

Oracle® Retail Promotion Intelligence and Promotion Planning and Optimization

Release Notes

Release 13.0

April 2008

Welcome to Oracle Retail Promotion Intelligence and Promotion Planning and Optimization 13.0.

The following documents were updated for release 13.0:

- Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Installation Guide
- Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Configuration Guide
- Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Standard Interface Specification
- Oracle Retail Promotion Intelligence User Guide
- Oracle Retail Promotion Planning and Optimization User Guide

These release notes contain information on new features and issues that have been fixed as well as known issues that exist in this release.

What's New in Oracle Retail Promotion Planning and Optimization 13.0

This release of Promotion Planning and Optimization introduces these enhancements:

- Offer Enhancements. The following features have been introduced:
 - Offers can be submitted, approved, and denied. Offers are associated with a submission status of In Progress, Submitted, Approved, and Denied. A new column on the Offers tab lists the status for each individual offer. Offers can also be sorted by offer status on the Offers Tab. Notes can be associated with submitted, approved or denied offers.
 - Offer Exclusion for the Forecast. A flag is provided allowing any offer to be included or excluded from the forecast.
 - SKU Exclusion from the Forecast. A flag has been added to identify whether a SKU should be included in the forecast. If the flag is set to No, then forecasting will exclude the SKU. The SKU would be ignored in the calculation of the forecast status for the offer.
 - SKUs can be entered more efficiently when creating an offer. Users can enter the SKU id, and then add the SKU to the offer. This also applies to other levels of the merchandise hierarchy like class and sub-class.

- High and Low Price. Fields have been added to the Offer Details window. The highest price SKU and the lowest price SKU within the offer are used to autofill these fields. However, these fields can be entered manually should the user wish to do so.
- Notes tab. The offers tab contains a new tab labeled Notes. Users can enter notes for an offer. Notes for the submission, approval, and denial of an offer can also be included in this tab.
- Custom attributes provide the ability to configure user-defined attributes of varying data types that can be used to enter retailer-specific information.
- Performance and What-If. The following enhancements have been added:
 - User Forecast. Two sets of forecast performance metrics are now available: user and system. Users can enter their own prediction of average units per store, average item cost, and average ad price. Once these values are entered, the user can generate a user forecast and compare that forecast to the system forecast based on the original values within the offer.
 - Value Index and Total Value Index metrics have been added.
- Vehicle Design. The following enhancements have been added:
 - Page templates can be edited in the Vehicle Designer List and Layout View. Users have the ability to add, duplicate, delete, resize, and move page positions. Positions may also be cut and paste between pages.
- Promotions. The following enhancements have been added:
 - Ability to override planned store count. Users will have the ability to adjust the store count that defaults based on the selected store sub-sets. This allows users to scale the forecast appropriately when a promotion is not running in all stores within a store sub-set.

What's New in Promotion Intelligence 13.0

This release of Promotion Intelligence 13.0 introduces the following enhancements:

- Scorecard Reports. Addition of Total Value Index and Allocated Non-Ad Units to the offer forecast metrics.
- Overlapping SKUs Report. This report displays all promotions that contain overlapping SKUs on offers.
- Audit Trail Report. This report tracks changes to a promotion that affect the forecast, changes to offer that impact the forecast, status or metrics, and changes to the promotion vehicle that impact the forecast.
- Forecast Exception Report. This report helps identify when re-forecasting results in a forecast variance% that is greater than a defined threshold.
- Affinity Reporting. Non-Ad% for both Item A and Item B has been added to the affinities report.

Enabling Promotion Intelligence and Promotion Planning and Optimization for Single Sign-On

Promotion Intelligence and Promotion Planning and Optimization can now be accessed through the Oracle Retail Workspace. The Workspace application provides a single point of access to the Oracle Retail applications used by your business. It also provides an integrated platform that can display operational and analytical information from multiple sources.

For the 13.0 release, the Promotion Intelligence and Promotion Planning and Optimization CD image includes a Single Sign-On cookie plugin. You can install this plugin on the server implementing Oracle® Application Server Single Sign-On (OSSO) to achieve one-way interoperability with Retail applications. When you log on to the OSSO server using a user account configured at both systems, a User Management cookie gets registered in your browser session. This enables you to access the Promotion Intelligence and Promotion Planning and Optimization URL directly. If you access the Promotion Intelligence or the Promotion Planning and Optimization application first and then later attempt to access the OSSO URL, you will need to log on to the OSSO system because the User Management module cannot create an SSO cookie. For more information on the Single Sign-On plugin, refer to the Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Installation Guide.

Upgrade Procedure

Note: This release supports upgrading from version 12.0.9-25 or later.

Note: The upgrade process will remove any custom views in the database. View configurations are not maintained.

Note: Customizations to configuration files (kde.properties, kde_local.properties, promote.properties) are not preserved. All of these files should be backed up before proceeding.

Complete the following steps to upgrade:

1. Create a backup of the database accounts.
2. Backup the PCE configuration files from \$PCE_HOME/etc
3. Backup the mdc scripts directory.
4. Edit the install.properties file and ensure that all properties are set as follows:
 - *db.oracle.create=no
 - *db.oracle.upgrade=yes
5. Add the following block to the install.properties file for OCM. The OCM portion is to appear between the bolded text.

install.properties.savefile=\${basedest.baselog.dir}/install/last-session.

properties

```
missing.properties.savefile=${basedest.baselog.dir}/install/missing-entries.properties
```

```
#OCM
basedest.baseocm.dir=${basedest.basedest.dir}
product.ocm.install=yes
ocm.distribution=<platform, ex. linux>
ocm.disconnected=no
ocm.csi_id=<csi id value>
ocm.metalink_id=<metalink id value>
ocm.country_code=<country code, ex. US>
```

```
install.database=oracle
```

6. Run the installer.
7. Stop and then start the application servers.
8. Update/merge the mdc/scripts and mdc/operations files.
9. Run the following mdc scripts:
 - mdc/scripts/5.ppo_config/5.users_roles_security/doit.sh
 - //base/current/Edina/Deploy/mdc/scripts/1.base_config/7.views/
10. Merge/reconcile changes to the following configuration files:
promote.properties and promoteResource.properties.
11. Manually reconcile the \$PCE_HOME/etc/kde_local.vars file with the backed up version. Do the same for \$PCE_HOME/etc/kde.properties. The upgrade will not preserve customization.
12. Reapply the custom views as follows:
 - cd <mdcdir>/scripts/1.base_config/7.views/
 - bash doit.sh

Fixed Issues

The following issues have been fixed with this release:

The Total Sales metrics are incorrect (24688). Totalsales should be = totalunits * adprice, however, it is being incorrectly computed as totalsales = basesales + incsales, where incsales = incunits * adprice.

Creating criteria four categories above Department can cause an 'error.invalid.bean' error (24574). The workaround is to break very large offers into smaller ones.

The PCE is not averaging the Effective Price/Normal Price/Ad Price/Effective Discount correctly when a planned event spans more than one week (2224685).

Known Issues

The following are known issues with this release:

The prediction engine does not currently support the scenario where an attribute value has never been seen before resulting in a failed forecast (24621).

For example, if a model is never trained to understand what happens when the focus class is on the back page, putting a SKU from that class on the back page will not produce a forecast.

Clicking on a position partially covered/overlapped by another position does not bring it to front (25381). This happens in the Vehicle Designer single page layout view. It can make the position menu attached to the position inaccessible when covered. As a workaround, the user can toggle to Move/Edit mode via the toggle arrow where the bring-to-front function would work. The user could also use the Position button menu on the toolbar.

Keyboard shortcuts not functioning consistently when doing page layout edits in Vehicle Design (25398). The keyboard shortcuts available in the Position menu (e.g. Ctrl+D, Ctrl+Alt+X) may not always perform the associated action.

Vehicle pages missing in the Navigator > Documents list (25400). When a user opens a promotion with multiple pages and uses the Documents icon within the Navigator to expand and view pages, the individual pages do not appear.

Add page position action should not be allowed on a dynamic page (25402). Within the Vehicle Designer, the ability to add, cut, paste, duplicate, move and resize page positions is available in the list view for pages with a fixed layout. To create a new position on a dynamic page, drag and drop a category to the page. A new position will automatically be created and assigned the respective category.

Oracle Retail Promotion Intelligence and Promotion Planning and Optimization, Release 13.0

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Value-Added Reseller (VAR) Language

(i) the software component known as **ACUMATE** developed and licensed by Lucent Technologies Inc. of Murray Hill, New Jersey, to Oracle and imbedded in the Oracle Retail Predictive Application Server - Enterprise Engine, Oracle Retail Category Management, Oracle Retail Item Planning, Oracle Retail Merchandise Financial Planning, Oracle Retail Advanced Inventory Planning and Oracle Retail Demand Forecasting applications.

(ii) the **MicroStrategy** Components developed and licensed by MicroStrategy Services Corporation (MicroStrategy) of McLean, Virginia to Oracle and imbedded in the MicroStrategy for Oracle Retail Data Warehouse and MicroStrategy for Oracle Retail Planning & Optimization applications.

(iii) the **SeeBeyond** component developed and licensed by Sun Microsystems, Inc. (Sun) of Santa Clara, California, to Oracle and imbedded in the Oracle Retail Integration Bus application.

(iv) the **Wavelink** component developed and licensed by Wavelink Corporation (Wavelink) of Kirkland, Washington, to Oracle and imbedded in Oracle Retail Store Inventory Management.

(v) the software component known as **Crystal Enterprise Professional and/or Crystal Reports Professional** licensed by Business Objects Software Limited ("Business Objects") and imbedded in Oracle Retail Store Inventory Management.

- (vi) the software component known as **Access Via™** licensed by Access Via of Seattle, Washington, and imbedded in Oracle Retail Signs and Oracle Retail Labels and Tags.
- (vii) the software component known as **Adobe Flex™** licensed by Adobe Systems Incorporated of San Jose, California, and imbedded in Oracle Retail Promotion Planning & Optimization application.
- (viii) the software component known as **Style Report™** developed and licensed by InetSoft Technology Corp. of Piscataway, New Jersey, to Oracle and imbedded in the Oracle Retail Value Chain Collaboration application.
- (ix) the software component known as **WebLogic™** developed and licensed by BEA Systems, Inc. of San Jose, California, to Oracle and imbedded in the Oracle Retail Value Chain Collaboration application.
- (x) the software component known as **DataBeacon™** developed and licensed by Cognos Incorporated of Ottawa, Ontario, Canada, to Oracle and imbedded in the Oracle Retail Value Chain Collaboration application.