

# Oracle® Retail Promotion Intelligence and Promotion Planning and Optimization

Release Notes

Release 13.2.1

October 2010

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Welcome to Oracle Retail Promotion Intelligence and Promotion Planning and Optimization 13.2.1.

This document highlights the enhancements, defect fixes, and known issues in this release. It also describes how you can upgrade to Release 13.2.1. It includes the following sections:

- [Hardware and Software Requirements](#)
- [Functional Enhancements](#)
- [Upgrading to Promotion Intelligence and Promotion Planning and Optimization](#)
- [Post-Installation Tasks](#)
- [Noteworthy Fixed Issues](#)
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## Build IDs:

- Promote-13.2.1-338-201010021715-257302
- PCE-13.2.1-347-201010021700-257302
- Installer-3.2.0-173-201004152245-251835
- Suite-3.2.0-173-201004152210-251835
- StoreSets-3.2.0-169-201004152245-251835
- Framework-3.2.0-188-201004152155-251835

## Hardware and Software Requirements

For more information on the hardware and software requirements, see the *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Installation Guide*.

## Functional Enhancements

This release of Promotion Planning and Optimization introduces the following new features:

- [Penny Rounding Rule](#)
- [Additional Performance Metrics in the Offer Details Window](#)
- [Selecting Multiple Categories or Offers and Add Them to a Position in Vehicle Design](#)
- [Improved User Experience in Calendar List View, Promotion Manager, and Offer Details Window](#)
- [Selecting Multiple Items To Delete or Add in the Criteria View of the Offer Details Window](#)
- [Selecting Multiple Items To Delete or Add in the Categories Tab of the Promotion Manager](#)

### Penny Rounding Rule

The rounding rule in the application has been updated to use the Penny rounding rule. Before this implementation, a Two-digit Ending rounding rule was used. Using the Penny rounding rule, the application will now round the amount to the nearest number that has the same second digit (after the decimal point) as the offer price.

In a Two-digit Ending rounding rule, the application rounded the amount to the nearest number that had the same two-digit ending (after the decimal point) as the offer price.

For example,

In the Two-digit Ending rounding rule,

- If the offer amount is 5.66 and the number calculated is 6.50, the application rounded it to 6.66.

In the Penny rounding rule,

- If the offer amount is 5.66 and the number calculated is 6.50, the application will now round it to 6.46.
- If the offer amount is 5.66 and the number calculated is 6.52, the application will now round it to 6.56.

### Additional Performance Metrics in the Offer Details Window

The Get SKU and Buy SKU Views in the Offer Details window now include additional performance metrics related to the offer user forecast overrides. For more information on the performance metrics that appear in the Get SKU and Buy SKU Views, refer to the *Oracle Retail Promotion Planning and Optimization User Guide*.

### Selecting Multiple Categories or Offers and Add Them to a Position in Vehicle Design

You can now select multiple categories or offers (from the Hierarchies Selector), and then drag and drop them in a specific position in the following views on the Vehicle Design screen:

- List View–Single Page
- Layout View–Single Page
- Position Detail Window

## Improved User Experience in Calendar List View, Promotion Manager, and Offer Details Window

Enhancements to the following screens improve the user experience in the application:

- **Calendar List View** – The *promote.properties* configuration file now includes the *calendar.list.promotion.showpanel* parameter that enables you to directly open the event (when set to *false*) when you click the promotion event name in the Calendar List View. In this case the Promotion Details panel will not appear. When set to *true*, the Promotion Details panel will first appear.
- **Promotion Manager** – The *promote.properties* configuration file now includes the *promotion.default.tab* parameter that enables you to set the default tab in the Promotion Manager when a user opens an event. To set the default tab, specify one of the following values:
  - *tab.promotion.PromotionVO.summary* – for the Summary tab.
  - *tab.promotion.PromotionVO.vehicles* – for the Vehicles tab.
  - *tab.promotion.PromotionVO.vendorDeals* – for the Vendor Deals tab.
  - *tab.promotion.PromotionVO.categories* – for the Categories tab.
  - *tab.promotion.PromotionVO.offers* – for the Offers tab.
  - *tab.promotion.PromotionVO.vehicleDesign* – for the Vehicle Design tab.
  - *tab.promotion.PromotionVO.workflow* – for the Workflow tab.

When left blank, the Summary tab will appear by default.
- **Offer Details Window** – When you add a single item to an offer in the Offer Definitions tab using the Quick Add feature, the Category or SKU Details window will automatically appear. This is similar to the way it appears when you drag and drop items from the Hierarchies Selector.

## Selecting Multiple Items To Delete or Add in the Criteria View of the Offer Details Window

In the Criteria View of the Offer Details window, you can now select multiple items to delete at the same time. You can also now select multiple items (from the Hierarchies Selector), and then drag and drop them in an offer to create a criteria. When you add a single item, the Category Details window will automatically appear.

## Selecting Multiple Items To Delete or Add in the Categories Tab of the Promotion Manager

In the Categories Tab of the Promotion Manager, you can now select multiple items to delete at the same time. You can also now select multiple items (from the Hierarchies Selector), and then drag and drop them in a promotion to create assigned categories.

## Technical Enhancements

This release of Promotion Planning and Optimization introduces the following technical enhancements:

- [Additional Metrics in the promo\\_offer Export File](#)
- [Recognizing and Retaining User Override Values for Offer Version Amount](#)
- [Configuration Parameters to Calculate High, Low, and Average Values During a Forecast](#)
- [Hide or Disable User Override Fields in the Version View of the Offer Details Window](#)
- [Default Selected Template in Promotion Details Window](#)
- [Spreading Forecast and Price Overrides to the Version Level](#)
- [New User Forecast Override Spreading Configuration Parameters](#)
- [New Script to Calculate Dark Weeks](#)
- [New Offers-related Configuration Parameters](#)

## Additional Metrics in the promo\_offer Export File

The *promo\_offer* export file now includes additional metrics/columns that provide information on user, base, and incremental forecast values for margin, units, and sales. It also includes additional metrics/columns that provide information on system and user location counts and user override offer location count for the promotion and promotion vehicle. For more information, refer to the section Export Views in the *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Operations Guide*.

## Recognizing and Retaining User Override Values for Offer Version Amount

The application now includes the ability to automatically check whether the offer version amount for a version is computed by the system or entered by a user. This enables the application to determine whether the offer version amount is a user override value. It also now includes the ability to retain the user overrides for the offer version amount and clear the user override state tracking. With the ability to retain the user overrides, the nightly batch forecast can be adjusted to compute the offer versions with each forecast safely.

To retain or update the user overridden offer version amount during a compute operation, the *promote.properties* configuration file now includes the *promote.version.user.override* parameter. Set the value to *true* to retain the user overridden value and set the value to *false* to update the offer amount during the compute operation. When set to *true* the user overridden value is retained regardless of how many times the version is computed, until the user clears the overridden value. Once the user overridden value is cleared, subsequent compute operations will recalculate and update the offer version amount.

This mechanism, automatically tracking the type of the offer version amount, is at the offer version level. In an offer with multiple versions, for a given compute operation, versions with user overrides will not get updated and versions without user overrides will get updated. To maintain a good application performance, when the *promote.version.user.override* parameter is set to *true*, the system offer version amount will not be calculated for offer versions with a user override specified.

To clear the user override state tracking (the time stamp recorded when a user provided an override), the *promote.properties* configuration file now includes the *promote.version.offer.reset* parameter. Set the value to *true* to clear the user override state tracking for each version of the offer. When you set the value to *false*, changing the offer amount will not clear the offer version's user override tracking. This will result in the user override values being replaced the next time the offer versions are computed after an offer amount change (in order to see the new offer version amount based on the new offer amount). It is possible that the new offer version amount may need to be overridden as a result of the computation based on the new offer amount.

## Configuration Parameters to Calculate High, Low, and Average Values During a Forecast

During a forecast for an offer, the high, low, and average values are now calculated based on the following configuration parameters in the *promote.properties* configuration file:

- *promote.offer.retailprices.forecasted* – specifies whether the high, low, and average values must be calculated at the offer level.
- *promote.version.retailprices.forecasted* – specifies whether the high, low, and average values must be calculated at the version level.

When both the parameters are set to *false*, the high, low, and average values are not calculated. When set to *true*, the high, low, and average values will get calculated and included in the forecast.

## Hide or Disable User Override Fields in the Version View of the Offer Details Window

The *promote.properties* configuration file now includes the *promote.version.userHighLow.editable* parameter that enables you to hide or disable (set to *false*) the following user override fields in the Version Details panel (appears in the Version View of the Offer Details window):

- High Price
- Low Price
- Avg Retail Price

## Default Selected Template in Promotion Details Window

You can now set the default selected template name in the Template drop-down list that appears in the Promotion Details window. To set the default template name, use the *label.promotion.selectedTemplate* parameter in the *promote.properties* configuration file.

When users start creating a new promotion, the Template drop-down list in the Promotion Details window will then display the default template name selected by default.

## Spreading Forecast and Price Overrides to the Version Level

The *promote.properties* configuration file now includes the following parameters that enable you to spread the forecast and price overrides at the offer level to the version level:

- *promote.spread.user.forecast* – Set the value to true to spread the forecast and price overrides.
- *promote.offer.versions.rollup* – Set the value to false to disable offer version roll up.

Once you set this up, the price and forecast related fields will not appear in the Version Details panel (in the Version View of the Offer Details window).

When a such a spread occurs, the version total units, total cost, total sales, and total margins are adjusted based on the overrides. The incremental units, incremental sales, incremental cost, and incremental margin are then calculated again based on the base system forecast and the user override totals.

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**Note:** Due to the nature of user forecast overrides being based on average units, cost, and price, user forecasts in some of the versions may not be equal to the user forecasts at the offer level.

For example,

Consider a system forecast for a store with two items. The first item sold for USD 1 and 101 such units were sold. So the total sales for the first item was USD 101. The second item sold for USD 101 and only one such item was sold. So the total sales for the second item was USD 101. Total units sold at the store was 102 and total sales at the store was USD 202. The average units was 52 and average price was USD 52.

If you override the system computed average units of 52 and USD 52 with the same values, the user forecast will then be 2704 (52 multiplied by USD 52). This is USD 2502 more than the system forecast.

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## New User Forecast Override Spreading Configuration Parameters

The *promote.properties* configuration file now includes the following user forecast override spreading configuration parameters that control the way the metrics are calculated at the version and item levels:

- *promote.user.forecast.empty.offers* – use this parameter to specify whether the user total forecast metrics (units, sales, cost, and margin) are calculated for offers with SKUs excluded (set the value to *true*). When an offer does not have SKUs included, it cannot have a system forecast. Since user forecasts are spread proportionally based on the system forecast, user forecasts for empty offers cannot be spread. Spreading of user forecast in empty offers when non-proportional only applies to versions and not items.
- *promote.user.forecast.spread* – use this parameter to enable the user forecast spreading feature (set the value to *true*). When this feature is enabled, the user forecast fields do not appear in the Version Details panel (appears in the Version View of the Offer Details window).
- *promote.user.forecast.versions* – use this parameter to specify whether the user forecast values are spread to versions when the user forecasting feature is enabled (set the value to *true*). When the spreading feature is enabled, the user forecast fields do not appear in the Version Details panel (appears in the Version View of the Offer Details window).
- *promote.user.forecast.items* – use this parameter to specify whether the user forecast values are spread to items when the user forecasting feature is enabled (set the value to *true*). When the spreading feature is enabled, the user forecast fields do not appear in the SKU View of the Offer Details window.

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**Note:** The user forecast fields do not currently appear in the SKU View.

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- *promote.user.forecast.override.averages* – use this parameter to specify whether the user forecast values are overridden as averages per store (set the value to *true*) or totals of all stores (set the value to *false*).

- When set to *true*, the following fields appear as system values for user forecast fields in the Offer Definition tab, Offer Version Details panel, and User Forecast window in the Performance and What-If tab:
  - averageUnits
  - itemAverageCost
  - itemAverageSales
- When set to *false*, the following fields appear as system values for user forecast fields:
  - totalUnits
  - totalCost
  - totalSales
- *promote.user.forecast.averageunits.sum* – use this parameter to specify whether the user forecast units are overridden as total average units per store (set the value to true) or average units per item per store (set the value to false).
  - When set to *true*, the Offer Definition tab, Offer Version Details panel, and User Forecast window in the Performance and What-If tab display the total of the included SKUs averageTotalUnits per store.
  - When set to *false*, they display the average of the included averageTotalUnits per store (effectively per sku per store).
- *promote.user.forecast.proportional* – use this parameter to specify whether the user forecast values are spread down proportionally based on the system forecast (set the value to true). With this parameter is set to false, you must take the following scenarios into consideration:
  - when the *promote.user.forecast.override.averages* parameter is set to *false*, the offer level user override price/cost values spread to items is divided by the offer item count.
  - when the *promote.user.forecast.override.averages* parameter is set to *false*, the offer level user override units/price/cost values spread to versions is divided by the offer version count.
  - when the *promote.user.forecast.averageunits.sum* parameter is set to *true* and *promote.user.forecast.override.averages* parameter is set to *false*, the offer level user override units values spread to items is divided by the offer item count.
- *promote.user.forecast.offer.prices* – use this parameter to specify whether the user forecast spread operation to the items uses the average price/cost of the offer (set the value to true) or the specific price/cost of each item in the computation of user total sales/cost. This applies when the offer does not override the price/cost or override averages are enabled with overridden units.



## New Script to Calculate Dark Weeks

A new script (`calc.dark.periods.sh`) and operational steps have been introduced that automatically calculate the dark weeks each week using the historic data. The existing weekly load script has also been updated to record the details of the steps that are executed. The new script will update the dark weeks for all weeks that fall within a configurable number of recent weeks or within the date range affected by promotions recently loaded into the system.

## New Offers-related Configuration Parameters

The `promote.properties` configuration file now includes the following properties related to promotion offers:

- `promote.offers.min.lcd` – enables you to specify whether the promotion offers are enforced to equal the `min_lcd` setting (set to `true`).
- `promote.offers.position.offer.amount.editable` – enables you to specify whether the offer amount values are editable (set to `true`) in a position. To disable editing offer amount values, set the value to `false`.
- `promote.copy.position.coordinates` – enables you to specify whether the position co-ordinates can be copied (set to `true`).

## Upgrading to Promotion Intelligence and Promotion Planning and Optimization

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**Note:** This release supports upgrading from version 13.2 only.

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

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**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.

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Complete the following steps to upgrade to Release 13.2.1:

1. Create a backup of the database accounts.
2. Back up the PCE configuration files from `$PCE_HOME/etc`.
3. Back up the PPO configuration files from `$installdir/config/`
4. Back up the `mdc/scripts` and `mdc/operations` directories.
5. Edit the `install.properties` file and ensure that all properties are set as follows:
  - `*db.oracle.create=no`
  - `*db.oracle.upgrade=yes`
6. Stop and then re-start the application servers.
7. Run the installer.

8. Stop and then re-start the application servers.
9. Update/merge the mdc/scripts, mdc/operations, and mdc/data files.
10. Merge/reconcile changes to the following configuration files:
  - VersionsExportTemplate.xslt
  - promoteResources.properties
  - promote.log4j.properties
  - promote.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, \$PCE\_HOME/etc/mdc\_local.vars, \$PCE\_HOME/etc/jvm\_arg.vars, \$PCE\_HOME/etc/model\_config.xml, \$PCE\_HOME/etc/\*.log4j.properties, and \$PCE\_HOME/etc/pceserver.log4j.properties. The upgrade will not preserve the customization.
12. Run the following mdc scripts:
  - ~/mdc/scripts/1.base\_config/7.views/doit.sh

## Post-Installation Tasks

The following steps must be performed after the installation process is completed:

- Run Market Basket Summaries again.
- Complete the following steps to support K-Nearest Neighbors (KNN) feature:
  1. Manually insert a row in the ASH\_CP\_TBL database table with the following data:
    - INTERSECT\_NAME: AE\_ANALYSIS
    - MERCHANDISE\_LEVEL: SKU
    - LOCATION\_LEVEL: COUNTRY
  2. Run the following external scripts:
    - 1.base\_config/0.patches
    - 1.base\_config/1.config\_files
    - 1.base\_config/2.promo\_metadata
    - 1.base\_config/7.views
    - 4.analyze\_history/5.knn

## Noteworthy Fixed Issues

The following issues has been fixed in this release:

| Internal Reference Number | Description   |
|---------------------------|---|
| 13544                     | During the move of the Audit data to the RDM, the Audit data (up to 30 days prior) was being processed again unnecessarily. The PR_AUDIT_EVENT database table also included a large number of obsolete PR_PROMO_AUDIT records.  |
| 13983                     | The database tables storing inventory related information occupied a large amount of space.   |
| 14877                     | A mechanism was required to handle the compression for the partitioned tables.  |
| 14977                     | Automated scripts or operational changes were required to perform actions such as cleaning Audit data, cleaning temporary files, loading log file, copy production data files (Restate and Weekly) to test environments, and so on.   |
| 16122                     | In the Version View, offer versions displayed an invalid value under the Offer column that caused an error when users clicked Compute.  |
| 16187                     | Offers with all SKUs excluded and user overrides did not have user forecasts available.   |
| 16214                     | Performance and memory issues were identified in load.merchandise and location.startup procedures.  |
| 16225                     | Performance and memory issues identified in areas such as SKU Lists, store sets, merchandise, and location caching.   |
| 16257                     | Forecasting an offer cleared the high, low, and average price values.   |
| 16287                     | A blank Offer List screen appeared along with an additional window displaying a system error in some scenarios.   |
| 16412                     | APE Weights calculation method needed to be updated so that the predict baseline data was used in place of the lengthy APE calculation (that analyzes inventory and APC data). A process was required to accommodate the rebuilding of the entire APE tree when a major reclassification occurred and provide the ability to reassess the APE affinities after the reclassification. The weekly operational steps needed to be updated to include a routine that adds merchandise to the existing APE tree each week, and then recalculate the APE weights. |
| 16510                     | In the Version view, the High and Low values appeared as 0.00 when an offer was created or forecasted.  |
| 16614                     | After positioning or unpositioning offers and computing the offer or version again (manually or using batch scripts), overridden version values were lost. This applies to applications with the configuration parameter <i>promote.version.user.override</i> set to <i>true</i> .  |
| 16748                     | An error occurred when a Fixed Type Page was deleted from the All Page Layout view of a promotion. This was observed in an application with the expanded configuration settings.  |
| 16753                     | For a vehicle with many pages and positions, the Position Details window appeared blank when users tried opening the last position in the last page.  |
| 16766                     | A performance issue was identified with large number of SKUs during the compute process for some offers.  |
| 16822                     | An error was reported when users tried copying and pasting some offers.   |

| Internal Reference Number | Description   |
|---------------------------|---|
| 16827                     | Metrics were not being calculated for offers with all SKUs excluded.  |
| 17012                     | Users experienced performance issues in the Offer Definition screen.  |
| 17052                     | The version offer amounts in the promo_offer export file were incorrect.  |
| 17341                     | In the Promote Calc Engine, the model deployment failed with underflow exception when values between -1E-130d and 1E-130d (except 0) were considered. |

## Related Documents

For more information, see the following documents in the Oracle Retail Promotion Intelligence and Promotion Planning and Optimization documentation set:

- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Configuration Guide*
- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Operations Guide*
- *Oracle Retail Promotion Planning and Optimization User Guide*

## Customer Support

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<https://support.oracle.com>

When contacting Customer Support, please provide the following:

- 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

## Review Patch Documentation

If you are installing the application for the first time, you install either a base release (for example, 13.2) or a later patch release (for example, 13.2.1). If you are installing a software version other than the base release, be sure to read the documentation for each patch release (since the base release) before you begin installation. Patch documentation can contain critical information related to the base release and code changes that have been made since the base release.

## Oracle Retail Documentation on the Oracle Technology Network

In addition to being packaged with each product release (on the base or patch level), all Oracle Retail documentation is available on the following Web site (with the exception of the Data Model which is only available with the release packaged code):

[http://www.oracle.com/technology/documentation/oracle\\_retail.html](http://www.oracle.com/technology/documentation/oracle_retail.html)

Documentation should be available on this Web site within a month after a product release. Note that documentation is always available with the packaged code on the release date.

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Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Release Notes, Release 13.2.1

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