

**Retek<sup>®</sup> Demand Forecasting<sup>™</sup>  
Retek<sup>®</sup> Curve<sup>™</sup>  
Retek<sup>®</sup> Promote<sup>™</sup>  
11.1**

**Administration Guide**

**ORACLE<sup>®</sup>**





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- Detailed step-by-step instructions to recreate.
- Exact error message received.
- Screen shots of each step you take.

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# Chapter 1 – Installation and Patching Processes

## sciInstall

Located in the `$SCI_HOME/scripts` directory, the `sciInstall.ksh` script is used to install domains that support RDF, Curve, Promote or Grade. The `sciInstall.ksh` script:

1. Verifies the path to the 'globaldomainconfig.xml'
2. Runs the 'rpasinstall' executable with the `-fullinstall` option
3. Registers the following libraries:
  - a. AppFunctions: RDF Common Functions
  - b. ClusterEngine: Grade Functions
  - c. LostSaleFunctions: Preprocessing Functions
  - d. RdfFunctions: Predict and Promote Functions
4. Curve, RDF, Promote or Grade-specific install tasks, depending on the solutions implemented
5. Runs 'checkparents' on each loaded hierarchy
6. Runs 'sciPostInstall.ksh'
7. Outputs the installation log file to either:
  - The default location if the `-o` option is not used with `sciInstall`:  
`$SCI_DATA/configurations/domainPath/sciInstallLog.txt`
  - The user-specified path if the `-o` option is used with `sciInstall`
8. Creates the domain(s)

The installation process creates two directories under `domainPath`.

- **ProjectName:** The name of the project defined in the RPAS Configuration Tools. This will be the domain directory root. If installing a Global Domain environment (LabsGA3), you will see within the D01 directory each of the local domains (ldom0, ldom1 and ldom2). In this case D01 is the Master domain.
- **Installs:** Contains information on the configuration used to create the domain(s) and is necessary to support the domain patching process. Do not delete or move this directory.



**Note:** You may see an error similar to the following during the install:

**Error when reading domain properties:** `[[DatabaseOpenFailed: path to $SCI_HOME/scripts/data/admin]].`

This error should be ignored, but it will not be displayed in the `sciInstallLog.txt`. An open defect has been logged to RPAS to remove this error message.

### Usage

```
sciInstall.ksh -d DomainPath -c ConfigName [-j ProjectName] [-p  
ConfigPath] [-I InputPath] [-o the path and name of log file] [-g  
Global Domain DimName | -f Global Domain ConfigDirectory]
```

**Example 1:** Install a Simple domain environment using the LabsGA2 configuration

```
$SCI_HOME/scripts/sciInstall.ksh -d /Domains/LabsGA2 -c LabsGA2 -j  
D01
```

**Example 2:** Install a Global Domain environment using the LabsGA3 configuration and the `-g` option

```
$SCI_HOME/scripts/sciInstall.ksh -d /Domains/LabsGA3 -c LabsGA3 -j  
D01 -g pgrp
```

**Example 3:** Install a Global Domain environment using the LabsGA3 configuration and the `-f` option

```
$SCI_HOME/scripts/sciInstall.ksh -d /Domains/LabsGA2 -c LabsGA2 -j  
D01 -f /SCI_HOME
```



**Note:** The `globaldomainconfig.xml`, any custom xml, data or scripts not specified in this document should not be stored at or below the `$SCI_DATA/configurations/ProjectName` directory.



**Note:** If you are building a Global Domain environment, the `-g` and the `-f` options with `sciInstall` SHOULD NOT be used together.

## sciPostInstall

Custom post-domain creation steps can be automated by creating a shell script named `sciPostInstall.ksh` in the `$SCI_HOME/scripts` directory. The `sciInstall.ksh` script will call the `sciPostInstall.ksh` script before exiting. For the LabsGA2 and LabsGA3 configurations this script is pre-configured to do the following:

1. Load data files from the `$SCI_DATA/data` directory into the domain
  - If building a Global Domain environment, `sciPostInstall.ksh` is pre-configured to split the data files (.dat files) for the LabsGA3 configuration based on the partition positions.
2. Run a Rule Group in the domain(s)

**sciPostInstall must be edited or removed before installing any configurations other than LabsGA2 or LabsGA3.**



## sciPatch

Located in the `$SCI_HOME/scripts` directory, the `sciPatch.ksh` script is used to patch domains that support RDF, Promote, Curve or Grade. Invoke the domain patch script (`sciPatch.ksh`) using the following syntax:

### Usage

```
sciPatch.ksh -d DomainPath -c ConfigName [-j ProjectName] [-p
ConfigPath] [-i InputPath] [-o the path and name of log file] [-g
Global Domain DimName | -f Global Domain ConfigDirectory]
```

**Example 1:** Install a Simple domain environment using the LabsGA2 configuration

```
$SCI_HOME/scripts/sciPatch.ksh -d /Domains/LabsGA2 -c LabsGA2 -j D01
```

**Example 2:** Install a Global Domain environment using the LabsGA3 configuration and the `-g` option

```
$SCI_HOME/scripts/sciPatch.ksh -d /Domains/LabsGA3 -c LabsGA3 -j D01
-g pgrp
```

**Example 3:** Install a Global Domain environment using the LabsGA3 configuration and the `-f` option

```
$SCI_HOME/scripts/sciPatch.ksh -d /Domains/LabsGA2 -c LabsGA2 -j D01
-f /SCI_HOME
```



**Note:** The `globaldomainconfig.xml`, any custom xml, data or scripts not specified in this document should not be stored at or below the `$SCI_DATA/configurations/ProjectName` directory.

The `sciPatch.ksh` script:

1. Runs the 'rpasinstall' executable with the `-patchinstall` option
2. Registers the following libraries:
  - a. AppFunctions: RDF Common Functions
  - b. ClusterEngine: Grade Functions
  - c. LostSaleFunctions: Preprocessing Functions
  - d. RdfFunctions: Predict and Promote Functions
3. Curve, RDF, Promote or Grade-specific patching tasks depending on the solutions implemented
4. Runs 'checkparents' on each loaded hierarchy
5. Runs `sciPostPatch.ksh`

6. Outputs the log file to: `$SCI_DATA/configurations/domainPath/sciPatchLog.txt`



**Note:** You may see an error similar to the following during patching:

**Error when reading domain properties:** `[[DatabaseOpenFailed: path to $SCI_HOME/scripts/data/admin]].`

This error should be ignored, but will not be displayed in the `sciInstallLog.txt`. An open defect has been logged for the removal of this error message.

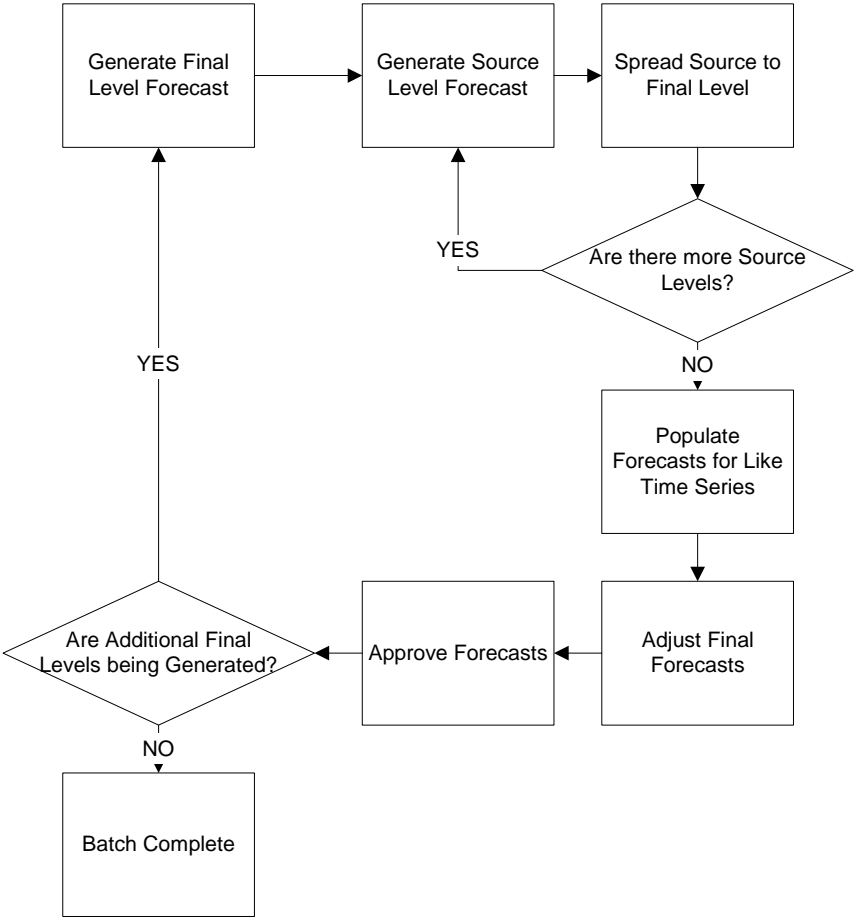
## sciPostPatch

Custom post-patch process can be automated by creating a shell script named `sciPostPatch.ksh` in the `$SCI_HOME/scripts` directory. The `sciPatch.ksh` script will call the `sciPostPatch.ksh` script before exiting. **sciPostPatch.ksh is delivered as part of the release package but is not pre-configured for any post-patching processes.**

# Chapter 2 – Batch Processes

## Overview

The following is a high-level overview of the batch forecast process:



## Batch processes

### PreGenerateForecast

Used in a Global Domain or Simple Domain environment, 'PreGenerateForecast' is an RDF executable that registers all token measures (measures with a birth date) prior to forecast generation using 'generate'. If a Global Domain environment is implemented, 'PreGenerateForecast' may be run against the Master or a Local domain. At either level the necessary measures to produce the batch forecast will be registered across all domains.

'PreGenerateForecast' requires an input file in the form of an XML. The XML is configured with the following values:

- **FinalLevel:** The Final Level Number that will be used to generate the forecast.
- **OutputFile:** The name of the resulting file located at the root of the domain after 'PreGenerateForecast' is run. The OutputFile includes the values set for FinalLevel and Override in addition to the birth date. This date is the Forecast Generation Date and is passed to the domains when 'generate' is run.

The date is produced in the following format: yyyyymmddHhhMmm (Example: 20050327H13M36). When this birth date is selected in the Forecast Approval wizard, it will be viewed as: (03/27/2005 13:36).

- **Override:** A true or false value. When 'generate' is passed a true value, the Next Run Date is ignored and the batch forecast uses today's date as the Next Run Date and the batch is executed. When 'generate' is passed a false value, the batch forecast will run if the Next Run Date is the same as today's date.



**Note:** When the 'Run Batch' template is used to generate the batch forecast, 'PreGenerateForecast' is run automatically. If a Global Domain environment is implemented, forecasts produced across Local domains using 'Run Batch' cannot be aggregated in the Master domain since they do not share the same Forecast Generation Date.

## Usage

PreGenerateForecast -InputFile filename

InputFile is required.

The input file should be an XML file that looks like this:

```
<Parameters>
  <Parameter>
    <Key>FinalLevel</Key>
    <Value>1</Value>
  </Parameter>
  <Parameter>
    <Key>OutputFile</Key>
    <Value>MyOutput.xml</Value>
  </Parameter>
  <Parameter>
    <Key>Override</Key>
    <Value>true</Value>
  </Parameter>
</Parameters>
```

FinalLevel and OutputFile are required parameters of the XML file.

Override is an optional parameter of the XML file (default is false).

Other parameters may be included in the input XML file. They will be passed through to the output XML file.

Return codes:

- 0 Success (either ran pregenerate or did not need to run)
- 1 Bad input
- 2 Failure

To set the logger verbosity level, use -loglevel with values of: all, profile, debug, information, warning, error, or none. To disable timestamp header use -noheader.

### **generate**

‘generate’ is an RDF executable used to produce the batch forecast. This executable requires as an input, the OutputFile resulting from ‘PreGenerateForecast’.

This binary runs RDF predict’s batch process. Generate can take two optional inputs: level and override. The generate usage is as follows:

```
generate (-level n | -override true)
```

The level input n must be a final level. When -level option is not used, generate runs through all final levels.

The override input must be true or false. The defaulted value is false if this option is given. When override is false, generate will only start the batch process if current time is later than the next run date in the domain. When the override is true, generate will start the batch forecast regardless of the next run date.

The generate binary invokes code in the BatchForecast library to execute the batch process.

## Usage

generate -InputFile filename

InputFile is required.

The input file should be an XML file that looks like this:

```
<Parameters>
  <Parameter>
    <Key>Birth</Key>
    <Value>20041027H11M52</Value>
  </Parameter>
  <Parameter>
    <Key>StartDate</Key>
    <Value>DAY20041027</Value>
  </Parameter>
  <Parameter>
    <Key>FinalLevel</Key>
    <Value>1</Value>
  </Parameter>
  <Parameter>
    <Key>Override</Key>
    <Value>true</Value>
  </Parameter>
</Parameters>
```

FinalLevel and Birth are required parameters of the XML file. Override (false) and StartDate (Default Forecast Start Date) are optional parameters of the XML file. (defaults in parentheses).

Return codes:

0 Success (either ran generate or did not need to run)

1 Bad input

2 Failure

To set the logger verbosity level, use -loglevel with values of: all, profile, debug, information, warning, error, or none. To disable timestamp header use -noheader.

## RDFvalidate

### Usage

`rdfvalidate -d pathToDomain`

To get this usage text, use `-?`, `-help` or `-usage`. To get the version of this utility, use `-version`. To set the logger verbosity level, use `-loglevel` with values of: `all`, `profile`, `debug`, `information`, `warning`, `error`, or `none`. To disable timestamp header use `-noheader`.

### RDF Validation

1. Hierarchies and Dimensions:
  - a. Verify “day” dimension exists on calendar hierarchy.
  - b. If there is a partition dimension, it must be along the product hierarchy.
  - c. check whether or not "FMTR", "FLVL", and "FBRT" exist in Data Hierarchy, if not create them.
2. For final levels:
  - a. Intersection (`rdf::RDFSysConstants::INTERSECTION` or `fintxlxb`)
    - Cannot be blank
    - Must be at or below all source level intersections.
    - Must be at or below the partition dimension on the partition branch.
  - b. Seasonal profile (`rdf::RDFSysConstants::SEASONAL_PROFILE` or `seasprofxlxb`)

Can be either:

    - Blank
    - Measure name (only one)
      - Must be valid measure
      - Should be of type real
      - Measure intersection must be equal to the level intersection
  - c. Source data (`rdf::RDFSysConstants::DATA_SOURCE` or `datasrcxlxb`)

Must be a measure name (only one)”

    - Must be a valid measure
    - Should be of type real
    - Measure intersection must be at or below the final level intersection



## d. Plan data (rdf::RDFSysConstants::PLAN or fplanlxb)

Must be either:

- Blank
- Measure name (only one)
  - Must be valid measure
  - Should be of type real
  - Measure intersection must be equal to the final level intersection

## 3. For source levels:

## a. Intersection (rdf::RDFSysConstants::INTERSECTION or fintlxb)

- Cannot be blank
- Must be at or above final level intersection.
- Must contain a dimension from the partition hierarchy.
- Must be either:
  - At or below the partition dimension on the partition branch.
  - On a branch of the partition hierarchy.

If on a branch of the partition hierarchy, also check if domains are “cleanly” partitioned (executable only). This means for the branched dimension on the partition hierarchy, each position for that dimension can exist in only one sub-domain.

## b. Seasonal profile (rdf::RDFSysConstants::SEASONAL\_PROFILE or seasproflxb)

Can be either:

- Blank
- Measure name (only one)
  - Must be valid measure
  - Should be of type real
  - Measure intersection must be equal to the level intersection

- c. Spreading profiles (rdf::RDFSysConstants::SPREADING\_PROFILE or sprdprof1xb)
  - Can only be blank if source level intersection equals final level intersection
  - Must be comma-separated list of curve levels and measure names (can be mixed)
    - If curve level, must be a valid curve level (final profile)
    - If measure:
      - i. Must be a valid measure
      - ii. Should be of type real
      - iii. Measure intersection must be at or above final level.

### Plug-in Only

1. Should call “manageFNHBI –validate” at install time.
2. Should call the RDF validation at install time.

### Executable Only

1. Make sure there is only one partition dimension per sub-domain. (Basic assumption of our code.)
2. Final and source levels:
  - a. Causal Aggregation Profile (rdf::RDFSysConstants::AGG or agg1xb)

Values should be either:

    - Blank
    - Measure name (one only)
      - Should be a valid measure
      - Should be of type real
      - The intersection of the measure must be at or above final level.
  - b. Causal Calculation Intersection (rdf::RDFSysConstants::CALC\_INT or calcint1xb)

Values should be either:

    - Blank
    - Intersection
      - Must be valid intersection
      - Must contain the calendar dimension
      - Must be at or above level intersection.

## c. Causal Data Source (rdf::RDFSConstants::CALC\_DATA\_SOURCE or calcdtsrclxb)

Values should be either:

- Blank
- Measure name (one only)
  - Should be a valid measure
  - Should be of type real
  - The intersection of the measure must be at or above level intersection.

## d. Causal Higher Intersection (rdf::RDFSConstants::CAUSAL\_HIGHER\_INT or cslhint)

Values should be either:

- Blank
- Intersection
  - Must be valid intersection
  - Must not contain the calendar dimension
  - Must contain a dimension from the partition hierarchy.
  - Must be at or above level intersection.
  - Must be either:
    - At or below the partition dimension on the partition branch.
    - On a branch of the partition hierarchy.
    - If on a branch of the partition hierarchy, also check if domains are “cleanly” partitioned (executable only). This means for the branched dimension on the partition hierarchy, each position for that dimension can exist in only one sub-domain.

## e. Causal Spread Profile (rdf::RDFSConstants::SPREAD or spreadclxb)

Values should be either:

- Blank
- Measure name (one only)
  - Should be a valid measure
  - Should be of type real
  - The intersection of the measure must be at or above final level.

- f. Deseasonalized Demand Array  
(rdf::RDFSysConstants::DESEASONALIZED\_DEMAND or ddemandxlb)

Values should be either:

- Blank
- Measure name (one only)
  - Should be a valid measure
  - Should be of type real
  - The intersection of the measure must be the level intersection less the calendar dimension

3. Final Levels only

- a. Default History Start Date (rdf::RDFSysConstants::DEF\_HISTORICAL\_START\_DATE or defhstdt)

Values should be either:

- Blank
- A date within the calendar.

- b. Forecast Start Date (rdf::RDFSysConstants::DEF\_FORECAST\_START\_DATE or dfxlb)

Values should be either:

- Blank
- A date within the calendar.

## Promote Validation

### Plug-in and Executable

1. Hierarchies and Dimensions:
  - Check whether or not "PTYP", "FLVL", and "PROM" exist in Data Hierarchy, if not create them.
2. Promotion Names:
  - Check if promotion names have 1-4 characters
3. Causal levels must be:
  - At or below the partition dimension on the partition branch.

### Plug-in Only

None

### Executable Only

None

## Curvevalidate

### Usage

curvevalidate -d domainpath [-s]

-s : set defaults

-d domain : set path to domain

To set the logger verbosity level, use -loglevel with values of: all, profile, debug, information, warning, error, or none. To disable timestamp header use -noheader.

1. Each Profile must have at least one Source Level
2. For each Profile:
  - a. For global domains, ALL intersections {Data Intersection, Profile Intersection, Stored Intersection, Aggregation Intersection, Approval Intersection} must be below the partition (NOT HBI)
  - b. Data Intersection (if a data source is specified) must conform with X in {Profile Intersection, Stored Intersection, Aggregation Intersection, Approval Intersection}
  - c. Profile Intersection must conform with the Stored Intersection
  - d. Aggregation Intersection must conform with the Approval Intersection
  - e. Aggregation Intersection must not be below the Approval Intersection
  - f. Aggregation Intersection must be above the Data Intersection (if data source specified)

- g. If the Aggregation Intersection conforms with Profile Intersection:
  - Profile Type must NOT be diff(8)
  - Aggregation Intersection must be above the Profile Intersection
  - Aggregation Intersection must be above Stored Intersection
- h. If Aggregation Intersection does not conform with Profile Intersection
  - Profile Type must be Diff (8)
  - There must be at least one common hierarchy between Aggregation Intersection and X in {Profile Intersection, Stored Intersection}
  - For each common non-PROD hierarchy H of Aggregation Intersection and X in {Profile Intersection, Stored Intersection}
    - Aggregation Intersection's H dimension must not be below X's H dimension.
- 3. For each Source Level:
  - a. For global domains, ALL intersections {Profile Intersection, Stored Intersection, Aggregation Intersection} must be below the partition (NOT HBI)
  - b. Parent Profile's Data Intersection (if data source specified) must conform with X in {Profile Intersection, Stored Intersection, Aggregation Intersection}
  - c. Profile Intersection must conform with Stored Intersection
  - d. Aggregation Intersection must be above parent Profile's Data Intersection (if data source specified)
  - e. If Aggregation Intersection conforms with Profile Intersection:
    - Profile Type must NOT be diff(8)
    - Aggregation Intersection must be above Profile Intersection
    - Aggregation Intersection must be above Stored Intersection
  - f. If Aggregation Intersection does not conform with Profile Intersection:
    - Parent Profile Type must be Diff (8)
    - There must be at least one common hierarchy between Aggregation Intersection and X in {Profile Intersection, Stored Intersection}
    - For each common non-PROD hierarchy H of Aggregation Intersection and X in {Profile Intersection, Stored Intersection}
      - Aggregation Intersection's H dimension must not be below X's H dimension.

## ManageFNHBI

After ensuring that the FNHBI measure is cleanly partitioned, ManageFNHBI copies corresponding cells (based on the partition) from each sub-domain to the master domain

### Usage

`managefnhbi -d pathToDomain [-ignoreModDim] [-update]`

To get this usage text, use `?`, `-help` or `-usage`. To get the version of this utility, use `-version`. To set the logger verbosity level, use `-loglevel` with values of: `all`, `profile`, `debug`, `information`, `warning`, `error`, or `none`. To disable timestamp header use `-noheader`.

## curvebatch

### Usage

`curvebatch -d domainpath [-level # ] [-debug] | -h | -version`

`-level` must be followed by a valid Profile ID

`-debug` causes temporary measures to be retained for debugging purposes

`-h` prints this usage message

`-version` prints version information

To set the logger verbosity level, use `-loglevel` with values of: `all`, `profile`, `debug`, `information`, `warning`, `error`, or `none`.





# Chapter 3 – AutoSource

## AutoSource

This binary runs RDF autosource's batch process. AutoSource can take four optional inputs: mode, finallevels, today and timelimit. The AutoSource usage is as follows:

```
autosource -mode RESTART/CYCLE/ONCEONCE -flvllist n,m -today todayStr -timelimit x
```

The mode input must be one of RESTART, CYCLE, or ONCEONLY

The flvllist must be comma separated list of final levels

The today input must be the same format as dim\_day.

The timelimit is in minutes

To run ONCEONLY mode, RESTART MODE has to be run first.

Example:

```
Autosource -mode RESTART -flvllist 1,6 -today DAY20050101 -timelimit 10
```

```
Autosource -mode ONCEONLY -flvllist 1,6 -today DAY20050101 -timelimit 10
```

The AutoSource binary invokes code in the BatchForecast library to execute the batch process. It is a reentrant program.

Usage: autosource -d pathToDomain -mode RESTART/ONCEONLY/CYCLE -flvllist lvlx,lvly [-today] todayString(the same format as in dim\_day) [-timelimit] minutes [-preserveTemp]

To get this usage text, use -?, -help or -usage

To get the version of this utility, use -version

To set the logger verbosity level, use -loglevel with values of: all, profile, debug, information, warning, error, or none

To disable timestamp header use -noheader.



# Chapter 4 – Forecast Approval Alerts

## Alerts

Alerts are one of the only configurable functions that are not configured through the Config Tools but must be registered on the backend of the domain. To say the least, the alert expressions require a good familiarity with the RPAS rule functions (rpas-1104-rfrg.pdf). The enhancement necessary to populate the Default Approval Method and Approval Method Override pick lists with the Forecast\_Approval alerts was added to the RDF 10.5.1.7 release. Below is an example Forecast Approval Alert configuration using the mock install provided in the release package (LabsGA2):

Step 0: Use the LabsGA configuration to install the domain.

Step 1: If the batch has NOT been ran already in the domain, token measure(s) need to be registered if they are to be used in the alert expression. Since you do not know the specific birth date at config time, token measures allow for measures with birth dates (a time stamp applied during the batch) to be evaluated. The token measure we are using in this example is System Forecast for level 1 (sf01). The following is necessary to register this token measure:

```
C:\Domains\LabsGA\D01>regTokenMeasure -d . -add sf01=<any registered measure>
```

Example:

```
C:\Domains\LabsGA\D01>regTokenMeasure -d . -add sf01=psal
```

'psal' will be overwritten once the batch is generated. DO NOT do this step if the batch has already been generated since the batch will have automatically registered sf01.

Step 2: Register the alert measure

```
C:\Domains\LabsGA\D01>regmeasure -d . -add "rdf_a1" -label "RDF Alert 1" -baseint  
"itemstr_" -db "data/test" -type boolean -navalue False
```

Step 3: Register the expression for the Forecast Approval Alert

```
C:\Domains\LabsGA\D01>alertmgr -d . -register "rdf_a1" -category  
"FORECAST_APPROVAL" -categoryLabel "RDF Alert 1" -expression "rdf_a1=abs (1-  
tssum(@sf01,index([clnd].[week],lookup(dfxlxb,[data].[flvl].[flvl01])),  
index([clnd].[week],lookup(dfxlxb,[data].[flvl].[flvl01]))+3)/(tssum(pos,  
index([clnd].[week],lookup(dfxlxb,[data].[flvl].[flvl01]))-  
52,index([clnd].[week],lookup(dfxlxb,[data].[flvl].[flvl01]))-52+3) +0.001)) > 0.5"
```

Simply put, this expression compares the sum of the first 4 weeks of the forecast horizon to the same 4 weeks in LY historical sales. If the values are within a 50% range, then the full forecast horizon is set to automatic approval, otherwise the Alert is triggered. This is all done in batch, therefore the Alert Manager is NOT necessary to apply the alert. For intersections that do not qualify for automatic approval, the Approval Comment on the Approval Worksheet in the FAP workbook will contain 'refused by alert'. However you may use the Alert Manager to display the alert flags for these intersections.



# Chapter 5 – Exporting Data

## Exporting Data

The RPAS exportData utility is a generic utility use to support the export of data based on a specified format indicated in the call to the utility. More information on exportData can be found in the RPAS ? Guide. The following is an example of how this script may be configured:

```
exportData -d . -out exportOut -array "data/appf|appf01xb%1 %12.4f 0  
%12.4f" -dim "WEEK data/hmaint|week2date %-8s 1" -dim "ITEM 4 %-  
20.20s 2" -dim "STR 4 %-20.20s 3"
```

Prior to using the exportData utility, if the final forecast level is at an aggregate dimension above 'day' an additional step will be needed to convert the date format of the data to the 'day' date format needed by external execution systems.