptions are listed here.

IBM Omni-Channel Merchandising does not create product links upon import if the following errors occur. The errors will appear in the **Import Status** dialog box. See “Checking import status” on page 74.

- The new product UPC and mature product UPC are invalid
- The mature product does not have any modeling coefficients

Data Column (in order from first to last)	Description
New Product UPC	Required, unique key, use single quote (') before the value  20 digit UPC code of new product
Mature Product UPC	Required, unique key, use single quote (') before the value  20 digit UPC code of mature product
Link Type	<ul style="list-style-type: none"> <li>• LINEEXT: Line extension; the new product will be introduced as an extension of an existing line group that includes the mature product.</li> <li>• DIRECTREP: Direct replacement; the new product will be replacing the mature product in the assortment.</li> <li>• null; the new product will not be extending an existing line group or replacing the mature product.</li> </ul>
Estimated Weekly Volume	Estimated weekly volume for the new product when the mature product is discontinued
Incremental Volume Percentage	Estimated incremental volume percentage for the new product when the mature product is discontinued

#### Related Topics

“Checking import status” on page 74

#### Product status

Product status data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Store Number (CustomerLocationKey)	Required, use single quote (') before the value  Store number or identifier
Prod Status (pIncPrd)	Status of the product; <b>1</b> means the product is active; <b>0</b> means the product is discontinued.

## Product status by zone

Product status by zone data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Division	Required  Division name
Zone	Required  Zone name
Prod Status (pIncPrd)	Status of the product; <b>1</b> means the product is active; <b>0</b> means the product is discontinued.

## Product to product relationship

This imports product to product relationship data used for the Product or Line Relationship rule. Product to product relationship data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC(1)	Required, unique key, use single quote (') before the value  20 digit UPC code
UPC(2)	Required, unique key, use single quote (') before the value  20 digit UPC code
Relationship Type	Enter Multiplier or Relative. <ul style="list-style-type: none"> <li>Multiplier: The value is multiplied with the optimized price of UPC(1).</li> <li>Relative: The value is added to the optimized price of UPC(1).</li> </ul> <p>If the Relationship Type field is blank in the import file, the relationship will not appear in IBM Omni-Channel Merchandising. If the relationship already exists, IBM Omni-Channel Merchandising will delete it.</p>
Relationship Value	Numeric value (greater than zero for multipliers) used to determine the new price of UPC(2), as in the following calculations: <ul style="list-style-type: none"> <li><i>Price of UPC(2) = Price of UPC(1) * Multiplier Value</i></li> <li><i>Price of UPC(2) = Price of UPC(1) + Relative Value</i></li> </ul>

## Product to product relationship by zone

This imports product to product relationship data used for the Product or Line Relationship rule. Product to product relationship by zone data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Division	Required Division name
Zone	Required Zone name
UPC(1)	Required, unique key, use single quote (') before the value 20 digit UPC code
UPC(2)	Required, unique key, use single quote (') before the value 20 digit UPC code
Relationship Type	Enter Multiplier or Relative. <ul style="list-style-type: none"> <li>Multiplier: The value is multiplied with the optimized price of UPC(1).</li> <li>Relative: The value is added to the optimized price of UPC(1).</li> </ul> <p>If the Relationship Type field is blank in the import file, the relationship will not appear in IBM Omni-Channel Merchandising. If the relationship already exists, IBM Omni-Channel Merchandising will delete it.</p>
Relationship Value	Numeric value (greater than zero for multipliers) used to determine the new price of UPC(2), as in the following calculations: <ul style="list-style-type: none"> <li><math>Price\ of\ UPC(2) = Price\ of\ UPC(1) * Multiplier\ Value</math></li> <li><math>Price\ of\ UPC(2) = Price\ of\ UPC(1) + Relative\ Value</math></li> </ul>

## Promoted product group - LU

Promoted product group - LU data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Product Group Name	Required, 50 character maximum  Promoted product group name; if the specified name does not exist, IBM Omni-Channel Merchandising creates a new promoted product group.

Data Column (in order from first to last)	Description
Product Group Code	20 character maximum  Unique code for the promoted product group
Logistical Item Identifier	30 character maximum  Logistical unit code; if a logistical unit you select (or a UPC linked to that logistical unit) already belongs to another promoted product group, IBM Omni-Channel Merchandising ignores the row.

### Promoted product group - SU

Promoted product group - SU data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Name	Required, 50 character maximum  Promoted product group name; if the specified name does not exist, IBM Omni-Channel Merchandising creates a new promoted product group.
Code	20 character maximum  Unique code for the promoted product group
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code; if a UPC you select already belongs to another promoted product group, IBM Omni-Channel Merchandising ignores the row.

### Size class and family

Size class and family data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Size Class (SizeClass)	Use single quote (') before the value  Size class name; allowable size class formats are size classes defined for the category. If the classes have not yet been defined, use the defaults (XXX-LARGE, XX-LARGE, X-LARGE, LARGE, MEDIUM, SMALL, X-SMALL, XX- SMALL XXX-SMALL) which you can later update in IBM Omni-Channel Merchandising.
Size Family (SizeFamily)	Use single quote (') before the value  Size family name

## SKU attributes

SKU attribute data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Attribute0	SKU attribute name; if left blank, you can assign an attribute to a product in the Data Maintenance > SKU/Zone Attribute report after the import.  The report contains 10 attribute fields (Attribute<0-9>). Your company may choose not to use these fields or to only use some of them.

## SKU/Zone attribute

SKU/Zone attribute data columns and descriptions are listed here.

A maximum of six attributes can be defined.

**Note:** You must first contact IBM Omni-Channel Merchandising Support before importing your own attributes to replace the system default CPI attributes (Ultra Notable, Notable, Partially Notable, Not Notable, Undefined1, Undefined2).

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Division	Required  Division name
Zone Group	Required  Zone group name
Zone	Required  Zone name
CPI Attribute	Enter one of the following or leave blank: <ul style="list-style-type: none"> <li>• Ultra Notable</li> <li>• Notable</li> <li>• Partially Notable</li> <li>• Not Notable</li> <li>• Undefined1</li> <li>• Undefined2</li> </ul>



Data Column (in order from first to last)	Description
Attribute0	SKU/zone attribute name; if left blank, you can assign an attribute to a product in the Data Maintenance > SKU/Zone Attribute report after the import.  The report contains 5 attribute fields (Attribute<0-4>). Your company may choose not to use these fields or to only use some of them.

### Store attributes

Store attributes data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Store Number (CustomerLocationKey)	Required, use single quote (') before the value  Store number or identifier
Level1 Descr	This report contains <b>Level&lt;1-12&gt; Descr</b> columns. Each column holds the description for a different store attribute. These attributes are only used for reporting purposes. Your company may choose not to use them or to use only some of the fields.
Level1 Code	This report contains <b>Level&lt;1-12&gt; Code</b> columns. Each column holds the code for a different store attribute. This code relates to the description field. These attributes are only used for reporting purposes. Your company may choose not to use them or to use only some of the fields.
Attribute1	Company defined store attribute; this value is optional and used only for reporting purposes.  The import contains four attribute fields (Attribute<1-4>).

### Store group

Store group data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Store Number (CustomerLocationKey)	Required, use single quote (') before the value  Store number or identifier
Name	Required, unique key, use single quote (') before the value  Store group name
Division	Division name

## Store price zone

Store price zone data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Division	Division name
Store Number (CustomerLocationKey)	Required, unique key, use single quote (') before the value  Store number or identifier
Name	Required, use single quote (') before the value  Store group name

## Tier class and family

Tier class family data columns and descriptions are listed here.

You must have the **Manage Tiered Pricing** permission to import tier classes and families. See Price permissions.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Tier Class (TierClass)	Use single quote (') before the value  Tier class name
Tier Family (TierFamily)	Use single quote (') before the value  Tier family name

## Time series product status

Time series product status data columns and descriptions are listed here.

Time Series Product Status enables you to specify effective dates for each Product loaded into IBM Omni-Channel Merchandising. For more information about applying effective dates, please contact your IBM Omni-Channel Merchandising representative.

Data Column (in order from first to last)	Description
UPC (ProductUPC)	Required, unique key, use single quote (') before the value  20 digit UPC code
Location Key (LocationKey)	The unique location, location group, or location group class key
Status Code (StatusCode)	Status code for the product status, as defined in the <b>Data &gt; Product Status Mapping</b> report
Effective Date (EffectiveDate)	Date at which the specified status code will become effective for the UPC, in mm/dd/yyyy format

### Transfer prices by store

You must have the **Franchise Pricing** permission to import transfer prices. Transfer prices by store data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Store Number	Use single quote (') before the value  Store number or identifier
Transfer Multiple	Required  Multiple amount; for example, if product is 3 for \$1, you would enter 3 in this column.
Transfer Price	Required  Price at which the item is sold to a franchisee; if you use multiples pricing, enter the price for the number of units in the Transfer Multiple field.

### Transfer prices by zone

You must have the **Franchise Pricing** permission to import transfer prices. Transfer prices by zone data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Division	Required  Division name
Zone	Required  Zone name
Transfer Multiple	Required  Multiple amount; for example, if product is 3 for \$1, you would enter 3 in this column.
Transfer Price	Required  Price at which the item is sold to a franchisee; if you use multiples pricing, enter the price for the number of units in the Transfer Multiple field.

## Zone exception

Zone exception data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Division	Division name
Zone (Name)	Store zone
Store Number (CustomerLocationKey)	Use single quote (') before the value  Store number or identifier
Zone Override (IsZoneException)	Enter 0 if the product does not have a zone override; enter 1 if the product has a zone override.

## Zone group assignment

Zone group assignment data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Product Category (ProductCategory)	Product category to which the zone group will apply
Division	Division name
Zone Group	Zone group name

## Zone override

This imports a file that overrides a scenario's optimized prices. Typically, you will export the **Price Approval** report. Zone override data columns and descriptions are listed here.

See "Exporting data" on page 75, make the price changes, and import the file back into IBM Omni-Channel Merchandising.

Data Column (in order from first to last)	Description
(ScenarioRunID)	Required, unique key  Scenario ID; this ID is contained in the URL on the Scenario Details page and appears automatically if you export first. Do not alter this column.
UPC	Required, unique key, use single quote (') before the value  20 digit UPC code
Zone	Required  Zone name
Multiple (OverOptMultiple)	Multiple associated with the override price; do not alter this column.

Data Column (in order from first to last)	Description
Manual Override (OverOptMultiplePrice)	Required  Override price that will replace the optimized price
Price Effective Date	Effective start date of the override price you are importing

### Related Topics

“Exporting data” on page 75

## Zone-location mapping

This import maps locations to zones. If the zone does not exist, a new zone will be created after import. Also, if the zone is set to empty/null in the import file, the current mapping will be deleted, meaning that the store will be unassigned from any zones. Zone-location mapping data columns and descriptions are listed here.

Data Column (in order from first to last)	Description
Division	Required  Division name
Zone Group	Required  Zone group name
Zone (Name)	Store zone
Store Number (CustomerLocationKey)	Required, use single quote (') before the value  Store number or identifier

## Importing data files

Use this procedure to import data files. You must have the **Import data to applications** user permission to import data from a local file into the applications.

### About this task

Data can be imported into IBM Omni-Channel Merchandising services using the **Import** dialog box.

### Procedure

1. Choose **Data > Import** to open the **Import** dialog box.
2. Select the type of data that you are importing from the **Data Type** drop-down menu.
3. Enter a description of the file in the **Description** text box. This will help you identify the type of data you are importing. Use descriptions that tell you what

category you are importing, or the types of edits you made, for example. The description will be the best way for you to find your file in the **Import Status** dialog box.

4. Enter the file name in the **Upload File** section. Make sure your file name contains 8 characters or less. The import will fail if it contains more characters.
5. Click **Import**.
6. When the import data process completes, the **Import Status** dialog box opens with your import listed.

#### **Related Topics**

“Checking import status”

## **Checking import status**

You will only be able to view your data imports. The **View all imports** user permission enables administrators to view imports of all users. Use this procedure to check import file status.

### **About this task**

When a data file is imported into a IBM Omni-Channel Merchandising service, the import process checks for the valid number of columns, the correct type of data (text or numeric in the appropriate records), the required fields, and if the records are allowed to be inserted or updated.

You can check the status in the **Import Status** dialog box. The data file will either be in the queue to be imported, in the process of being imported, completed, or have errors. If the file has errors, you must fix the errors in your original file, and then re-import.

### **Procedure**

1. Choose **Data > Import Status**. The **Import Status** dialog box opens.  
Each import is listed with a numeric ID, file name (typically your username), status, and the description that you typed in when you imported the file.  
The status is one of the following:
  - **Pending** - The file is in the queue, waiting for import to begin.
  - **Importing** - The file is being imported.
  - **Finished** - The file is successfully imported and can be viewed in the appropriate pages (product group data appears in the **Product Group** page, for example).
  - **Error** - The file was not imported successfully. Check the import log to view the errors. To view the import log, click on the file name (the underlined link). The **Import Log** dialog box opens. All of the errors are listed on this dialog box per line. If there are errors, you can go to the correct line in your original file, fix the error, and then start a new import.
2. Once imports are done, you can delete them from the **Import Status** dialog box to reduce clutter. To delete an import, right-click on the import, and select **Delete**. A dialog box appears asking if you are sure that you want to delete; click **Yes**. The page refreshes and your import is deleted.

## **Setting alert subscriptions**

Use this procedure to subscribe to receive alerts when you Import Market or New Product from Excel.

## About this task

When you Import Market or New Product from Excel, you can subscribe to receive alerts when an import Started, Failed, and/or Completed.

### Procedure

1. Click on the toolbox icon at the top navigation bar on any of the pages. The **Alert Subscription** pop-up window opens.
2. Click the **Assortment** tab.
3. Using the check-boxes, select the type of import alerts you would like to receive.
  - Checking a box under the **Email** column will send the alert to the email address registered to the application.
  - Checking a box under **Inbox** will send the alert to your Alert Inbox.
  - If you check a box for the Assortment Import failed notification, you will receive email with the link to the Import Error Log file.
4. When you are done selecting the type of alerts you would like to receive, click **Done**.

---

## Exporting data

You must have the **Export data to applications** user permission to export data from the applications. Use this procedure to export data.

## About this task

Data can be exported from IBM Omni-Channel Merchandising services to edit in Excel, or to review. You can export data files, such as product groups, and reports, such as Data Maintenance reports.

### Procedure

1. Choose **Data > Export**. The **Export** dialog box opens.
2. Select the type of data that you want to export from the **Report** drop-down menu.
3. Enter a description of the file in the **Description** text box using up to 8 characters. This will help you identify the type of data that you are exporting, and will be the best way for you to find your file in the **Export Status** page.
4. Select the file type that you want exported: Excel 97-2003 (.xls), Excel 2007 (.xlsx), or CSV. CSV format is recommended for exporting large amounts of data (above 130,000 records), since performance may vary with different memory configurations on your computer. You can click the **Get Record Count** button to view the total number of records that are in the report before exporting. The following describes the formatting of report fields when exported to a CSV file:
  - Double quotes are not appended to fields, unless they need to be used for the delimiter (a comma appearing in one of the numeric fields, for example, as a decimal separator).
  - All numeric/decimal number types will show a minimum of two decimal places and a maximum of three. For IBM Markdown Optimization, five digits are allowed before the decimal point.
  - Currency fields are displayed based on the locale Decimal and thousands separators are based on the locale.

- All dates are displayed in short format (mm/dd/yy or dd/mm/yy) and are formatted per locale. If the date needs to be displayed with the time, it will be displayed in short format. Large CSV files should be opened using Notepad or another text editor, instead of Excel. If you must use Excel to view the CSV file, import the file into the Excel application.
5. Select the division that you want to export from the **Division** drop-down menu. The **Division** drop-down menu will only display if the report requires a division for exporting. You can select multiple divisions using Shift-click or Ctrl-click for certain reports.
  6. Select the product category that you want to export from the **Export Category** drop-down menu. The **Export Category** drop-down menu will only display if the report requires a product category for exporting. You can select multiple categories using Shift-click or Ctrl-click, or select **All Categories** for certain reports.
  7. Select the store group that you want to export from the **Export Store Group** drop-down menu. The **Export Store Group** drop-down menu will only display if the report requires a store group for exporting.
  8. Click **Export**. The **Export Status** dialog box opens, and your export is listed.

## Checking export status

Use this procedure to check data export status, after a data export has started. You will only be able to view your data exports. The **View all exports** user permission enables administrators to view exports of all users.

### About this task

#### Procedure

Choose **Data > Export Status**. The **Export Status** dialog box opens. Each export is listed with a numeric ID, file name (typically your username), status, and the description that you typed in when you imported the file. The status is one of the following:

- **Exporting** - The file is being exported.
- **Finished** - The file is successfully exported. You can view the file by clicking on the file name (underlined link). The file will open in an Excel browser window. You can print, edit, or save the file from this window.
- **Error** - The file was not exported successfully.

Once exports are done, you can delete them from the **Export Status** dialog box to reduce clutter.

## Deleting an export

Use this procedure to delete an export.

#### Procedure

1. Right-click on the export.
2. Select **Delete**. A dialog box opens asking if you are sure you want to delete.
3. Click **Yes**. The page refreshes and your export is deleted.



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## Chapter 4. Attributing Overview

The product attributing process is a series of tasks in IBM OpenLink to prepare the product information for the modeling and optimization processes.

The product attributing process is a series of tasks in IBM OpenLink to prepare the product information for the modeling and optimization processes. Attributing involves correcting errors and inconsistencies in the product attributes, such as size, brand, and unit of measure. These attributes are used to associate SKU data in a Demand Group with existing pricing history in the same Demand Group. Demand Groups are assigned to SKUs so that a statistical analysis technique called Bayesian Inference can borrow information from products with a detailed demand history to help build the demand curves for other products with insufficient demand data.

A Demand Group is a set of highly substitutable products. For a typical consumer, these are products that are chosen based on price and product attributes. Some examples include paper towels and liquid laundry detergent. All products in a Demand Group will exhibit cannibalization.

The application provides two options to attribute products:

- Product Information File (PIF) export/import process - This process allows you to export the PIF to an MS Excel file, attribute the products, and re-import the information back to the system.
- Attributing UI - You can set up rules for attributing at the category level directly in the application.

The PIF is described in more detail since it is currently the most common process.

### **Related Topics**

“How Attributing Works”

“Understanding the Category Manager Workspace” on page 80

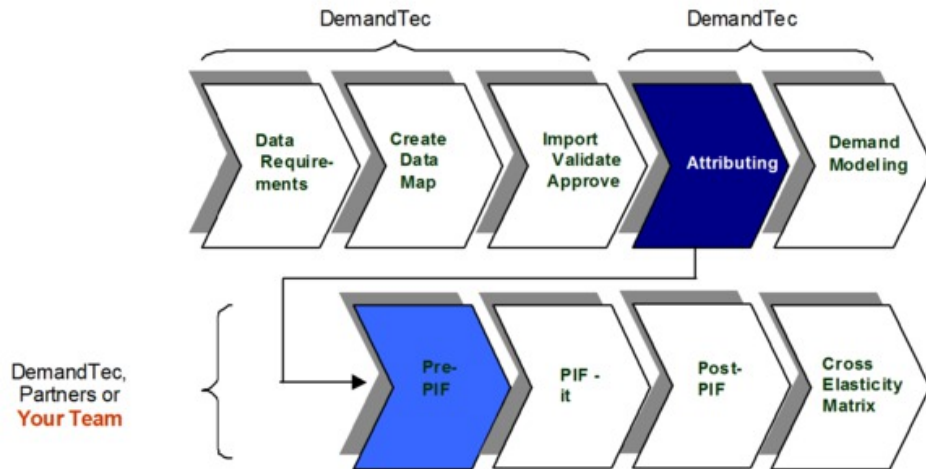
---

## How Attributing Works

Use this reference to learn about the attributing process in OpenLink.

The attributing process is part of the overall OpenLink process:

- Import data, such as POS, data warehouse, supply chain, and legacy systems
- Convert the data to the proper format for the OpenLink staging database
- Validate, check for errors, and approve data
- Attributing - Prepare the data for the modeling and optimization processes. Involves categorizing all products in your merchandise category, assigning values to attributes, and validating attributes such as size, unit of measure, and brand. For Everyday Price Optimization and Everyday Price Management optimizations, you will add values for Line Groups, pre-prices, Size Family/Size Class, Brand Family/Brand Class, and Other Family/Other Class.
- Demand model the data



**Related Topics**  
 “Attributing Process”

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## Attributing Process

The Attributing process is usually completed using both IBM OpenLink and Microsoft Excel

The Attributing process is usually completed using both IBM OpenLink and Microsoft Excel. The following is a high-level overview of each step in the process.

Step	Description	Notes®	Tool
1	Approve/reject category moves (if applicable)	Review if products are moving categories. Check <b>Uncategorized</b> category for orphaned products.	OpenLink
2	Run Product Status Resolver (if store level status is not being sent)	Be sure to run the PSR before conducting the Price Update process to ensure products have an updated status; some customers may want to run the PSR following the POS file approval each week in OpenLink.	OpenLink

3	Export PIF	Access the PIF via the automated email message sent by OpenLink upon PIF Export completion. Click on the link or copy and paste the link into a new Internet Browser window.	OpenLink
4	<p>Edit content using PIF</p> <ul style="list-style-type: none"> <li>a. Demand Group</li> <li>b. Size</li> <li>c. UOM</li> <li>d. Brand</li> <li>e. Included in Model</li> <li>f. Size Class/Family**</li> <li>g. Brand Class/Family**</li> <li>h. Line Group**</li> <li>i. Pre-Price</li> <li>j. Other Class/Family1**</li> <li>k. Other Class/Family2**</li> </ul>	<p>A PIF (Product Information File) is an Excel spreadsheet and should be treated as such. Do not delete columns from the PIF, but columns can be moved (re-ordered) without incident. If products should not be modeled, drop them from the PIF by <b>changing include in model to No.</b></p> <p>Opt for smaller demand group structures and more Demand Groups relationships. (Avoid single product demand groups, if possible).</p> <p>Note: Line group, Pre-Price, Size Family/Size Class, Brand Family / Brand Class and Other Family/Class values can be included in the PIF and imported into OpenLink, but these values are used for optimizing in Everyday Price Optimization and Everyday Price Management and are not needed for the modeling process.</p>	Excel PIF
5	Import PIF	Ensure all formatting and additional worksheets are removed. Limit the length of the file name for import.	OpenLink

6	Run Equivalent Units	Be sure that # with POS to be equivalized is 0 before submitting PIF for modeling.	OpenLink
7	Conduct integrity checks	Use the Category Breakdown reports - Brand and Demand Group aggregation. Accept or fix errors as needed.	OpenLink
8	Edit content (if applicable)	Double check brand names and fix issues from Equiv. Units as necessary. This step may prompt several steps above to be completed again.	OpenLink
9	Complete Demand Groups Relationships	We suggest Demand Groups relationships; verify and update, if needed.	OpenLink
10	Mark products as attributed	Marks products as attributed. This also "resets" the # of Unattributed column to zero so that new products can be easily identified after initial attributing is sent to IBM Omni-Channel Merchandising statistician.	OpenLink
11	Set Category Status	Alerts the IBM Omni-Channel Merchandising statistician that the category is ready to be modeled. Statistician receives an email if subscribed to receive this alert notification.	OpenLink

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## Understanding the Category Manager Workspace

The **Category Manager** displays the imported categories and the general statistics. You use it to manage attributing processing, such as running Product Status or Equivalent Units.

The **Category Manager** displays the imported categories and the general statistics. You use it to manage attributing processing, such as running Product Status or Equivalent Units.

The **Basic** tab displays some of the most commonly viewed columns in the page, such as the category name, total number of products in the category, number of unattributed products in the category, and the date of the last scan within the category. The **Detailed** tab displays these columns and more information about the category.

The **Data Characteristics** tab shows information about each category, including information relevant to modeling, as well as reporting metrics that show basic information about category performance, such as volume ratios when on ad, as well as information about data sparsity, such as the **Missing Weeks Count**.

Category Name	Price/Promotion Model			Markdown Model		Total # of Products	Unattributed Products
	Auto Remodel	Status	Updated	Status	Updated		
A01_BATTERIES FLASHLIGHTS	<input type="checkbox"/>			Released	Nov 6, 2011 9:37 PM	427	
A02_BATTERIES FLASHLIGHTS	<input type="checkbox"/>			Released	Oct 13, 2011 6:43 PM	427	
A03_BATTERIES FLASHLIGHTS	<input type="checkbox"/>			Released	Nov 6, 2011 9:37 PM	427	
A04_BATTERIES FLASHLIGHTS	<input type="checkbox"/>			Released	Nov 6, 2011 9:37 PM	427	
A05_BATTERIES FLASHLIGHTS	<input type="checkbox"/>			Released	Nov 6, 2011 9:37 PM	427	
A06_BATTERIES FLASHLIGHTS	<input type="checkbox"/>			Released	Nov 6, 2011 9:37 PM	427	
A07_BATTERIES FLASHLIGHTS	<input type="checkbox"/>			Released	Nov 6, 2011 9:37 PM	427	
A08_BATTERIES FLASHLIGHTS	<input type="checkbox"/>			Released	Nov 6, 2011 9:37 PM	427	
A09_BATTERIES FLASHLIGHTS	<input type="checkbox"/>			Released	Nov 6, 2011 9:37 PM	427	
A10_BATTERIES FLASHLIGHTS	<input type="checkbox"/>			Released	Nov 6, 2011 9:37 PM	427	

You can view the individual products within a category by right-clicking on the category, and selecting **Edit Content** or **Category Workspace**. You can also view all the products by category in the **Sellable Items** report, available within **Data Maintenance**.

**Note:** You must have the **Enable Category Manager** permission set to access the **Category Manager** page.

Attributed	Has Recent POS	Is Seasonal	Opt. Category	UPC	Description	Model Demand Group	Size
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CALCULATORS 1	C0113803003826	CANON LS-100TS BASIC CALCULATOR	CALC_BASIC	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CALCULATORS 1	C0113803009538	CANON LS-270 BASIC CALCULATOR	CALC_BASIC	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CALCULATORS 1	C0120963011004	SEIKO SPELL CHECKER	SPELL_DICT_BASIC	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CALCULATORS 1	C0120963054025	SEIKO DICTIONARY	DEFAULT_DEMAND_G...	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CALCULATORS 1	C0122447143249	ROYAL 52KB MEMORY PERSONAL ORGANIZER	PERS_ORGANIZER	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CALCULATORS 1	C0122447143812	ROYAL BASIC HANDHELD CALCULATOR	CALC_BASIC	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CALCULATORS 1	C0122447143843	ROYAL X60 DUAL POWER DESKTOP CALCULATOR	CALC_BASIC	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CALCULATORS 1	C0122447143850	ROYAL DESKTOP CALCULATOR	CALC_BASIC	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CALCULATORS 1	C0122447144307	ROYAL WS22 DESKTOP WEATHER STATION	WEATHER_DSKTP	1

“Viewing Category Changes” on page 83

“Moving Uncategorized Products to Categories” on page 144

“Running Product Status Resolver” on page 87

“Exporting the PIF” on page 91

“Editing Content and Attributing” on page 95

“Conducting Final Checks” on page 113

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## Chapter 5. Preparing to Attribute

Some tasks must be completed to prepare the content for attributing in the product information file (PIF).

Some tasks must be completed to prepare the content for attributing in the product information file (PIF).

### Related Topics

“Viewing Category Changes”

“Moving Uncategorized Products to Categories” on page 84

“Running Product Status Resolver” on page 87

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## Viewing Category Changes

Use this procedure to view Category Changes.

### About this task

Products often change categories when new category hierarchy structures are approved. Some category changes are due to anomalous data. You must approve or reject these system-generated product category changes. Category changes initiated by the user would not require a review. You can either view changes for a particular category, or view changes across all categories.

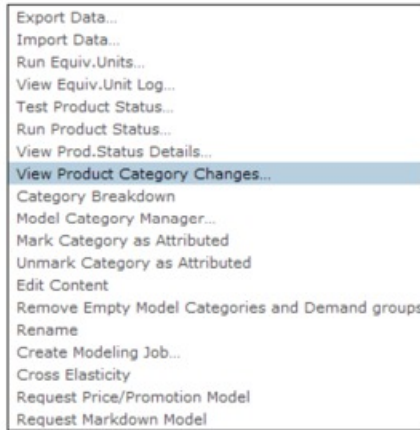
To view category changes:

### Procedure

1. Choose **OpenLink > Category Manager** to open the **Category Manager** page.

**Note:** To view changes across all categories, choose **Category > View Product Category Changes** to open the **Product Category Changes** page described in Step 4.

2. Look for categories that have a value other than zero in the **# of Products Entering Category** column in the **Detailed** tab. This value is the number of new products in the category.
3. Right-click on a category for which you want to view category changes. The context menu displays.



4. Select **View Product Category Changes**. The **Product Category Changes** page displays all products that are designated to enter the category.
5. Click **Approve All** or **Reject All** if all products are acceptable or not acceptable.

**Note:** When you select specific items that you want to submit for category change approval, the **Approve All** option will be disabled. This will protect you from accidentally approving all of the eligible category changes.

6. To select individual products, set either the **Accept** or **Reject** checkbox next to each product.
7. Click **Submit**. The approved products are added to the category.

---

## Moving Uncategorized Products to Categories

If the application does not recognize a new product hierarchy from the product file, the products are labeled as Uncategorized.

Once all product data has been imported into OpenLink, any subsequent re-loads of the product file will use the IBM Omni-Channel Merchandising categories and not the original retailer product hierarchy. If the application does not recognize a new product hierarchy from the product file, the products are moved to the default optimization category, UNCATEGORIZED. You can assign them to a category in either the **Edit Content** page or the **Category Workspace** page.

During the product file import into OpenLink, a new product hierarchy validation will flag all products that belong to UNCATEGORIZED. If this validation is ignored, all of the products will get routed to UNCATEGORIZED and will remain there until you manually move them.

In addition, any POS, Cost, or Price data for unknown products (products without a previous product record) will cause a "dummy" product record placed in the UNCATEGORIZED category and must also be manually moved.

If you are moving products into a category that has been attributed, you will need to ensure that the attributing process is conducted for the new products. This includes re-running PSR (as needed), assigning Demand Groups, checking the size, unit of measure, brand, and equivalent units.

**Note:** You must have the **Enable Attributing** permission set to access the **Edit Content** and **Category Workspace** pages.



## Related Topics

“Using the Edit Content Page”

“Using the Category Workspace Page” on page 86

## Using the Edit Content Page

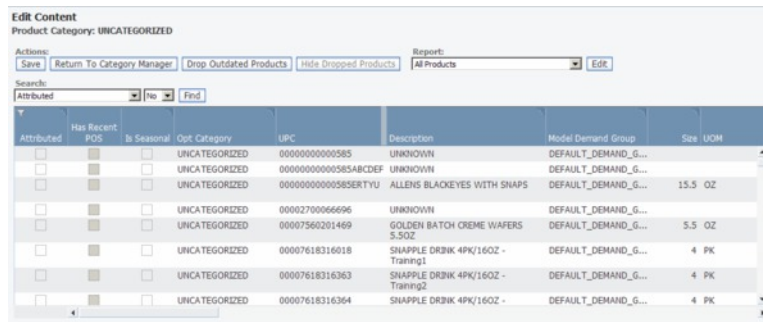
Use this procedure to move uncategorized products to categories in the **Edit Content** page.

### About this task

To move uncategorized products to categories in the **Edit Content** page:

### Procedure

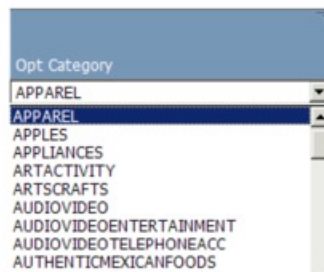
1. In the **Category Manager** page, right-click on an **UNCATEGORIZED** category with the products that you want to move, and select **Edit Content** from the context menu. The **Edit Content** page displays.



The screenshot shows the 'Edit Content' page for the 'UNCATEGORIZED' product category. At the top, there are action buttons: 'Save', 'Return To Category Manager', 'Drop Outdated Products', and 'Hide Dropped Products'. A 'Report' dropdown menu is set to 'All Products' with an 'Edit' button next to it. Below this is a search bar with 'Attributed' selected and 'Find' button. The main area is a table with columns: 'Attributed', 'Has Recent POS', 'Is Seasonal', 'Opt. Category', 'UPC', 'Description', 'Model Demand Group', and 'Size UOM'. The table lists several products, all currently in the 'UNCATEGORIZED' category.

Attributed	Has Recent POS	Is Seasonal	Opt. Category	UPC	Description	Model Demand Group	Size UOM
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	UNCATEGORIZED	000000000000585	UNKNOWN	DEFAULT_DEMAND_G...	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	UNCATEGORIZED	000000000000585ABDEF	UNKNOWN	DEFAULT_DEMAND_G...	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	UNCATEGORIZED	000000000000585ERTYU	ALLENS BLAKEYES WITH SNAPS	DEFAULT_DEMAND_G...	15.5 OZ
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	UNCATEGORIZED	00002700066696	UNKNOWN	DEFAULT_DEMAND_G...	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	UNCATEGORIZED	00007560201469	GOLDEN BATCH CREME WAFERS 5.5OZ	DEFAULT_DEMAND_G...	5.5 OZ
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	UNCATEGORIZED	00007618316018	SNAPPLE DRINK 4PK/16OZ - Training1	DEFAULT_DEMAND_G...	4 PK
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	UNCATEGORIZED	00007618316363	SNAPPLE DRINK 4PK/16OZ - Training2	DEFAULT_DEMAND_G...	4 PK
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	UNCATEGORIZED	00007618316364	SNAPPLE DRINK 4PK/16OZ -	DEFAULT_DEMAND_G...	4 PK

2. Choose the **All Products** report from the **Report** drop-down menu.
3. For the products that you want to move, click in the **Opt Category** column to select a new category from the drop-down list of categories. This will assign the products to the new optimization category.



Select a new category for which to move the products from the **UNCATEGORIZED** category

4. Click **Save** in the upper right corner of the **Edit Content** page. The products are moved into the destination category and into the default model group and default model category for the new optimization category.

In the **Category Manager** page, you will see the items you have moved listed in the new destination category. The number of products for the destination category will increase based on the number of products that you have moved.

## Using the Category Workspace Page

Use this procedure to move uncategorized products to categories in the **Category Workspace** page.

### About this task

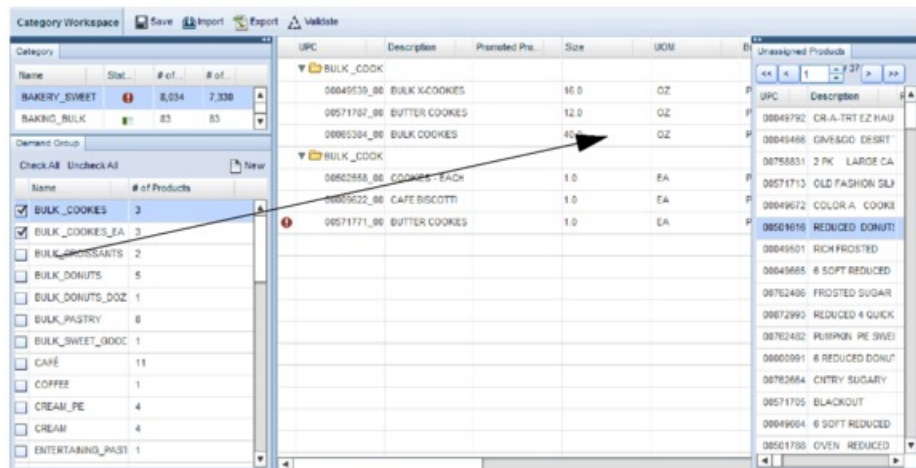
To move uncategorized products to categories in the **Category Workspace** page:

### Procedure

1. In the **Category Manager** page, right-click on an **UNCATEGORIZED** category with the products that you want to move, and select **Category Workspace** from the context menu. The **Category Workspace** page displays.

The **UNCATEGORIZED** category will be highlighted in the **Category** panel, and all of the products will be listed in the **Unassigned Products** panel since they are stored in the category's Default Demand Group.

Products in the **UNCATEGORIZED** category (and Default Demand Group) are listed in **Unassigned Products**



2. For the products that you want to move, select and drag each product from the **Unassigned Products** panel to a category in the **Category** panel. When you see the product name projected over the category that is underneath the bolded line, release the mouse button. The product will be added to the destination category in its Default Demand Group, and you will notice an increase in the number of products.

Name	Status	# of Products	# of unassign...
<b>BAKERY_SWEET</b>	❗	8,034	7,330
BAKING_BULK	■	83	83
BAKING_MIXES_SYRUPS	✓	7,356	6,657
BAKING_SUPPLIES_DECORATIO	■	652	114
BALLOONS	✓	77	77
BATH	✓	218	56
BATTERIES_FLASHLIGHTS	✓	197	51
BBQ	✓	0	0
BEEF	✓	777	777
BEEF_CHICKEN_PORK	❗	0	0
BEER	❗	0	0

You can select and drag a product from the Unassigned Products panel to a category in the Category panel. The product will be added to the category underneath the bolded line.

**Note:** The **Status** column shows whether the category has errors, if the Product Status Resolver is running, or if the Product Status Resolver ran successfully. Mouse over the status indicator icon to see the status message or number of errors.

3. With the destination category selected, you can move products from the Default Demand Group to a specific Demand Group in the **Demand Group** panel using drag-and-drop functionality.

See “Editing Content in the Category Workspace Page” on page 120 for more information about this page.

---

## Running Product Status Resolver

Product Status Resolver identifies products within a category as either active or discontinued.

### About this task

Product Status Resolver identifies products within a category as either active or discontinued. The status appears in the product information. Both active and discontinued products will be modeled, but only active products will be included in forecasts. During the optimization process, products with a discontinued status will not receive optimized prices.

**Note:** If you have sent a SKU-Store status location file to IBM Omni-Channel Merchandising (which is preferred), you do not need to run Product Status Resolver. If you do initiate the task in this situation, the task will run but will not update status values that were loaded via the status file by default. A system setting (PSR\_Overrides\_Status\_Files) can be configured to control the overwriting behavior. Contact your IBM representative for more information.

By default, the following criteria are used to determine the current product status:

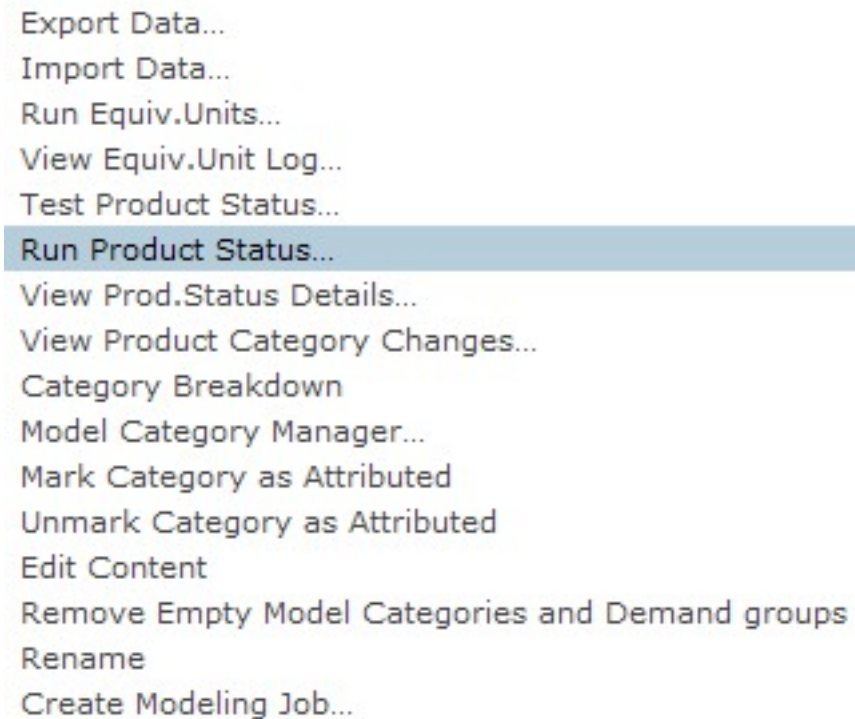
- If an item is a seasonal product, the item is active if it has sold in the last 365 days. Otherwise, it is discontinued.
- If an item is not a seasonal product, the item is active if it has sold in the last 90 days. Otherwise, it is discontinued.

You can run Product Status Resolver either manually for a selected category, or as an automated process in the Task Scheduler for one or more categories at set time intervals.

To manually run Product Status Resolver:

## Procedure

1. Choose **OpenLink > Category Manager** to open the **Category Manager** page.
2. Right-click on a category for which you want to run the Product Status Resolver. The context menu displays.



3. Select **Run Product Status**. The **Product Status Job Log** page displays all categories in the Product Status process. The data is shown at the store/SKU level.

Product Status Job Log				
Category	#of Updates	Job Start	Job Finish	Job Status
ARRANGEMENTS_BOUQUETS_BALLOONS	1981	Dec 8, 2007 12:31 AM	Dec 8, 2007 12:33 AM	Complete
BABY_ACCESSORIES		Dec 23, 2008 4:02 AM		Active
BEER_IN_A		Oct 11, 2006 9:11 AM	Oct 11, 2006 10:29 AM	Complete
COOKIES_CRACKERS		Jun 22, 2006 2:09 PM	Jun 22, 2006 2:22 PM	Complete
HAIR_CARE	1	Mar 22, 2006 9:53 AM	Mar 22, 2006 9:56 AM	Complete
SNACK_NUTS	294	Mar 22, 2006 1:21 PM	Mar 22, 2006 1:24 PM	Complete
TEA	1103	Mar 31, 2006 11:47 AM	Mar 31, 2006 12:18 PM	Complete

4. Press F5, or click the refresh button on the browser to refresh the screen for updated job statuses.
5. Once the Product Status process is complete, the job status in the **Job Status** column will change to **Complete**, and the number of status updates (from active to discontinued, or discontinued to active) will display in the **#of Updates** column.

Number of updates Job status

Product Status Job Log				
Actions: <a href="#">Return To Category Manager</a>		Report: <a href="#">Product Status View Log</a> <input type="button" value="Edit"/>	Search: <input type="text" value="#of Updates"/> <input type="button" value="Find"/>	
Category	# of Updates	Job Start	Job Finish	Job Status
ARRANGEMENTS_BOUQUETS_BALLOONS	198	Dec 8, 2007 12:31 AM	Dec 8, 2007 12:33 AM	Complete
BABY_ACCESSORIES		Dec 23, 2008 4:02 AM		Active
BEER_N_A		Oct 11, 2006 9:11 AM	Oct 11, 2006 10:29 AM	Complete
COOKIES_CRACKERS		Jun 22, 2006 2:09 PM	Jun 22, 2006 2:22 PM	Complete
HAIR_CARE	1	Mar 22, 2006 9:53 AM	Mar 22, 2006 9:56 AM	Complete
SNACK_NUTS	294	Mar 22, 2006 1:21 PM	Mar 22, 2006 1:24 PM	Complete
TEA	1103	Mar 31, 2006 11:47 AM	Mar 31, 2006 12:18 PM	Complete

- To view the products in the category that changed status (from active to discontinued, or discontinued to active), right-click on the category, and select **View Prod. Status Details**. The **Product Status Change Details** page opens.

Old status New status

Product Status Change Details		
Actions: <a href="#">View Log</a>		Report: <a href="#">Product Status Change Approval</a> <input type="button" value="Edit"/>
Category: <a href="#">ARRANGEMENTS_BOUQUETS_BALLOONS</a>		Search: <input type="text" value="New Status"/> <input type="button" value="Find"/>
Old Status	New Status	Product Name
Active	Discontinued	ASC 9" CLASSICO BUDVASE
Active	Discontinued	FRSH BQT HOT COLORS
Active	Discontinued	FRSH BQT HOT COLORS
Active	Discontinued	FRSH BQT HOT COLORS
Active	Discontinued	BULK70CM MAJESTIC ROSE ASST
Active	Discontinued	BULK70CM MAJESTIC ROSE ASST
Active	Discontinued	BULK70CM MAJESTIC ROSE ASST
Active	Discontinued	FRESH BQT PASSOVER CELEBRATION
Active	Discontinued	FRESH BQT PASSOVER CELEBRATION
Active	Discontinued	FRESH BQT PASSOVER CELEBRATION
Active	Discontinued	FRESH BQT PASSOVER CELEBRATION
Active	Discontinued	FRESH BQT PASSOVER CELEBRATION
Active	Discontinued	FRESH BQT PASSOVER CELEBRATION
Active	Discontinued	FRESH BQT PASSOVER CELEBRATION
Active	Discontinued	FRSH BQT DOZ ROSE 60/40 50CM
Active	Discontinued	FRSH BQT DOZ ROSE 60/40 50CM

- Click **View Log** to return to the **Product Status Job Log** page.



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## Chapter 6. Attributing for Modeling

Attributing involves assigning Demand Groups, size, unit of measure, and other attributes to products in a product information file (PIF).

Attributing involves assigning Demand Groups, size, unit of measure, and other attributes to products in a product information file (PIF). This process prepares the product categories for demand modeling.

### Related Topics

“Exporting the PIF”

“Editing Content and Attributing” on page 95

“Importing the PIF” on page 111

“Conducting Final Checks” on page 113

“Creating Demand Group Relationships” on page 124

“Marking Categories as Attributed” on page 129

“Notifying Modelers” on page 132

“Auto-Assigning Demand Groups to New Products” on page 133

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## Exporting the PIF

You can export the product information into a Microsoft Excel file called a product information file (PIF) to attribute the products.

You can export the product information into a Microsoft Excel file called a product information file (PIF) to attribute the products. The PIF is exported from OpenLink, manipulated, and then imported back into OpenLink. The current values from the product database will populate the attribute columns in the PIF, which you can edit. Those columns with missing values will appear as blank, in which you can enter your own values. After exporting, it is important that you do not change the PIF column structure in the Excel file due to data integrity and importing restrictions. See “Attribute Table” on page 97 for detailed information about the attribute columns.

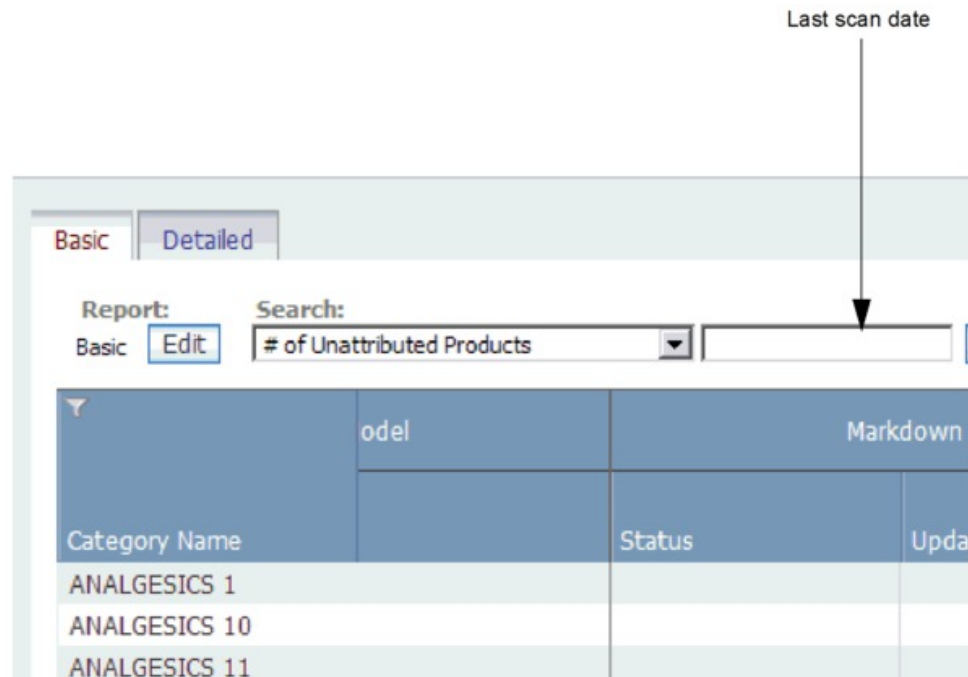
You can select the product attribute columns and determine their order in the PIF output. The selected attribute columns will also display in the **Edit Content** page. The attribute columns that can be selected are considered optional and are not required for modeling. For example, columns such as Brand Class and Size Class are primarily used for IBM Price Optimization rules, and the Level1Code/Descr columns are customer product hierarchy levels often used as a reference for setting up Demand Groups.

Products can be automatically assigned to Line Groups, and Size Classes and Size Families as part of the PIF export process. If you choose to also keep the existing values, the products will be added to existing groups. Any existing assignments will also remain. If you do not keep the existing values, new Line Groups will be created using brand, volume of measure, and base cost/price; Size relationships will be created using product name/description, brand, and volume of measure. This feature will be most valuable when there are no pre-existing values in the

application, and you are setting up Line or Size relationships for the first time. See “Auto-Assigning Line Groups and Size Relationships” on page 94 for more information. Note that products can also be assigned by choosing the **Assign Product Relationships** right-click menu option in the **Category Manager** page.

**Note:** Before you export, be sure of the following:

- Product Status Resolver has been run
- The last scan date is recent. You can check the last scan date in the **Last Scan** column in the **Category Manager** page (**OpenLink > Category Manager**)



- The last Summary Statistics run date is recent. Summary Statistics include statistics for sales and volume, for example. If Summary Statistics has not been run recently, you can update them as an automated process in the Task Scheduler for one or more categories.

**Note:** Summary Statistics should initially be run once from the Task Scheduler. This full run will update the Summary Statistics based on two years of POS data. Subsequently, they will be automatically updated after each new POS data load, and there will be no need to schedule a job. You can view the last Summary Statistics run date in the **Last Summary Stats Run** column in the **Category Manager** page (**OpenLink > Category Manager**) in the **Detailed** tab.



Last Summary  
Statistics run date

Category Name	Category Type	Total # of Products	Product Moving Category	Last Summary Stats Run	Last Scan	Min Weeks to Retire Link	Total # of Linked New Products	Total # of Products
ARRANGEMENTS_BOU...	Modeled	1578		Aug 31, 2006	Jan 6, 2007		0	
AUDIO_VIDEO_HOME_...	Modeled	133		Aug 10, 2006	Jan 6, 2007		0	
AUTOMOTIVE_GH	Modeled	171		Jan 9, 2007	Jan 6, 2007		0	
AUTOMOTIVE_WHSE	Modeled	26		Jan 9, 2007	Jan 6, 2007		0	
BABYFOOD_FORMULA...	Modeled	876		Jan 10, 2007	Jan 6, 2007		0	
BABY_ACCESSORIES	Modeled	322		Aug 2, 2006	Jan 6, 2007		0	
BABY_NEEDS	Modeled	222		Jul 14, 2006	Jan 6, 2007		0	
BACON	Modeled	170		May 9, 2006	Jan 6, 2007		0	
BAKED_GOODS_FROZEN	Modeled	243		Sep 18, 2006	Jan 6, 2007		0	
BAKERY_SWEET	Modeled	880		Nov 22, 2006	Jan 6, 2007		0	
BAKING_BULK	Modeled	83		Jan 9, 2007	Jan 6, 2007		0	
BAKING_MIXES_SYRUPS	Modeled	766		Oct 2, 2006	Jan 6, 2007		0	
BAKING_SIBBITER...	Modeled	692		Jul 3, 2006	Jan 6, 2007		0	

### Related Topics

“Attribute Table” on page 97

“Auto-Assigning Line Groups and Size Relationships” on page 94

“Exporting the PIF to Excel”

## Exporting the PIF to Excel

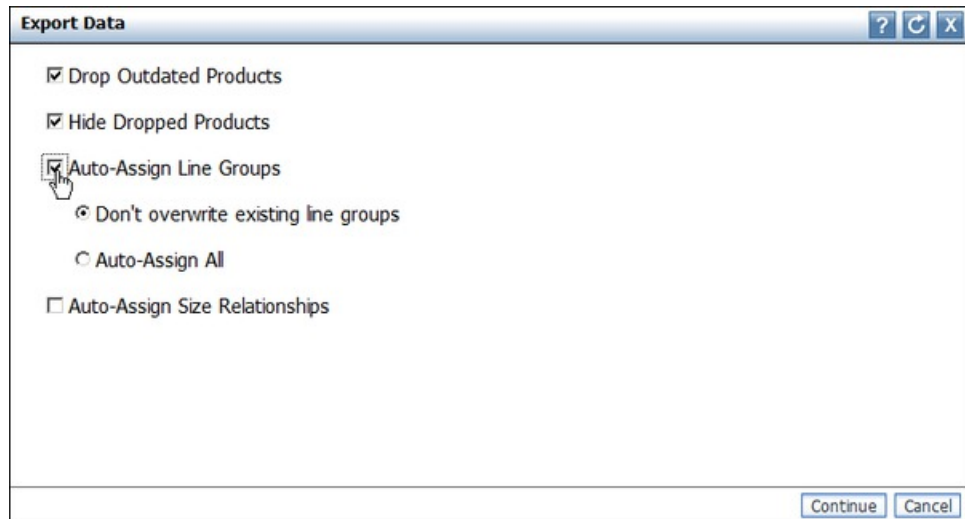
Use this procedure to export the PIF.

### About this task

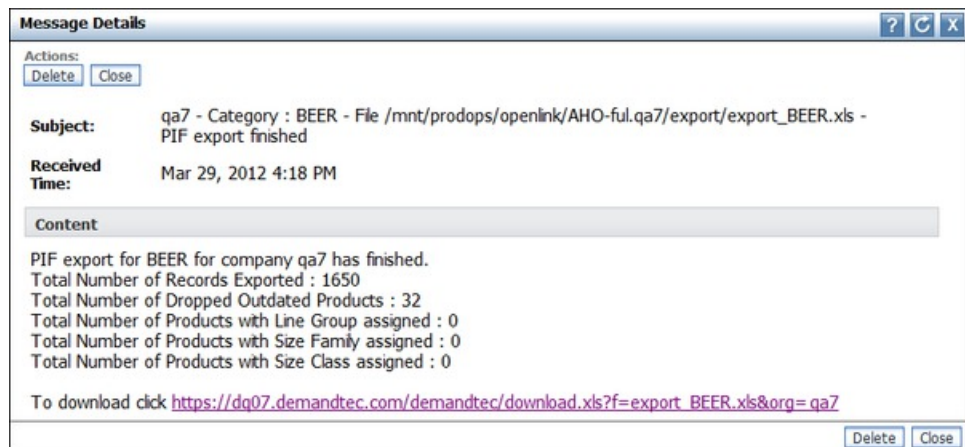
To export the PIF:

### Procedure

1. Choose **OpenLink > Category Manager** to open the **Category Manager** page.
2. Right-click on a category to export, and select **Export Data**. The **Export Data** dialog box displays with the **Drop Outdated Products** and **Hide Dropped Products** options set by default.
3. Keep **Drop Outdated Products** checked to remove outdated products from the modeling task. These products will not be included in the export file. Outdated products are those products that last scanned before the modeling period (104 weeks by default). If you clear the checkbox, all products assigned to the category will be exported and their status will not be changed.
4. Keep **Hide Dropped Products** checked to remove products that have been dropped from the category from the exported PIF. If you clear this checkbox, previously dropped products will be included in the exported PIF file.



5. Set the **Auto-Assign Line Groups**, **Auto-Assign Size Relationships** checkboxes, or both to assign products from the product database to Line Groups, Size Classes, and Size Families. Set **Don't overwrite existing line groups** to keep the existing assignments and assign the products to the existing groups. If you would prefer to discard existing line group information and attempt to auto-generate all line groups, select **Auto-Assign All**. OpenLink will create new line or size relationships based on product attributes and POS statistics.
6. Click **Continue**. An automated email will be sent to your email account (the user who exported the PIF), the Alert Inbox in the top right of the application, or to both if you have subscribed to receive an alert when the PIF has completed exporting. The email will contain a link to the PIF. See "Alert inbox" on page 22 for more information about subscribing to the alerts.



7. Select the link to download and open the PIF.

## Auto-Assigning Line Groups and Size Relationships

Products can be automatically assigned to Line Groups, and Size Classes and Size Families as part of the PIF export process.

Products can be automatically assigned to Line Groups, and Size Classes and Size Families as part of the PIF export process, or by choosing the **Assign Product Relationships** option in the **Category Manager** page. For a general overview of

this feature, see “Exporting the PIF” on page 91; for instructions on enabling this feature in the **Export Data** dialog box, see “Exporting the PIF to Excel” on page 93.

**Note:** When Line or Size relationships are auto-assigned in a PIF export, the database is updated with these values, and then read into the PIF. If you want to clear out or change any recommended values, you must edit them in the PIF and then import the PIF, which will then update the database. If you run this process from the **Category Manager**, the database will also update. To remove or change any recommended values, you must edit them in the **Edit Content** page and save the report.

New Line Groups are created using brand, volume of measure, and base cost/price. Size relationships are created using product name/description, brand, and volume of measure. The following describes the logic behind how the Line Groups and Size Relationships are assigned:

- Line Group - Two products fall in the same Line Group when they have the same brand, similar cost (up to 5% variation), and similar volume (up to a 2% variation).
- Size Family - Two products fall in the same Size Family when they have the same brand and similar product description. The product description is matched using the following steps:
  - Each product description is split into a list of valid words. A valid word is one that is not a brand or unit of measure, length  $\geq 3$ , and special characters like \*, %, etc. are removed.
  - Valid words between products are “fuzzy matched”. Fuzzy match is a natural language processing on words. Basically, it is matching MILK to MLK, etc.
  - Best matching scores for each product are picked, as long as the score is  $\geq 2$ , for example, when two or more words match between product descriptions. The brands need to match as well.
- Size Class - Size Class is assigned within a Size Family with a 10% variation in size. For example, say we have three products of size 2, 4, 8 in a Size Family, and we assign Small, Medium, and Large respectively. If it is 20, 40, 80, we still assign the same way. If we have 20, 40, we assign Small and Large respectively. If we have 2, 4, 8, 16, then we have X-Small, Small, Large, X-Large respectively. A medium size is assigned only when the number of products in a Size Family is odd.

#### **Related Topics**

“Exporting the PIF” on page 91

“Exporting the PIF to Excel” on page 93

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## **Editing Content and Attributing**

Attributing a PIF essentially involves assigning Demand Groups, size, unit of measure, and other attributes to products in a PIF.

Attributing a PIF essentially involves assigning Demand Groups, size, unit of measure, and other attributes to products in a PIF. You also edit and scrub content in the PIF to maintain consistencies and correct errors. These tasks will help ensure accurate modeling.

**Note:** It is important that you do not delete any of the columns in the PIF. Any new columns that you add will not be recognized and will be ignored in the modeling process.

**Note:** PIFs are not required for Markdown Optimization.

**Related Topics**

“Getting Familiar With the PIF”

“Attribute Table” on page 97

“Understanding the Category” on page 100

“Dropping Products” on page 100

“Populating Demand Group Structures” on page 101

“Equivalizing Size and UOM” on page 102

“Scrubbing Brand Names” on page 103

“Everyday Price Optimization and Everyday Price Management Attributes” on page 103

## Getting Familiar With the PIF

The product information file (PIF) is an Excel spreadsheet that contains the product attribute information required for the modeling process.

The product information file (PIF) is an Excel spreadsheet that contains the product attribute information required for the modeling process. It is a convenient format for attributing the content.

The column header prefix in the PIF indicates where the information is going, such as the modeling or optimization database. Sometimes information flows into two areas simultaneously.

This is an example of an exported PIF:

	A	B	C	D	E	F	G
1	Ref UPC	Ref Customer	PreIncluded in Model	Model Category	Description	MC Demand Group	Demand Group
2	00004690000102	00004690000102	Yes	CANNED BEANS	RANCH STYLE BEANS		STHWST_BEAN
3	00001119438166	00001119438166	No	CANNEDDRYSOAS	S&W OVEN BKD BEANS		BAKED_BEANS
4	00001119438489	00001119438489	No	CANNEDDRYSOAS	S W CHILI BEANS		CHILI_BEANS
5	00001119438588	00001119438588	No	CANNEDDRYSOAS	S W BBO TX RANCH STYLE BE		STHWST_BEAN
6	00001119438596	00001119438596	No	CANNEDDRYSOAS	S W MAPLE SUGAR BEANS		BAKED_BEANS
7	00001119439164	00001119439164	No	CANNEDDRYSOAS	S&W CECI BEANS (CHK PS)		CHICK_PEAS
8	00001119439305	00001119439305	No	CANNEDDRYSOAS	S W CHICK PEAS CECI BEANS		CHICK_PEAS
9	00001300045160	00001300045160	Yes	CANNEDDRYSOAS	HEINZ VEGETARIAN BEANS		BAKED_BEANS
10	00001760008802	00001760008802	Yes	CANNEDDRYSOAS	CASA FIESTA REFRIED BEANS		REFRIED_BNS
11	00002000010967	00002000010967	Yes	CANNEDDRYSOAS	GRN GIANT BLACK BEANS FRL		BLACK_BEANS
12	00002000011174	00002000011174	Yes	CANNEDDRYSOAS	GREEN GIANT RED BEANS		RED_BEANS
13	00003470041410	00003470041410	Yes	CANNEDDRYSOAS	ALLEN DARK RED KIDNEY BEA		KIDNEY_BEAN
14	00003470042317	00003470042317	Yes	CANNEDDRYSOAS	ALLEN BAKED BEANS		BAKED_BEANS
15	00003470042417	00003470042417	Yes	CANNEDDRYSOAS	ALLEN BAKED BEANS		BAKED_BEANS
16	00003470058410	00003470058410	Yes	CANNEDDRYSOAS	ALLEN S PURPLE HULL PEAS		BLACKKEYD_PS
17	00003470059410	00003470059410	Yes	CANNEDDRYSOAS	ALLEN S CROWDER PEAS		BLACKKEYD_PS
18	00003470062410	00003470062410	Yes	CANNEDDRYSOAS	ALLEN S BLACKYES WITH SN		BLACKKEYD_PS
19	00003470081410	00003470081410	Yes	CANNEDDRYSOAS	ALLEN LIGHT RED KIDNEY BEA		KIDNEY_BEAN
20	00003639350100	00003639350100	Yes	CANNEDDRYSOAS	GLORY FOODS BLACK EYED P		BLACKKEYD_PS
21	00003639350400	00003639350400	Yes	CANNEDDRYSOAS	GLORY FOODS SSND GRT NRT		SOUPBEANS
22	00003639350500	00003639350500	Yes	CANNEDDRYSOAS	GLORY FOODS SEASONED FLI		BLACKKEYD_PS
23	00003639350600	00003639350600	Yes	CANNEDDRYSOAS	GLORY FOODS SEAS FLD PS V		BLACKKEYD_PS
24	00003639350800	00003639350800	Yes	CANNEDDRYSOAS	GLORY FOODS SEASONED BTI		BUTTER_BEAN
25	00003940001368	00003940001368	Yes	CANNEDDRYSOAS	BUSH S FRESH BLACKEYE PE		BLACKKEYD_PS

**Note:** The Ref column prefix nomenclature indicates that the information is reference only, and must not be changed.

**Related Topics**

“Attribute Table” on page 97

## Attribute Table

Refer to the following table for the attribute column descriptions, allowable values, and from where the pre-populated data on the PIF comes from.

Refer to the following table for the attribute column descriptions, allowable values, and from where the pre-populated data on the PIF comes from. Highlighted rows indicate attributes that are editable or should be completed in the PIF.

Attribute Name	Attribute Description	Allowable Values for Category - how to complete PIF	Data Source - where is pre-populated data coming from?
Ref UPC	UPC from retailer	Do not change	UPC as defined by the retailer
Ref Customer Product Key	Retailer product numbering system. If not available, will default to UPC.	Do not change	UPC or retailer ID as defined in map
Unapproved	Indicates if the Demand Group that was auto-assigned to a new product since the category was last modeled was approved or not (see "Auto-Assigning Demand Groups to New Products" on page 133)	Yes or No	Model Demand Group in the Demand Group column. This can be changed to a different Demand Group before approving.  Displays only if you have the Enable Auto-Assign Product to Demand Groups permission to view the auto-assigned products.
Auto Assigned Date	The date that the Demand Group was auto-assigned to the new product (see "Auto-Assigning Demand Groups to New Products" on page 133)	Do not change	Demand Group is auto-assigned based on how the new product's attributes align with existing Demand Groups.  Displays only if you have the Enable Auto-Assign Product to Demand Groups permission to view the auto-assigned products.
Include in Model	Indicates whether a product should be included in the Price/Promotion modeling or not	Yes, or No (when the model status for a product is Discontinued)	Model status of product
Description	Product Description to be sent to Everyday Price Management	Numerical/Alphabetic	Retailer description. If retailer has more than one description, check with map.

Demand Group	A collection of highly substitutable products	Alpha-numeric, 50 characters maximum.	Default is DEFAULT_demand group
Size	Size (Volume of Measure) to be used for modeling at the retailer/division/category level. This size can be inferred.	Numerical. If free or bonus product, includes base size + amount free. (Ensure Size Class code is grouped with the base product VOM for free products).	Retailer's product file
UOM	Unit of Measure to be used for modeling and optimization at the retailer/category level. UOM should be consistent within a Demand Group.	Alphabetic CT, OZ, LOAD, SHEET, LB	Retailer's product file
Brand	Corrected/inferred brand to be used for modeling. Brands can be streamlined in the PIF or on the OpenLink Category Breakdown page.	Alphabetic, no illegal characters (&, /, *)	Retailer's product file
Manufacturer	User-defined manufacturer of the product. This can be defined in the PIF or on the Edit Content screen.	Alphabetic, no illegal characters (&, /, *)	N/A
Ref DT Status	Determined by aggregating the results of the Product Status Resolver rules. If the product is scanned in any location, the Ref_DT_Status is active.	Do not change	From the results of the Product Status Resolver, if run.
Ref Customer Status	The product status as it is sent from the retailer	Do not change	Retailer's location status file; defaults to ACTIVE if no value is sent
Ref Current Retail	Average of Current Retail Price across stores over the last 12 months, if loaded	Do not change	From retailer POS scan data
Ref Avg Scan Price	Volume-weighted Average Scan price over the last 12 months derived from POS data	Do not change	From retailer POS scan data
Ref Price per UOM	Ref Avg Scan Price/Size	Do not change	N/A

Ref Cost	Volume-weighted Average Scan price over the last 12 months derived from POS data	Do not change	From retailer POS scan data
Ref Avg Weekly Volume	Average Weekly Volume over the last 12 months across all stores at chain level. If IBM Omni-Channel Merchandising does not have a record for a week, the volume is not counted as zero.	Do not change	From retailer POS scan data
Ref Total Revenue	Total revenue of the product	Do not change	From retailer POS scan data
Ref First Scan Date	The first time a product in the category (across all stores) was scanned	Do not change	From retailer POS scan data
Ref Last Scan Date	The last time a product in the category (across all stores) was scanned. If the last POS file was received on Monday, 1/20/2003 and the last time a product scan was Friday, 1/10/2003, the Last Scan Date = 1/10/2003.	Do not change	From retailer POS scan data
Ref Customer Level 1 Descr - Level 6 Descr	Description for the Ref Customer Level 1 - Level 6 code. Very useful for assigning Demand Group names as sometimes the customer's hierarchy emulates a Demand Group structure.	Do not change	From retailer product data
Has Attributes	Indicates whether a product has attributes or not.	1 - Yes 0 - No	Attributing status of product.  This will be populated if the product's category has been marked as attributed in the Category Manager page, or if the Attributed column has already been set for the product in the Edit Content page.

Ref ProductId	An assigned unique SKU ID	Do not change	Systematically generated
Ref ProductCategory	The retailer's category name	Do not change	From retailer product data

### Related Topics

“Auto-Assigning Demand Groups to New Products” on page 133

## Understanding the Category

You can use the following resources to research the product and category.

Review the entire PIF to understand the products and category. It is a good idea to get a sense of the equivalent units, sizes, and customer buying habits for the products. You can use the following resources for your research:

- Category Manager interview - The Category Manager is a great source of information. Conducting a store walk-through or an interview with the Category Manager is a good way to get to know a category before the attributing process begins. It is a helpful way to understand the product, see product placement, and identify unknown or new products within the category.
- Store walk-through - The store walk-through can provide some valuable information, especially if a sub-category structure is required. You can work with the Category Manager to understand the optimization strategy and how to optimize the prices.
- World Wide Web - These web sites offer user manuals, product information down to the equivalent unit detail, as well as valuable preferences and decision trees:
  - UPCdatabase.com
  - Your company's web site
  - The manufacturer's web site
  - A specific UPC entered in a search engine of your choice, such as Google, Yahoo!, MSN, etc.

## Dropping Products

Since deleting products from the PIF is not optimal, you simply enter a value in the PIF for the products to be dropped.

Products that are inactive or outdated can be dropped so that they are ignored during the modeling and optimization processes. Since deleting products from the PIF is not optimal, you simply enter a value in the PIF for the products to be dropped.

Products are typically dropped from PIFs for the following reasons:

- Not all of the products on the PIF need to be attributed. Because OpenLink exports all products in the retailer's product file, regardless of the POS data, products can be on the PIF, but will never be used in the modeling or optimization processes. To identify these marginal products in the PIF, look for products with:
  - Ref Customer Status or Ref DT Status = Discontinued
  - Last Scanned Date > 90 days prior to the last scan for category



- Avg Weekly Volume is less than or equal to one unit
- Products are non-saleable- Retailers often have non-saleable products listed in the product for replenishment purposes. Items such as pamphlets, display items, and shippers are included in the PIF, but do not need to be attributed because they are not sold and will not affect the share model.
- Products are unidentifiable- Occasionally, a product description is not enough to identify the UPC. Because the PIF includes both active and discontinued products, UPCs often cannot be found through any website as well. When this problem occurs, review the Customer Status field. If it is discontinued, drop the product.

To drop a product, enter **No** in the **Included in Model** column. This will trigger the modeling process to ignore the product, therefore eliminating it from the optimization process as well.

C
<b>Included in Model</b>
Yes
No
No
No
No
No
No

← Enter No in the Included in Model column

When the PIF is imported, all dropped products will be automatically moved into the DROPPED\_FROM\_MODELING Demand Group (if you have this system setting enabled). If a product is manually moved into this Demand Group in the PIF, **Included in Model** will be automatically set to **No** upon PIF import. If this system setting is not enabled, dropped products will remain in their existing Demand Group.

**Note:** The system setting for automatically moving dropped products to the DROPPED\_FROM\_MODELING Demand Group should not be enabled if you regularly include dropped products in rule groups and pricing actions in IBM Price Optimization and IBM Price Management. This is because the automated assignment of these products to the DROPPED\_FROM\_MODELING Demand Group and NON\_MODELED model category could create rule violations, depending on the assignments of the other products in a rule group.

If you later choose to include a product in the modeling process by changing **No** to **Yes** in the **Included in Model** column in the PIF, you should specify a new Demand Group for the product. Products without Demand Groups will be automatically assigned into the Default Demand Group along with new products.

## Populating Demand Group Structures

Demand Groups are groups of highly substitutable products.

Demand Groups are groups of highly substitutable products. The price and promotion of one item in the group directly affects demand for the other items. Demand Group names can be up to 50 characters long. Examples of Demand

Groups include LARGE EGGS, EGGS SUBSTITUTE, and DIET SOFT DRINKS. In the PIF, you assign Demand Groups in the **Demand Group** column.

Before populating Demand Groups with products, consider the following:

- Seasonal products should be in their own Demand Group
- Products should have similar size: Trial sizes and industrial size (really large) products should be in their own Demand Group
- Products should have similar price points since they are HIGHLY substitutable
- Think: How are the products merchandised on the shelf – what does the customer see when making a purchasing decision?
- Think: What products will be cannibalized if I put one product on promotion?
- Always keep in mind how your average customer shops your category at your store

Here are some best practices as you populate the Demand Groups in the PIF:

- Fill in Demand Groups in the “Demand Group” field
- Use custom filters to help
- Use your REF Level Fields (product hierarchy) information
- Move or hide columns on the PIF to put valuable information side by side

These are some rules for entering Demand Group names:

- Up to 50 characters long
- Alpha-numeric characters only
- Demand Group names should be ALL\_CAPS
- Opt for smaller Demand Groups:
- As a general rule of thumb, Demand Groups should contain between 15-50 products
- Avoid single-product Demand Groups if possible
- Use suffixes to separate Demand Groups:
- PRM = Premium (for example, LOTION\_PRM)
- ECON = Economy (for example, LOTION\_ECON)
- TS = Trial sizes (for example, LOTION versus LOTION\_TS)
- IND = Industrial or large sizes (for example, TOMATO\_SAUCE versus TOMATO\_SAUCE\_IND)

## Equalizing Size and UOM

Size and unit of measure (UOM) information from the data provider cannot always be used for the modeling process.

Size and unit of measure (UOM) information from the data provider cannot always be used for the modeling process. An understanding of consumer behavior is required to apply the correct size and unit of measure for modeling. For example, data on candy bars comes as follows:

- Hersheys almond bar 6 oz
- Milky Way bar 5.3 oz
- Three Musketeers bar 6.2 oz

The consumer is not paying for each candy bar by the ounce. Instead, the consumer is choosing a one count bar of candy. As such, the size should be 1, and the UOM should be count (CT).

In another example, data on laundry detergent comes as follows:

- Tide 128 ounce (32 loads), \$9.99
- Tide Ultra 64 ounce (32 loads), \$9.99
- Tide 64 ounce (16 loads), \$5.99

The consumer is not paying for the ounces in the package. Instead, the consumer is paying for the number of loads completed by each product. By changing the size and unit of measure to the number of loads, the products can be equivalized, and the size/UOM relative to the price makes more sense.

Two UOMs within a Demand Group is not preferred, but is sometimes necessary. For example, nail polish remover has both ounce and count UOMs. If the distribution of products in each UOM is equitable, then this is not necessarily a problem. The modeling process will assign a unique equivalent value to each UOM. If one UOM value does not have a sufficient sampling, however, the median price of that UOM might be skewed.

## Scrubbing Brand Names

Brand assignment in the attributing process is extremely important to ensure consistent brand rules.

Brand assignment in the attributing process is extremely important to ensure consistent brand rules. Examples such as the following should be addressed:

- The brand may represent the manufacturer instead of the brand. In some categories, such as cereal, the **Brand** field is actually the manufacturer (for example, General Mills, not Cheerios). The Brand name should be changed on the PIF to reflect the actual brand, so that rules can be applied in Everyday Price Optimization and Everyday Price Management.
- The Brand name is not consistent. Brand names will often be inconsistent (for example, Natural Grain comes in as NaturalGrain, and Natural Grain or Starkist comes in as Strkst. SK, or Stkst) due to the many people who may have managed a category's data throughout the years.
- The Brand name is sometimes not provided, and needs to be completed in the PIF.

## Everyday Price Optimization and Everyday Price Management Attributes

Product Relationship attributes are not required for the modeling process, but are used for Everyday Price Optimization and Everyday Price Management rules.

Product Relationship attributes are not required for the modeling process, but are used for Everyday Price Optimization and Everyday Price Management rules. Include these additional attributes in your product information file (PIF) if you are planning to create optimization scenarios in the Price application. You can assign values to these optional attributes while the Modeling team processes the models for the required attributes described in Chapter 6, "Attributing for Modeling," on page 91.

The Product Relationship attributes establish pricing relationships between different line groups, sizes, brands, or other types of classifications in optimized scenarios.

**Note:** Products that have been dropped from modeling in the PIF will still be included in optimized scenarios in Everyday Price Optimization and Everyday Price Management if they have been assigned Product Relationship attributes and are still active. If you do not want to include a product in a pricing action, it should not have any Product Relationship attributes assigned to it.

**Related Topics**

Chapter 6, "Attributing for Modeling," on page 91

"Attributes Table"

"Understanding the Category" on page 100

"Assigning Line Groups" on page 108

"Assigning Size Family and Size Class" on page 108

"Assigning Brand Family and Brand Class" on page 109

"Assigning Other 1 & 2 Family and Other 1 & 2 Class" on page 110

**Attributes Table**

Refer to the following table for the Product Relationship attribute column descriptions, allowable values, and from where the pre-populated data on the PIF comes from.

Refer to the following table for the Product Relationship attribute column descriptions, allowable values, and from where the pre-populated data on the PIF comes from.

Attribute Name	Attribute Description	Allowable Values for Category - how to complete PIF	Data Source - where is pre-populated data coming from?
----------------	-----------------------	---	--

Size Class	Applied in IBM OpenLink or IBM Price Management. Each item in a Size Family is given a number/level: 8 oz = SMALL, 16 oz = MEDIUM, 24 oz = LARGE	Allowable Size Class formats are size classes that are defined for the category in IBM Price Management. If the Size Classes have not yet been defined, use the default Size Classes (XXX-LARGE, XX-LARGE, X-LARGE, LARGE, MEDIUM, SMALL, X-SMALL, XX-SMALL, XXX-SMALL), which can later be modified in IBM Price. 50 characters maximum.  Do not include Bonus products or Trial/Travel sizes in Size Class.	Blank
Size Family	Applied in IBM OpenLink or Price Optimization. Size Family is used to set rules for pricing on how different sizes of the same product should be priced on an absolute basis (for example, Small < Medium < Large), and on a relative basis based on the equiv price (for example, the large should be a better value than the medium.	Alphabetic, 50 characters maximum	Blank
Brand Class	A value which differentiates two products with a family. In this case, Brand Class differentiates products within a Brand Family.	NATIONAL, PRIVATE LABEL, or define as needed, 50 characters maximum	Retailer's product file, usually blank

Brand Family	A value which links two products together for the purpose of comparison through rules. The Brand Family is usually the type and size of the product being compared across brands.	Alphabetic, no illegal characters (&, /, *), 50 characters maximum	Retailer's product file, usually blank
Line Group	Line price group value sent by retailer	Alpha-numeric, no spaces or illegal characters (&, /, *), 50 characters maximum	Retailer's product file
Is Pre Priced	Indicated pre-priced product, supplied by the retailer. Populated with a 1 if the product is pre-priced. A pre-priced product will NOT change price during the course of the optimization.	Pre-priced product = 1 Non-prepriced product = 0	Default is 0; if the value comes from the retailer, 1 indicates a pre-priced product
Other Class1	A value which differentiates two products with a family. In this case, Other Class1 differentiates products within an Other Family1.	Numerical/ Alphabetic, 50 characters maximum	Blank
Other Family1	A value which links two products together for the purpose of comparison through rules. The Other Family1 grouping of products can be based on any characteristic of a product.	Numerical/ Alphabetic, 50 characters maximum	Blank
Other Class2	A value which differentiates two products with a family. In this case, Other Class2 differentiates products within an Other Family2.	Numerical/ Alphabetic, 50 characters maximum	Blank



## Assigning Line Groups

A Line Price Group consists of “like” products that are priced equally, such as different flavors or scents of the same product.

A Line Price Group consists of “like” products that are priced equally, such as different flavors or scents of the same product. Line Groups are used by the Line Group rule.

Line Group values are usually sent by the retailer, so you may not need to change the Line Group column at all. If you make a change in the Line Group field in the PIF, the new information will be sent to Everyday Price Optimization and Everyday Price Management.

## Assigning Size Family and Size Class

Size Family and Size Class ensures that Everyday Price Optimization and Everyday Price Management will always recommend that larger sizes are a higher price than smaller sizes, and larger equivalized sizes of the same product are less than the smaller equivalized size.

### About this task

Size Family and Size Class ensures that Everyday Price Optimization and Everyday Price Management will always recommend that larger sizes are a higher price than smaller sizes, and larger equivalized sizes of the same product are less than the smaller equivalized size (for example, Twinlab Vitamin C 30 CT will have an optimized price that is less than Twinlab Vitamin C 60 CT, but the 60 count will be a better value per tablet). The larger size is a better value.

Size Family and Size Class can be modified from the **Edit Content** screen. For more information, see “Editing Content in the Edit Content Page” on page 119.

**Note:** Size Family names should only be used within the same brand.

The following example shows how Size Family and Size Class are used:

Product Description	Demand Group	Brand	Size	UOM	Size Family	Size Class
Contadina Tomato Sauce	Tomato_sauce	Contadina	8	OZ	Contadina Sauce	SMALL
Contadina Tomato Sauce	Tomato_sauce	Contadina	15	OZ	Contadina Sauce	MEDIUM
Contadina Tomato Sauce	Tomato_sauce	Contadina	24	OZ	Contadina Sauce	LARGE
Contadina Tomato Sauce	Ind_tomato_sauce	Contadina	128	OZ		
Private Label Tomato Sauce	Tomato_sauce	Private Label	8	OZ	PL Sauce	SMALL
Private Label Tomato Sauce	Tomato_sauce	Private Label	15	OZ	PL Sauce	MEDIUM
Private Label Tomato Sauce	Tomato_sauce	Private Label	24	OZ	PL Sauce	LARGE
Hunts Tomato Sauce	Tomato_sauce	Hunts	8	OZ	Hunts Sauce	SMALL
Hunts Tomato Sauce	Tomato_sauce	Hunts	15	OZ	Hunts Sauce	MEDIUM
Hunts Tomato Sauce	Tomato_sauce	Hunts	24	OZ	Hunts Sauce	LARGE

In this example, the Size Family (Contadina Sauce) is what links the three products together. The Size Class (Small, Medium, Large) differentiates each product within the family. The allowable values for Size Class are:



- XXX-SMALL
- XX-SMALL
- X-SMALL
- SMALL
- MEDIUM
- LARGE
- X-LARGE
- XX-LARGE
- XXX-LARGE

**Note:** A free product should not be seen as a larger size. For example, a 12 ounce shampoo and a 15 ounce (12 + 3 free) shampoo are actually the same size.

To assign Size Family and Size Class:

### Procedure

1. Sort the PIF by brand, and then by size.

**Note:** If the product descriptions are complete, you can sort by product description first.

2. Look for natural groupings, and assign structures. Be aware of bonus products, and double check product pricing.

### Assigning Brand Family and Brand Class

The Brand Family name ties the products together, and the Brand Class differentiates products within a brand.

### About this task

The Brand Family and Brand Class values are used for Everyday Price Optimization and Everyday Price Management. The Brand Family name ties the products together, and the Brand Class differentiates products within a brand.

The following example shows how Brand Family and Brand Class are used:

Product Description	Demand Group	Brand	Size	UOM	Brand Family	Brand Class
Contadina Tomato Sauce	Tomato_sauce	Contadina	8	OZ	8 oz	National
Contadina Tomato Sauce	Tomato_sauce	Contadina	15	OZ	15 oz.	National
Contadina Tomato Sauce	Tomato_sauce	Contadina	24	OZ	24 oz.	National
Contadina Tomato Sauce	Ind_tomato_sauce	Contadina	128	OZ		
Private Label Tomato Sauce	Tomato_sauce	Private Label	8	OZ	8 oz	Private
Private Label Tomato Sauce	Tomato_sauce	Private Label	15	OZ	15 oz.	Private
Private Label Tomato Sauce	Tomato_sauce	Private Label	24	OZ	24 oz.	Private
Hunts Tomato Sauce	Tomato_sauce	Hunts	8	OZ	8 oz	National
Hunts Tomato Sauce	Tomato_sauce	Hunts	15	OZ	15 oz.	National
Hunts Tomato Sauce	Tomato_sauce	Hunts	24	OZ	24 oz.	National

To assign Brand Family and Brand Class:

## Procedure

1. Sort the PIF by size, and then by brand.
2. Look for natural groupings, and assign structures.

## Assigning Other 1 & 2 Family and Other 1 & 2 Class

Other Family/Other Class is often used to create relationships to support pricing strategies such as "good, better, best" or "lowest price".

Other Family and Other Class establish other relationships when Brand Family/Class is already being leveraged. Other Family/Other Class is often used to create relationships to support pricing strategies such as "good, better, best" or "lowest price".

Other Family/Class can be used for various Price rule objectives where:

- Family ties products to be compared by size
- Class differentiates the products within the family

IBM Omni-Channel Merchandising provides you two sets of Other Family/Other Class values, which is why you have Other Family 1/Other Class 1 and Other Family 2 /Other Class 2.

**Note:** Always use the Other 1's together and the Other 2's together, or the rule will not work during optimization.

The following examples illustrate how Other Family/Other Class values are used:

Example 1: Good-Better-Best Strategy (economy vs. premium), where the retailer wanted the following:

- Straw brand = good
- Sticks brand = better
- Brick brand = best

Product Description	Size / Unit of Measure	Other Family 1	Other Class 1
Straw	1 count	1 ct building material	Good
Straw	4 count	4 ct building material	Good
Straw	8 count	8 ct building material	Good
Sticks	1 count	1 ct building material	Better
Sticks	4 count	4 ct building material	Better
Sticks	8 count	8 ct building material	Better
Brick	1 count	1 ct building material	Best
Brick	4 count	4 ct building material	Best
Brick	8 count	8 ct building material	Best

Example 2: Lowest price strategy, where the retailer wanted one brand to be the lowest price on the shelf, regardless of other brand strategies within the category:

Lowest brand = Super Saver

Product Description	Size / Unit of Measure	Other Family 1	Other Class 1
Cottonelle	Single	Single	Other
Cottonelle	4 pack	4 pack	Other
Cottonelle	8 pack	8 pack	Other
Charmin	Single	Single	Other
Charmin	4 pack	4 pack	Other
Charmin	8 pack	8 pack	Other
Super Saver	Single	Single	Low
Super Saver	4 pack	4 pack	Low
Super Saver	8 pack	8 pack	Low

## Importing the PIF

Use this procedure to import the PIF.

### About this task

Once all of the values in the PIF are completed, the PIF can be imported back into OpenLink. These are some helpful tips to follow prior to the import:

- Save the PIF to a place that you will remember
- The PIF can be imported open or closed
- Delete any formulas (Paste Special > Values)
- Turn off any filters in the PIF file
- Delete any additional columns (moved columns are OK)
- Delete any additional spreadsheets in the Excel workbook

To import the PIF:

### Procedure

1. Choose **OpenLink > Category Manager** to open the **Category Manager** page.
2. Right-click on a category to import, and select **Import Data**. The **Import Data** dialog box displays.

3. Click **Browse** to locate the PIF.
4. Click **Continue**. An automated email will be sent to your email account (the user who imported the PIF), the Alert Inbox in the top right of the application, or to both if you have subscribed to receive an alert when the PIF has completed importing. See “Alert inbox” on page 22 for more information about subscribing to the alerts.

**Note:** If you receive an immediate error after clicking **Continue**, check the following:

- The PIF is the first spreadsheet in the Excel workbook
  - The name of the PIF (Excel spreadsheet name) is not too long
5. Open the email to view the import status message. It will either indicate that the PIF was imported successfully with no errors, or will list import errors.
- This is an example of a success message:

**Subject:** edu1.edu - File 6\_6\_export\_ORAL+CARE+1\_answers.xls - PIF import finished  
**Received Time:** Feb 10, 2009 4:47 PM

**Content**

PIF import for company edu1.edu has finished.  
Number of Records Imported : 402  
Number of records with null mandatory fields: 0

**Additional Information:**

---

Total Processed Records = 402  
Total Imported Records = 402

- These are some examples of error messages:

1.

PIF import for company eda1.edu has finished.  
 Number of Records Imported : 402  
 Number of records with null mandatory fields: 1

List of records with null mandatory fields:			
Column Description	Sheet Name	Row #	Column #
Demand Group	Sheet0	34	6

Additional Information:  
 Detect invalid size class [MEDIUUM], all valid size classes are: XXX-LARGE, XX-LARGE, X-LARGE, LARGE, MEDIUM, SMALL, X-SMALL, XX-SMALL, XXX-SMALL, Sheet [Sheet0]

Number of products skipped because of size class invalid: 1  
 And in line this error occurs, line number: 48

Total Processed Records = 402  
 Total Imported Records = 402

This means that a Demand Group is blank

This indicates that the size class 'MEDIUUM' is invalid. In this case, it was misspelled in the PIF.

2.

PIF import for company sas1.com has finished.  
 Number of Records Imported : 0  
 Number of records with null mandatory fields: 0

Additional Information:  
 UPC productId not match, productid [163371], skipping Line 3 in the Sheet[Sheet1]  
 UPC productId not match, productid [163453], skipping Line 4 in the Sheet[Sheet1]  
 UPC productId not match, productid [364835], skipping Line 5 in the Sheet[Sheet1]  
 UPC productId not match, productid [163446], skipping Line 6 in the Sheet[Sheet1]  
 UPC productId not match, productid [364928], skipping Line 7 in the Sheet[Sheet1]  
 UPC productId not match, productid [362048], skipping Line 8 in the Sheet[Sheet1]  
 UPC productId not match, productid [163622], skipping Line 9 in the Sheet[Sheet1]  
 UPC productId not match, productid [364290], skipping Line 10 in the Sheet[Sheet1]  
 UPC productId not match, productid [163444], skipping Line 11 in the Sheet[Sheet1]  
 UPC productId not match, productid [363844], skipping Line 12 in the Sheet[Sheet1]  
 UPC productId not match, productid [163468], skipping Line 13 in the Sheet[Sheet1]  
 UPC productId not match, productid [163474], skipping Line 14 in the Sheet[Sheet1]  
 UPC productId not match, productid [163687], skipping Line 15 in the Sheet[Sheet1]  
 UPC productId not match, productid [163403], skipping Line 16 in the Sheet[Sheet1]  
 UPC productId not match, productid [163557], skipping Line 17 in the Sheet[Sheet1]

.The file was likely sorted inaccurately.

3.

PIF import for company sas1.com has finished.  
 Number of Records Imported : 261  
 Number of records with null mandatory fields: 0

Additional Information:  
 You do not currently have permissions to access this product's category in database. Product UPC: 0000016333\_003, Category Name: GM\_PET\_CARE, skipping Line 215, Sheet: Sheet1  
 You do not currently have permissions to access this product's category in database. Product UPC: 0000016330\_003, Category Name: GM\_PET\_CARE, skipping Line 220, Sheet: Sheet1

Total Processed Records = 263  
 Total Imported Records = 261

This means the products were moved to a different category that you do not have permission to access. This is the only reason that you can delete products from a PIF.

- In all three cases, you can edit the PIF to fix the errors and re-import the PIF.

## Conducting Final Checks

After the PIF has been attributed and imported back into OpenLink, you conduct some final checks to ensure that the product information is clean for the modeling process.

After the PIF has been attributed and imported back into OpenLink, you conduct some final checks to ensure that the product information is clean for the modeling process.

The **Model Health** report presents metrics to show the status of the active models used by the Everyday Price Optimization and Everyday Price Management, and Promotion Planning & Optimization services for a given category. It can help you to determine when to re-model or perform a model refresh based on user-defined thresholds.

#### **Related Topics**

“Running Equivalent Units”

“Conducting Integrity Checks” on page 117

“Editing Content” on page 119

“Auto-Assigning Demand Groups to New Products” on page 133

“Viewing Model Health” on page 122

## **Running Equivalent Units**

The Equivalent Unit check looks for products that are outside of the acceptable limits for highly substitutable products.

Because Demand Groups are groups of highly substitutable products, the products should be relatively close in price. For example, a \$2.59 toothbrush and a \$34.99 electric toothbrush should not be in the same Demand Group.

The Equivalent Unit check looks for products that are outside of the acceptable limits for highly substitutable products. Products are considered out of bounds if their sizes are greater than or less than 50% of the Median Demand Group size, or an equivalent price is less than or greater than 5% of the price ratio.

Equivalent Units can be run from either the **Category Manager** page, or the **Category Workspace** page.

#### **Related Topics**

“Running Equivalent Units from the Category Manager Page”

“Running Equivalent Units from the Category Workspace Page” on page 115

## **Running Equivalent Units from the Category Manager Page**

Use this procedure to run Equivalent Units from the **Category Manager** page.

### **About this task**

To run Equivalent Units from the **Category Manager** page:

#### **Procedure**

1. Choose **OpenLink > Category Manager** to open the **Category Manager** page.

The **# with POS to be Equivalentized** column in the **Detailed** tab shows the number of products with POS data for which Equivalent Units needs to be run before the category can change to Completed in the attributing process. You can also edit the page to display the **# to be Equivalentized** column to display the total number of products for which Equivalent Units needs to be run. This

information may be useful for non-modeled categories.

# with POS to be Equivalized and # to be Equivalized columns

Category Name	# of Unattributed Products	# without POS	# with POS to be Equivalized	# to be Equivalized	# of Dropped Products	# of Products Leaving Category	# of Products Entering Category	Production Optimization	Price Delivery Pending
ARRANGEMENTS_BOU...	0	636	0	0	281	3	3	<input type="checkbox"/>	<input type="checkbox"/>
AUDIO_VIDEO_HOME...	0	17	0	0	4	0	0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AUTOMOTIVE_GM	0	3	0	0	20	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
AUTOMOTIVE_WHSE	0	3	0	0	0	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BABYFOOD_FORMULA...	0	21	0	0	56	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BABY_ACCESSORIES	0	8	0	0	26	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BABY_NEEDS	0	13	0	0	27	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BACON	4	41	0	4	4	0	0	<input type="checkbox"/>	<input type="checkbox"/>
BAKED_GOODS_FROZEN	3	22	0	3	12	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BAKERY_SWEET	0	242	0	0	159	2	1	<input type="checkbox"/>	<input type="checkbox"/>

- Right-click on a category, and select **Run Equiv Units**. The **Run Equivalent Units Calculation** dialog box displays.

**Run Equivalent Units Calculation**

**Options**

Update Database

Recalculate for all Products

Continue Cancel

- Set **Update Database** to update the modeling database with the equivalent unit values. This must be done before modeling can begin, and should be done for refresh processes or subset optimizations.
- Set **Recalculate for all Products** to calculate equivalent units for all products within the category. This will update any existing equivalent units within the category, and should only be done for an initial category optimization or a total category re-model.

**Note:** The **Recalculate for all Products** option will delete modeling coefficients for categories that are already modeled.

- Click **OK**. The process will check that all unit prices and sizes of products are within limits.

**Note:** The **Update Database** and **Recalculate for all Products** options should both be set when getting ready to model. Otherwise, only the **Update Database** option should be set.

## Running Equivalent Units from the Category Workspace Page

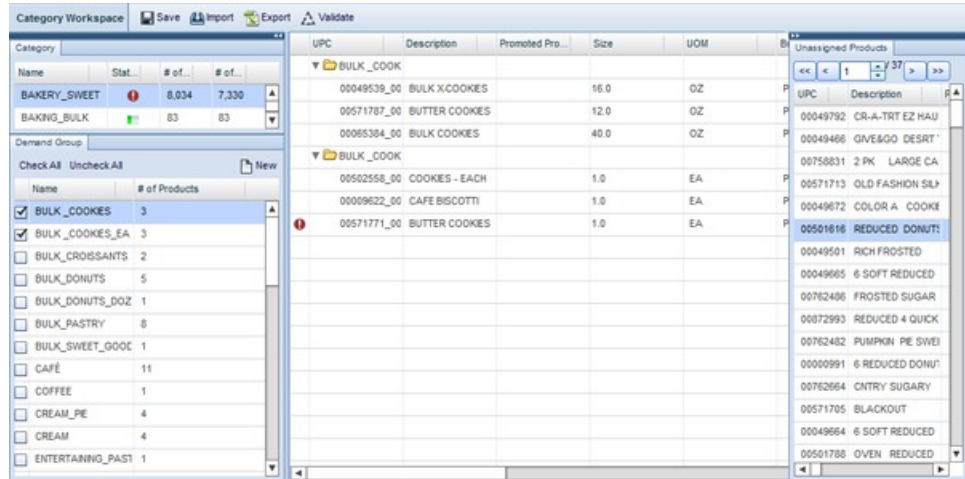
Use this procedure to run Equivalent Units from the **Category Workspace** page.

## About this task

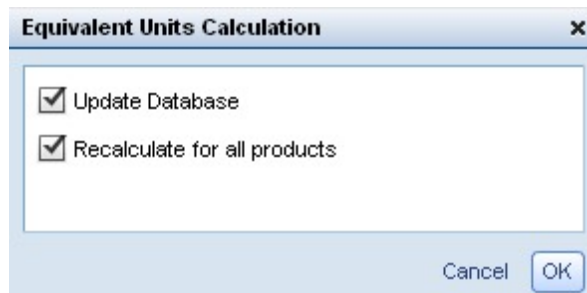
To run Equivalent Units from the **Category Workspace** page:

### Procedure

1. Choose **OpenLink > Category Manager** to open the **Category Manager** page.
2. Right-click on a category, and select **Category Workspace** to open the **Category Workspace** page.



3. Select a category in the **Category** panel, and then select one or more Demand Groups in the **Demand Group** panel. All of the products in the selected Demand Groups will display in the **Assigned Product** list in the middle of the page. All products in the Default Demand Group will display in the **Unassigned Products** panel.
4. Click the **Validate** button at the top of the page, and select **Equivalent Units Check**. The **Run Equivalent Units Calculation** dialog box displays.



5. Set **Update Database** to update the modeling database with the equivalent unit values. This must be done before modeling can begin, and should be done for refresh processes or subset optimizations.
6. Set **Recalculate for all Products** to calculate equivalent units for all products within the category. This will update any existing equivalent units within the category, and should only be done for an initial category optimization or a total category re-model.

**Note:** The **Recalculate for all Products** option will delete modeling coefficients for categories that are already modeled.

7. Click **OK**. The process will check that all unit prices and sizes of products are within limits. When the validation is running, the **Validate** button will display as 'Validation in Progress', and all the panels will become read-only.



- Click the **Refresh** button. When the validation is complete, the fields with errors will be highlighted for both the assigned and unassigned products. If you hold the pointer over the field, an error tooltip will display that describes the error. After modifying the field value, re-run the Equivalent Unit check.

**Note:** Because the columns in the **Unassigned Products** panel are not editable, you must update the fields with errors in the **Edit Content** page. In this page, filter by 'Default Demand Group' for the category to view the unassigned products.

**Note:** The **Update Database** and **Recalculate for all Products** options should both be set when getting ready to model. Otherwise, only the **Update Database** option should be set.

## Conducting Integrity Checks

You conduct integrity checks in the **Category Breakdown** page for the Demand Group and the brand.

### About this task

You conduct integrity checks in the **Category Breakdown** page for the Demand Group and the brand. Fixes can be made in the **Edit Content** page for new products or for few product changes, or in the PIF.

You can check for the following:

- Demand Groups with multiple units of measure
- Equiv errors (size and price) which are not accepted
- Many products in a Default Demand Group
- Products in a Default Demand Group with a scan history
- Brand name duplication due to spelling errors or data anomalies

To conduct an integrity check:

### Procedure

- Choose **OpenLink > Category Manager** to open the **Category Manager** page.
- Right-click on a category, and select **Category Breakdown**. The **Category Breakdown** page displays.

Model Category	Demand Group	Unit of Measure	# of Products	# of Products with Unaccepted Equiv Errors	# without POS
ARRNGMNTS_BQUET...	ARRANGEMENT_BUD_VASE	EA	15	11	0
ARRNGMNTS_BQUET...	ARRANGEMENT_CORSAGE	EA	6	0	0
ARRNGMNTS_BQUET...	ARRANGEMENT_EXTRA_LARGE	EA	61	35	0
ARRNGMNTS_BQUET...	ARRANGEMENT_LARGE	EA	60	39	0
ARRNGMNTS_BQUET...	ARRANGEMENT_MEDIUM	EA	138	88	0
ARRNGMNTS_BQUET...	ARRANGEMENT_PREMIUM	EA	6	3	0
ARRNGMNTS_BQUET...	ARRANGEMENT_SMALL	EA	22	15	0
ARRNGMNTS_BQUET...	ARRANGEMENT_VASE	EA	8	4	0
ARRNGMNTS_BQUET...	BOUQUETS_PREMIUM	EA	33	6	0
ARRNGMNTS_BQUET...	BOUQUET_EXTRA_LARGE	EA	66	26	0
ARRNGMNTS_BQUET...	BOUQUET_LARGE	EA	99	0	0
ARRNGMNTS_BQUET...	BOUQUET_MEDIUM	EA	138	74	0

- To check items related to the Demand Group, choose **Category Breakdown - Demand Groups** in the **Report** drop-down menu. The Demand Group report lists all Demand Groups for a model category.

4. Aggregate Demand Groups. Review Demand Group structures to ensure that anomalous Demand Group names do not exist. Also, Demand Groups that were originally separated (for example, LOW\_FAT\_COOKIES and NO\_FAT\_COOKIES) can be combined into a single Demand Group.
5. Check for multiple units of measure for the same Demand Group. If an error exists, right-click on the row with the error, and select **Edit Content** to open the **Edit Content** page.
6. Locate the products with different units of measure, and click in the **UOM** column to change the unit of measure.

**Edit Content**  
Demand Group: ARRANGEMENT\_BUD\_VASE

Actions:     Report:

Search:

Attributed	Size	UOM	Included in Model	Customer Status	First Scanned Date	Last Scanned Date	Use Prod Map
<input checked="" type="checkbox"/>	1	EA	<input checked="" type="checkbox"/>	Active		Dec 18, 2004	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1	EA	<input checked="" type="checkbox"/>	Active			<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1	EA	<input checked="" type="checkbox"/>	Active			<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1	EA	<input checked="" type="checkbox"/>	Discontinued			<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1	EA	<input checked="" type="checkbox"/>	Active			<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1	EA	<input checked="" type="checkbox"/>	Active		Feb 4, 2006	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	1	EA	<input checked="" type="checkbox"/>	Active		Apr 24, 2004	<input checked="" type="checkbox"/>

You can change the units of measure in the drop-down lists that appear when you click in the UOM column.

7. While you are in the **Edit Content** page, you can scroll to the right to check for products in a Default Demand Group that have a scan history.
8. If unaccepted equiv errors exist, the number of products with these errors will appear in the **# of Products with Unaccepted Equiv Errors** column in the **Category Breakdown** page. To correct the errors, right-click on the Demand Group, and select **View Equiv Details** to open the **View Equiv Details** page.
9. Look for products with the **Has Error** checkbox set, and scroll to the right to see if the **Price Error** or **Size Error** checkbox is set. A price error exists if the price is more than five times the median price in the Demand Group, or less than one-fifth the median price in the Demand Group (the price is either current retail or the base price from POS). A size error exists if the equiv unit is more than 10 or less than .1 of the median Demand Group size.
10. To fix an equiv error, right-click on the row with the error, and select **Change UOM** or **Change Demand Group**. The **Change UOM** or **Change Demand Group** dialog box will appear.
11. Change either the unit of measure or the Demand Group, and click **Continue** to save the changes.
12. To check items related to the Brand, choose **Category Breakdown - Brands** in the **Report** drop-down menu. The Brands report lists all brands for a model category.
13. Look for misspelled brands. In this report, you can click a brand name in the **Brand** column to choose the correct name in the drop-down list.

**Category Breakdown**  
 Category: ARRANGEMENTS\_BOUQUETS\_BALLOONS; # DemandGroups: 58; # Model Categories: 2; # Brands: 2; # Unit of Measures: 2;

Actions:   Category: ARRANGEMENTS\_BOUQUETS\_BALLOONS Report: Category Breakdown - Brands

Search: # of Products

Brand	# of Products	# of Products with Unaccepted Equity Errors	# without POS
NOT_PROVIDED	9	1	8
PRIVATE_LABEL	1569	47	628

↑  
 You can choose a correct brand name in the Brand column

## Editing Content

You can do a final edit of the product information.

You can do a final edit of the product information in either the **Edit Content** or **Category Workspace** page. Most of the fields are editable. The **Edit Content** and **Category Workspace** pages both display an online PIF. See “Editing Content in the Category Workspace Page” on page 120 for more details about this page.

**Note:** Any changes made when editing content may change the number of products with POS data to be equalized. You should re-run the Equivalent Unit check until all data is fixed and the **# with POS to be Equalized** column in the **Detailed** tab of the **Category Manager** page is zero. See “Running Equivalent Units” on page 114 for more information.

**Note:** You must have the **Enable Attributing** permission set to access the **Edit Content** and **Category Workspace** pages.

### Related Topics

“Editing Content in the Category Workspace Page” on page 120

“Running Equivalent Units” on page 114

“Editing Content in the Edit Content Page”

## Editing Content in the Edit Content Page

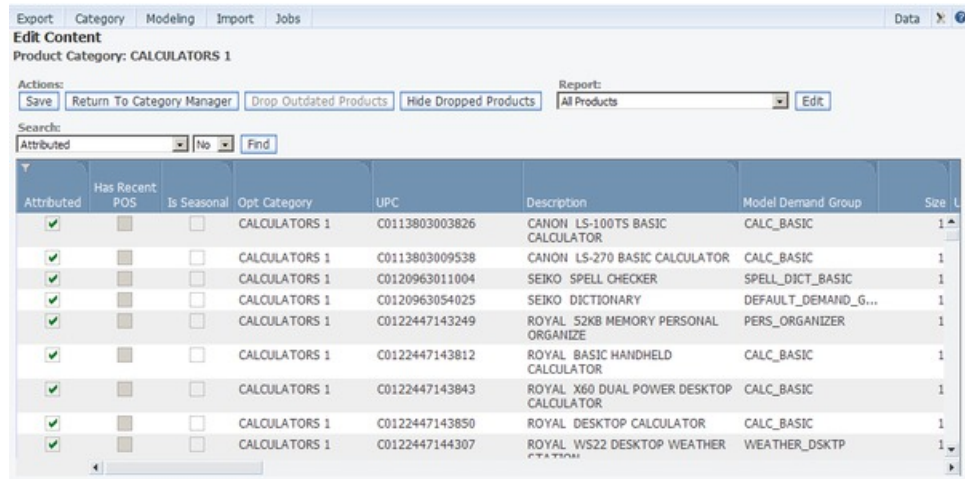
Use this procedure to edit content.

### About this task

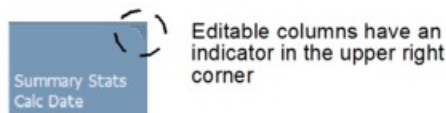
To edit content:

### Procedure

1. Choose **OpenLink > Category Manager** to open the **Category Manager** page.
2. Right-click on a category, and select **Edit Content** to open the **Edit Content** page.



3. Choose the **All Products** report from the **Report** drop-down menu.
4. In an editable column, click in a field to change the value. Either a drop-down menu or an editable field will display.



5. Click **Save** in the upper left corner to save your changes.

## Editing Content in the Category Workspace Page

The **Category Workspace** page allows you to view products from different categories, change attributes, and group products into Demand Groups in a single location.

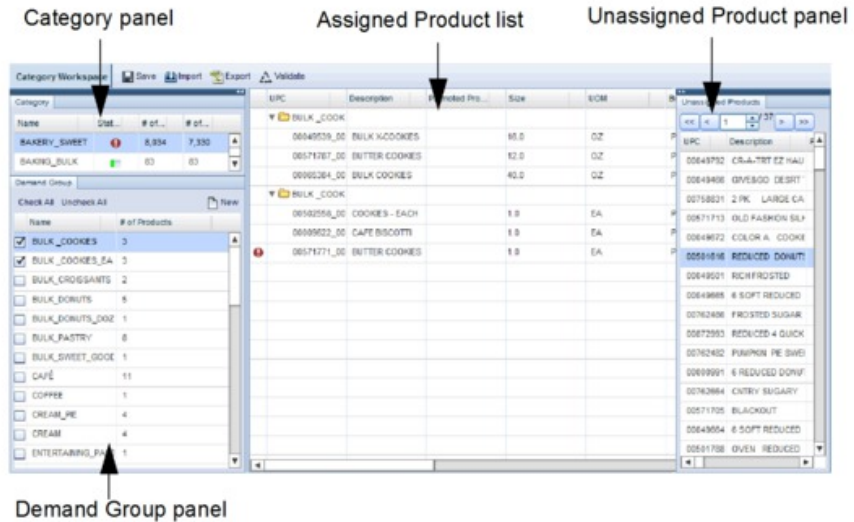
### About this task

The **Category Workspace** page allows you to view products from different categories, change attributes, and group products into Demand Groups in a single location. You can easily move products to different categories and Demand Groups using drag-and-drop functionality.

**Note:** The **Enable Attributing** permission is required for accessing the **Category Workspace** page.

The **Category Workspace** has four main regions:

- **Category panel** - Shows the list of categories with the number of products in each category, number of unassigned products, and the category's status. Hover over the error icon to see the number of validation errors, including size errors and average scan price errors. Note that if the number of validation errors is zero, validations may not have been run.
- **Demand Group panel** - Shows all the Demand Groups in the category with the number of products in each Demand Group.
- **Assigned Product list** - Shows all the products in the selected Demand Group.
- **Unassigned Product panel** - Shows all the products in the selected category that have not been assigned to a Demand Group



To edit content:

### Procedure

1. Choose **OpenLink > Category Manager** to open the **Category Manager** page.
2. Right-click on a category, and select **Category Workspace** to open the **Category Workspace** page.
3. Select a category in the **Category** panel, and then select one or more Demand Groups in the **Demand Group** panel. All of the products in the selected Demand Groups will display in the **Assigned Product** list in the middle of the page. All products in the Default Demand Group will display in the **Unassigned Products** panel.
4. In an editable column in the **Assigned Product** list, click in a field to change the value. Either a drop-down menu or an editable field will display.

Fields with validation errors, such as the **Size** column, will be highlighted. If you hold the pointer over the field, an error tooltip will display that describes the error. After modifying the field value, re-run the **Equivalent Units Check** validation (see “Running Equivalent Units from the Category Workspace Page” on page 115 for more information).

UPC	Description	Promoted Pro...	Size	UOM	Brand	Manufacturer
▼ BACON_CAN						
00308124_00	CANADIAN	33718	5.0	OZ	NEIDER	UNKNOWN
00308023_00	CHUNK	mx1 PPG single cal	12.0	OZ	HORMEL	UNKNOWN
00281169_00	TWIN PK	33718	78.0	OZ	TO	UNKNOWN
00885779_00	SMKD	33718	10.0	OZ	CAM	UNKNOWN

This product has size error, and please update size to remove this error.

5. Click **Save** in the upper left side to save your changes.

### Related Topics

“Running Equivalent Units from the Category Workspace Page” on page 115

## Viewing Model Health

The **Model Health** report allows you to understand how changes in sales history and the assortment mix for categories impact previously executed models for those categories.

Health Status	Category	Division	Annual Revenue	# of Active Products	# Weeks since Model	# of New Products	% Volume from New Products	% Revenue from New Products
Green	CANNEDDRYISOAKBEANS	Chain	\$0	0	0	0	0.0%	0.0%
Green	DRYRICE	Chain	\$0	0	0	0	0.0%	0.0%
Red	BAKINGMIXES	Chain	\$0	0	52	29	0.0%	0.0%
Yellow	CANNEDMILKORDRY	Chain	\$0	0	52	10	0.0%	0.0%
Green	DISHDETERGENT	Chain	\$0	0	0	0	0.0%	0.0%
Green	FROZENBREAKFASTPR...	Chain	\$0	0	0	0	0.0%	0.0%
Green	MARSHMALLOWS	Chain	\$0	0	0	0	0.0%	0.0%

The **Model Health** report (**OpenLink > Model Health**) allows you to understand how changes in sales history and the assortment mix for categories impact previously executed models for those categories. The report provides color highlighting (traffic lighting) based on user-defined thresholds. The metrics combined with the traffic lighting can help you determine when to re-model.

Individual metrics that have exceeded a given threshold and triggered a status change are highlighted. Types of thresholds include the number of weeks since the last model, the percentage of volume from new products, and the percentage of new stores opened since the category was last modeled. The current values of these metrics are displayed in the report.

The red, yellow, and green highlights indicate the following:

- Red - Model is in poor health - schedule a re-model this month
- Yellow - Model is in OK health - consider scheduling a re-model next month
- Green - (Default status of **Health Status** column when no threshold is exceeded) Model is in good health - no need to re-model yet

See your system administrator to configure the traffic lighting thresholds. The Model Health calculation is typically scheduled to run on a weekly basis, so the metrics are updated every week. The frequency of this task is also set up by the system administrator.

### Related Topics

“Report Columns”

## Report Columns

Use this reference to learn about the report columns in OpenLink.

This column...	Has this meaning...
<b>Health Status</b>	Red, Yellow, or Green depending on the defined thresholds.  Indicates the overall health of the model.

<b>Category Name</b>	Category name
<b>Division</b>	Division name
<b>Annual Revenue</b>	Summation of revenue for the category for the last year calculated from the most recently loaded POS week back one year.  Ranks category importance.
<b># of New Products</b>	Products that started scanning since the category was last modeled.  Measures assortment change related to new, non-modeled products.
<b># of Active Products</b>	Products with active status (as specified by the status import or PSR) and have scanned at least once in the last year.  Indicates the size of the current assortment.
<b># of Weeks Since Model</b>	Number of weeks since the category was last modeled.  Indicates the "age" of the underlying model.
<b>% Volume from New Products</b>	Percentage of category volume represented by new products that have entered the category in the last 4 weeks of POS data.  Measures assortment change related to new, non-modeled products.
<b>% Revenue from New Products</b>	Percentage of category revenue that is contributed by the new products in the POS in the last 4 weeks of POS.  Measures assortment change related to new, non-modeled products.
<b>% Volume from Discontinued Products</b>	Percentage of category volume that is represented by products that have been discontinued since the category was last modeled. This metric is intended to show how much of the model depended on products that have since been discontinued. This metric uses the category volume for the last 90 days of the last modeling period.  Measures assortment change related to discontinued products.
<b>% Revenue from Discontinued Products</b>	Percentage of category revenue from discontinued products since the last model date. This metric is intended to show how much of the model depended on products that have since been discontinued. This metric uses the category revenue for the last 90 days of the last modeling period.  Measures assortment change related to discontinued products.

<b>% New Stores</b>	Percentage of stores that have been opened (new stores) since the category was last modeled.  Measures non-modeled stores.
<b>Health Report Last Run Date</b>	The last date that the category health metrics were last calculated for the category.  The update is triggered by a scheduled task in the Task Scheduler. It could be set up to run after a POS data load depending on the load time for POS data.  Indicates if metrics are up to date.

---

## Creating Demand Group Relationships

A Demand Group relationship is provided for the statistician to help streamline the modeling process.

A Demand Group relationship is provided for the statistician to help streamline the modeling process. Cross terms between Demand Groups within a category are noted in this matrix (either affinity, cannibalistic, or no relationship). An affinity is a relationship in which a Demand Group is a complement to the other (for example, Dry Hair Shampoo and Dry Hair Conditioner). A cannibalistic relationship is one in which a Demand Group can substitute for the other (for example, Normal Hair Shampoo and Oily Hair Shampoo).

The modeling process uses these cross terms to look for relationships between two Demand Groups within a category. You can indicate the relationships either at the product category level or the Demand Group level, according to your preference.

At the Demand Group level, you select a Demand Group at the top of the page (the "driver" Demand Group), and all remaining Demand Groups are displayed in the report (the "driven" Demand Groups). The cross term is assigned to the driven Demand Group. The logic of the relationship is: the driver Demand Group cannibalizes/prompts the purchase of the driven Demand Group.

At the product category level, you choose both Demand Groups on a single page. You define their relationship, and define if the relationship reciprocates. This may be the easiest method if you have only a few relationships to create.

As an alternative, Demand Group relationships can be exported, manipulated, and then imported back into OpenLink. Editing a matrix in Excel may be easier if you have a lot of Demand Groups and relationships to create.

Demand Group relationships are not automatically created so that you have the ability to choose relationships based on actual sales activity. If data is left on its own in the system, cross-terms might be discovered in the data, but they may not be accurate. For example, the retailer often promotes both 17" and 19" monitors at the same time. As a result, the volume of these two Demand Groups spikes at the same time. The model might think that there is an affinity relationship between the two Demand Groups, but the 19" sometimes cannibalizes the 17". So, it is better to manually define Demand Group relationships in the application.



**Note:** If modeling does not find a relationship between two Demand Groups, it will not force one. Assigning Demand Group relationships simply tells the model to search for this type of relationship.

### Related Topics

“Assigning to Demand Groups”

“Assigning to Categories” on page 126

“Exporting Demand Group Relationships” on page 127

“Importing the Demand Group Relationship Matrix” on page 128

## Assigning to Demand Groups

Use this procedure to assign Demand Group relationships at the Demand Group level.

### About this task

To assign Demand Group relationships at the Demand Group level:

### Procedure

1. Choose **OpenLink > Category Manager** to open the **Category Manager** page.
2. Right-click on a category, and select **Demand Group Relationships**. The **Demand Group Relationships** page shows all existing relationships for the selected category.

Driver DG	Driven DG	Coefficient	Reciprocal?
SEDATIVE	STIMULANT	Cannibalism	<input checked="" type="checkbox"/>
STIMULANT	SEDATIVE	Cannibalism	<input checked="" type="checkbox"/>

3. Click **View by DG** to open the **Demand Group Relationships by Demand Group** page.

Driver DG	Coefficient	Reciprocal?
DEFAULT_DEMAND_G...	No Relation	<input type="checkbox"/>
IBUPROFEN	No Relation	<input type="checkbox"/>
MOTION_STICKN	No Relation	<input type="checkbox"/>
SEDATIVE	No Relation	<input type="checkbox"/>
STIMULANT	No Relation	<input type="checkbox"/>

4. Choose a driver Demand Group from the **Demand Group** drop-down list at the top right-side of the page.

**Demand Group:** ARRANGEMENT\_LARGE 4 of 57

5. Click the coefficient in the **Coefficient** column, and choose **No Relation**, **Affinity**, or **Cannibalism** from the drop-down list. This assigns a coefficient to the driven Demand Group in the **Driven DG** column. The driver Demand Group cannibalizes/prompts the purchase of the driven Demand Group.

- Set the **Reciprocal** checkbox if the relationship reciprocates (which will be true in most cases). For example, laundry detergent is an affinity to fabric softener, and fabric softener is an affinity to laundry detergent.

Non-reciprocal relationships only apply in one direction, for example, the 6-pack of AAA batteries cannibalizes the 2-pack of AAA batteries, but the reverse is not true.

- For each Demand Group, you can change the relationship in the **Coefficient** column (**No Relation**, **Affinity**, or **Cannibalism**).
- Click **Save** when you are done.

## Assigning to Categories

Use this procedure to assign Demand Group relationships at the Category level.

### About this task

To assign Demand Group relationships at the Category level:

### Procedure

- Choose **OpenLink > Category Manager** to open the **Category Manager** page.
- Right-click on a category, and select **Demand Group Relationships**. The **Demand Group Relationships** page shows all existing relationships for the selected category.

Driver DG	Driven DG	Coefficient	Reciprocal?
SEDATIVE	STIMULANT	Cannibalism	<input checked="" type="checkbox"/>
STIMULANT	SEDATIVE	Cannibalism	<input checked="" type="checkbox"/>

- Click **New Relationship** to open the **Demand Group Relationships** dialog box.

**Demand Group Relationships**

Product Category:  
ANALGESICS 1

Driver DemandGroup:  
ACETAMINOPH

Driven DemandGroup:  
DEFAULT\_DEMAND\_GROUP

Coefficient:  
No Relation

Reciprocal:

Save Cancel

- Choose driver and driven Demand Groups from the drop-down lists.

- Choose **No Relation**, **Affinity**, or **Cannibalism** from the **Coefficient** drop-down list. This assigns a coefficient to the driven Demand Group. The driver Demand Group cannibalizes/prompts the purchase of the driven Demand Group.
- Set the **Reciprocal** checkbox if the relationship reciprocates (which will be true in most cases). For example, laundry detergent is an affinity to fabric softener, and fabric softener is an affinity to laundry detergent.  
Non-reciprocal relationships only apply in one direction, for example, the 6-pack of AAA batteries cannibalizes the 2-pack of AAA batteries, but the reverse is not true.
- Click **Save** when you are done. If the same relationship already exists, you will see a message at the top of the **Demand Group Relationships** dialog box that the new Demand Group relationship already exists. You can adjust the settings in the dialog box and save the relationship again. Your new Demand Group relationship will appear in the **Demand Group Relationships** page.

## Exporting Demand Group Relationships

Use this procedure to export a Demand Group relationship.

### About this task

A Demand Group relationship can be exported if many relationships are required for modeling. You can modify the file for a given category, and then import the file back into IBM OpenLink.

To export a Demand Group relationship:

### Procedure

- Choose **OpenLink > Category Manager** to open the **Category Manager** page.
- Right-click on a category, and select **Demand Group Relationships**. The **Demand Group Relationships** page displays.

Driver DG	Driven DG	Coefficient	Reciprocal?
SEDATIVE	STIMULANT	Cannibalism	<input checked="" type="checkbox"/>
STIMULANT	SEDATIVE	Cannibalism	<input checked="" type="checkbox"/>

- In this page, click **Export Relationships**. The Demand Group relationship matrix will result in an Excel **.csv** file in the following format. You can modify the file by adding relationship coefficients with the appropriate reciprocal setting (See “Modifying the Demand Group Relationship Matrix File” on page 128).

**Note:** OpenLink will export and import files in this format. You must transform the **.csv** file into (and back from) a classic matrix layout if needed. Contact your IBM representative if you need assistance.

Ref Model Category	Driver Demand Group	Related Demand Group	Relation Coefficient	Reciprocal
ANALGESICS	ACETAMINOPH	ARTHRITIS	1	One Way
ANALGESICS	ACETAMINOPH	ASPIRIN	1	Two Way
ANALGESICS	ACETAMINOPH	CHLDRENS_LQD	1	Two Way
ANALGESICS	ACETAMINOPH	CHLDRN_TBLTS	1	Two Way

### Related Topics

“Modifying the Demand Group Relationship Matrix File”

## Modifying the Demand Group Relationship Matrix File

Use this procedure to modify the Demand Group relationship matrix file.

### About this task

You can modify the Demand Group relationship matrix file, and add or change the relationship coefficients and reciprocal settings. The Demand Groups in the matrix must already exist in the correct categories.

To modify the Demand Group relationship matrix file:

### Procedure

1. Create relationships between Demand Groups, and add Relation Coefficients. The coefficient is assigned to the Related Demand Group. The driver Demand Group cannibalizes/prompts the purchase of the related (driven) Demand Group.  
Valid relation coefficients are 1 and -1:
  - 1 corresponds to an affinity/complementary relationship
  - -1 corresponds to a cannibalization/substitute relationship
2. You can modify the Reciprocal setting as follows:
  - Enter One Way if customers will purchase the Related Demand Group (such as cough drops) when purchasing the Driver Demand Group (such as cough medicine), but will not purchase cough medicine because they purchase cough drops.
  - Enter Two Way if the Driver and Related Demand Groups both have the same influence on each other.

## Importing the Demand Group Relationship Matrix

Use this procedure to import a Demand Group relationship matrix.

### About this task

You can import the modified Demand Group relationship matrix file back into OpenLink.

**Note:** Any changes in the current Demand Group relationship matrix in OpenLink will be overridden by the import.

To import a Demand Group relationship matrix:

## Procedure

1. Choose **OpenLink > Category Manager** to open the **Category Manager** page.
2. Right-click on a category, and select **Demand Group Relationships**. The **Demand Group Relationships** page displays.

Driver DG	Driven DG	Coefficient	Reciprocal?
SEDATIVE	STIMULANT	Cannabalm	✓
STIMULANT	SEDATIVE	Cannabalm	✓

3. In this page, click **Import Relationships**. The **Import Demand Group Relationships** dialog box appears.

**Import Demand Group Relationships**

Product Category  
ANALGESICS 1

Import File  
 **Browse...**

**Continue** **Cancel**

4. Click **Browse** to locate the Excel **.csv** file, and click **Continue**.

---

## Marking Categories as Attributed

Use this procedure to mark categories as attributed.

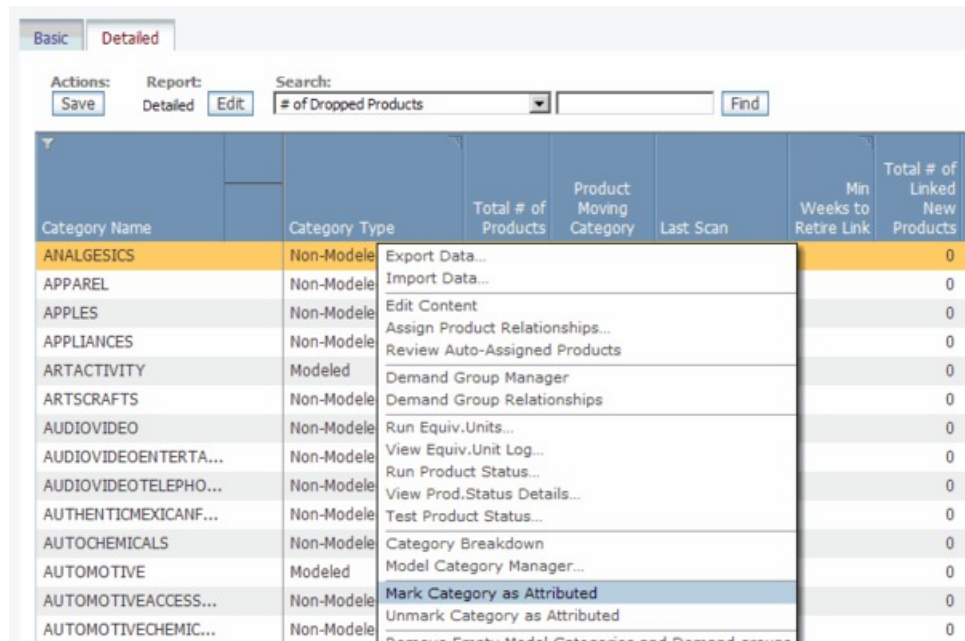
### About this task

Now that you are finished attributing, you can mark the categories as attributed. This setting indicates that the products in the categories have passed all tests, are cleansed, and are ready for modeling.

You can also later unmark a category as attributed. If any individual product within the category should not be marked as attributed, you can clear its setting. The **# of Unattributed Products** column in the **Category Manager** page will update. You can also reference this column to see if new, unattributed products have entered the category and are ready to be attributed. See “Locating New Products” on page 131 for other ways to identify new, unattributed products.

To mark categories as attributed:

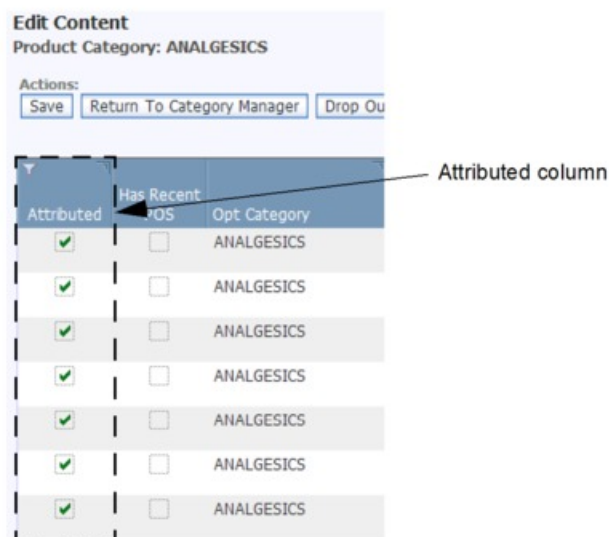
1. Choose **OpenLink > Category Manager** to open the **Category Manager** page.
2. In the **Detailed** tab, right-click on a category and select **Mark Category As Attributed**. The **Attributed** column will show the current date, and the **Attributed By** column will show your user name.



3. If you want to later unmark the category as attributed, right-click on a category in the **Category Manager** page, and select **Unmark Category as Attributed**.

To edit attributed products:

1. In the **Category Manager** page, right-click on a category, and select **Edit Content** to open the **Edit Content** page. The **Attributed** checkbox is set for each product in the category.



2. Clear the **Attributed** checkbox for the products that you do not want marked as attributed. Any product that is not attributed is counted in the **# of Unattributed Products** column in the **Category Manager** page.

### Related Topics

“Locating New Products” on page 131

## Locating New Products

If new products have entered your categories and need attributing, there are several report columns in IBM OpenLink and other applications that you can reference to identify the new products.

If new products have entered your categories and need attributing, there are several report columns in IBM OpenLink and other applications that you can reference to identify the new products. Once you have located them as described in this section, you can proceed with the attributing process as described in “Attribute New Products” on page 145.

The following columns will be updated at the category level:

- The **# of Unattributed Products** value in the **Category Manager** page will be increased.

Category Name	Price/Promotion Model		Markdown Model		Total # of Products	# of Unattributed Products
	Updated	Status	Updated	Status		
AAA					0	0
AE_NEW					9	5
ANALGESICS					1518	1309
APPAREL					64	56
APPLES	d	Aug 4, 2009 11:37 PM			308	308

- The **# of New Products** column will be updated in the **Model Health** report in IBM OpenLink (see “Viewing Model Health” on page 122 for more information about this report).
- If you are an IBM Price Optimization user, the **# of New Products** column will be updated in the **Category Activity** report in the **Manage Categories** page.

To view the new products within the category, right click on a category in the **Category Manager** page, and select **Edit Content** to open the **Edit Content** page. The following columns in this page will identify the new, unattributed products in the category:

- The **Attributed** checkbox will be cleared.

Attributed	Has Recent POS	Opt Category	UPC	Description	Model Demand Group	Size UOM
<input type="checkbox"/>	<input type="checkbox"/>	DRY DOGFOOD 9	00907910010786	NEW BITS N BITES BURGERS N CHEEZ	DEFAULT_DEMAND_GROUP	17.6 LB
<input type="checkbox"/>	<input type="checkbox"/>	DRY DOGFOOD 9	00907910010791	NEW BITS N BITES HOMESTYLE CHICKEN VEG	DEFAULT_DEMAND_GROUP	4 LB
<input type="checkbox"/>	<input type="checkbox"/>	DRY DOGFOOD 9	00907910012127	NEW BITS N BITES ORIGINAL BONUS	DEFAULT_DEMAND_GROUP	5 LB

- The **Included in Model** checkbox will be cleared.

**Edit Content**  
Product Category: PAPER TOWELS 3

Actions:     Report:

Search:

Attributed	Avg Scan Price	Price per UOM	Cost	Avg Weekly Volume	Included in Model	Customer Status	First Scanned Date	Last Scanned Date	Use
<input type="checkbox"/>		\$0.22	\$1.120		<input checked="" type="checkbox"/>	Discontinued		Apr 13, 2004	
<input type="checkbox"/>		\$0.01	\$0.568		<input type="checkbox"/>	Active		Jan 20, 2004	
<input type="checkbox"/>		\$0.33	\$1.133		<input type="checkbox"/>	Active		Sep 2, 2003	

- The **Model Demand Group** will be DEFAULT\_DEMAND\_GROUP.

**Edit Content**  
Product Category: PAPER TOWELS 3

Actions:     Report:

Search:

Attributed	UPC	Description	Model Demand Group	Size	UOM	Brand
<input type="checkbox"/>	P0301258703100	HANDWIPE DISPOSABLE TOWELS	DEFAULT_DEMAND_GROUP	6	SH	HANE
<input type="checkbox"/>	P0301310050123	HOLIDAY PRINT TOWELS	DEFAULT_DEMAND_GROUP	80	CT	HOLI
<input type="checkbox"/>	P0301310077030	SPA PAPER TOWELS 3 ROLL	DEFAULT_DEMAND_GROUP	3	RL	SPAR

### Related Topics

“Viewing Model Health” on page 122

---

## Notifying Modelers

After attributing, you can notify your Modelers that a category is ready for modeling .

### About this task

After attributing, you can notify your Modelers that a category is ready for modeling for use in the Everyday Price Optimization and Everyday Price Management, Promotion Planning & Optimization, or Markdown Optimization applications by setting a category status in the **Category Manager** page. As the Modelers complete their tasks, they can set statuses in the **Modeling Categories** page. Once a status is set, an email notification is sent so that other users are informed of the progress in the attributing and modeling process.

**Note:** You must subscribe to these alerts in the **Alert Subscription** page to receive email notifications for each attributing or modeling action (choose **Alert Subscriptions** from the **Tools** menu):

- **Request Price/Promotion Model / Request Markdown Model** - Users will receive an email notification once an Attributer sets the **Requested** status to



request the category to be modeled. A separate email notification will be sent to users if a Modeler determines that a category is not ready to be modeled and sets the **Recalled** status.

- **Price/Promotion Model in Progress / Markdown Model in Progress** - Users will receive an email notification once a Modeler sets the **In Progress** status to begin modeling the category.
- **Release Price/Promotion Model / Release Markdown Model** - Users will receive an email notification once a Modeler sets the **Released** status to release a model to production. A separate email notification will be sent to users if a Modeler determines that a category is not ready to be modeled and sets the **Recalled** status.
- **Return Price/Promotion Model** - Users will receive an email notification once a Modeler sets the **Returned** status to return the category to the Attributers for more attributing work.

To set an attributing category status:

### Procedure

1. Choose **OpenLink > Category Manager** to open the **Category Manager** page.
2. In either the **Basic** or **Detailed** tab, right-click on one or more categories, and select **Request Price/Promotion Model**, or **Request Markdown Model**.
3. You can enter comments in the comment dialog box, and click **OK**. When the dialog box closes, the **Requested** status and current date will display in the **Price/Promotion Model Status** or **Markdown Model Status** column for each category in the **Category Manager**. Also, an email notification with the following information will be sent to all users that are subscribed to receive this alert:
  - Action - **Price/Promotion Model Requested / Markdown Model Requested**
  - Category name and product category ID
  - User ID (user name or email address)
  - Date and time
  - Any comments entered into the comment dialog box with the last status change

---

## Auto-Assigning Demand Groups to New Products

Before re-modeling a category, new products that have been added must be assigned to Demand Groups.

### About this task

Before re-modeling a category, new products that have been added must be assigned to Demand Groups. You can schedule the **Auto-Assign New Products** task in the Task Scheduler so that new products are automatically assigned to existing Demand Groups based on their attributes. Any existing products in the Default Demand Group that have not yet been assigned to Demand Groups will also be automatically assigned. You can review the auto-assigned products and approve the assignments, or manually re-assign different Demand Groups before approving them. For more information about creating tasks, including the **Auto-Assign New Products** task, see “Creating new tasks” on page 151.

The recommended workflow for preparing categories for a re-model is the following:

- Review the auto-assigned new products and change or approve their Demand Group assignments.
- Run the Equivalent Unit check.
- Conduct integrity checks.
- Set the status that a category is ready for modeling (optional).

**Note:** You must have these permissions to conduct this process:

- **Enable Auto-Assign New Products** permission to review the auto-assigned products.
- **Enable Auto-Assign New Products Task** permission to schedule the automated task for assigning Demand Groups.

To review the Demand Groups assigned to new products:

## Procedure

1. Choose **OpenLink > Category Manager** to open the **Category Manager** page.
2. Right-click on a category with unapproved auto-assigned products in the **# Unapproved Auto-Assigned Products** column. The column will be highlighted in yellow if the number of products is more than zero.
3. Select **Review Auto-Assigned Products** in the context menu.

In the **All Products** report that displays in the **Edit Content** page, the unapproved and auto-assigned products are indicated by a checkmark in the **Auto-Assign Unapproved** column. The date that the products were assigned to Demand Groups is shown in the **Auto-Assigned Date** column.

Auto-Assign Unapproved	Auto-Assign Date	Attributed	Has Recent POS	Opt. Category	Model Category	UPC	Description
<input checked="" type="checkbox"/>	Mar 16, 2009	<input type="checkbox"/>	<input type="checkbox"/>	ANALGESICS	ANALGESICS	00004116718103	PRO THERAPY X LRG KNEE BRACE
<input checked="" type="checkbox"/>	Mar 16, 2009	<input type="checkbox"/>	<input type="checkbox"/>	ANALGESICS	ANALGESICS	00004116718105	PRO THERAPY MEDIUM KNEE BRAC
<input checked="" type="checkbox"/>	Mar 16, 2009	<input type="checkbox"/>	<input type="checkbox"/>	ANALGESICS	ANALGESICS	00004116718112	PRO THERAPY BACK BRACE
<input checked="" type="checkbox"/>	Mar 16, 2009	<input type="checkbox"/>	<input type="checkbox"/>	ANALGESICS	ANALGESICS	00004116718201	PRO THERAPY MED FOAM INSERT
<input checked="" type="checkbox"/>	Mar 16, 2009	<input type="checkbox"/>	<input type="checkbox"/>	ANALGESICS	ANALGESICS	00004116718203	PRO THERAPY LONG DUR HOT INSRT

4. Slide the scrollbar to the right to view the assigned Demand Groups in the **Model Demand Group** column. Any new values are highlighted. You can also click in this column to change the Demand Group selection in the drop-down menu.

Auto-Assign Unapproved	UPC	Description	Model Demand Group	Size Uom	Brand
<input checked="" type="checkbox"/>	00004116718103	PRO THERAPY X LRG KNEE BRACE	EXT_PABN_PATCH	1.00 CT	PRO
<input checked="" type="checkbox"/>	00004116718105	PRO THERAPY MEDIUM KNEE BRACE	EXT_PABN_PATCH	1.00 CT	PRO
<input checked="" type="checkbox"/>	00004116718112	PRO THERAPY BACK BRACE	EXT_PABN_PATCH	1 CT	PRO
<input checked="" type="checkbox"/>	00004116718201	PRO THERAPY MED FOAM INSERT	EXT_PABN_PATCH	1 CT	PRO
<input checked="" type="checkbox"/>	00004116718203	PRO THERAPY LONG DUR HOT INSRT	EXT_PABN_PATCH	1 CT	PRO

5. Select one or more unapproved and auto-assigned products, and select **Approve** in the right-click menu. The **Auto-Assign Unapproved** checkbox will be cleared for each Demand Group assignment that you approve.
6. Click **Save** when you are done with your changes. When you return to the **Category Manager** page, the **# Unapproved Auto-Assigned Products** column will be updated.



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## Chapter 7. Maintaining Your Category Hierarchy

OpenLink creates a Category Map to assign a category hierarchy structure to the products from your product file.

IBM Omni-Channel Merchandising creates a Category Map to assign a category hierarchy structure to the products from your product file. All subsequent loads of product information into the application will use the Category Map. For efficient processing, it is important to get the category hierarchy structure correct with the initial product load.

You can change your category hierarchy structure and reconfigure it differently for optimization purposes. For example, you can make adjustments such as breaking large categories into smaller categories, combining categories, and moving your products into new categories. After the changes, you conduct the product attributing process to prepare the data for modeling.

### Related Topics

“Importing the Category Map”

“Re-categorizing Products” on page 141

“Setting the Product Hierarchy Override” on page 147

“Managing Categories” on page 149

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## Importing the Category Map

The Category Map with your product hierarchy is usually already imported into OpenLink at the beginning of implementation.

### About this task

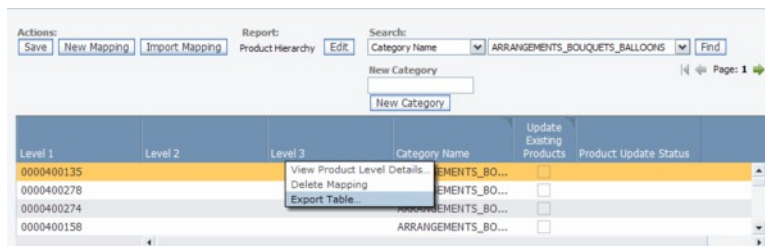
The Category Map with your product hierarchy is usually already imported into OpenLink at the beginning of implementation. If not, you must first import your category information in an Excel spreadsheet to populate the **Category Mappings** page.

**Note:** If you are using the improved product hierarchy data schemas, you can use the **Product Hierarchy Mapping** page instead. For more information, see “Product Hierarchy Mappings” on page 139.

To import a Category Map:

### Procedure

1. Choose **OpenLink > Category Mappings** to open the **Category Mappings** page.



- Right-click on any row in the report and select **Export Table** to export the report columns into an Excel spreadsheet. The **Export** dialog box displays.
- Click **Export**. Click the refresh button in the upper right corner of the **Export Status** dialog box until the file has finished exporting.

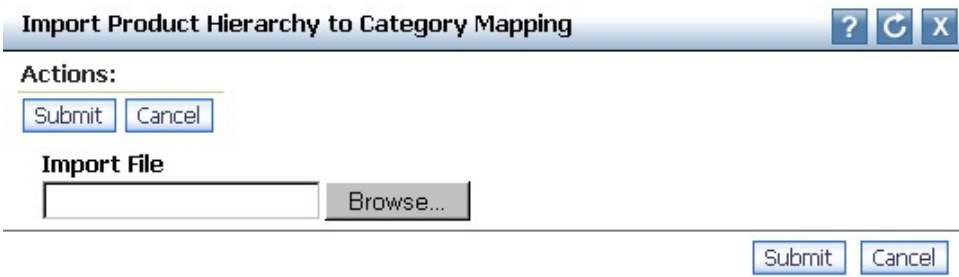


- When the status for your file has changed to Finished, click the file name in the **Export Status** dialog box to open the spreadsheet file.
- Complete the fields in the spreadsheet, as described in the following table. The columns must be in the correct order, or the import will fail.

In this column...	Add this information...
Column A	Level 1 hierarchy (typically a category name)
Column B	Level 2 hierarchy (typically a classification)
Column C	Level 3 hierarchy (typically a sub-classification name)
Column D	Category name. Optimization category that you want to see in the Promotion, Price, or Markdown service.
Column E	Update existing products already in the database with the map. <ul style="list-style-type: none"> <li>• 1 - Yes</li> <li>• 0 or blank - No</li> </ul>

	A	B	C	D	E	F
1	Level 1	Level 2	Level 3	Category Name	Update Existing Products	Product Update Status
2	L1DESC_A	L1DESC_B	L1DESC_C	COFFEE		1
3	L1DESC_A	L1DESC_B	L1DESC_C	COFFEE		1
4	511VEG_1	511VEG_2		CANNEDDRYISOAKBEANS		1
5	level1111	level2222		CANNEDDRYISOAKBEANS		1
6	level_1	level2		ANALGESICS		1
7	LEVEL1C	LEVEL2C		COFFEE		0

- Save your Excel file to a convenient location.
- Close the **Export Status** dialog box, if it is still open.
- In the **Category Mappings** page, click **Import Mapping**. The **Import Product Hierarchy to Category Mapping** dialog box displays.



9. Click **Browse** to locate your mapping Excel file, and click **Submit**. The **Category Mappings** page will contain the information from your file (you may need to refresh the page first). The **Product Update Status** column will display the **Waiting to update existing products** status for those existing products that you indicated that you wanted updated with the new map.

**Note:** If the mapping file contains errors, the **Import Product Hierarchy to Category Mapping** dialog box will list each error and the row number. You must correct these errors in the mapping file and re-import.

#### Related Topics

“Product Hierarchy Mappings”

---

## Product Hierarchy Mappings

You can use the **Product Hierarchy Mappings** page to define categorical levels for each product within your product hierarchy.

### About this task

As an alternative to the **Category Mappings** page, you can use the **Product Hierarchy Mappings** page to define categorical levels for each product within your product hierarchy. The **Product Hierarchy Mappings** page allows you to include up to ten sub-categorizations for each product. You can simplify the categorization or re-categorization process by:

- Dynamically mapping sub-levels using an intuitive hierarchy tree
- Assigning products quickly, using simple filters to hierarchically organize all products

You can also export and import Product Hierarchy mappings. For more information, please see “Importing and Exporting Product Hierarchy Mappings” on page 140.

**Note:** You must have the **Use Product Hierarchy Tree** permission set to access the **Product Hierarchy Mapping** page.

To use the **Product Hierarchy Mappings** page:

### Procedure

1. Choose **OpenLink > Product Hierarchy Mapping**. You will see a hierarchy tree of all mapped products, as well as uncategorized products. As you select and expand nodes, the Product Hierarchy tree will dynamically update, fetching the requested data.

2. In the **Category** column, click in the row for the item you wish to categorize.
3. If you want to find a specific portion of the product hierarchy to categorize, use the search field. Once you enter all or portion of the node name you are looking for, click **Find** to see the results.
4. To show the result in the Product Hierarchy to see how other similar products are categorized, click **Show in Hierarchy**.
5. Enter the name in the field to filter the category list using search-ahead functionality.

If a match is not found, the field will be highlighted in red when you click away from the field. You can delete the name and try again, or create a new category by clicking **Add Category** at the top of the page. After adding the new category in the **Add Category** dialog box, click **Create**. The new category will be available to choose from the category list.

6. Once you have added a new category or modified an existing category name, the **Update Existing Products** checkbox will be set, indicating that the products will be moved to the new category when you save your changes. If this checkbox is cleared, the products will not be moved to the new category.
7. You can make any adjustments to the category names in a product's hierarchy, as needed. The new or changed categories will be in bold.

One of the following icons will display in the **Status** column:

- 



The category for this product has changed, and one or more of its children in the hierarchy have changes.

- 



The category for this product has changed, and its children in the hierarchy have inherited the changes.

- 



One or more children in the hierarchy have changes.

8. Click **Save** to commit your mapping changes for new or updated products, or **Revert to Last Save** to revert to the previously saved changes.

#### **Related Topics**

[“Importing and Exporting Product Hierarchy Mappings”](#)

## **Importing and Exporting Product Hierarchy Mappings**

Use this procedure to import and export existing Product Hierarchy mappings.

### **About this task**

Rather than creating mappings in the **Product Hierarchy Mapping** screen, you can export mappings to Excel and modify them manually. To export existing Product Hierarchy mappings:

1. Navigate to **Data > Export** and select **Product Hierarchy Node to Category Mapping** from the **Report** drop-down:



2. Click **Export**.
3. Click the appropriate link on the **Export Status** screen to download the mappings file.
4. Edit the file using Excel or the editor of your choice.

When you have finished editing the file, you can import it back into OpenLink:

1. Navigate to **Data > Import** and select **Product Hierarchy Node to Category Mapping** from the **Data Type** drop-down
2. Click **Browse** and locate the edited file containing your Product Hierarchy mappings.
3. Click **Import**.

For more information about properly formatting imports for Product Hierarchy mapping, please contact your IBM representative.

---

## Re-categorizing Products

Products may need to be re-categorized due to merchandise hierarchy changes such as a "reclass" process, or if they were accidentally placed in the wrong category.

### About this task

Products may need to be re-categorized due to merchandise hierarchy changes such as a "reclass" process, or if they were accidentally placed in the wrong category. These steps must be completed to successfully move items in OpenLink and ensure that they are ready for forecasting in IBM Omni-Channel Merchandising services:

### Procedure

1. Create a new optimization category, if you decide that it is needed for particular products.
2. Move the item in the **Edit Content** page or **Category Workspace** page.

3. Conduct the attributing process.
4. Conduct the modeling or model refresh process.
5. Decide to use the original product hierarchy or the IBM Omni-Channel Merchandising product hierarchy going forward.

#### Related Topics

“Creating a New Optimization Category”

“Moving Individual Products to Categories” on page 143

“Moving Uncategorized Products to Categories” on page 144

“Attribute New Products” on page 145

## Creating a New Optimization Category

Use this procedure to create a new optimization category.

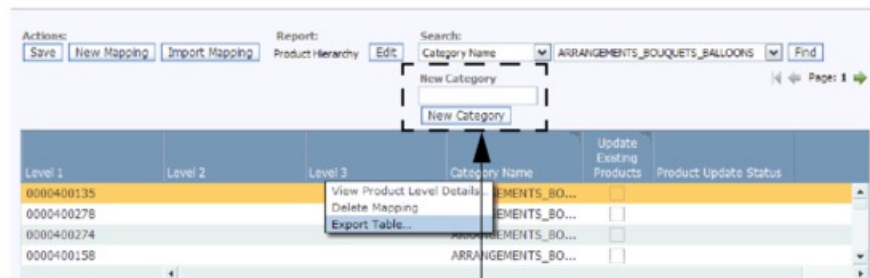
### About this task

You can create new optimization categories in OpenLink.

To create a new optimization category:

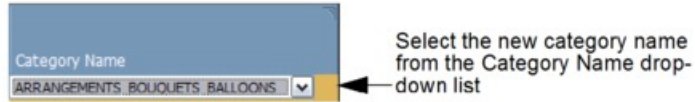
### Procedure

1. Choose **OpenLink > Category Mappings** to open the **Category Mappings** page .
2. Enter a new category name in the **New Category** field and click the **New Category** button. The new category is available in the **Category Name** drop-down menu in this page.



Enter a new optimization category name and click New Category

3. If you want to select the new category for an existing category hierarchy, click next to the category name, and select the new category name in the drop-down list.



- To move all products in the hierarchy structure to the new optimization category, set the **Update Existing Products** checkbox.
- Click **Save** in the upper left corner of the **Category Mappings** page. The **Product Update Status** column will display the **Waiting to update existing products status**. Refresh the page until the process has completed and the message disappears.

## Moving Individual Products to Categories

Use this procedure to move a product between categories.

### About this task

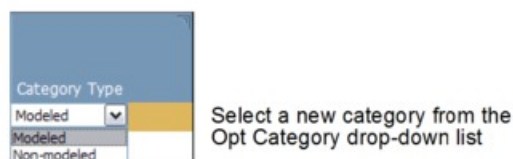
You can easily move individual products to new categories in the **Edit Content** page, or in the **Category Workspace** page.

To move a product between categories in the **Edit Content** page:

- Choose **OpenLink > Category Manager** to open the **Category Manager** page.
- Right-click on the category with the product that you want to move, and select **Edit Content** from the context menu. The **Edit Content** page displays.

Attributed	Has Recent POS	Is Seasonal	Opt Category	UPC	Description	Model Demand Group	Size
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CALCULATORS 1	C0113803003826	CANON LS-100TS BASIC CALCULATOR	CALC_BASIC	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CALCULATORS 1	C0113803009538	CANON LS-270 BASIC CALCULATOR	CALC_BASIC	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CALCULATORS 1	C0120963011004	SEIKO SPELL CHECKER	SPELL_DICT_BASIC	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CALCULATORS 1	C0120963054025	SEIKO DICTIONARY	DEFAULT_DEMAND_G...	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CALCULATORS 1	C0122447143249	ROYAL 52KB MEMORY PERSONAL ORGANIZER	PERS_ORGANIZER	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CALCULATORS 1	C0122447143812	ROYAL BASIC HANDHELD CALCULATOR	CALC_BASIC	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CALCULATORS 1	C0122447143843	ROYAL X60 DUAL POWER DESKTOP CALCULATOR	CALC_BASIC	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CALCULATORS 1	C0122447143850	ROYAL DESKTOP CALCULATOR	CALC_BASIC	1
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CALCULATORS 1	C0122447144307	ROYAL WS22 DESKTOP WEATHER STATION	WEATHER_DSKTP	1

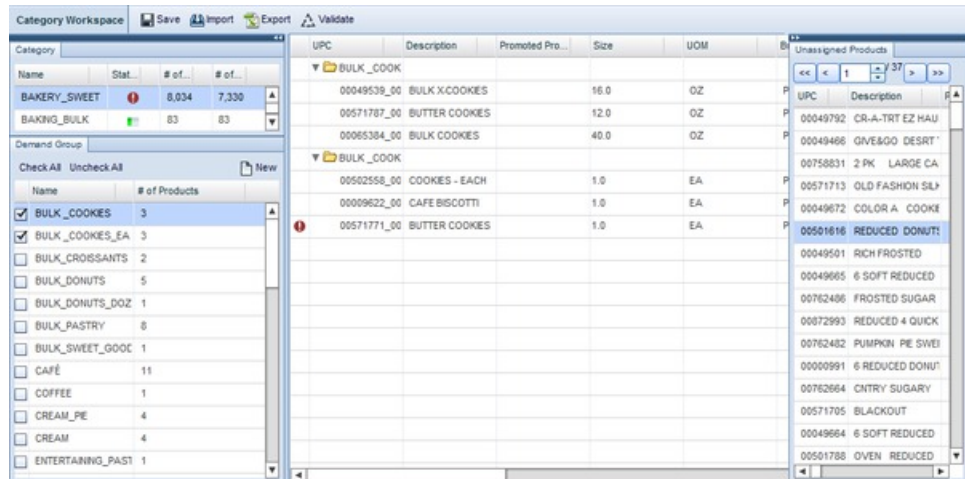
- Choose the **All Products** report from the **Report** drop-down menu.
- For the product that you want to move, click in the **Opt Category** column to select a new category from the drop-down list of categories. This will assign the product to the new optimization category.



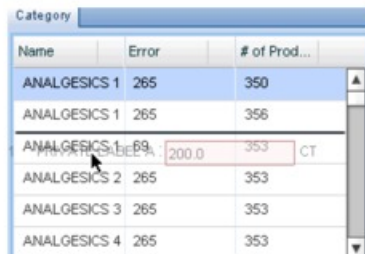
- Click **Save** in the upper left corner of the **Edit Content** page. The product is moved into the destination category and into the Default Demand Group and default model category for the new optimization category.

To move a product between categories in the **Category Workspace** page:

- Choose **OpenLink > Category Manager** to open the **Category Manager** page.
- Right-click on a category, and select **Category Workspace** to open the **Category Workspace** page.



- Select a category in the **Category** panel, and then select one or more Demand Groups in the **Demand Group** panel. All of the products in the Demand Groups will display in the **Assigned Product** list in the middle of the page.
- Select and drag each product from the **Assigned Product** list to a category in the **Category** panel. When you see the product name projected over the category that is underneath the bolded line, release the mouse button. The product will be added to the destination category's Default Demand Group.



You can select and drag a product from the Assigned Products panel to a category in the Category panel. The product will be added to the category underneath the bolded line.

## Moving Uncategorized Products to Categories

If the application does not recognize a new product hierarchy from the product file, the products are moved to the default optimization category, uncategorized.

Once all product data has been imported into OpenLink, any subsequent re-loads of the product file will use the IBM Omni-Channel Merchandising categories and not the original retailer product hierarchy. If the application does not recognize a new product hierarchy from the product file, the products are moved to the default optimization category, UNCATEGORIZED. You can assign them to a category in either the **Edit Content** page or the **Category Workspace** page. See “Moving Uncategorized Products to Categories” for more details.

## Attribute New Products

Use this procedure to attribute new products in the category.

### About this task

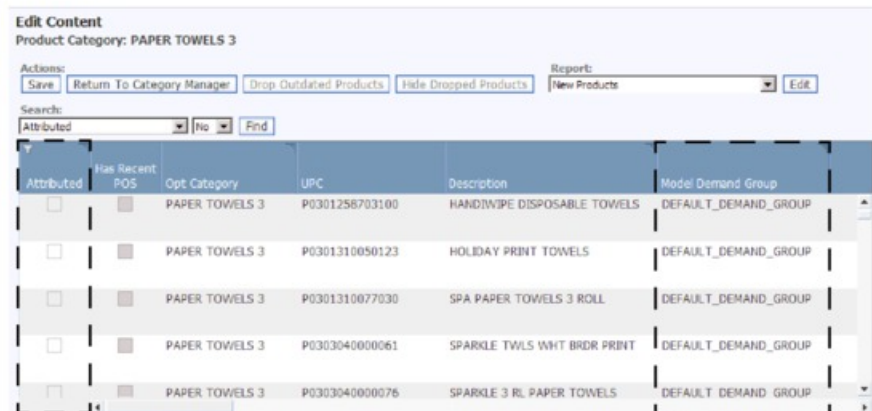
Once products are approved into a new optimization category, they must be assigned a Demand Group structure and equivalized in the new category structure. You can attribute the products directly in the **Edit Content** page, or the **Category Workspace** page.

This process ensures that the products entering the category are included in the forecast. If the products are not assigned a Demand Group structure, they will be excluded from the forecast, resulting in a disparity between predicted and actual results. See Chapter 5, “Preparing to Attribute,” on page 83 for more information about the attributing process. See “Equalizing Size and UOM” on page 102 for more information about equalizing sizes and UOMs.

**Note:** You must have the **Enable Attributing** permission set to access the **Edit Content** and **Category Workspace** pages.

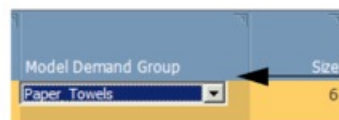
To attribute new products in the category in the **Edit Content** page:

1. In the **Category Manager** page, right-click on the category with the product that you want to attribute, and select **Edit Content** from the context menu. New products in a category are typically not attributed, not modeled, and have a Default Demand Group.



Attributed	Has Recent POS	Opt Category	UPC	Description	Model Demand Group
<input type="checkbox"/>	<input type="checkbox"/>	PAPER TOWELS 3	P0301258703100	HANDWIPE DISPOSABLE TOWELS	DEFAULT_DEMAND_GROUP
<input type="checkbox"/>	<input type="checkbox"/>	PAPER TOWELS 3	P0301310050123	HOLIDAY PRINT TOWELS	DEFAULT_DEMAND_GROUP
<input type="checkbox"/>	<input type="checkbox"/>	PAPER TOWELS 3	P0301310077030	SPA PAPER TOWELS 3 ROLL	DEFAULT_DEMAND_GROUP
<input type="checkbox"/>	<input type="checkbox"/>	PAPER TOWELS 3	P0303040000061	SPARKLE TWLS WHT BRDR PRINT	DEFAULT_DEMAND_GROUP
<input type="checkbox"/>	<input type="checkbox"/>	PAPER TOWELS 3	P0303040000076	SPARKLE 3 RL PAPER TOWELS	DEFAULT_DEMAND_GROUP

2. Click in the **Model Demand Group** column, and choose an existing Demand Group from the drop-down list. This will automatically assign the appropriate model category to the product.

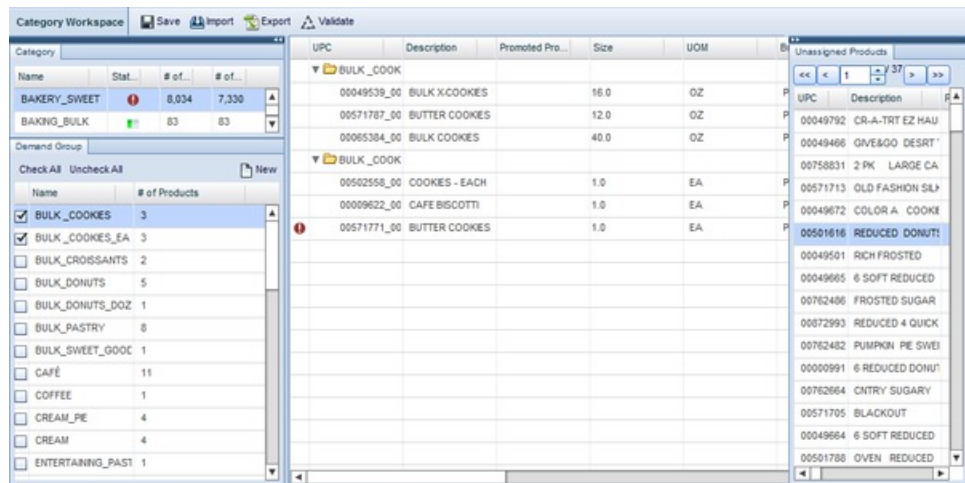


Choose an existing Demand Group for the category from the Model Demand Group drop-down list

3. Complete the remainder of the attributing process in this page to ensure that the category is ready for modeling.
4. Click **Save** in the upper left corner of the **Edit Content** page.

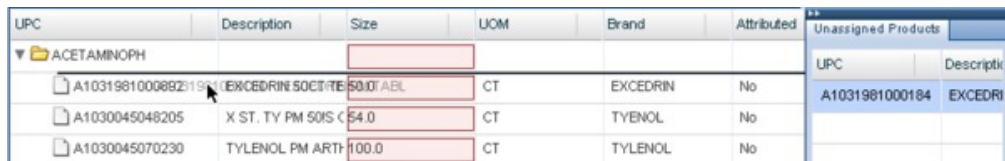
To attribute new products in the category in the **Category Workspace** page:

1. Choose **OpenLink > Category Manager** to open the **Category Manager** page.
2. Right-click on a category, and select **Category Workspace** to open the **Category Workspace** page.



3. Select a category in the **Category** panel. All of the unassigned products are stored in the category's Default Demand Group and will display in the **Unassigned Product** panel. New products in a category are typically not attributed or modeled.
4. Select and drag each product from the **Unassigned Product** panel to a Demand Group in the **Demand Group** panel. When you see the product name projected over the Demand Group that is underneath the bolded line, release the mouse button. The product will be added to the destination Demand Group.

With the Demand Group selected, you can also drag a product directly to the **Assigned Products** list in the middle of the page. The product will be added to a new row below the bolded line.



### Related Topics

“Creating New Demand Groups”

## Creating New Demand Groups

Use this procedure to create a new Demand Group.

### About this task

New Demand Groups available to choose from can be created in the **Demand Group Manager** page, or in the **Category Workspace** page.

**Note:** You must have the **Enable Attributing** permission set to access the **Category Workspace** page.

To create a new Demand Group in the **Demand Group Manager** page:

1. In the **Category Manager** page, right-click on the category for which you want a new Demand Group, and select **Demand Group Manager** from the context menu. The **Demand Group Manager** page displays.

Name	Description	NumProd
ACETAMINOPH	ACETAMINOPH	151
DEFAULT_DEMAND_GROUP	Default Demand Group	3
DROPPED_FROM_MODELING	Dropped From Modeling	0
IBUPROFEN	IBUPROFEN	158
MOTION_SICKN	MOTION_SICKN	9
SEDATIVE	SEDATIVE	28
STIMULANT	STIMULANT	7

2. Click **New Demand Group**. A new Demand Group named **New\_DemandGroup** is added to the **Demand Group Manager**. You can click this name field to change the name, but it must be unique.

**Note:** The Demand Group name cannot have more than 50 characters.

Name	Description	# of Products
FRESH_CUT_MIXED_GREENS	FRESH_CUT_MIXED_GREENS	16
FRESH_CUT_POMS	FRESH_CUT_POMS	21
HARDGOOD_CONTAINER_PLANTER	Default Demand Group	0
HARDGOOD_SUPPLY	HARDGOOD_SUPPLY	1
HRDGD_CONTAINER_PLANTER	HRDGD_CONTAINER_PLANTER	1
New_DemandGroup		0

Click the New\_DemandGroup name field to change the name

3. Click **Save** in the upper left corner of the **Demand Group Manager** page. The new Demand Group is now available throughout the application.

To create a new Demand Group in the **Category Workspace** page:

1. In the **Category Workspace** page, in the **Demand Group** panel, click **New** in the top right corner.
2. Enter a unique Demand Group name in the **New Demand Group** dialog box, and click **Create**.
3. When you click **OK** in the status message that appears, the new Demand Group will be added to the end of the Demand Group list.

## Setting the Product Hierarchy Override

Use this procedure to set the product hierarchy override.

### About this task

When you make a change to a product hierarchy, it does not flow back into the retailer system so that several product hierarchies can be managed for optimization purposes. Because retailers send data to the system each week, it is important to ensure that changes to the product hierarchy are not overwritten with subsequent retailer data loads. You can clear the **Use Map** setting in either the **Edit Content** page or **Product Level Details** page so that the imported Category Map will always override any new retailer product file category mapping.

**Note:** If the retailer product file has a major restructure, you may want to check the **Use Map** setting so that the large-scale category changes are captured with the next product file load.

To set the product hierarchy override in the **Edit Content** page:

1. Choose **OpenLink > Category Manager** to open the **Category Manager** page.
2. Right-click on the changed category hierarchy, and select **Edit Content** from the context menu. The **Edit Content** page displays.
3. In the **All Products** report, be sure that the **Use Prod Map** checkbox next to each product is cleared. A blank in this checkbox ensures that the Category Map will always override the retailer product file category mapping each time it is imported. This is the default setting.

To set the product hierarchy override in the **Product Level Details** page:

1. Choose **OpenLink > Category Mappings** to open the **Category Mappings** page.
2. Right-click on the changed category hierarchy, and select **View Product Level Details** from the context menu. The **Product Level Details** page displays.
3. In the **Product Map Details** report, be sure that the **Use Map** checkbox next to each product is cleared. A blank in this checkbox ensures that the Category Map will always override the retailer product file category mapping each time it is imported. This is the default setting.

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## Configuring PIF Attribute Columns

You can configure your PIF to include additional fields which are helpful for either attributing purposes or Everyday Price Optimization and Everyday Price Management rules.

### About this task

You can configure your PIF to include additional fields which are helpful for either attributing purposes or Everyday Price Optimization and Everyday Price Management rules. Selecting these product attributes and determining their order in the PIF is an administrative procedure that you only need to do once for all users in your company.

These reference fields are helpful in attributing:

- Ref Level 1-12 code and description
- Ref Attribute 0-9

These product relationship fields are only needed for optimization rules in the Price application:

- Line Group (also useful in Promotion Planning & Optimization)
- Pre-price
- Size Family
- Size Class
- Brand Family
- Brand Class
- Other Family 1
- Other Class 1
- Other Family 2



- Other Class 2

**Note:** You must have the **Enable Configure PIF Columns** permission set to configure the PIF columns.

To configure the PIF attribute columns:

## Procedure

1. Choose **OpenLink > Configure PIF Columns** to open the **Configure PIF Columns** page. The names of the columns as they will appear in the PIF are listed, along with sample attribute values from a record in the product database. The sample values can help you determine if the columns will be useful for the attributing process.

Export Order	Export	Name	Sample Value
1	<input checked="" type="checkbox"/>	Size Class	MEDIUM
2	<input checked="" type="checkbox"/>	Size Family	PAIN CAPLET
3	<input checked="" type="checkbox"/>	Brand Class	NATIONAL BRAND
4	<input checked="" type="checkbox"/>	Brand Family	PAIN_RELIEF_CAPS
5	<input checked="" type="checkbox"/>	Line Group	LP_00838910
6	<input checked="" type="checkbox"/>	Is Pre Priced	0

2. Set the attribute columns in the **Include** column that you want included in the PIF export. By default, the following columns will be set, which you can clear:
  - Size Class
  - Size Family
  - Brand Class
  - Brand Family
  - Line Group
  - Is Pre Priced
  - Level1Descr
  - Level2Descr
  - Level3Descr
  - Level4Descr
  - Level5Descr
  - Level6Descr
3. You can click in the **Order** column to change the column order. These attributes will all appear in a block to the right of the other attribute columns in the exported PIF.

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## Managing Categories

Use this procedure to rename categories.

### About this task

After re-organizing your category hierarchy, or moving all products in one category to another, some categories may become obsolete. You can easily delete these categories in the **Category Manager** page to reduce clutter.

You may have adopted new naming conventions for your categories, or may have given a category an incorrect name. You can also rename categories within the

**Category Manager.** You cannot, however, rename those categories that are considered reserved, such as the default UNCATEGORIZED category.

**Note:** You must have the **Enable Category Delete** permission set to delete product categories, and have the **Enable Category Rename** permission set to rename product categories.

To rename categories:

1. Choose **OpenLink > Category Manager** to open the **Category Manager** page.
2. Right-click on a category, and select **Rename** from the context menu.

**Note:** A confirmation message will display if there are any unfinished modeling jobs for the category. Renaming the category could cause the modeling jobs to fail. Click **Yes** if you want to proceed with the renaming.

3. In the dialog box that appears, enter a unique category name and click **Save**. The category name will be changed in the **Category Manager**.

To delete categories:

1. Choose **OpenLink > Category Manager** to open the **Category Manager** page.
2. Right-click on a category, and select **Delete** from the context menu. A category with the following conditions can be deleted:
  - No product is in, or currently moving into the category
  - No scenario, CPI, Category Group, Rule Group, or product group is in the category
  - No promotion, calendar, or package is in the category
  - No markdown plan is in the category
3. If all the criteria are met, a confirmation message will appear. Click **Yes** to proceed with the deletion.

**Note:** Any mappings with a deleted category will be removed from the **Category Mappings** page. See “Importing the Category Map” on page 137 for more information about this page.

#### **Related Topics**

“Importing the Category Map” on page 137

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## Chapter 8. Task scheduler

The Task Scheduler is used to manage automated tasks in the IBM Omni-Channel Merchandising services.

A task is a IBM Omni-Channel Merchandising procedure or workflow with well-defined inputs, outputs, and dependencies. Examples of tasks are modeling jobs, imports, exports, Product Status Resolver activity, and automated Price Updates. Tasks can be scheduled with start times and dates, as well as frequencies. You can also view a history of task executions.

### Related Topics

“Creating new tasks”

“Editing tasks” on page 157

“Deleting tasks” on page 157

“Viewing task execution history” on page 158

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## Creating new tasks

Use this procedure to create new tasks. New tasks can be created and scheduled in the **Task Scheduler** page.

### Procedure

1. Choose **Admin > Settings > Task Scheduler** to open the **Task Scheduler** page. The page lists all tasks by task type, task definition and description, the latest start date, the latest run status (Scheduled, Started, Running, Finished, Error), the next start date, the task status (Active, Inactive, Completed), and the user who started the task.

**Note:** If the Task Scheduler service is not available, you will see an error message and will be unable to create tasks. Contact your IBM Omni-Channel Merchandising Representative for assistance.

2. Click **New Task** to open the **New Task** dialog box.
3. To define a task, select one of the following **Task Types** and **Task Definitions**, and then input the relevant **Task Details**:

Task Type...	With this Task Definition	With these Task Details
Import	<b>Staging Import</b> - Import data using the IVA framework. <b>Rapids</b> - Import bulk data using the Rapids framework.	<b>Description</b> - A description of the task used as an identifier. <b>Data Type</b> - (Applicable to Staging Import and Rapids) The type of data to be imported. <b>Active/Inactive</b> - (Common for all tasks) The schedule for the task is active if this checkbox is set. If it is cleared, the Task Scheduler will not execute the task. <b>Post Import Action/Simple Action</b> - Describes the action after the data is imported: <b>Approve</b> - Brings the imported data into the database. <b>Validate</b> - Stops after the import process after data validation.

Task Type...	With this Task Definition	With these Task Details
Export	<p><b>Promotion Forecast Export</b> - Exports the forecasts for unit volume at the store, product, week level.</p> <p><b>MC Performance Detail Export</b> - Exports the performance details from the Master Calendar.</p> <p><b>Enhanced MC Performance Detail Export</b> - Exports the performance details that belong to promotions on the Public Calendar.</p> <p><b>Enhanced Event Details Export</b> - Exports the events and associated details that belong to promotions on the Public Calendar.</p> <p><b>Event Details Export</b> - Exports the events and associated details that include stores and LGCs.</p> <p><b>Promotion TPM Export</b> - Exports promotion details for integration with SAP TPM.</p> <p><b>Markdown Price Export</b> - Exports recommended prices to stores when a scenario has been approved for implementation.</p> <p><b>Campaign Details Export</b> - Not currently in use.</p> <p><b>Package Details Export</b> - Exports the packages and associated details that include package header information, location groups, product groups, and product group details.</p> <p><b>Display Planning Export</b> - Exports all Display Plan information from the Display Planning feature.</p> <p><b>Custom Export</b> - Exports customized data types, such as Product to Product and Line to Line relationships. This is primarily used by IBM Omni-Channel Merchandising Technical Services.</p> <p><b>Price Scenario Export</b> - Exports details of a Price Update. This export includes all fields from the All Prices report.</p> <p><b>Assortment Export</b> - Exports Planogram-Cluster Product data, a configurable set of product attributes and metrics, Date Approved, and Cluster Details (Stores). Also includes an optional Cluster-Store file that lists the mappings of stores to clusters. Exports all scenarios that have been marked for approval.</p>	<p><b>Description</b> - A description of the task used as an identifier.</p> <p><b>Active/Inactive</b> - (Common for all tasks) The schedule for the task is active if this checkbox is set. If it is cleared, the Task Scheduler will not execute the task.</p> <p><b>Export Task Definition</b> - Customized export task definitions.</p> <p><b>Incremental export or full export</b> - Incremental exports will export only elements that have changed since the last export. Full export will export all elements.</p> <p><b>Aggregate at geography level or national level</b> - Level at which forecasts are exported.</p> <p><b>Export File Directory</b> - Directory where the exported file is stored.</p> <p><b>Export File Compression Threshold</b> - Threshold for compression specified in bytes. Exported files that are bigger than the threshold are compressed and stored in the export directory.</p> <p><b>Markdown Only:</b></p> <p><b>Export Recommendation Period</b> - Exports recommended prices from either the current week or the current to last week.</p> <p><b>Price Recommendation</b> - Exports all price recommendations or only the price recommendations which changed from the previously exported prices.</p> <p><b>Export Markdown Price Threshold</b> - A threshold value for exporting new recommended prices compared to the previously exported recommended prices. For example, a value of 0.10 means that the difference between the previous and current recommendations should be at least 10 cents.</p> <p><b>Exclude Already Exported Recommendation</b> - If set to Yes, excludes any recommended prices that have already been exported. If set to No, any recommended prices that have already been exported will be re-exported.</p>
Price Delivery	<p><b>Base Price Delivery</b> - Base prices for stores and products at the division level.</p> <p><b>Base Price Delivery (zone level)</b> - Base prices at the zone level.</p> <p><b>Express Pricing</b> - Exports express prices directly to stores outside of the regular scenario process.</p> <p><b>Express Pricing (zone level)</b> - Reads from zone-level export tables to produce an express price export file</p> <p><b>Transfer Price</b> - Produces an export file containing transfer prices</p> <p><b>Base and Transfer Price</b> - Produces an export file containing base prices and transfer prices</p> <p><b>Custom Delivery</b> - Used internally.</p>	<p><b>Description</b> - A description of the task used as an identifier.</p> <p><b>Active/Inactive</b> - (Common for all tasks) The schedule for the task is active if this checkbox is set. If it is cleared, the Task Scheduler will not execute the task.</p> <p><b>Division</b> - The division for the process.</p>

Task Type...	With this Task Definition	With these Task Details
Scenario and Data Maintenance	<p><b>Price Scenario Delete</b> - Deletes unused and outdated scenarios in Everyday Price Optimization and Everyday Price Management.</p> <p><b>Competitor Data Delete</b> - Clears out old competitor data from the database that is older than a specified number of days.</p> <p><b>Scenario Archive</b> - Archives scenarios that are older than a specified number of days to improve system performance (180 days is recommended). The following types of scenarios are not included in the archive:</p> <ul style="list-style-type: none"> <li>• Production scenarios</li> <li>• The last scenario run for a category-division</li> <li>• Scenarios marked as "Keep"</li> <li>• Permanently deletes scenarios that are in Pending Delete status (Scenario Purge)</li> </ul>	<p><b>Description</b> - A description of the task used as an identifier.</p> <p><b>Active/Inactive</b> - (Common for all tasks) The schedule for the task is active if this checkbox is set. If it is cleared, the Task Scheduler will not execute the task.</p> <p><b>Category</b> - The category for the process.</p> <p><b>Division</b> - The division for the process.</p> <p><b>Competitor</b> - The specific competitor(s) for the competitor data soft delete.</p> <p><b>Older Than (# of days)</b> - The number of days (taken from the scenario run date) after which the data will be deleted.</p>
Price Maintenance	<p><b>Price Update</b> - Runs a process that looks for data changes and then executes a Price Update. These are the primary types of data changes that can trigger a Price Update:</p> <ul style="list-style-type: none"> <li>• New vendor costs</li> <li>• New competitive information</li> <li>• New Compliance</li> <li>• New products</li> <li>• New VAT rates</li> <li>• Zone structure</li> </ul> <p><b>Recalculate</b> - Recalculates scenarios for which IBM Omni-Channel Merchandising has auto-imported price override data. These scenarios have a status of <b>Recalculate! Optimized prices have been changed</b> and belong to the category and division selected for the task.</p> <p><b>Rules Price</b> - Schedules the rules pricing process for Rules Based Pricing scenarios, detecting changes and automatically running rules pricing.</p> <p><b>Price Approval</b> - marks all scenarios as <b>Approved for Export</b> if they have not been exported, and are visible on the <b>Production Price Approval</b> screen. To be notified when products are automatically approved, subscribe to the <b>Automated Price Approval Task Status</b> alert.</p>	<p><b>Description</b> - A description of the task used as an identifier.</p> <p><b>Active/Inactive</b> - (Common for all tasks) The schedule for the task is active if this checkbox is set. If it is cleared, the Task Scheduler will not execute the task.</p> <p><b>Category</b> - The category for the process. Categories can be multi-selected using Ctrl-click, or Shift-click to select multiple adjacent categories.</p> <p><b>Division</b> - The division for the process.</p> <p><b>Data Type (Optional)</b> - The data files that must be loaded via IBM Omni-Channel Merchandising OpenLink before a Price Update is run. If a data file for a category/division fails to load, an email notification is sent. The process will run for the category/divisions with successfully loaded data.</p>
Product Status Calculation	<p><b>Product Status Resolver</b> - Runs the PSR process to impute the status at the store-product level based on the sales history.</p> <p><b>Product Statistics Summary</b>- Runs a process to calculate various Summary Statistics from the sales data.</p> <p><b>Opt Product Statistics</b> - Runs a process to calculate the average price and cost at the product level, and the active products with modeling coefficients at the store level. This should be run prior to linking stores.</p>	<p><b>Description</b> - A description of the task used as an identifier.</p> <p><b>Active/Inactive</b> - (Common for all tasks) The schedule for the task is active if this checkbox is set. If it is cleared, the Task Scheduler will not execute the task.</p> <p><b>Category</b> - The category for the process. Categories can be multi-selected using Ctrl-click, or Shift-click to select multiple adjacent categories.</p>
Workflow	<p><b>OpenLink Workflows</b> - Workflows to automatically load the data, such as product, cost, and location, in the correct sequences.</p> <p><b>OpenLink Auto Data Load</b> - Allows inbound data to be loaded automatically soon after the data files arrive at a pre-configured frequency. This workflow eliminates the need to schedule data load processes or other workflows based on the time when data files are expected to arrive.</p> <p>Note: You must have the Enable OpenLink Auto Data Loading permission to enable this task.</p>	<p><b>Description</b> - A description of the task used as an identifier.</p> <p><b>Active/Inactive</b> - (Common for all tasks) The schedule for the task is active if this checkbox is set. If it is cleared, the Task Scheduler will not execute the task.</p> <p><b>Workflow</b> - The workflow for the process.</p> <p><b>Poll Interval (in minutes)</b> - The frequency at which the workflow will search the file system for new data files. It is recommended that the poll interval be set at 10 minutes or greater.</p> <p><b>Poll Duration (in hours)</b> - The length of time that the workflow will poll for new data files. This parameter is used to confine all data loads to a fixed time frame.</p>

Task Type...	With this Task Definition	With these Task Details
Modeling	<b>Modeling Task</b> - Runs a modeling job.	<p><b>Description</b> - A description of the task used as an identifier.</p> <p><b>Active/Inactive</b> - (Common for all tasks) The schedule for the task is active if this checkbox is set. If it is cleared, the Task Scheduler will not execute the task.</p> <p><b>Product Category</b> - The category for the process.</p> <p><b>Base Modeling Job</b> - Modeling job associated with the product category. Every recurrence will be a copy of the base modeling job.</p>
Optimization	<b>Markdown Re-optimization</b> - Runs a Markdown re-optimization.	<p><b>Description</b> - A description of the task used as an identifier.</p> <p><b>Active/Inactive</b> - (Common for all tasks) The schedule for the task is active if this checkbox is set. If it is cleared, the Task Scheduler will not execute the task.</p> <p><b>Category</b> - The category for the process.</p> <p><b>Division</b> - The division for the process.</p>

Task Type...	With this Task Definition	With these Task Details
Others	<p><b>Notification Summary</b> - Accumulates email messages and sends them to users in batch either daily or weekly.</p> <p><b>Event Time Based Locking</b> - Runs a process that locks events that have exceeded their lock thresholds.</p> <p><b>Model Health Calculation</b> - Runs a model health calculation for all categories. This updates the Model Health report.</p> <p><b>TLog MBI Calculation</b> - Runs a calculation for the market basket metrics. This updates the MBI metrics in the Market Basket Insights report in the home page and in the Promotion Optimization product picker. It uses transaction log data that has been pre-processed and validated by IBM Omni-Channel Merchandising OpenLink. This task should be configured to run once a week.</p> <p><b>CompPrice Rollover</b> - Loads competitive prices from Competitive Price History datastore into zone-level competitive price entries.</p> <p><b>Auto-Assign New Products</b> - Runs a process for assigning existing Demand Groups to new products in IBM Omni-Channel Merchandising OpenLink. You can run it for all categories (default), or for one or more selected categories in the Category drop-down menu.</p> <p><b>Margin Based Cost Calculation</b> - Runs a process for calculating costs from user-defined cost margins for products.</p> <p><b>Markdown Plan Scenario Purge</b> - Permanently deletes Markdown plans and scenarios that have been soft-deleted in Markdown Optimization.</p> <p><b>Expand Store Distribution</b> - Copies modeling coefficients for new products from existing stores to new stores so that they can receive forecasts across the full set of stores in the Promotion Optimization application. New products have no history in the new stores for estimating the modeling coefficients used for the forecasts.</p> <p>Note: You must have the Enable Copy Coefficients Across Stores Task permission to enable this task.</p> <p><b>Expand Store Distribution for CP</b> - Copies modeling coefficients for new products from existing locations to new locations so that they can receive forecasts in the Promotion Optimization application.</p> <p>Note: You must have the <b>Enable Copy Coefficients Across Stores Task</b> permission to enable this task.</p> <p><b>Collision Detection</b> - Used to run collision detection checks on a regular basis, validating that there are no collisions between items on the Team and Public Calendars.</p> <p><b>Data Import Monitor</b> - Checks recent data imports to be sure that they fall within expected ranges for size and load time. It also checks for abnormal data loads and missing files, sending an alert as appropriate if there are errors.</p> <p><b>Display Plan Validation</b> - Checks to make sure that Display Plan characteristics do not collide, providing alerts as appropriate if there are errors.</p> <p><b>Event Validation</b> - Detects whether collisions occur between events created in Event Planning, providing alerts as appropriate if there are errors.</p> <p><b>Marketing Calendar Aggregation</b> - Pre-aggregates forecast and actual data for events created in Event Planning, making those calculations available during future planning.</p>	<p><b>Description</b> - A description of the task used as an identifier.</p> <p><b>Active/Inactive</b> - (Common for all tasks) The schedule for the task is active if this checkbox is set. If it is cleared, the Task Scheduler will not execute the task.</p> <p><b>Category</b> - (Applicable to Auto-Assign DGs) The categories for which Demand Groups will be assigned to their new products.</p> <p><b>Markdown Only:</b></p> <p><b>Date Type</b> - If Plan Start Date is chosen, all plans with a Plan Start Date earlier than the specified Cutoff Date value will be deleted. If Plan End Date is chosen, all plans with a Plan End Date earlier than the specified Cutoff Date value will be deleted.</p> <p><b>Cutoff Date</b> - The cut off date (in MM/DD/YYYY format) for deleting the plans. All plans with either a Plan Start Date or Plan End Date earlier than this date will be deleted.</p>

Task Type...	With this Task Definition	With these Task Details
Promotion Data Maintenance	<p><b>Promotion Purge</b> - Permanently deletes promotions that have been soft-deleted in Promotion Management and Optimization.</p> <p><b>Auto Predict Promotions</b> - You can choose to automatically predict promotions by date range, calculation status, workflow status, and category. You can specify the schedule on which you would like the auto-prediction to run. You can also re-predicts promotions to apply updates such as re-modeling of categories or re-calibration of models. This task will re-predict promotions that satisfy certain conditions.</p> <p>In the Task Scheduler, enable promotions that are on the Public Calendar to qualify for auto-prediction using the following conditions:</p> <ul style="list-style-type: none"> <li>• Select promotions to auto-predict by workflow status. You can select any combination of the following statuses: <ul style="list-style-type: none"> <li>- Draft</li> <li>- On Public Calendar</li> <li>- On Team Calendar</li> <li>- On Team and Public Calendar</li> </ul> </li> <li>• Define a time window for the dates of promotions that will be auto-predicted. For example, you can specify an auto-prediction of all promotions set to begin between six and eight weeks from today's date. This would prevent auto-prediction for promotions set to begin within the next six weeks.</li> <li>• Set the end date and time to end an auto-prediction.</li> </ul> <p>The Promotion Task Scheduler options are controlled through the system settings. Contact your IBM representative for more information about the system settings.</p> <p><b>UEF Allocation Purge</b> - Permanently deletes UEF allocations that have been soft-deleted in Promotion Management and Optimization.</p> <p><b>Location Group Class Purge</b> - Permanently deletes Location Group Classes that have been soft-deleted in Promotion Management and Optimization.</p> <p><b>Promoted Price Conflict Report</b> - Runs the Promoted Price Conflict Report.</p> <p><b>Update Product Count</b> - Updates product count to reflect the most current count.</p> <p><b>Promotion PosDaily Purge</b> - Permanently deletes Daily POS data that has been soft-deleted in Promotion Management and Optimization.</p> <p><b>Promotion Product Category Purge</b> - Permanently deletes Product Categories that have been soft-deleted in Promotion Management and Optimization.</p>	

4. You can schedule a task to occur once at a specified time, time zone, and on a specified date, or you can create a recurring schedule by specifying the frequency of recurrence, the time of the recurrences, and the range of recurrences.

These are the **Range of Recurrence** options:

- **No end** - The task will recur forever (default).
- **End after** - The task will complete and will no longer be active after the specified number of occurrences.
- **End by** - The task will complete and will no longer be active after the specified date. The end by date should not be earlier than the start date.



A recurrence has the following restrictions to prevent unused tasks from slowing system performance:

- The recurrence of a custom task cannot be greater than 59 minutes.
- The recurrence of an hourly task cannot be greater than 23 hours.
- The recurrence of a daily task cannot be greater than 6 days.
- The recurrence of a monthly task cannot be greater than 11 months.

Note that there is no recurrence limitation for Weekly and Yearly tasks.

**Note:** A weekly task will only execute on one day per week, for example, every Monday. If you must schedule a weekly task to run on more than one day of the week, a task for each day must be created.

5. Click **Save** when you are done entering the task details. The new task will appear in the **Task Scheduler** page.

#### **Related Topics**

“Editing tasks”

---

## **Editing tasks**

Use this procedure to edit tasks.

### **About this task**

An existing task can be edited if the task status is **Active**. You edit a task in the **Task Scheduler** page.

### **Procedure**

1. Choose **Admin > Settings > Task Scheduler** to open the **Task Scheduler** page.

**Note:** If the Task Scheduler service is not available, you will see an error message and will be unable to edit tasks. Contact your IBM Omni-Channel Merchandising Representative for assistance.

2. Select a task, right-click, and select **Details** to open the **Edit Task** dialog box.
3. You can edit your selections for the **Task Type** and **Task Definition**. You cannot change the start date of a schedule for a task if the task was executed one or more times. The number of occurrences cannot be less than or equal to the number of times that the task has already executed on the schedule.
4. Click **Save** when you are done with your edits. The edited task will appear in the **Task Scheduler** page.

---

## **Deleting tasks**

Use this procedure to delete tasks.

### **About this task**

An existing task can be deleted if it is scheduled to start or it has already started. The task will be removed from the **Task Scheduler** page.

### **Procedure**

1. Choose **Admin > Settings > Task Scheduler** to open the **Task Scheduler** page.

**Note:** If the Task Scheduler service is not available, you will see an error message and will be unable to delete tasks. Contact your IBM Omni-Channel Merchandising Representative for assistance.

2. Select a task.
3. Select **Delete**.
4. Click **Yes** in the confirmation message that appears. The deleted task is removed from the **Task Scheduler** page.

---

## Viewing task execution history

Use this procedure to view a task execution history.

### About this task

You can view a history of the task executions, including the start time, job status, and the user who started the task.

### Procedure

1. Choose **Admin > Settings > Task Scheduler** to open the **Task Scheduler** page.
2. Select a task.
3. Select **Execution History** to open the **Task Execution History** dialog box. The summary at the top shows the task type, description, task definition, and frequency of the task. All the executions of the task are listed, including the start time, run status, and the user who started the task.

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## Chapter 9. Getting help and support

IBM Omni-Channel Merchandising is designed to be user-friendly, but every once in awhile you might have a question on a feature. IBM Omni-Channel Merchandising offers multiple help and support solutions which are designed to assist you in finding the answers you need quickly.

### Related Topics

“Release notes”

“Online help”

“Printable user guide” on page 160

“Contacting IBM Omni-Channel Merchandising customer support” on page 161

“Logging a support case” on page 162

“Disabling pop-up blockers in Internet Explorer” on page 166

“IBM Omni-Channel Merchandising education and Training” on page 168

“Documentation questions and comments” on page 168

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## Release notes

In order to support quarterly upgrades to IBM Omni-Channel Merchandising customers, Release Notes are posted directly in the application under the **Help** menu. Each Release Notes document contains the following information:

- **Release Overview** - The general overview and focus of the current IBM Omni-Channel Merchandising application release.
- **New Features** - Summary descriptions of the new release features.
- **Fixed Bugs** - IBM Omni-Channel Merchandising strives to close all customer bugs as soon as possible. Fixed bugs are documented in the Release Notes.
- **Known Issues** - Descriptions of known issues with the current release and any workaround instructions. Known issues will be fixed in subsequent releases.

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## Online help

Every IBM Omni-Channel Merchandising software service offers a help function. This help function is designed to automatically present information that is pertinent to the screen you are currently viewing.

### Related Topics

“Accessing online help”

“Navigating help” on page 160

## Accessing online help

Use this procedure to access online help.

## About this task

The Online Help will open in another window. If you have a pop-up blocker on your computer you will need to disable it before using the Online Help. See "Disabling pop-up blockers in Internet Explorer" on page 166 for more information.

## Procedure

1. Access Online Help by clicking on the question mark icon in the upper right corner of the page.
2. In the drop-down menu, click on **Online Help** to open the Online Help.

## Navigating help

The Online Help system is designed to mimic the layout of a printed book. You can navigate from one section to another by clicking on the book icons on the left panel. Clicking on a book chapter opens it to reveal topic pages. Click on a topic page to bring up the details in the right panel.



Above the book pages are four main navigation buttons: **Contents**, **Index**, **Search** and **Favorites**.

- **Contents** - This button will show all of the available Online Help topics in book form. This is the default view when you first open Online Help.
- **Index** - This button lists all of the available Online Help topics in alphabetical order.
- **Search** - This button allows you to search for a specific term in the Online Help. Enter the search term in the box and click **Go!** to display the results.
- **Favorites** - This button allows you to save a short list of specific topics to a personal quick reference list. You can access your saved favorites at any time by clicking on the Favorites button.

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## Printable user guide

Each of the IBM Omni-Channel Merchandising software services has a complete user guide which is accessible as an Adobe Acrobat PDF file. The PDF file can be viewed electronically or printed out and read as a traditional paper manual.



To access the PDF file, look for the Adobe Acrobat icon in the upper-right corner of the Online Help screen. Click on the Adobe Acrobat icon to load the PDF.

In order to properly view the PDF, you will need to have the latest version of Adobe Acrobat Reader installed on your system. You can download Adobe Acrobat Reader from Adobe's website at:

<http://get.adobe.com/reader/>.

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## Contacting IBM Omni-Channel Merchandising customer support

Personalized assistance is available directly from IBM Omni-Channel Merchandising Customer Support for any issues you may encounter.

The IBM Omni-Channel Merchandising Customer Support team can be reached via phone, email or the web.

When contacting support you should have the following information available:

- Your name
- Your company
- Your phone number
- Detailed description of your issue
- Priority level of issue

### Related Topics

“Phone support”

“Web support”

## Phone support

IBM Omni-Channel Merchandising Customer Support is available via phone at +1-866-460-0501.

This is a toll free number for US-based customers. If you are calling from overseas, please be aware that your phone company may assess charges for the call.

### Phone hours

IBM Omni-Channel Merchandising offers three Customer Support teams in order to ensure maximum availability.

- The USA-based support team is available Monday through Friday from 6am to 6pm PST.
- The Europe-based support team is available Monday through Friday from 8am to 5pm CET.
- The Japan-based support team is available Monday through Friday from 8am to 5pm JST.

IBM Omni-Channel Merchandising observes Daylight Savings Time. If your location does not observe Daylight Savings Time, please adjust the times appropriately.

## Web support

IBM Omni-Channel Merchandising Customer Support can be reached from the IBM Omni-Channel Merchandising login page at [www.mydt.demandtec.com](http://www.mydt.demandtec.com).

Sign In

English | Français | 中文 | Español | 日本語

User Name

Password

Sign In

[Forgot Password](#)

Don't have a network account?  
[Sign up for free](#)

Looking for Support?  
Visit our [Customer Support](#) page.

Contact Support link

In order to connect to the Customer Support portal where you can begin logging cases, you will need to first log in using a free web support account.

If you already have a web support account, you will need to request a new password by entering your username and then clicking the **Forgot your password?** link. A temporary password with log in instructions will be sent to your email address. If you do not yet have an account, register on the Customer Support web portal to gain access.

#### **Related Topics**

“Logging a support case”

“Reviewing a submitted case” on page 165

“Using the customer support portal” on page 165

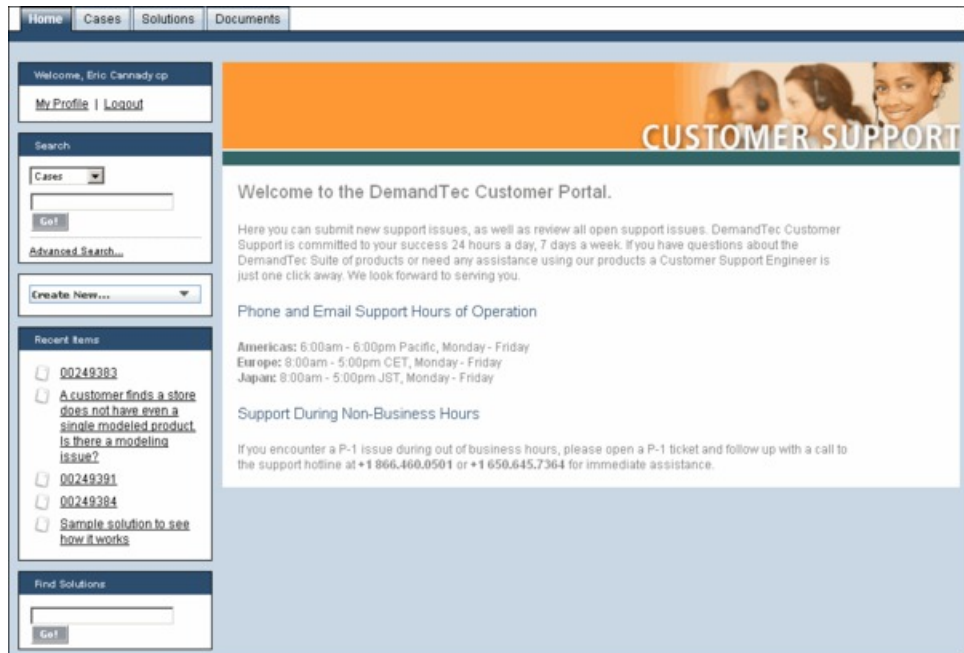
## **Logging a support case**

Logging a support case with your feedback, problem, or question is a simple process. You will also receive email notifications when new information about resolving your issue is available.

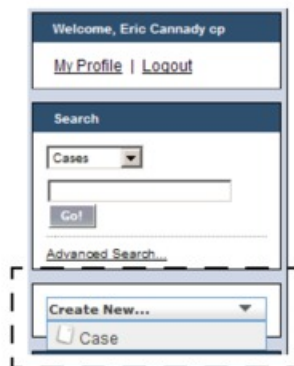
### **About this task**

#### **Procedure**

1. Once you have logged in successfully, you will see the IBM Omni-Channel Merchandising Customer Support portal.



2. To enter a support case, click the **Create New** drop-down list, and select **Case**.



3. Enter the information in the **New Case** page. The required fields have a red vertical bar next to the fields.

- **Contact Name** - Enter your full name (*required*)
  - **Status** - (*Required by default, but read-only*)
  - **Priority** - Choose a priority level for the issue:
    - **P1 Critical** - You cannot use the application, or the implementation schedule will be severely impacted by a lack of system stability
    - **P2 Urgent** - Your ability to perform common business functions is hampered
    - **P3 Important** - Minor features are not functioning as expected
    - **P4 Necessary** - You have general inquiries and/or feature requests
    - **P5 Modeling Request** - You have a modeling request
  - **Product** - Choose the IBM Omni-Channel Merchandising application you were using when the issue was found (*required*)
  - **Found in version** - Choose the version of the IBM Omni-Channel Merchandising application
  - **Sub Product 1** - Choose the related area of the IBM Omni-Channel Merchandising application
  - **Sub Product 2** - Choose the related area of the IBM Omni-Channel Merchandising application (*if available*)
  - **Subject** - Enter a meaningful title for your issue (*required*)
  - **Description** - Enter a detailed description of your issue (*required*). Include a list of all the steps required to replicate the issue. This will help Customer Support diagnose the problem and respond to you in a timely manner.
4. Click **Submit**. You will see a confirmation that your request was received with a ticket number. Your case will be stored in your customer portal, which you can later review, make changes, and then re-submit. See “Reviewing a submitted case” on page 165 for detailed information.
  5. Alternatively, click **Submit & Add Attachment** to include an attachment to help illustrate the issue, such as a screen capture, and submit. The size of the attachment can be up to 5 MB.

#### Related Topics

“Reviewing a submitted case” on page 165



## Reviewing a submitted case

You can open and review your cases that you previously submitted to Customer Support. You can also edit cases and re-submit them, or close cases that no longer need attention.

### Procedure

1. Log in to the IBM Omni-Channel Merchandising Support Center web site.
2. Click the **Cases** tab. A summary of your recently viewed cases displays in the center of the customer portal.  
In the **View** drop-down list, you can choose to view all of your cases, only your open cases, or your recently viewed cases (the default).
3. Click the case number to open the case. You can click the **Edit** button in the **Case Detail** section to edit details of your issue and re-submit. You can also enter new comments, add additional attachments, view suggested solutions, and review the current progress of the support case.
4. Click the **Close Case** button to close the case if it is no longer valid, or does not require feedback from Customer Support. You cannot delete cases from the portal.

## Using the customer support portal

The IBM Omni-Channel Merchandising Customer Support portal provides a central location for all your support needs. The tabs at the top of the page let you easily access different types of information.



### Tabs

- **Home** tab - The main page of your customer portal. You can click the **My Profile** link to edit or update your user profile information.
- **Cases** tab - The page to create, edit, and view cases.
- **Solutions** tab - Search and view solutions to common issues. You can choose to view all solutions, most commonly viewed, or only those which you have

recently viewed. You can also search cases by the first letter in the case title. Solutions can be searched directly from the **Find Solutions** search field at the bottom of the **Home** tab.

- **Documents** tab - Search and view supplemental documents to help with using the IBM Omni-Channel Merchandising applications or learning more about how Customer Support processes and manages cases.

### Search

The **Search** area is available in the sidebar of all tabs within the portal. You can search for your cases using a keyword that you enter, or an exact phrase in advanced search.

Advanced search searches additional fields in cases, including notes, descriptions, and comments. It allows you to do the following:

- Use operators, such as AND, OR, and AND NOT to refine your search.
- Add quotation marks around multiple keywords to perform an exact phrase match, such as "receive error when enter values in the Edit field".
- Add an asterisk to the end of your keyword to search for items that start with the word, such as receive\*.

### Create New Case

The create new case drop-down list is available in the sidebar of all tabs within the portal.

### Recent Items

You can open your recently viewed items, such as cases, documents, or case solutions.

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## Disabling pop-up blockers in Internet Explorer

Use this procedure to allow pop-ups for a website.

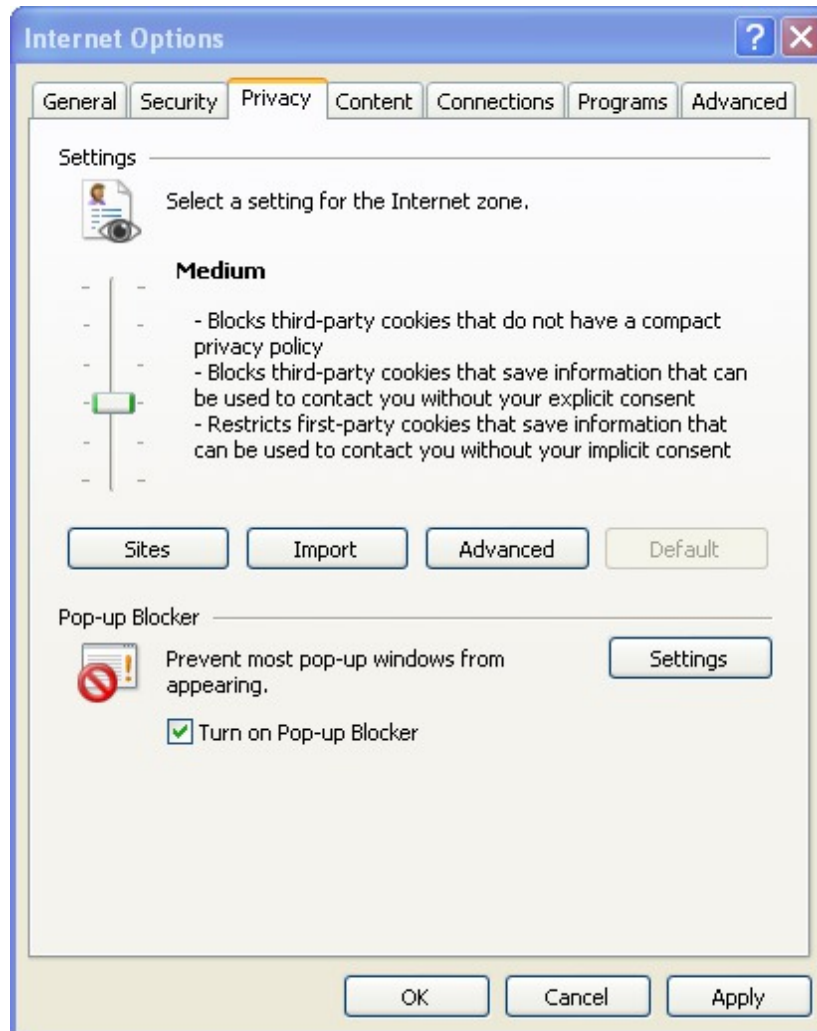
### About this task

If you are using software that disables pop-up browser windows, you may need to disable this feature in order to successfully use IBM Omni-Channel Merchandising. IBM Omni-Channel Merchandising uses pop-up windows in various places throughout the application, such as when you export files to Microsoft Excel.

To allow pop-ups for a particular website like IBM Omni-Channel Merchandising you need to add that site to an approved sites list.

### Procedure

1. Open Internet Explorer 7.
2. Choose **Tools > Internet Options** from the menu bar. The Internet Options dialog box displays.
3. Click the **Privacy** tab.



4. You can see the Pop-up Blocker settings at the bottom of the window. If you want to completely disable the Internet Explorer 7 Pop-up Blocker ensure that the box next to **Turn on Pop-up Blocker** is unchecked. If you want to keep the Pop-up Blocker enabled, but add IBM Omni-Channel Merchandising to an approved white list, click the **Settings** button. A white list is a list of approved sites which are ignored by the Pop-up Blocker and allowed to function without interference. You may be familiar with the concept of a white list from your email program which allows you to add selected email addresses to a white list so those addresses can then bypass the spam filter. This works in a similar manner.
5. In the Pop-up Blocker Settings dialog box type the name of the site (Ex: mydt.demandtec.com for IBM Omni-Channel Merchandising and click the **Add** button.

**Note:** These instructions are for Internet Explorer 7. If you are using third party pop-up blockers, such as software from Google, MSN or Yahoo!, the instructions may differ.

#### **Related Topics**

“Single use disable for pop-up blockers” on page 168

## Single use disable for pop-up blockers

If you do not want to disable the pop-up blocker on your system, you can use the Control key as a single use shortcut to temporarily disable the Internet Explorer 7 pop-up blocker. Simply hold down the Control key while clicking on any web link.

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## IBM Omni-Channel Merchandising education and Training

IBM Omni-Channel Merchandising Education offers in-depth training sessions on all software services.

You may attend release training by viewing e-presentations that explain the new features for each release. These are available via a web-based e-learning system which is available to you anytime that is convenient for you. Contact your project leader or your IBM Omni-Channel Merchandising trainer for more details.

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## Documentation questions and comments

IBM Omni-Channel Merchandising encourages you to contact us with any suggestions, ideas, questions or comments regarding the Online Help.

IBM Omni-Channel Merchandising encourages you to contact us with any suggestions, ideas, questions or comments regarding the Online Help. You can reach the Technical Publications team directly at [jessicae@us.ibm.com](mailto:jessicae@us.ibm.com).

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## Chapter 10. Glossary

This glossary includes terms used throughout the application.

**Activity-Based Costing:** An accounting system that allocates costs of all activities to each item (rather than spreading costs uniformly across all items, which is what simpler methods like traditional cost accounting do), so that you know exactly how much it costs to sell an item once you include all supply chain costs such as transportation, labor, and overhead.

**Accrual Fund:** Either an allowance, or a funding method used to allocate trade funds to accounts. When it is applied as an allowance, the manufacturer agrees to pay the retailer a set amount for every case that they buy during the year (this can include all base volume and all promoted volume). In return, the retailer agrees to run a set number of promotions for the manufacturer throughout the year. The difference between an accrual fund and a case allowance is that, with the accrual fund, one deal is done for the entire year's worth of promotions, and with the case allowance, different terms are negotiated for each event.

When the accrual fund method is used for trade fund allocation, it is used to decide how many trade funds will be allocated to a specific account. Retailers usually set accrual funds aside to fund only promotions.

**Ad:** Promotion of a good in various media channels, including print, radio, and television.

**Ad Allowance:** A dollar amount that the retailer receives for every case that the retailer purchases from the manufacturer (paid after the ad has run).

**Ad Zone:** A collection of stores that offer the same advertised promotion.

**Allowance:** The amount of discount that the retailer receives from the manufacturer. There are two types of allowance: performance allowance and non-performance allowance.

**Assortment:** The mix of items that retailers stock. They periodically review their assortment to figure out which items should be discontinued, and which new items should be added.

**Backhaul:** A term used in logistics when a truck picks up another load for a return trip after unloading its original haul.

**Backhaul Allowance:** The manufacturer provides the retailer with a backhaul allowance based on every case of product that the retailer collects from the manufacturer's warehouse using contracted trucks.

**Base Price:** The regular non-promoted shelf price.

**Basis Point:** A basis point is the smallest measure used to quote financial return. One basis point equals one one-hundredth of a percent. For example, the difference between a net profit margin of 2.25% and 2.50% percent is 25 basis points.

**Bayesian Inference:** A highly sophisticated approach to statistical modeling that is useful in sparse data environments. Bayesian Inference is based on theories by Rev. Thomas Bayes, who lived over 200 years ago. Phil Delurgio is one of a handful of experts outside academia experienced in building large scale, robust Bayesian models.

**Bayesian Shrinkage:** A Bayesian methodology whereby information is borrowed across products and stores in order to intelligently "shrink" model estimates and moderate extreme values.

**BOGO:** "Buy One Get One" Free. A promotion tactic often used to give consumers an incentive to buy and stock up on a product.

**Blocks:** See Store Zones.

**Brand:** The name (usually trademarked) that a manufacturer assigns to a group of items. The brand name is not always the same as the manufacturer name, since a manufacturer can own several brands. For example, Clorox brands include: Clorox, Pine-Sol, Armor All, Brita; Proctor & Gamble brands include: Tide, Mr. Clean, and Cover Girl.

**Brand Class:** Classifications of brands. Brand classes let you create brand relationships between products so you can set rules for optimizations. For example, you might put generic sodas in a Private label brand class and Coke in a National label brand class.

**Brand Class Rule:** A constraint applied between brands that dictates their price relationship. Example: Premium brands are always more expensive than economy brands.

**Brand Family:** Brand families let you further define subsets of a brand class. For example, you might have Coke and Pepsi products in a National label brand class and Generic soda A and soda B in a Private label brand class. To set a rule that controls the price relationship between Coke and Generic soda A, you must put the Coke products in a Coke brand family and Generic soda A in a Generic A brand family.

**Brand Manager:** The Brand Manager charts the strategy and tactics surrounding the Brand plan (for example, which new products get developed, and which marketing mix events will occur). The marketing research department supports the Brand Managers.

**Business Rules:** Constraints on the optimization that allow rules to describe strategies or policies that are important in guiding the outcome of the optimization to suit the customer's needs.

**Cannibalization:** The negative effect on sales of a product when a consumer buys one product instead of another (often due to pricing, promotion, or new desirable attributes). For example, when a new flavor of yogurt is introduced, it may cannibalize sales of other flavors or brands of yogurt. While consumers may not buy more yogurt overall (category expansion), they may alter the choice of their usual product for the new one.

**Category:** A collection of related products that are substitutes or complements. Retailers use categories to group and manage products (for example, produce, dairy, and frozen foods).

**Category Manager:** A person responsible for all merchandising activities for a category of products, including price, promotion, placement, and assortment.

**Category Plan:** All promotions for one category that intersect in time with a specified date range. They are the basis for category predictions and forecasts, and allow accurate what-if analyses of different promotion plans.

**Chain:** A branded collection of stores with one owner (for example, Longs, and Winn-Dixie).

**Client:** The user-interface application installed at the customer site.

**Coefficient:** A number representing the relationship between a dependent variable (for example, sales volume or share) and an independent variable (for example, base price or discount).

**Comp Shop:** A technique used by retailers to find competitor prices. For example, if Longs has Dove soap on its "comp shop list", or if Longs "comp shops" Dove, it means that Longs regularly conducts store checks at competitor stores to make sure that they meet or beat the competition's price on Dove. This is also referred to as a **Competitor Price Audit**.

**Competitive Prices:** Prices that are perceived to be a good value compared to what the competition is charging.

**Competitor Prices:** Prices that the competition (other stores that consumers could choose to shop instead) is charging for the same items.

**Competitor Price Rule:** An example of a business rule, this feature allows users to enforce rules that ensure that prices are competitive. For example, you could impose a rule that says prices on cereals are within 5% of competitor prices.

**Complementary Products:** Items that consumers usually buy together. The classic example is hot dogs and hot dog buns.

**Constraint:** A rule that forces the optimization to generate results that fall within a certain range.

**Consumer:** A person that buys items at a store.

**Consumer Demand Model:** A system of equations that predicts how much consumers will buy depending on factors such as price, seasonality, and promotions.

**Consumer Response Model:** See Consumer Demand Model.

**Consumer Loyalty:** The affinity that consumers have for a product or retailer that makes them more likely to purchase a specific product, or shop at a specific store.

**Contribution Margin:** The dollars remaining after variable costs are subtracted from adjusted gross margin. A more accurate measure of profit than gross margin.

**Contribution Margin%:** Contribution margin divided by revenue.

**Cost of Capital:** The costs associated with carrying merchandising inventory.

**Cost of Goods:** The amount of money that the retailer pays the manufacturer for the product. It can be specified in terms of a case, pound, unit, or ounce, for example.

**Cost Per Incremental Unit:** Original price minus promoted price plus any trade funds.

**Cross-Elasticity:** The relationship between the purchase of one product and the purchase of another. If the products are completely independent, the cross-elasticity is zero. If products are complementary, the cross-elasticity is positive. If products are substitutable, the cross-elasticity is negative.

**Cross-Elasticity of Demand:** See Cross-Elasticity.

**Deal:** Promotional pricing for a good.

**Demand:** The amount of a product that will be purchased at a particular price.

**Demand Curve:** Demand over a range of prices over a period of time.

**Demand Group:** A collection of highly substitutable products. The price and promotion of one item in the group directly affects demand for the other items.

**Discount Price:** The sale price of a product (also known as Temporary Price Reduction).

**Display:** A form of in-store promotion to draw attention to a particular product or line of products.

**Drop Ship Method:** When middlemen avoid carrying costs of inventory by sending single unit orders for products to manufacturers (or major stocking distributors), who drop ship the merchandise directly to the customers of the middlemen.

**DSD:** Direct Store Delivery. Shipment from manufacturer to retail store which bypasses any middlemen such as distributors or wholesalers.

**EDLP:** Every Day Low Pricing. Wal-Mart is the leader in EDLP, building trust among consumers by offering low prices every day. Others choose to have higher everyday prices but promote or discount heavily.

**End Cap:** A display at the end of an aisle.

**Equivalent Retail Price:** Price per equivalent unit, calculated by taking shelf price divided by the standardized unit of measure.

**Equivalent Unit:** A standardized unit of volume using equivalization.

**Equivalization:** The assignment of a standardized unit of measure to a product based on the product's description and the spread of sizes/counts that apply to that description. This allows direct comparison across a wide range of sizes. For example, both one case of Coke and two 12-packs of Coke = 1 equivalent case.

**Event:** A group of promotions arranged around a theme. They are used to group promotions for long-term planning, the creation of media such as circulars, FSIs, advertisements, wraps, and event-specific planning meetings.



**IBM Price Optimization and Price Management:** IBM Omni-Channel Merchandising software system that helps retailers and manufacturers maximize profits by setting the optimal price for every product in every store.

**Financial Modeling:** A process that enables retailers to understand the cost drivers of their business, including fixed and variable supply chain costs. See Activity-Based Costing.

**Fixed Cost:** A cost that does not vary depending on production or sales volume.

**Flat Fee:** A lump sum of cash that the manufacturer pays to the retailer to secure a display or an Ad. It can be viewed as the fee for renting the display space or for the ad space even though it is not a direct payment for either one.

**Forward Buy:** The purchase of an amount of product that exceeds immediate needs to take advantage of favorable pricing offered for promotions.

**Gross Margin:** Revenue minus product cost.

**Gross Margin%:** Gross margin divided by net sales, expressed as a percentage.

**Gross Margin Rule:** Constraint requiring optimization results to be within a gross margin range.

**Gross Profit:** See Gross Margin.

**Gross Profit%:** See Gross Margin%.

**Incremental Value:** Forecasts the promotion's incremental profit change and cost per promoted product value by stripping out everyday business results. It is often considered the true indicator of a promotion's worth.

**KPI (Key Performance Indicators):** A set of measurements to assess success against predefined core objectives.

**Labor Rate:** An hourly labor cost including wages and benefits.

**Last Digits:** The digits in a price after the decimal point.

**Line Pricing:** Assigning a group of similar products the same price, usually across flavors (for example, 6 packs of soda, or all boxes of Jello).

**Loyalty Card Program:** A program that consumers sign up for to enjoy discount or reward programs in return for tracking of consumer behavior patterns. Also called Frequent Shopper Program.

**Magic Price:** A price at which demand increases dramatically. For example, pricing a 6-pack of soda at \$1.99 may result in an unusually high demand vs. pricing it at \$2.00.

**Markdown:** The amount by which a price is reduced to boost sales.

**Merchandising:** The promotion of products, including coordinating production and marketing, and developing advertising, display, and sales strategies.

**Multiples:** Price statements in which multiple products are offered at a particular price, for example 2 for \$1.00.

**Net Margin:** See Net Profit.

**Net Margin%:** See Net Profit%.

**Net Profit:** Gross sales minus cost of goods sold, cost of operations, taxes, interest, and depreciation.

**Net Profit%:** Net profit divided by revenue.

**Non-Performance Allowance:** Additional funding from the manufacturer to the retailer that is not tied to promotions. Freight allowance, backhaul allowance, spoilage allowance, and buying allowance are some examples.

**Offer:** The proposal that a manufacturer makes to a retailer about the products that should be promoted, the manner in which these products should be promoted (for example, Ad, Display, or TPR), the time in which the products should be promoted, and the amount of money that the retailer will receive from the manufacturer (in a lump sum of cash, or as a saving off of the cost of the product, which are referred to as the deal terms).

**Optimization:** The process of finding the best formula (for example, prices, product mix, and promotion plan) for achieving a given merchandising objective.

**Overhead:** All operational costs other than supply-chain costs.

**Overhead Allocation:** The amount of overhead costs attributed to a particular product.

**Panel Data:** Tracking of individual consumer behavior over time to assess individual consumption patterns, impact of promotions, and switching behavior.

**Pantry Loading:** The act of stocking up on a product because it is on sale or promotion. Also known as Time Cannibalization or Stockpiling.

**Performance Allowance:** A discount that a retailer qualifies for after performing a promotion. There are two main types of performance allowances: Case Allowance (based on the amount of product that is shipped from the manufacturer to the retailer - shipment -based); and Scan Allowance (based on the amount of product bought by the consumer from the retailer - consumption-based).

**Performance Period:** The period of time that the promotion will run. It is the time when the promotion is performing, for example, when the product is on Display, Ad, or TPR.

**POS Data:** Point of Sale information that is collected by scanners upon check-out. POS Data shows the date, volume, and purchase price for all items sold.

**Pre-Price:** Products that have a price stamped on the packaging by the manufacturer.

**Price Check:** Confirmation of the selling price or retail price for a product.

**Price Elasticity of Demand:** The rate at which demand changes for a change in price. Change in demand divided by change in price.

**Price Gap:** The price difference between two similar products.

**Price Image:** The consumer perception of a retailer's prices and value.

**Price Zone:** Group of stores that always have the same prices across products.

**Product Costs:** The wholesale cost, or vendor cost, that a retailer pays a manufacturer.

**Product Cube:** The volume of space occupied by a product, expressed in cubic feet.

**Product Elasticity:** Price elasticity of demand for a particular product.

**Product Groups:** A group of products for a IBM Omni-Channel Merchandising user.

**Product Pairs:** A set of two products that have a promotional constraint established between them. For example, Dial White Bar Soap 3CT should be priced at 90% of Dial Gold Bar Soap 3CT.

**Product Share:** The ratio (in terms of percentage) of the revenue of an individual product (SKU) to the total revenue in one store.

**Product Storage Type:** The location in the store that houses a product. IBM Omni-Channel Merchandising values equals shelf (frozen or refrigerated).

**Profit:** Revenue less variable costs, fixed costs, and ABC costs.

**Promotion:** A temporary product price adjustment and/or consumer benefit tied directly to the purchase of a product.

**Promotion Planning & Optimization:** The IBM Omni-Channel Merchandising software service that helps retailers and manufacturers optimize product promotion decisions.

**Replenishment Frequency:** The number of times that store or DC inventory is replaced in a given time period.

**Retail Price:** The selling price or shelf price a consumer pays for a product.

**Return on Trade Funds:** The incremental value of the promotion (value of the promotion less everyday business) divided by trade dollars.

**Revenue:** The amount of sales in terms of dollars or local currency collected from consumer or business-to-business transactions.

**ROI:** Return on investment (after-tax operating income/ net (depreciated) book value of assets).

**Sales:** See Revenue.

**Sales Volume:** The number of units of products sold in consumer or business-to-business transactions.

**Same-Store Sales:** Same-store comparisons measure the growth in sales, excluding the impact of newly opened stores.

**Scanner Data:** POS data collected by a barcode scanner. See POS Data.

**Scenario:** A set of constraints and rules applied to product, store, price, and cost data that is optimized to achieve a particular business objective in terms of profit, revenue, and volume. The term "scenario" may be synonymous with "promotion".

**Seasonality:** An underlying trend in consumer behavior based on the time of the year (for example, the impact of Thanksgiving holiday on the purchasing behavior of turkey).

**Shelf Depth:** The amount of space between the front of a shelf and the back of a shelf.

**Shelf Height:** The vertical clearance of a shelf.

**Shelf Width:** The horizontal clearance of a shelf.

**Single Product Rules:** Optimization constraints applied to one product or SKU.

**Size Class:** An attribute assigned to a product to place the product in a particular group based on size, volume, or weight. Size classes let you create size relationships between products so you can set rules for optimizations. The allowable size classes are XXX-Small through XXX-Large.

**Size Family:** Size Families let you further define subsets of a Size Class. For example, you might have 12oz. Coke in a Small Size Class, and 16oz. Coke in a Medium Size Class. To create a rule between the two, such as the 16oz. Coke is always more than the 12oz., but not more than double the price, you must create a Size Family named Coke. If you do not create that Size Family, the rule would end up applying to all products in the 12oz. and 16oz. Size Class.

**Size Group:** A classification of a group of products based on their relative sizes (for example, 0-8 oz = small, 9-12 oz = medium, >12 oz = large).

**Size Rule:** A predefined relationship between two similar products based on their respective volumes, weights or counts.

**SKU:** Stock Keeping Unit. It is a number that a retailer assigns to a product.

**Slotting Fees:** The fees a retailer charges a manufacturer to insert or "slot" a new product onto shelves.

**Store-For-Store Sales:** See Same-Store Sales.

**Store Groups:** A set of individual stores that should be treated as one unit to achieve a business goal (for example, Region).

**Store Traffic:** The number of shoppers per unit of time.

**Store Zones:** A group of stores that share a set of prices. Also called Zones, Store Prize Zones, or Blocks.

**Strategy:** A set of pricing and promotion initiatives or activities that complement each other to achieve a particular business goal.

**Substitute Products:** Products that consumers perceive as having the same or similar utility. A substitute product is one that a consumer would purchase in lieu of another product without giving up a significant amount of perceived value.

**Time Horizon:** A promotion's time span.

**Time Series:** A set of values of a variable at periodic points in time.

**TPR:** Temporary Price Reduction. A reduction in the consumer price of a product for a temporary period of time.

**Trade Funds:** Funds offered by a manufacturer to a retailer for the promotion of a set of products, also referred to as Trade Spend. These funds are usually allocated to pay for promotional activities on the part of the retailer, including Ads, Displays, and Temporary Price Reductions (TPR).

**Trend:** An underlying relationship within a group of data points.

**Two Product Rules:** A constraint or rule relating two products together.

**Unit of Measure:** The type of size measurement.

**Unit Sales:** See Sales Volume.

**UPC:** Universal Product Code. A number and bar code that uniquely identify an individual consumer product issued by the manufacturer. The IBM Omni-Channel Merchandising standard is 14 digits.

**Variable Cost:** An expense that is associated with producing, stocking, or purchasing a SKU.

**Vendor/Manufacturer:** The company that makes the goods that the retailer buys. The vendor considers three main merchandising activities when deciding how to plan their promotion calendars and construct their offers: Displays, Ads, Temporary Price Reductions (TPR).

**Vendor Cost Change:** Manufacturer-driven change in the purchase price of a product.

**Volume:** The number of units sold for a particular SKU.

**Volume Rule:** A constraint on the volume range for a given product or group of products within an optimization.

**What-Ifs:** Varying key assumptions to determine how the end results of an analysis differ.

**Zone Prices:** Common prices implemented across multiple stores in an account.

**Release**

Planned set of new functionality for IBM Omni-Channel Merchandising application suite that becomes available to all users on a specified date.



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## Chapter 11. Quick Reference Guide

This section serves as a summary of all the key commands and features in IBM OpenLink.

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### Related Topics

“Attributing Process”

“Using the PIF vs. the OpenLink UI” on page 181

“Demand Group Hints” on page 182

“Size/UOM Hints” on page 182

“Dropping (not included in model)” on page 182

“Product Information File (PIF) General Notes” on page 183

“PIF Details” on page 183

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## Attributing Process

The attributing process can be broken down into 11 basic steps.

The attributing process can be broken down into 11 basic steps.

	Description	Notes	Tool
1	Approve/Reject Category Moves	Check "Uncategorized" category for orphaned products.	OpenLink
2	Run Product Status	You do NOT need to run the Product Status if your company sends a status file each week. Be sure to run the PSR before conducting the Price Update process to ensure products have an updated status.	OpenLink
3	Export PIF	Access the PIF (Product Information File) via the automated message in email or in the application Inbox.	OpenLink

	Description	Notes	Tool
4	Edit Content Using PIF <ul style="list-style-type: none"> <li>• Demand Group</li> <li>• Size</li> <li>• UOM</li> <li>• Brand</li> <li>• Included in Model</li> <li>• Size Family**</li> <li>• Size Class**</li> <li>• Brand Family**</li> <li>• Brand Class**</li> <li>• Pre-Price**</li> <li>• Line Group**</li> <li>• Other Family 1 &amp; 2**</li> <li>• Other Class 1 &amp; 2**</li> </ul>	A PIF is an Excel spreadsheet and should be treated as such. Any Formula must be removed before importing the PIF back into OpenLink. Do not delete any rows from the Product Information File. If products should not be modeled, drop them from the PIF. <p><b>Note:</b> Line Group, Pre-price, Size Family/Size Class and Brand Family/Brand Class and Other Family/Other Class values can be added to the configurable PIF for scenario preparation purposes only; they are not needed for the modeling process.</p>	Excel PIF
5	Import PIF	Remove formulas before importing the PIF back into OpenLink. Limit the length of the file name for import. Check the import automated message for potential errors.	OpenLink
6	Run Equivalent Units	Be sure that # with POS to be Equivalized is 0 before submitting category to modeling.	OpenLink
7	Conduct Integrity Checks	Use the Category Breakdown reports: Brand and Demand Group aggregation. Accept or fix errors as needed.	OpenLink
8	Edit Content (if applicable)	Double check brand names and fix issues from Equiv. Units as necessary. This step may prompt several steps above to be completed again.	OpenLink



	Description	Notes	Tool
9	Complete Demand Group Relationships	If relationships do not exist between Demand Groups, the Demand Group Relationships matrix does not need to be completed. Found in the Category Manager page.	OpenLink
10	Mark Products as Attributed	Marks products as attributed. This also "resets" the # of Unattributed column to zero so that new products can be easily identified after initial attributing is sent to IBM Omni-Channel Merchandising statistician.	OpenLink
11	Set Category Status	Alerts the IBM Omni-Channel Merchandising statistician that the category is ready to be modeled. Statistician receives an email if subscribed to receive this alert notification.	OpenLink

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## Using the PIF vs. the OpenLink UI

Use this procedure to know when to use the PIF and when to use the Edit Content functionality.

Use the PIF when:

- New Demand Group names must be established, usually occurring when/if the following are true:
- The first time a category is Attributed
- A new product line is introduced to the category
- Greater than 1 year has elapsed since the last Attributing
- Attributing could be better accomplished 'off line', using the PIF
- Excel spreadsheet (e.g., out of the office, if the UI is unavailable, etc...)

Use **Edit Content** when:

- New Products need to be attributed for Price Maintenance.

**Note:** The new products must be entered into an existing demand group.

- Correcting Brand names (use the 'Category Breakdown' feature)
- Fewer than 20 products need to be attributed

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## Demand Group Hints

Use this reference to further understand Demand Groups.

- Remember, Demand Groups are HIGHLY substitutable products.
- Products within a Demand Group should be relatively close in price and price per UOM.
- Demand Groups may have suffixes to separate products which could belong in the same Demand Group, but where price points are not equitable.
- PRM = Premium (higher price point, considered the best quality, designer products)
- REG = Regular (Good products, average price point products)
- ECON = Economy (lower price point, considered the poorest quality, entry-level)
- TS = Trial size (typically merchandised in a separate part of the store)
- IND = Industrial or institutional size (not 'highly substitutable' with regular size products)
- Separate Trial Size and Industrial Size products into their own Demand Group.
- Limit the use of 1-product Demand Groups to extreme circumstances.
- Remember, products within a Demand Group cannibalize each other symmetrically. If asymmetric relationships exist within a Demand Group, separate products into two Demand Groups and control relationships through the Demand Group Relationship matrix.

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## Size/UOM Hints

Use this reference to further understand Size/UOM.

- UOMs should be consistent within a Demand Group.
- Trial Size or "Bonus" products should not be included in Size family/Size class relationships.
- Sizes may need to be changed to reflect what the customer is truly purchasing (e.g., Laundry detergent ounces to loads).

---

## Dropping (not included in model)

Use this procedure to drop a product in the PIF.

You should NEVER delete a product from a PIF. Instead "drop" the product from the PIF, which means that it will not be modeled.

To drop a product in the PIF:

- Change the Included in Model column to "No."

What products should be dropped?

- Non-saleable Products
- Outdated Products
- Statistically insignificant Products (all 3 criteria must be met):
  - Customer Status = discontinued
  - Last Scan > 90 days before last scan for category
  - Average Weekly Volume is VERY low

- Products with no POS – Products lacking POS will not be modeled. These products can be ‘dropped’ from the PIF or should be linked to existing products if they are new/active products.

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## Product Information File (PIF) General Notes

Use this as a reference for PIF.

- Do not delete information from the PIF. If products should not be modeled, drop them.
- PIFs should not contain any formulas to be successfully imported into DT OpenLink.
- Only the first spreadsheet in the Excel workbook will be imported into DT OpenLink. Delete any additional sheets containing pivot tables or formatting prior to PIF import.
- PIFs can contain additional columns when importing. The import is looking for the column headers so, don’t delete those!
- You can also re-order the PIF columns. The import does not care about the order, just the first two rows of the column (the names of the column).
- Remember, once the PIF is imported, any changes you make in the OpenLink application will NOT be reflected on your saved PIF excel spreadsheet. It is recommended to re-export your complete PIF when you are finished with the category.

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## PIF Details

Use this reference to further understand PIF Details.

PIF Attributes:

**Note:**

Name	Description	How to Complete	Source
<b>Ref UPC</b>	UPC from retailer	Do not change	UPC as defined by the retailer
<b>Ref Customer Product Key</b>	Retailer product numbering system. If not available, will default to UPC.	Do not change	UPC or retailer ID as defined in map
<b>Included in Model</b>	Place to "drop" products so that they will not be included in the model. These products are also not in the scenario.	Change to "No" if the product should not be modeled	Default is <b>Yes</b>
<b>Description</b>	Product description to be sent to Everyday Price Management	Typically, is not changed	Retailer description. If retailer has more than one description, check with map.

Name	Description	How to Complete	Source
<b>Demand Group</b>	Collection of highly substitutable products	Alpha-numeric, 50 characters maximum, no spaces (use underscore to separate words). Must begin with an alpha character.	Default is <b>DEFAULT_demand group</b>
<b>Size</b>	Size (Volume of Measure) to be used for Modeling at the retailer/division/category level. This size can be inferred.	Numerical. If "free or bonus" product, include base size + amount "free".	Retailer's product file
<b>UOM</b>	Unit of Measure used for Modeling and Optimization. Should be consistent within a demand group.	Alphabetic CT, OZ, LOAD, SHEET, LB	Retailer's product file
<b>Brand</b>	Corrected/inferred brand to be used for modeling. Brands can be streamlined in the PIF or on the OpenLink Category Breakdown page.	Alphabetic only, no spaces or illegal characters (&, /, "", *)	Retailer's product file
<b>Ref DT Status</b>	Determined by aggregating the results of the Product Status Resolver rules.	Do not change	Result of Product Status Resolver, if run
<b>Ref Customer Status</b>	The product status as it is sent from the retailer.	Do not change	Retailer's location status file; defaults to ACTIVE if no value is sent
<b>Ref Current Retail</b>	Summary Statistic: Average of current retail price over the last 12 months across stores, if loaded	Do not change	Retailer's price file
<b>Ref Avg Scan Price</b>	Summary Statistic: Volume-weighted Average Scan price over the last 12 months	Do not change	From POS scan data
<b>Ref Price per UOM</b>	Summary Statistic: Price per UOM as divided by information on PIF	Do not change	Calculated on PIF

Name	Description	How to Complete	Source
<b>Ref Avg Weekly Volume</b>	Summary Statistic: Average Weekly Volume over the last 12 months across all stores at chain level.  If the application does not have a record for a week, the volume is not counted as zero.	Do not change	From POS scan data
<b>Ref Cost</b>	Summary Statistic: Cross store straight average of cost sent in the Current Cost file, if available.	Do not change	From POS scan data
<b>Ref First Scan Date</b>	Date product first scanned (across all stores)	Do not change	From POS scan data
<b>Ref Last Scan Date</b>	Date product last scanned (across all stores)	Do not change	From POS scan data
<b>Product ID</b>	An IBM Omni-Channel Merchandising assigned unique SKU ID	Do not change	System assigned

Highlighted rows indicate fields which should be completed in the PIF.

Name	Description	How to Complete	Source
<b>Size Class</b>	Applied in IBM OpenLink or IBM Price Management. Each item in a Size Family is given a number/level: 8 oz = SMALL, 16 oz = MEDIUM, 24 oz = LARGE	Allowable Size Class formats are size classes that are defined for the category in IBM Price Management. If the Size Classes have not yet been defined, use the default Size Classes (XXX-LARGE, XX-LARGE, X-LARGE, LARGE, MEDIUM, SMALL, X-SMALL, XX-SMALL, XXX-SMALL), which can later be modified in IBM Price Management. 50 characters maximum.  Do not include Bonus products or Trial/Travel sizes in Size Class.	Blank

Name	Description	How to Complete	Source
<b>Size Family</b>	Applied in OpenLink or Price. Size Family is used to set rules for pricing on how different sizes of the same product should be priced on an absolute basis (for example, Small < Medium < Large), and on a relative basis based on the equiv price (for example, the large should be a better value than the medium.	Alphabetic, 50 characters maximum	Blank
<b>Brand Class</b>	A value which differentiates two products with a family. In this case, Brand Class differentiates products within a Brand Family.	NATIONAL, PRIVATE LABEL, or define as needed, 50 characters maximum	Retailer's product file, usually blank
<b>Brand Family</b>	A value which links two products together for the purpose of comparison through rules. The Brand Family is usually the type and size of the product being compared across brands.	Alphabetic, no illegal characters (&, /, *), 50 characters maximum	Retailer's product file, usually blank
<b>Pre Priced</b>	Indicated pre-priced product, supplied by the retailer. Populated with a 1 if the product is pre-priced. A pre-priced product will NOT change price during the course of the optimization.	Pre-priced product = 1 Non-prepriced product = 0	Default is 0; if the value comes from the retailer a value of 1 indicates a pre-priced product
<b>Line Group</b>	Line price group value sent by retailer.	Alpha-numeric, no spaces or illegal characters (&, /, *), 50 characters maximum	Retailer's product file
<b>Other Family/ Other Class 1&amp;2</b>	Establish other relationships when Brand Family/Class is already being leveraged.	Define as needed	Blank

Name	Description	How to Complete	Source
<b>Ref Level 1-12 Code/Desc</b>	Generally product hierarchy fields from host system. May help outline Demand Group structure.	Do not change	From Retailer data
<b>Ref Attribute 0-9</b>	If you send Location or SKU attribute values in your location or product file (typically sent by your IT dept), you can choose to populate these values on the PIF using the attribute field on the product table.	Do not change	From Retailer data





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