

# **Retek<sup>®</sup> Demand Forecasting<sup>™</sup>, Curve<sup>™</sup>, Promote<sup>™</sup> 10.5.1**

## **Release Notes**



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#### Corporate Headquarters:

Retek Inc.  
Retek on the Mall  
950 Nicollet Mall  
Minneapolis, MN 55403  
  
888.61.RETEK (toll free US)  
+1 612 587 5000

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#### European Headquarters:

Retek  
110 Wigmore Street  
London  
W1U 3RW  
United Kingdom  
  
Switchboard:  
+44 (0)20 7563 4600  
  
Sales Enquiries:  
+44 (0)20 7563 46 46  
Fax: +44 (0)20 7563 46 10

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<b>Mail</b>	Retek Customer Support Retek on the Mall 950 Nicollet Mall Minneapolis, MN 55403
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- Detailed step by step instructions to recreate.
- Exact error message received.
- Screen shots of each step you take.



## Release Details

Solutions:	Retek Demand Forecasting (RDF), Curve, Promote <b>Note:</b> The package may not include all solutions depending on the licensing agreement
Version Number:	10.5.1 on RPAS 11.0.4 using Retek Configuration Tools 11.0.4
Code Cut Off Date:	January 6, 2004
Release Date:	January 16, 2004
Type of Release:	GA - Generally Available
Base:	Yes
Patch:	No
RPAS Client Version:	ARPOplatform 5
RPAS Server Version:	RPAS 11.0.4
Acumate Version:	Acumate 25
Supported OS:	Windows NT, Sun Solaris 5.8, AIX 5.2 *HP 11.11 is currently not support with this release but will be patched.
Documentation:	Retek Demand Forecasting, Curve, Promote 10.5.1 Installation Guide
	Retek Demand Forecasting, Curve, Promote 10.5.1 User Guide
	RPAS 11.0.4 Administrator Guide
	RPAS 11.0.4 Installation Guide
	RPAS 11.0.4 User Guide
	RPAS 11.0.4 Configuration Guide
	RPAS 11.0.4 Functions Guide

## Configuration Notes

In addition to the configuration requirements outlined in the RPAS Configuration Tools User's Guide, the following section includes additional configuration requirements and/or issues by solution. The RPAS Configuration Tools User's Guide is required to be reviewed prior to configuring a Curve, RDF or Promote Solution.

## Curve Configuration Notes

New to this release, the concept of Final and Source Profile has been reinforced through design changes in our workbook templates. The Final Profile is the profile at which Adjustments and Approvals are made. The Source Profile is the profile at which the System Training Window can be overridden.

## Configuration Requirements

### Hierarchy Requirements

- Hierarchies need to always have item or store at the lowest level, if neither are at the lowest level, the configurator can set the hierarchy dimension name to be item or store, but have the label of the dimension, match the true dimension. Example: if lowest level is subclass, the hierarchy dimension name is item, but the label is subclass.
- To support daily and weekly profiles, the calendar hierarchy must include the following:
  - Off the 'day' dimension, add 'dow' (Day of Week) and 'dos' (Day of Season) dimensions.
  - Off the 'dos' (Day of Season) dimension, add 'wos' (Week of Season) dimension.
  - Off the 'week' (Week) dimension, add 'woy' (Week of Year). As a configuration option, you may also add 'wg1' (Week Grouping 1) or additional week groupings off 'week' to support user-defined week groupings once the application is being used.

**Note:** If 'day' is not required in your calendar hierarchy, then the 'dow', 'dos' and 'wos' dimensions are not required.

- Curve also requires an additional hierarchy to support relative time periods. See the RPAS Configuration Tools User's Guide for more details.

- Configuring Differentiator dimensions (also referred to as Diff dimensions) within the merchandise hierarchy is optional. See the RPAS Configuration Tools User's Guide for more details.

## Profile Label Requirements

- It is recommend that Profile Labels include the Profile Name (which is the system-assigned profile number). The Profile Name is referenced in the RDF Solution to specify Spreading Profiles. Curve requires that profiles 1 through 9, be referenced as 01, 02, ..., 09 when being specified as a Spreading Profile in the RDF Solution.
- It is recommended that Profile Labels for Final Profiles include 'Final' or another designator that distinguishes the profile as a Final Profile.
- RPAS will automatically put () around Profile Labels. The configurator should not include these in their level label configuration or the installer will fail. An example of a Profile Label that would violate this requirement is (01 – chn->str-Final). It is acceptable as 01 – chn->str-Final.
- '-' should not be used before or after the Profile Label. And example of a Profile Label that would violate this requirement is -01-chn->str-Final-. It is acceptable as 01 – chn->str-Final.

## Source Data Requirements

- Source Data is specified only for Source Profiles. No Source Data should be specified for any profiles that are dynamically generated to support Source Level Forecasting in RDF.

## Configuration Issues

### Invalid Solution Name

- CurveExtension or any variation of case on this string is not allowed as an extension name.

### Cloning an Extension or a Project

- You will not be able to copy (clone) an RDF/Curve/Promote extension if you cloned a project.

### Auto Generation Issues

- After the auto generation of a Curve configuration, the Curve Solution will display exclamation icons next to the Measures, Rules, Workbooks and Wizard Designers. Once you save and re-open the configuration, these icons will not appear.
- After the auto generation of a Curve configuration, the Workbooks and Wizards Designers should be ignored since these do not contain the templates that will be produced in the domain.
- Measures: Only the Label associated with a measure that is a by-product of auto generation may be modified.

### Profile Deletion

- Deletion of a profile level will cause the system-assigned enumerated values in the Profile Name to renumber such that levels are in consecutive order starting with profile level 01. Deleting a profile level may impact any solution configuration that utilizes a specific profile level. For example, the following parameters within an RDF Solution configuration may be affected if profile levels are deleted or renumbered:

- Seasonal Profile
- Spreading Profile

As well, if the domain using the configuration has previously been installed, there is potential to lose data associated to a level that has been deleted or renumbered.

### Patching Issues

- RPAS currently does not support the patch process if levels are deleted in the Tools on an existing domain.
- RPAS Configuration Tools does not support the patch process if measures or rules are modified in Tools on an existing domain.



# RDF Configuration Notes

## Configuration Requirements

### Hierarchy Requirements

- Hierarchies need to always have item or store at the lowest level, if neither are at the lowest level, the configurator can set the hierarchy dimension name to be item or store, but have the label of the dimension, match the true dimension. Example: if lowest level is subclass, the hierarchy dimension name is item, but the label is subclass.

### Common Solution Measures

- The following measures must be added and realized in the Common solution for any RDF configuration:

#### Measure 1

Identifier: it\_L\_B  
Label: Interim Forecast Level Birth  
Data Type: Boolean  
Base Intersection: week  
Agg Method: ambig  
Spread Method: repl  
Base State: read  
Agg State: read  
Database: data/it  
Shown: true

#### Measure 2

Identifier: it\_LWORKBOOK  
Label: Interim Forecast Level Wkbk  
Data Type: Boolean  
Base Intersection: week  
Agg Method: ambig  
Spread Method: repl  
Base State: read  
Agg State: read  
Database: data/it  
Shown: true

## Measure 3

Identifier: it\_F\_B  
 Label: Interim Forecast Final Birth  
 Data Type: Boolean  
 Base Intersection: week  
 Agg Method: ambig  
 Spread Method: repl  
 Base State: read  
 Agg State: read  
 Database: data/it  
 Shown: true

## Measure 4

Identifier: it\_FWORKBOOK  
 Label: Interim Forecast Final Wkbk  
 Data Type: Boolean  
 Base Intersection: week  
 Agg Method: ambig  
 Spread Method: repl  
 Base State: read  
 Agg State: read  
 Database: data/it  
 Shown: true

## Calendar Dimension Labels and Level Label Requirements

- It is recommended that Level Labels include the Level Name (which is the system-assigned level number). Within the RDF Solution, Source Levels are now referenced as Level Names, rather than Level Labels as in previous releases. Unlike Curve, RDF does not require levels 1 through 9 to be specified as 01, 02, ..., 09. For example, in the LabsGA configuration, level 03 (Level Name) has a Level Label of '3:itm/chn/week'. Within RDF, the Source Level for Level 01 is specified as '3'.
- The calendar dimension specified in your Forecast Level Labels should match the case specified in the Calendar Dimension Labels in the Calendar Hierarchy configuration. For example, if you have configured a 'day' dimension in your calendar hierarchy and the label is specified as 'day' and you have a forecast level that is defined at day, the Forecast Level Label should be Item/Store/day, where 'day' matches the case of the Calendar Dimension Label.
  - The position of the calendar dimension in the level label string does not matter
  - Separators do not matter

- It is recommended that Forecast Level Labels for Final Levels include 'Final' or another designator that distinguishes the level as Final.
- RPAS will automatically put () around Forecast Level Labels. The configurator should not include these in their level label configuration or the installer will fail. An example of a Forecast Level Label that would violate this requirement is (1:itm/str/week - Final). It is acceptable as 1:item/str/week - Final.
- '-' should not be used before or after the Forecast Level Label. An example of a Forecast Level Label that would violate this requirement is - 1:itm/str/week - Final-. It is acceptable as 1:itm/str/week - Final.

## Configuration Issues

### Invalid Solution Name

- ForecastExtension or any variation of case on this string is not allowed as an extension name.

### Forecast Method Issues

- Causal Method is not available to be selected as a forecast method in the RDF Configuration Tools UI if the Promote Solution is not yet part of the configuration. However, if Causal is selected and you have not licensed Promote, the RDF batch forecast will not generate.
- If Promote is licensed you must include the Causal forecast method for any current causal forecast level. It is recommended that Causal is included for any levels that you may want to be active for causal forecasting in the future. Adding Causal at a later time after the domain is build will require the re-auto generation of measures and rules within the Configuration Tools and additional patching to support it.

## Auto Generation Issues

- After the auto generation of an RDF configuration, the Forecast Solution will display exclamation icons next to the Measures, Rules, Workbooks and Wizard Designers. Once you save and re-open the configuration, these icons will not appear.
- After the auto generation of an RDF configuration, the Workbooks and Wizards Designers should be ignored since these do not contain the templates that will be produced in the domain.
- After the auto generation of an RDF configuration, the following rule groups will be flagged (shown in red) as invalid, but will be installed properly in the domain:

FAP\_calc\_F01

FAP\_calc\_F06

FAP\_load\_It

FEV\_load\_It

FINT\_load

FINT\_calc

Measures: Only the Label associated with a measure that is a by-product of auto generation may be modified.

## Patching Issues

- RPAS currently does not support the patch process if levels are deleted in the Tools on an existing domain.
- If the user modifies the Seasonal Profile, Spreading Profile or Data Plan within the RDF application, these parameters will need to change the Configuration Tools to reflect the new values. Otherwise the new values will be overwritten with the old values when patching occurs.
- RPAS Configuration Tools does not support the patch process if measures or rules are modified in Tools on an existing domain.

## Level Deletion Issues

- Deletion of a forecast level will cause the system-assigned enumerated values in the Level Name to renumber such that levels are in consecutive order starting with forecast level 01. Deleting a forecast level may impact any solution configuration that utilizes a specific level. As well, if the domain using the configuration has previously been installed, there is potential to lose data associated to a level that has been deleted or renumbered.

## Promote Configuration Notes

### Configuration Requirements

#### Promote Licensing

If Promote is licensed you must include the Causal forecast method for any current causal forecast level. It is recommended that Causal is included for any levels that you may want to be active for causal forecasting in the future. Adding Causal at a later time after the domain is build will require the re-auto generation of measures and rules within the Configuration Tools and additional patching to support it.

#### Promotion Name

The Promotion Name may not be greater than 5 characters. The following characters may not precede or follow the label that is entered in this field:

‘( )’ Example: (xmas)

‘-’ Example: -xmas-

#### Promotion Label

The label of the promotion that will be viewed by the user once the domain is created. The following characters may not precede or follow the label that is entered in this field:

‘( )’ Example: (Christmas)

‘-’ Example: -Christmas-

## Configuration Issues

### Forecast Method Issues

Causal Method is not available to be selected as a forecast method in the RDF Configuration Tools UI if the Promote Solution is not yet part of the configuration. However, if Causal is selected and you have not licensed Promote, the RDF batch forecast will not generate.

### Hierarchy Requirements

Hierarchies need to always have item or store at the lowest level, if neither are at the lowest level, the configurator can set the hierarchy dimension name to be item or store, but have the label of the dimension, match the true dimension. Example: if lowest level is subclass, the hierarchy dimension name is item, but the label is subclass.

### Promotion Date Configuration

Holiday promotion dates are no longer part of the pre-domain configuration process. The promotion dates must be set using the Promotion Planner workbook.

### Invalid Solution Name

PromoteExtension or any variation of case on this string is not allowed as an extension name.

### Auto Generation Issues

- After the auto generation of a Promote configuration, the Promote Solution will display exclamation icons next to the Measures, Rules, Workbooks and Wizard Designers. Once you save and re-open the configuration, these icons will not appear.
- After the auto generation of a Promote configuration, the Workbooks and Wizards Designers should be ignored since these do not contain the templates that will be produced in the domain.
- After the auto generation of a Promote configuration, the Rule Definition tool will not include any rules since all Promote-specific rules are dynamically created in the domain based on the configured causal forecast levels and promotions.
- Measures: Only the Label associated with a measure that is a by-product of auto generation may be modified.

## 10.1 vs. 10.5.1 Functional Differences

New Features to this release are outlined in the first section for each solution (Enhancements) below. The following sections outline these new features and differences in functionality in respect to workbook templates. The issues that are covered in this section are also repeated in a later section titled 'Known Issues'.

### Curve

#### Enhancements

##### Final and Source Profiles

New to this release, the concept of Final and Source Profile has been reinforced. The Final Profile is the profile at which Adjustments and Approvals are made. The Source Profile is the profile at which the System Training Window can be overridden.

##### Spreading Profile Configuration

New to this release, the spreading profiles used for Source Level Forecasting are specified at the source forecast level in RDF. In previous releases these profiles were hidden from the user and were not required to be configured. However, once these dynamic profiles are configured in the RPAS Configuration Tools, only two parameters must be set in Profile Administration and then there is no other maintenance required on these profiles.

##### Maintenance and Approval along the Calendar Dimension

New to this release, global defaults can be overridden and approvals can be made along the calendar dimension. Time periods to include in both the Profile Maintenance and Profile Approval workbooks are specified in each workbook's wizard.

## Profile Administration

New to this release, the spreading profiles used for Source Level Forecasting are specified at the source forecast level in RDF. The default settings for the spreading profile must be set before the batch forecast is run. For profiles that will be dynamically generated during the batch forecast, open the Profile Administration Workbook and set the following measures:

- Default Approval Policy: Set all levels to 'Approve Use System'
- Training Window Method: Set all levels to 'Default and Override'

For other profiles that must be user-approved or potentially adjusted, the settings will vary based on the configuration.

New measures in this workbook include the following:

- Final Level Profiles: A read-only, Boolean measure indicating a final profile
- Normal Value: If the profile is aggregated to the Aggregation Intersection this will be the value in all the cells (or zero outside of the phase window.) This is usually 1.00 (100%) but occasionally you would want to override this value.
- Profile Agg Intersection: A read-only measure set in the Configuration Tools. The intersection at which the profile will sum to 1.00 (100%), this value may be override in Normal Value.
- Profile Approval Intersection: A read-only measure set in the Configuration Tools. The intersection at which the profile is approved. Approval Intersection should be above or equal to the Aggregation Intersection.
- Profile Intersection: A read-only measure set in the Configuration Tools. The initial intersection to which the profile will spread down.
- Profile Type: A read-only measure set in the Configuration Tools. The type is used to determine the profile algorithm and validation required by the profile level. See the Curve 10.5 User's Guide for more information on each type.
- Renormalize: Renormalize is a boolean measure. When set to TRUE, it will automatically renormalize the calculated profile result at the corresponding final level. Normally the renormalization is not necessary. For example, if you have a source profile at week of season and its final profile is at day of season, you would need to renormalize the final level because going from week -> day will do replication. Now at day level the profile will sum up to greater than 1 for a season. (Since it was a week to day it will probably sum up to seven). The renormalize will force the final profile to sum to 1.



- Source Level Profiles: A read-only measure set in the Configuration Tools. Specifies the Final Profile that has been assigned to a Source Profile. All Final Profiles have their own profile number in this measure.
- System Training Window Length: A write-able measure that specifies the number of weeks of the most recent data to use when the Training Window Method is set to 'Use Training Window'. The System Training Window Length defaults to 10 weeks.

## Profile Maintenance

New to this release, global defaults can be overridden along the calendar dimension. Time periods to include in this workbook are specified in the wizard.

The same measures as previous releases are in the Profile Maintenance workbook, however they are specified at either Final or Source Level:

- Final Tab: Approval Method, Source Profile Exception
- Source Tab: System Training Window Begin, System Training Window End

Within the Profile Maintenance wizard, if a hierarchy does not exist in the desired profile, then selecting dimensions in the hierarchy from the two-tree is meaningless. This should not cause any problems in building the workbook or changing settings in the workbook.

## Profile Approval

Within the Profile Approval wizard, if a hierarchy does not exist in the desired profile, then selecting dimensions in the hierarchy from the two-tree is meaningless. This should not cause any problems in building the workbook or changing settings in the workbook.

### Final Tab

In previous releases, the final profile results were not adjustable. This can now be done using the Adjusted Profile measure:

- Adjusted Profile: The user-adjusted final profile

If the user wants to make adjustments to the final profile, it is required that the Final worksheet be aggregated to the Aggregation Intersection and lock the cells before making adjustments at the lower level. An easy way to determine the Aggregation Intersection is to match the intersection on the Approval worksheet. For example in our LabsGA configuration, the profile intersection for Profile 11 is Day of Week/Item/Store. The Aggregation Intersection (as shown on the Approval worksheet) is Item/Store. On the Final worksheet, remove the Day of Week dimension and lock the cells, then add Day of Week back into the worksheet. Locking the cells at the Aggregation Intersection allows for cells to normalize to 100% or 1.00 when adjustments are made at the Profile Intersection. This is a usability issue that we hope to address in a patch or future release.

## Run Batch Profile

Rather than selecting a Processing Plan to run the batch as in previous releases, the user may now select one or multiple Final Profiles.

## RDF

The following sections summarize functional and cosmetic changes to RDF by workbook template.

### Forecast Administration

The worksheets in the Forecast Administration Workbook have been modified such that parameters are defined only at a Final level or at both Final and Source, as well new parameters for more robust configuration support have been included.

#### Basic Settings Tab/ Final Level Parameters worksheet

There is an issue in this release that prevents the Final Level Parameters worksheets from including only the Final Level. For each domain, it is recommended that the configurator open this worksheet, hide the source levels, and then save the template format. If this step is not done and changes are made to the source levels on these worksheets, those changes will not affect the forecast.

**Data Source:** This is now read-only and is configured in the Config Tools. New to this release, the user will no longer be able to have multiple data sources for final levels.

**Default Source Level:** This is no longer a pick list of source levels, but is the integer associated to the source levels. The system defaults to the source level set in the Configuration Tools. To easily identify the number associated to the levels, we suggest that the level label set in the Configuration Tools include the level number.

**Store Interim Forecast:** New—a boolean measure that must be activated if the customer wants to view/analyze the interim forecast measure generated at the final level.

There are more implications other than storage space if this measure is not active. The Forecast Approval and Forecast Scorecard Workbooks include a wizard that asks the user to select additional forecasting measures to include in the workbook. One of these measures is Interim Forecast. If the Interim Forecast is not stored and the user chooses to include this measure in the workbook, the workbook will not build.

## Basic Settings Tab/ Final and Source Level Parameters worksheet

**Data Plan:** This is now read-only and is configured in the Config Tools

**Forecast Length:** This parameter must now be set at both the final and source level. For example, if the forecast length is to be 10 weeks then the setting for a final level at day is 70 (10x7days) and a source level at week will be 10

**Seasonal Profile:** A writeable measure. If using a forecasting method that requires a seasonal profile, the measure name must be specified. This measure must be setup in the Configuration Tools. If this value is specified in the Configuration Tools, this value will be the default value in the workbook, but can be changed to a different measure.

**Spreading Profile:** A writeable measure. A value is required at the source level when supporting Source Level Forecasting. For dynamically generated profiles, this value is the number associated with the final profile level (for example 01)—note that profiles 1 through 9 have a zero (0) preceding them in Curve—this is different than the forecasting level numbers. For profiles that must be approved, this is the measure associated with the final profile level. This measure is 'apvp'+level (for example: apvp1). Spreading Profile can include multiple profiles separated by commas (for example: 09,apvp11). These types of profiles are multiplied by each other to determine the final level results.

If the user modifies the Seasonal Profile, Spreading Profile or Data Plan, these parameters will need to change the Configuration Tools to reflect the new values. Otherwise the new values will be overwritten with the old values when patching occurs.

## Advanced Settings Tab/ Final and Source Level Parameters worksheet

- **Default Confidence %:** Removed from the workbook. This measure along with the various intervals viewed in the Forecast Approval Workbook, have long confused users on the use of the interval calculations. The feedback we have heard from our users is they see little if no value in viewing the resulting measure, Upper Confidence Limit.
- **Causal Aggregation Profile:** Used only for Daily Causal Forecasting. The measure name of the profile used to aggregate causal variable from its base level to the Causal Calculation Intersection.
- **Causal Calculation Intersection:** Used only for Daily Causal Forecasting. The intersection to run the causal forecast. The format needs to match the hierarchy dimension names set in the Configuration Tools—such as itemstr\_week. Each dimension must have only 4 characters; order of the dimension does not matter. There is no validation of correct format of this intersection.

- **Causal Data Source:** Used only for Daily Causal Forecasting. An optional setting that contains the measure name of the sales data to be used if the level's Data Source is different than the causal data source.
- **Causal Higher Intersection:** This intersection is the aggregate level to model promotions if the causal intersection cannot produce a meaningful causal effect. This intersection will apply to promotions whose Promotion Type is set to 'Override From Higher Level' (set in the Promotion Maintenance workbook). The format of this intersection needs to match the hierarchy dimension names set in the Configuration Tools—such as itemstr\_week. Each dimension must have only 4 characters; order of the dimension does not matter. There is no validation of correct format of this intersection.
- **Causal Calculation Intersection Periodicity:** Used only for Daily Causal Forecasting. This measure needs to be set to the periodicity of Causal Calculation Intersection. Periodicity is the number of periods within 1 year that correspond to the calendar dimension.
- **Causal Spread Profile:** Used only for Daily Causal Forecasting. The measure name of the profile used to spread the causal baseline forecast from the Causal Calculation Intersection to the Final Level.
- **Croston's Min Gaps:** The value must be set based on the calendar dimension of the level. For example, if the value is to be 5 weeks then the setting for a final level at day is 35 (5x7days) and a source level at week will be 5.
- **DD Duration:** The value must be set based on the calendar dimension of the level. For example, if the value is to be 10 weeks then the setting for a final level at day is 70 (10x7days) and a source level at week will be 10.
- **Holt Min Hist:** The value must be set based on the calendar dimension of the level. For example, if the value is to be 13 weeks then the setting for a final level at day is 91 (13x7days) and a source level at week will be 13.
- **Winters Min Hist:** The value must be set based on the calendar dimension of the level. For example, if the value is to be 104 weeks/2 years then the setting for a final level at day is 728 (104 weeks x 7 days) and a source level at week will be 104.

## Forecast Maintenance

- **Like-Item, Sister Store functionality** has been removed from the Forecast Maintenance Workbook and now resides in a separate workbook.
- **Source Level Override:** This is no longer a pick list of source levels, but is the integer associated to the source levels. The system defaults to 0 if no override is necessary. To easily identify the number associated to the levels, we suggest that the level label set in the Configuration Tools include the level number.

## Forecast Like-Item, Sister Store

All parameters associated to the Like SKU/Sister Store functionality in Forecast Maintenance in v.10.1, now reside in this workbook. The measures required for Like Sku/Sister Store functionality have remained the same.

## Forecast Approval

- Wizard includes only one screen to select time periods for historical, horizon and future dates to include in the workbook. The issue with this wizard is that it is up to the user to include the correct time periods associated with the forecast horizon. The risk is the user may not include all time periods in the forecast horizon and a time series may not get approved or adjusted.
- Wizard includes and screen that asks the user to select additional forecasting measures to include in the workbook. One of these measures is Interim Forecast. If the Interim Forecast is not stored (activated in the Forecast Administration Workbook) and the user chooses to include this measure in the workbook, the workbook will not build.
- Upper Confidence Limit and the Confidence Worksheet has been removed from the workbook.
- Adjusting the Forecast for periods outside of the horizon in FAP will not commit.

## Forecast Scorecard

An issue with the Forecast Scorecard wizard is the need for the user to range through the calendar two-tree hierarchy to select historical and horizon dates for the forecast. This puts the onus on the user to know and select the time periods in the forecast horizon. We hope to fix this issue prior to a customer taking this release.

## Interactive Forecasting

- An issue with the Interactive Forecast wizard is the need for the user to range through the calendar two-tree hierarchy to select historical and horizon dates for the forecast. This puts the onus on the user to know and select the time periods in the forecast horizon. If the user does not include all time periods in the horizon, the forecast will be generated incorrectly. We hope to fix this issues prior to a customer taking this release.
- New to this release, the forecast is automatically generated at the time of the workbook build using the following parameters set in the Forecast Administration Workbook:
  - History Start Date
  - Forecast Length
  - Default Forecast Method
- If the user chooses to calculate the Forecast Interval and Cumulative Interval for a Source Level forecast, these values will be meaningless since interval calculations are only relevant at Final Levels.

## Promote

### Enhancements

New to this release, the Boolean variables to activate promotions have now been replaced with continuous inputs. The same functionality as in previous releases is available in this release to turn a promotion on or off by entering a 1 (indicates 100%) or leaving the cell at 0 (0#). Continuous inputs provide more robust functionality to support promo price, discounts and ability to indicate the expected performance/contribution of a promotion over the time periods in which it is active.

### Promotion Selector

This workbook has been removed from this release since all promotions are now configured through the RPAS Configuration Tools. If a promotion is to be inactive, the Promotion Planner workbook should not include any promotion variables for future activity. Deleting the promotion from the Configuration Tools, then patching this change into the domain can allow the permanent removal of a promotion from the system.

## Promotion Planner

The promotion variable is now a continuous input rather than a Boolean measure.

Within the Promotion Planner wizard, if a hierarchy does not exist in the desired promotion level, then selecting dimensions in the hierarchy from the two-tree is meaningless. This should not cause any problems in building the workbook or changing settings in the workbook.

## Promotion Maintenance

Includes the ability to build a Promotion Maintenance workbook with multiple causal levels rather than only a single level.

Within the Promotion Maintenance wizard, if a hierarchy does not exist in the desired promotion level, then selecting dimensions in the hierarchy from the two-tree is meaningless. This should not cause any problems in building the workbook or changing settings in the workbook.

## Promotion Effectiveness

- Formerly known as the Promotion Analysis and Planning workbook
- Still purely a promotion simulation tool--no commit capabilities
- Within the Promotion Effectiveness wizard, if a hierarchy does not exist in the desired promotion level, then selecting dimensions in the hierarchy from the two-tree is meaningless. This should not cause any problems in building the workbook or changing settings in the workbook.
- Several new measures are used for analysis:
  - Approved Forecast: Read-only measure. Formerly Promotional Forecast in previous releases.
  - Approved Promotional Peak: Read-only measure. Calculated during the Forecast Approval process.
  - Promotion Future Baseline: Read-only measure. Calculated as the Approved Forecast – Approved Promotional Peaks.
  - Promotion Future Forecast: Read-only measure. Promotion Future Baseline with Promotion Effects applied. Changing the Promotion Effect Override or Promotion Variables will change this result.
  - Promotion Historical Baseline: Read-only measure. Calculated if the promotion is not turned on  $\text{baseline} = 1. \text{Pagg} * \text{PCE}$



- Promotion Historical Forecast: Read-only measure. Historical Baseline \* Pagg \* Causal Effect.
- Promotion Variable Aggregation (Promotion): Read-only measure. Needs to be hidden. Will be resolved via patch.
- Promotion Type: Removed in favor of changing the Promotion Effect Override.

## Performance Summary

A performance benchmark has not yet been performed.

## Known Issues

### Known Curve Issues

Issue	Issue Owner	Status / Workaround
Current release does not support HP-UX	Tools	High Priority: To be addressed immediately in a patch
Optimized release build on HP	Retek Labs	Low Priority: To be addressed once a customer takes our HP release.
Current release is translatable but not fully internationalized.	RPAS/Tools/Retek Labs	High Priority: To be addressed in the future in a patch
Current release does not support patching a domain.	RPAS/Tools/Retek Labs	High Priority: To be addressed in the future in a patch
Current release is not fully supported by the Alert Manager	RPAS	Issue reported to RPAS
Profile Administration: bug identified in Approve By, Approve Date and Adjusted Profile measures	Retek Labs	High Priority: To be addressed immediately in a patch
Incorrect result under Diff configuration due to Profile Approval bug	Retek Labs	High Priority: To be addressed immediately in a patch
Update Curve configuration script	Retek Labs	High Priority: To be addressed immediately in a patch
Profile Approval: Update commit rules for Approval measures	Retek Labs	High Priority: To be addressed immediately in a patch
After the auto generation of a Curve configuration, the Curve Solution will display exclamation icons next to the Measures, Rules, Workbooks and Wizard Designers.	Tools	Low Priority: Once you save and re-open the configuration, these icons will not appear.

Issue	Issue Owner	Status / Workaround
After the auto generation of a Curve configuration, the Workbooks and Wizards Designers should be ignored since these do not contain the templates that will be produced in the domain.	Tools	Scope/Strategy determining the priority: The correct Workbook templates are produced via the install process in the Installation Guide
RPAS currently does not support the patch process if levels are deleted in the Tools on an existing domain.	RPAS/Tools/Retek Labs	High Priority: No workaround
RPAS Configuration Tools does not support the patch process if measures or rules are modified in Tools on an existing domain.	RPAS/Tools/Retek Labs	High Priority: No workaround
Within Profile Approval: If the user wants to make adjustments to the final profile, it is required that the Final worksheet be aggregated to the Aggregation Intersection and lock the cells before making adjustments at the lower level.	Retek Labs	Medium Priority: Usability issue.  An easy way to determine the Aggregation Intersection is to match the intersection on the Approval worksheet. For example in our LabsGA configuration, the profile intersection for The Aggregation Intersection (as shown on the Approval worksheet) is Item/Store
Profile Approval: Modify wizards to include hierarchy ranging	Retek Labs / Dynamic Template	Usability Issue: yet to be prioritized.
Profile Administration: Need to add a wizard to prevent the Default Curve Level from being visible in the workbook.	Retek Labs / Dynamic Template	Usability Issue: yet to be prioritized.
Pre-ranging of hierarchy dimensions in 2-tree wizards based on the intersection of a measure	Retek Labs / Dynamic Template	Usability Issue: yet to be prioritized.
Ability for a workbook to read in hierarchy positions based on the values of a measure.	Retek Labs / Dynamic Template	Usability Issue: yet to be prioritized.

Issue	Issue Owner	Status / Workaround
Ability for a wizard to have different paths or selections based on a Final or Source Level	Retek Labs / Dynamic Template	Usability Issue: yet to be prioritized.
Ability for a wizard to allow different additional measure selections based on whether or not the additional measure options have stored values.	Retek Labs / Dynamic Template	Usability Issue: yet to be prioritized.

## Known RDF Issues

Issue	Issue Owner	Status / Workaround
Current release does not support HP-UX	Tools	High Priority: To be addressed immediately in a patch
Optimized release build on HP	Retek Labs	Low Priority: To be addressed once a customer takes our HP release.
Current release is translatable but not fully internationalized.	RPAS/Tools/Retek Labs	High Priority: To be addressed in the future in a patch
Current release does not support patching a domain.	RPAS/Tools/Retek Labs	High Priority: To be addressed in the future in a patch
Current release is not fully supported by the Alert Manager	RPAS	Issue reported to RPAS
Periodicity incorrectly configured via Tools	Tools	High Priority: To be addressed immediately in a patch.
Forecast Approval: Bug identified with Adjusted Cumulative Interval	Retek Labs	High Priority: To be addressed immediately in a patch.
Forecast Approval: Bug identified with Approved flag and Approve Date measures	Retek Labs	High Priority: To be addressed immediately in a patch.
A change is required so that the rdf batch is looking for a domain-specific customization XML file	Retek Labs	High Priority: To be addressed immediately in a patch

Issue	Issue Owner	Status / Workaround
After the auto generation of an RDF configuration, the Forecast Solution will display exclamation icons next to the Measures, Rules, Workbooks and Wizard Designers.	Tools	Low Priority: Once you save and re-open the configuration, these icons will not appear.
After the auto generation of an RDF configuration, the Workbooks and Wizards Designers should be ignored since these do not contain the templates that will be produced in the domain.	Tools	Scope/Strategy determining the priority: The correct Workbook templates are produced via the install process in the Installation Guide
After the auto generation of an RDF configuration, the following rule groups will be flagged (shown in red) as invalid, but will be installed properly in the domain: FAP_calc_F01 FAP_calc_F06 FAP_load_It FEV_load_It FINT_load FINT_calc	Tools	Low Priority: Does not prevent functionality
RPAS currently does not support the patch process if levels are deleted in the Tools on an existing domain.	RPAS/Tools/Retek Labs	High Priority: No workaround
RPAS Configuration Tools does not support the patch process if measures or rules are modified in Tools on an existing domain.	RPAS/Tools/Retek Labs	High Priority: No workaround

Issue	Issue Owner	Status / Workaround
Forecast Administration: There is an issue in this release that prevents the Final Level Parameters worksheets from including only the Final Levels.	RPAS/Dynamic Template	Usability Issue: yet to be prioritized.  For each domain, it is recommended that the configurator open this worksheet, hide the source levels, and then save the template format. If this step is not done and changes are made to the source levels on these worksheets, those changes will not affect the forecast.
Default Source Level: This is no longer a pick list of source levels, but is the integer associated to the source levels.	Retek Labs	Low Priority: Usability Issue  The system defaults to the source level set in the Configuration Tools. To easily identify the number associated to the levels, we suggest that the level label set in the Configuration Tools include the level number.
Store Interim Forecast: The Forecast Approval and Forecast Scorecard Workbooks include a wizard that asks the user to select additional forecasting measures to include in the workbook. One of these measures is Interim Forecast. If the Interim Forecast is not stored and the user chooses to include this measure in the workbook, the workbook will not build.	Retek Labs	Usability Issue: yet to be prioritized
If the user modifies the Seasonal Profile, Spreading Profile or Data Plan, these parameters will need to change the Configuration Tools to reflect the new values. Otherwise the new values will be overwritten with the old values when patching occurs.	Tools	Tied to the Patching Issue

Issue	Issue Owner	Status / Workaround
<p>Forecast Approval: Wizard includes only one screen to select time periods for historical, horizon and future dates to include in the workbook. The issue with this wizard is that it is up to the user to include the correct time periods associated with the forecast horizon. The risk is the user may not include all time periods in the forecast horizon and a time series may not get approved or adjusted.</p>	<p>Retek Labs / Dynamic Template</p>	<p>Usability Issue: yet to be prioritized</p>
<p>Forecast Scorecard: An issue with the Forecast Scorecard wizard is the need for the user to range through the calendar two-tree hierarchy to select historical and horizon dates for the forecast. This puts the onus on the user to know and select the time periods in the forecast horizon. We hope to fix this issue prior to a customer taking this release.</p>	<p>Retek Labs / Dynamic Template</p>	<p>Usability Issue: yet to be prioritized</p>
<p>Interactive Forecasting: An issue with the Interactive Forecast wizard is the need for the user to range through the calendar two-tree hierarchy to select historical and horizon dates for the forecast. This puts the onus on the user to know and select the time periods in the forecast horizon. If the user does not include all time periods in the horizon, the forecast will be generated incorrectly. We hope to fix this issues prior to a customer taking this release.</p>	<p>Retek Labs / Dynamic Template</p>	<p>Usability Issue: yet to be prioritized</p>

Issue	Issue Owner	Status / Workaround
Interactive Forecasting: Change wizards such that wizard options are different based on whether the user selects to create the workbook with a Final or Source Level	Retek Labs / Dynamic Template	Usability Issue: Low priority
Interactive Forecast: If forecasting for as Source Level, provide ability for the system to use the Source Level's default parameters set in Forecast Administrating rather than the Final Level defaults	Retek Labs / Dynamic Template	Usability Issue: Low priority
Pre-ranging of hierarchy dimensions in 2-tree wizards based on the intersection of a measure	Retek Labs / Dynamic Template	Usability Issue: yet to be prioritized.
Ability for a workbook to read in hierarchy positions based on the values of a measure.	Retek Labs / Dynamic Template	Usability Issue: yet to be prioritized.
Ability for a wizard to have different paths or selections based on a Final or Source Level	Retek Labs / Dynamic Template	Usability Issue: yet to be prioritized.
Ability for a wizard to allow different additional measure selections based on whether or not the additional measure options have stored values.	Retek Labs / Dynamic Template	Usability Issue: yet to be prioritized.

## Known Promote Issues

Issue	Issue Owner	Status / Workaround
Current release does not support HP-UX	Tools	High Priority: To be addressed immediately in a patch
Optimized release build on HP	Retek Labs	Low Priority: To be addressed once a customer takes our HP release.
Current release is translatable but not fully internationalized.	RPAS/Tools/Retek Labs	High Priority: To be addressed in the future in a patch



Issue	Issue Owner	Status / Workaround
Current release does not support patching a domain.	RPAS/Tools/Retek Labs	High Priority: To be addressed in the future in a patch
Current release is not fully supported by the Alert Manager	RPAS	Issue reported to RPAS
After the auto generation of a Promote configuration, the Promote Solution will display exclamation icons next to the Measures, Rules, Workbooks and Wizard Designers. Once you save and re-open the configuration, these icons will not appear.	Tools	Low Priority: Once you save and re-open the configuration, these icons will not appear.
After the auto generation of a Promote configuration, the Workbooks and Wizards Designers should be ignored since these do not contain the templates that will be produced in the domain.	Tools	Scope/Strategy determining the priority: The correct Workbook templates are produced via the install process in the Installation Guide
Promotion Effectiveness: Promotion Variable Aggregation (Promotion): Needs to be hidden.	Retek Labs	To be resolved immediately via patch