

**Oracle® Retail Demand Forecasting, Curve, and
Promote**

Release Notes
Release 11.1.13

October 2006

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Preface

A Release Notes document can include some or all of the following sections, depending upon the release:

- Overview of the release
- Functional, technical, integration, and/or performance enhancements
- Assumptions
- Fixed and/or known issues/defects

Because of their brevity, Release Notes do not include chapters, appendices, or a table of contents.

Audience

Release Notes are a critical communication link between Oracle Retail and its retailer clients. There are four audiences in general for whom a Release Notes document is written:

- Retail clients who wish to understand the contents of this release.
- Integrators and implementation staff who have the overall responsibility for implementing Oracle Retail Merchandising System (RMS) into their enterprise.
- Business analysts who are looking for high-level functional information about this release.
- System analysts and system operation personnel who are looking for high-level functional and technical content related to this release.

Customer Support

- <https://metalink.oracle.com>

When contacting Customer Support, please provide:

- Product version and program/module name.
- Functional and technical description of the problem (include business impact).
- Detailed step-by-step instructions to recreate.
- Exact error message received.
- Screen shots of each step you take.

Release Notes

Overview

The following table provides information about the current release.

Release Information	Details regarding this Release
Solutions:	Oracle Retail Demand Forecasting (RDF), Curve, and Promote Note: The package may not include all solutions depending upon the licensing agreement.
Version Number:	11.1.13
Code Cut Off Date:	October 6, 2006
Release Date:	October 13, 2006
Type of Release:	Patch
Base:	Yes
Patch:	Yes
RPAS Client Version	ARPOplatform 5
RPAS Server Version	RPAS 11.1
Acumate Version	Acumate 25
Supported OS	Windows NT, Sun Solaris 5.8, AIX 5.2, HP 11.11
Next Patch Version Supported OS, RPAS Server (11.1.14)	Sun Solaris 9, AIX 5.3, HP-UX 11.23 (PA-RISC)
Additional Documentation:	Oracle Retail Demand Forecasting, Curve, Promote 11.1.8 Installation Guide Oracle Retail Demand Forecasting, 11.1.13 User Guide RDF 11.1.8 Administrator's Guide RPAS 11.1 Administrator's Guide RPAS 11.1 Installation Guide RPAS 11.1 User Guide RPAS 11.1 Configuration Guide RPAS 11.1 Rule Functions Reference Guide

RPAS OS Certification Strategy

Oracle Retail Product Strategy has provided clear direction on Operating System certifications in order to better support our customer's OS upgrade plans. For the next patch of RPAS 11.1 (11.1.14), the following OS certifications will be completed:

- **Sun Solaris 9**
- **AIX 5.3**
- **HP-UX 11.23 (PA-RISC)**

Previous versions of the above Operating Systems will no longer be certified, however the release may be backwardly compatible. Backward compatibility verification is not included in Oracle's OS certification methodology. The RPAS Server will no longer be certified or packaged for Windows NT, however OS support will continue for the RPAS Client and RPAS Configuration Tools on Windows NT, XP and 2000.

The 11.1.4 patch will be completed during calendar Q1 2007. The exact date has yet to be determined by Oracle Retail Customer Support, but will be communicated to the RPAS 11.1 customers as soon as it is scheduled. For any questions or concerns about Oracle Retail's OS certification strategy please contact or Oracle Retail Customer Support Representative.

Compatible 11.1.x Versions of RDF/Promote/Curve and RPAS

The following is a summary of the ARPO Platform version that may be used with each release of RDF, Promote, or Curve:

Release Date	RDF, Promote, Curve	ARPO Platform
April 15, 2005	11.1.6	11.1.6
May 18, 2005	11.1.7	11.1.7
August 8, 2005	11.1.8	11.1.8
September 13, 2005	11.1.9	11.1.9
September 19, 2005	11.1.9.1	11.1.9
October 11, 2005	11.1.9.2	11.1.9
November 14, 2005	11.1.9.3	11.1.9
November 29, 2005	11.1.10	11.1.10
January 13, 2006	11.1.10.2	11.1.10.2
February 24, 2006	11.1.11	11.1.11
June 23, 2006	11.1.12	11.1.12
September 29, 2006	11.1.12.1	11.1.12
October 13, 2006	11.1.13	11.1.13

Current Patch Detail — RDF Patch 11.1.13

10/13/2006

This release addresses the following:

- RDF, Promote, Curve v11.1.13 on RPAS 11.1.13 released
- Addressed an issue in the RMS-RDF Interface calendar transform scripts (rdft_calhier.ksh) that caused the script to fail (BugDB# 5396697).
when executed using a scheduler that runs out of process resources. The problem may now be addressed by using the “-f” parameter when executing the script.
- Corrected an issue that caused the users to see duplicates of the following RDF and Grade measures in the measure-selection wizard for Measure Analysis (BugDB# 5021450).:
 - Interim Forecast (all Final levels)
 - Cluster by Group Intersection
 - Cluster Method
 - Cluster Run Name
 - Dimension to Cluster
 - Dimension to Cluster Over
 - Measure to Cluster
 - Number of Clusters

Patching History

09/29/2006

This patch provides three new Winters seasonal forecasting approaches. Retailers can choose either the current Winters forecasting approach or select from new approaches available in this patch. In general, the new forecasting approaches provide more flexibility to interpret seasonality and respond faster to recent sales levels (BugDB#: 5564343).

The Winters forecasting approaches, including the current seasonal approach are:

- Oracle Winters (current approach)
- Winters Decomposition
- Winters Standard
- Winters Responsive

Note: The current Winters approach has been named
“Oracle Winters.”

The “Winters Mode” can be set at each forecast level from the “Advanced Settings” tab of the “Forecast Administration” workbook. When any forecast method calls multiplicative or additive Winters, the system will execute the Winters forecasting approach indicated by the Winters Mode.

The selected approach will affect the following forecasting methods:

- AutoES
- Seasonal ES
- Winters Multiplicative
- Winters Additive
- Causal (Causal forecasting call Seasonal ES)

All three of the new approaches improve the responsiveness of the seasonal forecast. Also, the new forecasts provide greater flexibility to interpret seasonality so that forecasts will not as closely reflect last year’s sales. Winters Decomposition and Responsive Winters will, in general, have a closer fit to more recent sales than the other methods.

For more details on the Winters Seasonal Forecasting approaches, please refer to Chapters 3 and 8 in the Oracle Retail Demand Forecasting User Guide.

Note: If patching this change into a domain, in order to view this measure in the Forecast Administration workbook, it must be added to the ‘Final and Source Level Parameters’ worksheet by selecting it from the ‘Show/Hide’ dialog within the RPAS client.

6/23/2006

This release addresses the following:

- RDF, Promote, Curve v11.1.12 on RPAS 11.1.12 released to ROCS.
- Fixed problem with opening Forecast Approval workbook from Global Domain (BugDB#: 5082053/5253320).
- Fixed issue when running multiple forecasts one after the other from the client with different Final levels, which caused the Client to loose connection in some situations (BugDB# 5239591).
- Fixed an issue with Approved Forecasts getting cleared when new Forecast batch is run with a different Forecast Start date and Approval is set to Manual (BugDB# 5202234).
- Fixed issue with History Data Measure in the Forecast Scorecard not aggregating values across time series (BugDB# 5206035).
- Curve functionality has been updated to default to calendar start or end dates if the Start or End dates in the Training window are outside the Calendar range (Bug DB# 5068521).
- Changed Default Aggregation Method for following measures from Average to Total: Actual - System Forecast, Actual - Interim Forecast, Actual - Approved System Forecast, Actual - Approved Forecast, Actual - Adjusted Forecast (BugDB# 5238530).

Integration Scripts

- Due to an HPUNIX restriction on the use of “-e”, this hardcoded parameter in the rdft_calhier.ksh was modified to use “-f”. The issue caused the rmse_calhier.dat extract to not be found when the transformation script is executed. This has been fixed (BugDB#: 5108289).
- RDFT_weekly_sales.ksh script has been updated to split weekly issues into multiple files by domain. (BugDB#: 5097404).

2/24/2006

This release addresses the following:

- RDF, Promote, Curve v11.1.11 on RPAS 11.1.11 released to ROCS.
- Changed the insertable attribute for “Interim Forecast” to false (**BugDB#: 5021450**).

1/13/2006

This release addresses the following:

- RDF, Promote, Curve v11.1.10.2 on RPAS 11.1.10.2 released to ROCS
- Added an error message to 'PreGenerateForecast.ksh' if it is passed an invalid path to the outfile. The error message states: "Output path <invalid path> does not exist" "PreGenerateForecast failed." (**BugDB#: 4874690**)
- Corrected an issue in the RDF plug-in that prevented the Forecast Approval workbook from building in a simple domain environment. (**BugDB#: 4858111**)

Addressed several contention issues in the Global Domain environment during the execution of 'PreGenerateForecast' when the 'Run Batch' wizard is used to produce the forecast (**BugDB#: 4856125**).

These issues include:

- All forecast batch runs fail in a Global Domain environment when the batch is executed simultaneously in multiple domains
- Workbooks builds fail while the online batch is executed in the domain
- Unable to login to any domain in the global domain environment while the online batch is executing

This fix relies on two environment variable settings:

1. **RPAS_PROCESSES:** to support parallel measure registration across multiple domains simultaneously. See the RPAS 11.1.10.2 Release Notes for more information on setting this variable.
 2. **RPAS_LOCK_TIMEOUT:** to cover the time required for the 'PreGenerateForecast' to complete. There is no recommended time setting for this variable as the timing of this process varies significantly based on environment. If the online batch is executed in multiple local domains while 'PreGenerateForecast' is running, the 'RPAS_LOCK_TIMEOUT' variable allows one domain to successfully complete. Once complete, the process begins in the other domain. **See the RPAS 11.1.10.2 Release Notes for more information of the RPAS_LOCK_TIMEOUT variable.**
- Added functionality to address the deletion of forecast measures with birthdates under the following conditions when using 'PreGenerateForecast.ksh' (**Enhancement**):
 - Condition 1: If the 'PreGenerateForecast.ksh' process unexpectedly fails with no error message prior to measure registration completing in the Master domain, the forecast birthdate measures will not be registered.
 - Condition 2: If the 'PreGenerateForecast.ksh' process unexpectedly fails with no error message after measure registration occurs in the Master domain, the birthdate must be deleted from the Master domain (not the local domains) using the 'Forecast Delete' wizard. No subsequent 'Generate' processes can run successfully until the invalid birthdate is removed from the system.
 - Condition 3: If the 'PreGenerateForecast.ksh' process throws an error message at any point in the measure registration process, the birthdate measures will be automatically unregistered from the domain(s).

11/29/2006

This release addresses the following:

- RDF, Promote, Curve v11.1.10 on RPAS 11.1.10 released to ROCS.
- Corrected an issue in Preprocessing that caused invalid adjustments on out of stock days. The algorithm was changed such that when there is no data for a particular time period, the adjustment will be made based on previous time period's sales (DEFECT000397905).
- 'Seasonal Index Smoothing' parameter was added to the 'Advanced' tab / 'Final and Source Level Parameters' worksheet in the Forecast Administration workbook. This parameter is used in the calculation of seasonal index. The current default value used within forecasting is .80. Changes to this parameter will impact the value of seasonal index directly and impact the level indirectly. When seasonal smooth index is set to 1, seasonal index will be closer to the seasonal index of last year sales only. When seasonal smooth index is set to 0, seasonal index will be closer to the mean of all seasonal indexes from history.

Note: If patching this change into a domain, in order to view this measure in the Forecast Administration workbook, it must be added to the 'Final and Source Level Parameters' worksheet by selecting it from the 'Show/Hide' dialog within the RPAS client.

- 'Causal Short Seasonal Threshold' parameter was added to the 'Advanced' tab / 'Causal Parameters' worksheet in the Forecast Administration workbook. Used only in Causal forecasting, this parameter is the minimum number of historical time periods that are required for SeasonalES to be used to produce the Causal forecast. Otherwise, the baseline from Causal regression will be used. The algorithm currently uses 52 weeks of history as the default for this parameter.

Note: If patching this change into a domain, in order to view this measure in the Forecast Administration workbook, it must be added to the 'Causal Parameters' worksheet by selecting it from the 'Show/Hide' dialog within the RPAS client.

- The Aggregation Method was changed from 'avg' to 'avg_pop' for the following measures used for forecast evaluation within the Forecast Scorecard workbook:
 - Forecast Mean Absolute Error (adjfmae)
 - Adjusted Forecast Mean Absolute Percentage Error (adjfmape)
 - Adjusted Forecast Mean Error (adjfme)
 - Adjusted Forecast Percentage Absolute Error (adjfpae)
 - Adjusted Forecast Root Mean Squared Error (adjfrmse)
 - Approved Forecast Mean Absolute Error (appfmae)
 - Approved Forecast Mean Absolute Percentage Error (appfmape)
 - Approved Forecast Mean Error (appfme)
 - Approved Forecast Percentage Absolute Error (appfpae)
 - Approved Forecast Root Mean Squared Error (appfrmse)
 - Approved System Forecast Mean Absolute Error (appsfmae)

- Approved System Forecast Mean Absolute Percentage Error (appsfmape)
- Approved System Forecast Mean Error (appsfme)
- Approved System Forecast Percentage Absolute Error (appsfpae)
- Approved System Forecast Root Mean Squared Error (appsfrmse)
- Interim Forecast Mean Absolute Error (intfmae)
- Interim Forecast Mean Absolute Percentage Error (intfmape)
- Interim Forecast Mean Error (intfme)
- Interim Forecast Percentage Absolute Error (intfpae)
- Interim Forecast Root Mean Squared Error (intfrmse)
- System Forecast Mean Absolute Error (sysfmae)
- System Forecast Mean Absolute Percentage Error (sysfmape)
- System Forecast Mean Error (sysfme)
- System Forecast Percentage Absolute Error (sysfpae)
- System Forecast Root Mean Squared Error (sysfrmse)
- Corrected an issue in the Forecast Approval workbook that prevented changes to the 'Adjusted Forecast' from being committed in the master domain (DEFECT000397437).
- Corrected an issue that prevented the 'Adjustment Ratio' or the 'Substitution Method' in the Forecast Like-Item, Sister-Store workbook from refreshing (DEFECT000397457).
- Corrected an issue that prevented all default measures in the Forecast Maintenance workbook from refreshing (DEFECT000397458).
- Corrected an issue in the Forecast Administration workbook that prevented the workbook from opening if Causal was not implemented in the domain (DEFECT000398175).
- Corrected a contention issue that prevented the use of Autoworkbook functionality to build the Forecast Approval workbook when multiple workbooks are being built in parallel across domains (DEFECT000397590).

Open Defects

The following open defects exist:

- The FLVLDEFAULT position is being added to the 'Final and Source Level Parameters' worksheets in the Forecast Administration workbook. The same issue is causing the CLVLDEFAULT position to be added to the 'Final and Source Level Intersection' worksheet in the Profile Administration workbook. These positions do not have any negative impact to workbook functionality. A future 11.1.X patch of RPAS will correct this issue (DEFECT000398434).
- In the Forecast Approval workbook, the 'Valid Forecast Run' worksheet should display only the final level selected for the workbook. This worksheet is currently displaying all levels configured in the system. However, this defect does not negatively impact any functionality in the Forecast Approval workbook. A future patch of 11.1 will correct this issue (DEFECT000398574).
- In a Global Domain environment, if using the 'Run Batch' wizard to generate a forecast, the batch will fail if the batch is executed while 'PreGenerateForecast' is running in another domain (DEFECT000396978).

11/14/2005

This release addresses the following:

- RDF, Promote, Curve v11.1.9.3 hotfix on RPAS 11.1.9 released to ROCS. You must have 11.1.9.2 installed prior to installing this patch.
- Corrected an issue in 'Environment' library that prevented the purge of forecasts based on the 'Days to Keep Forecasts' parameter set in the Forecast Administration workbook (**DEFECT000398333**).

10/11/2005

This release addresses the following:

- Select RDF libraries have been released as 11.1.9.2 due to the following bug fixes. You must have 11.1.9.1 installed prior to installing this patch.
- Adjusted Forecast values in the Forecast Approval workbook were not committing properly, so users could not make updates to the forecast. (**DEFECT000397437**).
- Global Forecast Approval workbook was failing in the wizard process with a TMPFLVLDAT1 error message. (**DEFECT000397582**).

09/13/2005

This release addresses the following:

- RDF, Promote, Curve v11.1.9 on RPAS 11.1.9 released to ROCS.
- Corrected an issue in the Forecast Approval workbook when viewed in the master domain. The Forecast Horizon selected by the user would include seven additional calendar positions in the workbook (**DEFECT000396712**).

08/8/2005

This release addresses the following:

- RDF, Promote, Curve v11.1.8 on RPAS 11.1.8 released to ROCS.
- The following documentation has been updated:
 - rdf-1118-ug: RDF 11.1.8 Users Guide
 - rdf-1118-ag: RDF 11.1.8 Administrator Guide
 - rdf-1118-ig: RDF 11.1.8 Installation Guide
 - rpas-1118-secg: RPAS 11.1.8 Solution Extension Configuration Guide
- Several changes were made to the Forecast Administration workbook requiring one of the two processes defined below to be followed. “Option A” allows for the workbook to be updated with the latest changes within the RPAS Configuration Tools.

Note: This process deletes any custom rules added to the RDF solution and removes custom measures added to the workbook templates. If you want to preserve custom rule and workbook changes already implemented in the RDF solution configuration, follow “Option B.”

Option A:

1. Open the configuration in the 11.1.8 Configuration Tools.
2. Autogenerate the Curve solution.
3. Right-click on the RDF solution, and select ‘Delete.’
4. Click on the Project Name so it is highlighted.
5. From the ‘Automation’ menu, select ‘RDF,’ and then select ‘Specify Parameters.’
6. Your last RDF level configuration is visible in the ‘Forecast Manager’ utility. Select **OK** to autogenerate the configuration.
7. Autogenerate the Promote solution.
8. Continue with the standard domain patching process.

Option B:

1. Follow the standard domain patching process.
2. For each domain (Master and Local domains), take the following actions:
 - a. Open the Forecast Administration workbook.
 - b. On the Basic Settings tab / Final Level Parameters worksheet, hide the 'Store Interim Forecast' parameter.
 - c. On the Basic Settings tab / Final and Source Level Parameters worksheet, hide the 'Forecast Length' parameter.
 - d. On the Advanced Settings tab / Final and Source Level Parameters worksheet, hide the following parameters:
 - Causal Aggregation Profile
 - Causal Calculation Intersection
 - Causal Calculation Intersection Periodicity
 - Causal Data Source
 - Causal Higher Intersection
 - Causal Spread Profile
 - Disable Causal
 - e. Save the format of the template.
- The following summarizes the changes made to the Forecast Administration workbook:
 1. Changes made to the Basic Settings tab / Final Level Parameters worksheet:
 - a. Moved 'Store Interim Forecast' to the Advanced Settings tab / Final Level Parameters worksheet.
 - b. Moved 'Default Keep Last Changes' to the Advanced Settings tab / Final Level Parameters worksheet.
 - c. Added 'Forecast Length' from the Basic Settings tab / Final and Source Level Parameters worksheet.
 2. Changes to the Advanced Settings tab / Final and Source Level Parameters worksheet:
 - a. Added a new parameter, Fall Back Method.
 3. Created a new worksheet on the Advanced Settings tab labeled 'Causal Parameters.' The following parameters were moved to this worksheet from the Advanced Settings tab / Final and Source Level Parameters worksheet:
 - a. Causal Aggregation Profile
 - b. Causal Calculation Intersection
 - c. Causal Calculation Intersection Periodicity
 - d. Causal Data Source
 - e. Causal Higher Intersection
 - f. Causal Spread Profile
 - g. Promo Levels Disable

4. The following new parameters were added to the Advanced Settings tab / Causal Parameters worksheet:
 - a. Causal Beta Scale
 - b. Causal Capping Number
 - c. Causal Capping Ratio
 - d. Minimum Causal History
 - e. Use Causal Capping

Note: See the RDF 11.1.8 User Guide for more information on the new parameters added to the Forecast Administration workbook.

- A new executable was added to the system, 'UpdateFnhbiRdf.' This executable replaces 'ManageFnhbi' during the batch process. However, 'ManageFnhbi' is still used to validate clean partitioning of sub-domains in a Global Domain environment. 'UpdateFnhbiRdf' is a performance enhancement that only updates the measures for a specific birth date, rather than all measures in the Global Domain environment.
- The template configuration for the 'Forecast Like-Item, Sister-Store' workbook was updated. This change allows for positions in the Like-Item and Sister-Store pick-lists to be sorted alphabetically based on the position label (DEFECT000394672).
- An issue in the wizard for 'Forecast Scorecard' workbook was corrected. The wizard that allows you to select the forecast birth date was not filtering correctly based on the final level (DEFECT000395765).
- Contention issues in the Master domain during runs of 'Generate' were corrected (DEFECT000396080).
- A new parameter was added to the Profile Administration workbook. 'Use Advanced Profile Features' is set to true (checked) by default; however if dynamic profiles are being generated during the RDF batch process, setting this parameter to false (unchecked) improves batch performance by skipping unnecessary processes in the creation of the dynamic profiles.
- Several performance improvements to the RDF batch were completed with this patch.

05/18/2005

This release addresses the following:

- RDF, Promote, Curve 11.1.7 on RPAS 11.1.7 released to ROCS.
- LostSale function rewritten.

Special Note: Because the LostSale function was re-written as a special expression, RPAS date/time functions may not be used with the expression. In the example provided, the preprocess parameter LSTODAY requires a measure that holds the date. This measure should be data type of 'int.' In addition, the expression is now used with an '<-' rather than '='

Example:

An expression that is currently written as:

```
LSOVER:LSOVERMEAS, LS:LS1MEAS, TSALERT:TSALERTMEAS =
preprocess(SRC:DATASRCMEAS, METHODID:MTHIDMEAS, LSTODAY:TODAY,
NPTS:NPTSMEAS, WINDOW:WINMEAS)
```

Will now be written as:

```
LSOVER:LSOVERMEAS1, LS:LS1MEAS, TSALERT:TSALERTMEAS <-
preprocess(SRC:DATASRCMEAS, METHODID:MTHIDMEAS,
LSTODAY:DATEMEAS, NPTS:NPTSMEAS, WINDOW:WINMEAS)
```

Note: In the first example the '=' becomes '<-' in the second example. In addition, 'TODAY' in the first example becomes 'DATEMEAS' (a measure that holds the date value).

- Changes to Curve in this patch require a rebuild of any domain implemented with a Curve solution:
 1. Removed the Profile Maintenance Intersection.
 2. Split out several Curve databases to reduce the risk of profile databases exceeding the 2 GB limit.
 - The Promotion Effectiveness workbook has had significant design changes to support what-if capabilities for both final and source levels (DEFECT000378175). These changes include:
 1. The automatic loading of all promotions into the workbook.
 2. Allowing you to select any single causal level, not just causal levels at final.
 3. Using the System Forecast rather than Approved Forecast in workbook calculations.
 4. Using the System Peaks rather than the Approve Peak (which is only at Final).
 5. Bringing in the latest birth date for the forecast.

6. Changing the future baseline calculation in the Forecast Approval workbook to use the System Promo Peak rather than the Approved Promo Peak.
 - Corrected an issue that prevented FORECAST_APPROVAL alerts from appearing in the Approval Method pick list in Forecast Administration and Forecast Maintenance workbooks (DEFECT000394608).
 - Corrected an issue that caused the fmaenddt measure's NA value to be overwritten with incorrect values (DEFECT000393820).
 - Enhancements have been made to the Forecasting Engine to improve performance of the Adjust function (DEFECT000394514).
 - Implemented Bayesian capping from v9.4.
 - Oracle Retail has added a new parameter to Forecast Administration that allows you the option for items with end dates within the horizon to have zero demand applied to time series before or after the interim forecast is calculated. The parameter is called 'Item End Date Action.' The two options are:
 1. 'Apply 0 After Spreading' – This is the default value and how the system currently works. Spreading ratios are calculated for time series with no consideration made to the end date of an item. It is after the source is spread to the final level when zero is applied to the System Forecast.
 2. 'Apply 0 to Interim' – For items that have an end date within the forecast horizon, zero is applied to the Interim Forecast before the spreading ratios are calculated. This ensures that no units are allocated to the final level for time series that have ended.

04/15/2005

This release addresses the following:

- Initial release of RDF 11.1.6 on RPAS 11.1.6 released from the Fulfillment Center.

Release Overview

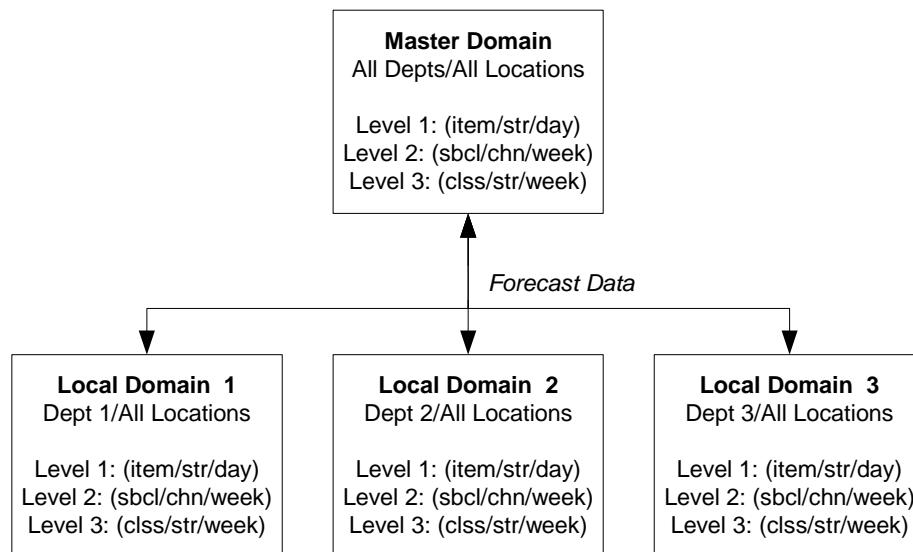
The primary scope defined for the release of RDF 11.1 includes the following:

- Support a Global Domain Environment.
- Support the RDF wizard and workbook template configuration through the RPAS Configuration Tools.
- Supports configuration changes to the RDF and Curve workbook templates.
- Provides enhanced validation on data entered by the user during configuration and the batch processes.

Support a Global Domain Environment

New to this release is RDF's ability to support either a Global or Simple Domain environment. A Simple Domain environment supports isolated partitions of data. This type of environment does not allow for data to be aggregated across partitions into a single view. In contrast, a Global Domain environment allows for data partitions to exist; certain data may be edited and viewed across partitions. Within this structure, Oracle Retail refers to data within a partition as the Local domain (or sub-domain) and the view to data across multiple local domains as the Master domain.

The following diagram represents a Global Domain environment:



Within this structure, batch forecast results across all domains may be viewed within the Master Domain. This functionality is achieved by passing the same forecast birth date (date/time stamp) to each Local Domain when the batch forecast is generated.

Note: This cannot be achieved through the use of the 'Run Batch Forecast' wizard. See the RDF 11.1 Administration Guide for more information on the execution of batch forecast processes to support a Global Domain environment.

The RDF solution in a Global Domain environment also supports centralized administration and maintenance of forecast parameters in the Master domain. Additional details on the availability and limitations of all of the RDF, Promote, and Curve workbook templates in the Master domain environment are provided in the following sections.

Support RDF Wizard and Workbook Template Configuration through the RPAS Configuration Tools

The RDF, Promote, and Curve solution extensions require a special interface within the RPAS Configuration Tools to provide the necessary components to the configuration. This approach lessens the tedious tasks of configuring hierarchies, measures, rules, and workbooks that are required to support the solution extension. This special interface that supports the solution extensions is referred to as **Plug-Ins**.

The new Plug-In architecture in 11.1 allows for the Solution Extension development teams to utilize base RPAS Configuration Tools functionality and to create configuration utilities that meet the specific needs of each solution. In particular, this new architecture now allows for RDF wizard and workbook templates to be configured in the Configuration Tools (as opposed to being expanded just before the domain install using the 'installtemplates' script).

Support Configuration Changes to RDF and Curve Workbook Templates

An important goal for RDF 11.1 is to provide our customers more flexible configuration options to modify the GA workbook template configurations. Similar to the 10.5 release, the autogeneration process creates hierarchies, measures, and rules needed to support the GA solution. However, new to 11.1, this functionality was extended to create the required wizard and workbook templates. Certain changes to the GA Configuration are allowed. Once edits to the GA Configuration are made and the autogeneration process occurs again, valid changes to the configuration are preserved. There is nothing in the RPAS Configuration Tools to prevent invalid changes from being made. The following outlines acceptable changes and restrictions:

- **Solution Extension Name** – The name assigned to the resulting solution after autogeneration occurs cannot be edited.
- **Major and Minor Classes** – Additional Major and Minor classes may be added to the GA Configuration. The Major and Minor classes that are part of the GA Configuration may not be edited. This restriction also applies to Measure Names and Measure Labels.
- **Rules** – Additional Rule Sets, Rule Groups, and Rules may be added to the GA Configuration. Such changes include support for adding new Rules to existing GA Configuration Rule Groups. Oracle Retail recommends that new Rules added to the GA Configuration Rule Groups include 'cust' (represents 'Custom') in the Rule Name. This terminology allows for easy identification of Rules that are not part of the GA Configuration. Rule Sets, Rule Groups, and Rules that are part of the GA Configuration may not be renamed. Existing Rules that are part of the GA Configuration may not be modified in any way.

- **Workbook Templates** – Additional Workbook Templates may be added to the RDF and Curve GA Configurations. In addition, new Measures and Rules may be added to the GA Configuration Workbook Templates. These changes are made by adding new Major and Minor classes and then adding new Rules to existing Rule Groups in the GA Configuration.

Provide Enhanced Validation on Data Entered by the User during Configuration and the Batch Processes

New to the 11.1 release is the enhancement of validation criteria of data entered in the solution Plug-Ins as well as the parameter information set by the user for the RDF and Curve batch processes. Within the solution Plug-Ins, you are notified at the time of autogeneration when invalid data has been entered in the configuration. This validation also extends to the installation of the domain. This approach should significantly lessen the introduction of incorrect configuration information into the domain install.

Within the batch processes, additional validation occurs when 'generate' and 'curvebatch' are executed. The validation criterion checks certain parameter information and returns more meaningful exceptions when invalid information is entered into the system.

Other Enhancements

The following enhancements have been implemented:

- The ability to define both Boolean and continuous (real) promotion variables.
- The Spreading of the Causal Peak generated at Source to the Final level.
- RDF and Curve batch results are split into separate .gem files.
- Forecast Level Label configuration restrictions were removed.
- 'Item' and 'store' dimension requirements in the product and location hierarchies were removed.
- Curve Profile Approval wizards were enhanced to allow hierarchy selections only on the profile intersection.
- The Default Source Level measure is displayed as a pick-list.
- There were preprocessing performance enhancements.

Known Issues

RDF

Issue	Issue Owner	Status / Workaround
The fmain_B database is not deleting after the birth is deleted.	RDF Development	Medium Priority: To be fixed in a patch.
All Rule Group names must be unique in the entire configuration before autogeneration of the solution can occur by the Plug-In.	RPAS	Low Priority: This is a limitation of the Tools API.
Autogeneration must occur in the Curve Plug-In before autogeneration can occur in the RDF or Promote Plug-Ins. The order is:	RDF Development	Low Priority: This is a limitation of the Plug-In infrastructure needed to support data validation.
<ol style="list-style-type: none"> 1. Curve 2. RDF 3. Promote 		
Only one position from the Partition Dimension per local domain is allowed.	RDF Development	RDF Architectural Limitation.
Any dimension along the partition hierarchy used as an intersection to forecast must be unique across all domains.	RDF Development	RDF Architectural Limitation especially applies to Alternate Hierarchies. For example, if my level is supplier\str\week, my Supplier dimension cannot have a supplier position that exists in multiple domains.

Curve

Issue	Issue Owner	Status / Workaround
All Rule Group names must be unique in the entire configuration before autogeneration of the solution can occur by the Plug-In.	RPAS	Low Priority: This is a limitation of the Tools API.
Autogeneration must occur first in the Curve Plug-In before autogeneration can occur in the RDF or Promote Plug-Ins. The order is:	Oracle Retail Labs	Low Priority: This is a limitation of the Plug-In infrastructure needed to support data validation.
<ol style="list-style-type: none"> 1. Curve 2. RDF 3. Promote 		

Promote

Issue	Issue Owner	Status / Workaround
All Rule Group names must be unique in the entire configuration before autogeneration of the solution can occur by the Plug-In.	RPAS	Low Priority: This is a limitation of the Tools API.
Autogeneration must occur first in the Curve and RDF Plug-Ins before autogeneration can occur in the Promote Plug-Ins. The order is:	Oracle Retail Labs	Low Priority: This is a limitation of the Plug-In infrastructure needed to support data validation.
<ol style="list-style-type: none"> 1. Curve 2. RDF 3. Promote 		

Functional Differences

The following sections summarize new features and differences in functionality between the initial release (11.1.6) and the 10.5 release:

RDF

Executables and Scripts

See the RDF 11.1 Administration Guide for changes in this release in support of the following:

- sciInstall
- sciPostInstall
- sciPatch
- sciPostPatch
- autosource
- PreGenerateForecast
- generate
- rdfvalidate
- curvevalidate
- managefnhbi
- curvebatch

Database Changes

The following summarizes changes made to the databases specified for some measures. The ‘_F’ indicates that the measure name or database includes the final level number:

- appcumint_FXB: data/appcumint_F
- appf_FXB: data/appf_F
- appint_FXB: data/appint_F
- appk_FXB, appktmp_FXB, pp_FXB, wm_FXB: data/frcst_F
- appsysf_FXB and appsysftmp_FXB: data/appsys_F
- cchdaf_FXB: data/adjf_F
- lappf_FXB: data/lappf_F
- ac_FXB: data/adjcumint_F
- af_FXB: data/adjf_F
- ai_FXB: data/adjint_F
- it_FXB: data/frcst_F
- actsf_FXB: data/actstat_F
- assf_FXB: data/fasgls_F
- citmp_FXB and sftmp_FXB: data/frcstsrc_F
- ci_FXB: data/cumint_F
- in_FXB: data/int_F
- sf_FXB: data/sysf_F

Plug-In

Plug-in changes include the following:

- If a Global Domain environment is to be implemented, the partition dimension must be defined in the Forecast Common Plug-In.
- New to this release is the creation of the RDF solution configuration via the RDF Plug-In.
- New measures and rules can be added to RDF workbooks.

Forecast Administration

Forecast Administration changes include the following:

- The Forecast Administration workbook can be viewed in the Master Domain, the Local Domain, or the Simple Domain environment.
- Removed 'Maximum Number of Forecasts.'
- 'Days to Keep Forecasts': This field is used to set the number of days that the system stores forecasts based on the date/time the forecast is generated. The date/time of forecast generation is also referred to as the 'birth date' of the forecast. A forecast is deleted from the system if the birth date plus the number of days since the birth date is greater than the Days to Keep Forecast. This process occurs when either the 'Run Batch Forecast' wizard is used to generate the forecast or when 'PreGenerateForecast' is executed. See the RDF 11.1.8 Administration Guide for more information on 'PreGenerateForecast.'
- The 'Default Source Level' is now a pick-list of source level names.

Forecast Delete

Forecast Delete changes include the following:

- The Forecast Delete template can be run in the Master Domain, the Local Domain, or the Simple Domain environment.
- Forecast Delete in the Master Domain – Forecasts with the selected birth date are deleted across all domains in the Global Domain environment.
- Forecast Delete in the Local or Simple Domain – Forecasts with the selected birth date are deleted only in the current domain.

Forecast Maintenance

Forecast Maintenance changes include the following:

- The Forecast Maintenance workbook can be viewed in the Master Domain, the Local Domain, or the Simple Domain environment.
- 'Source Level Override' is now a pick-list of source level names.

Forecast Like-Item, Sister Store

No changes.

Forecast Approval

Forecast Approval changes include the following:

- The Forecast Approval workbook can be viewed in the Master Domain, the Local Domain, or the Simple Domain environment.
- Additional logic was added to the wizards to account for varying forecast horizons across domain partitions when a Global Domain environment is implemented.
- Additional logic was added to the workbook to prevent the commit of adjustments to time series that are not forecasted in the horizon viewed in the workbook.

Forecast Scorecard

Forecast Scorecard changes include the following:

- The Forecast Scorecard workbook can be viewed in the Master Domain, the Local Domain, or the Simple Domain environment.
- Changes were made to the calendar wizards to allow Forecast Scorecard to be built using AutoWorkbook functionality.

Interactive Forecasting

No changes.

Run Batch Forecast

If a Global Domain environment is implemented, forecasts generated in the Local domain using the Run Batch Forecast wizard can be viewed in the Master domain.

However, this forecast is isolated to the data in the Local domain. Executing 'PreGenerateForecast' at the Master domain and then passing the output of the process to 'Generate' from the backend of each Local domain allows for the Local domains to share a birth date, thus supporting a view to forecast data across Local domains in the Master domain. See the RDF 11.1 Administration Guide for more information on 'PreGenerateForecast' and 'Generate.'

Curve

Executables and Scripts

See the RDF 11.1 Administration Guide for changes in this release in support of the following:

- sciInstall
- sciPostInstall
- sciPatch
- sciPostPatch
- curvevalidate
- managefnhbi
- curvebatch

Database Changes

The following summarizes changes made to the databases as specified for some measures. The ‘_F’ indicates that the measure name or database includes the final level number.

- pgappby_F and tmpdateagg_F: data/pgappdate_F
- pgappdate_F and tmpstragg_F: data/pgappby_F

Plug-In

Plug-in changes include the following:

- If a Global Domain environment is to be implemented, the partition dimension must be defined in the Forecast Common Plug-In.
- New to this release is creation of the Curve solution configuration via the Curve Plug-In.
- The intersection defined in the Profile Intersection populates the default value in the Profile and Stored Intersection for the Source Level.
- The intersection defined in the Aggregation Intersection populates the default value in the Approval and Stored Intersection for the Source Level.
- New measures and rules can be added to Curve workbooks.

Profile Administration

Profile Administration changes include the following:

- The Profile Administration workbook can be viewed in the Master Domain, the Local Domain, or the Simple Domain environment.
- Simplified default parameter settings are now only set on the final profile.
- The Profile Maintenance Intersection was removed because it is no longer required.
- The Profile Type Labels are displayed rather than the Profile Type names in the ‘Profile Type’ pick-list.
- The ‘Default Source Profile’ is now a pick-list of profile level names.

Profile Maintenance

Profile Maintenance changes include the following:

- The Profile Maintenance workbook can be viewed in the Master Domain, the Local Domain, or the Simple Domain environment.
- Training Window exceptions are now only set on the final profile level.

Profile Approval

No changes.

Run Batch Profile

No changes.

Promote

Plug-In

Plug-in changes include the following:

- If a Global Domain environment is to be implemented, the partition dimension must be defined in the Forecast Common Plug-In.
- The user may now enter a Default Intersection that populates the base intersection of any promotion added to the configuration.
- The database may be defined for each promotion.
- Either 'Real' or 'Boolean' measure type can be selected for a promotion.
- New measures and rules can be added to the Promote solution, but not workbooks.

Promotion Planner

No changes.

Promotion Maintenance

No changes.

Promotion Effectiveness

No changes.