

Retek[®] Demand Forecasting[™], Curve[™], Promote[™] 10.5.1.8

Release Notes



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- Screen shots of each step you take.

Release Details

Solutions:	Retek Demand Forecasting (RDF), Curve, Promote Note: 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:	Yes
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
Additional 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 Rule Functions Reference Guide
	RPAS 11.0.4 Solution Extension Configuration Guide

Patching History

1/16/2004

- RPAS and Configuration Tools v11.0.4 release to the Fulfillment Center
- RDF, Promote, Curve v10.5.1.1 released to the Fulfillment Center

1/17/2004 – 3/29/2004

- RPAS and Configuration Tools v11.0.4.1 through v11.0.4.3 release to ROCS
- RDF, Promote, Curve v10.5.1.2 through v10.5.1.4 released to ROCS, however these patch versions did not include the updated domain configurations required to complete a full install of RDF, Promote and Curve. Additional support is required from Retek Labs to complete the install of any of these versions.

3/30/2004

- RPAS and Configuration Tools v11.0.4.4 released to ROCS
- RDF, Promote, Curve v10.5.1.5 released to ROCS
 - This patch version includes all necessary components for a full install of RDF, Promote and Curve

5/12/2004

- RPAS and Configuration Tools v11.0.4.6 released to ROCS and Fulfillment Center as a Service Pack
- RDF, Promote, Curve v10.5.1.6 released to ROCS and Fulfillment Center as a Service Pack

7/6/2004

- RPAS and Configuration Tools v11.0.4.7 released to ROCS
- RDF, Promote, Curve v10.5.1.7 released to ROCS
 - Patch includes support for Forecast Approval Alerts, returns the behavior of the Forecast 'Approved' Boolean measure back to the design in RDF 9.5/10, and addresses domain patching issues.

7/30/2004

- RPAS and Configuration Tools v11.0.4.8 released to ROCS
- RDF, Promote, Curve v10.5.1.8 released to ROCS
 - Patch includes an update to the aggregation method for several forecast metrics viewed in the Forecast Scorecard Workbook.
 - Customers with existing configurations must open the configuration in the latest version of the RPAS Configuration Tools and autogenerate each of the RDF, Promote or Curve solution extensions that are implemented. Please see the following documentation for more details:
 - RPAS 11.0.4 Solution Extension Configuration Guide: Information on 'autogenerating' a solution extension.
 - RDF 10.5.1 Installation Guide: Information on patching configuration changes into an existing domain.
 - Patch includes a new prod.dat file as part of the LabsGA configuration. This modified file is a temporary solution to address Defect371292, an RPAS issue with the handling of parenthesis used in position labels.

RDF, Promote and Curve Versions and Corresponding RPAS Versions

RDF, Promote, Curve	RPAS and Tools
10.5.1.1	11.0.4
10.5.1.2	11.0.4.1
10.5.1.3	11.0.4.2
10.5.1.4	11.0.4.3
10.5.1.5	11.0.4.4
10.5.1.6	11.0.4.6
10.5.1.7	11.0.4.7
10.5.1.8	11.0.4.8

Known Issues

Known Curve Issues

Issue	Issue Owner	Status / Workaround
RPAS currently does not support the patch process if levels are deleted in the Tools on an existing domain.	RPAS/Tools/Retek Labs	Known Limitation: No workaround
RPAS Configuration Tools does not support the patch process if Solution Extension measures or rules are modified in Tools on an existing domain.	RPAS/Tools/Retek Labs	Known Limitation: 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	<p>Medium Priority: Usability issue.</p> <p>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</p>

Known RDF Issues

Issue	Issue Owner	Status / Workaround
<p>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:</p> <p>FAP_load_It</p> <p>FEV_load_It</p> <p>FINT_load</p> <p>FINT_calc_L01 (and any other levels in your configuration..L02, L03...)</p>	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	Known Limitation: No workaround
RPAS Configuration Tools does not support the patch process if Solution Extension measures or rules are modified in Tools on an existing domain.	RPAS/Tools/Retek Labs	Known Limitation: No workaround
<p>Forecast Administration:</p> <p>There is an issue in this release that prevents the Final Level Parameters worksheets from including only the Final Levels.</p>	RPAS/Dynamic Template	<p>Usability Issue: yet to be prioritized and very difficult for RPAS to resolve.</p> <p>For each domain, it is recommended that the configuration specialist 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.</p>

Issue	Issue Owner	Status / Workaround
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.
If the user modifies the Seasonal Profile, Spreading Profile or Data Plan in the FAD workbook, 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	No workaround

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 for configuration. However, once these dynamic profiles are configured in the RPAS Configuration Tools, 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 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 overridden 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 configuration specialist 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.

An enhancement has been requested of RPAS to populate this measure with a pick-list of all levels that are valid for a particular final level.

- 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.

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.

An enhancement has been requested of RPAS to have this measure populated with a pick-list that includes all final profiles

- 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 `sclsrn_`. 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

- Upper Confidence Limit and the Confidence Worksheet has been removed from the workbook.

Forecast Scorecard

- Same functionality as previous releases

Interactive Forecasting

New to this release, the forecast is automatically generated at the time of the workbook build using the Default Forecast Method set in the Forecast Administration Workbook

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.

Promotion Effectiveness

- Formerly known as the Promotion Analysis and Planning workbook
- Still purely a promotion simulation tool--no commit capabilities
- The workbook only applies to causal levels that are final

- Several new measures are used for analysis (See the RDF Users Guide for more details):
 - Approved Forecast.
 - Approved Promotional Peak
 - Promotion Future Baseline
 - Promotion Future Forecast
 - Promotion Historical Baseline
 - Promotion Historical Forecast
 - Promotion Type: Removed in favor of changing the Promotion Effect Override.
 - Promotion Approved Effect
 - Promotion Simulated Effect
 - Promotion System Calculated Effect