

Oracle® Retail Promotion Intelligence and Promotion Planning and Optimization

Release Notes

Release 13.0.3

February 2009

Welcome to Oracle Retail Promotion Intelligence and Promotion Planning and Optimization 13.0.3.

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

Build IDs:

- Promotefe-13.0.3-79-200902242324-234518
- PCE-13.0.3-506-200902242300-234518
- Framework-1.7.4-320-200901162100-232718
- Installer-2.3.4-312-200901162200-232718
- Suite-1.7.4-317-200901162130-232718
- StoreSets-2.3.4-309-200901162145-232718

What's New in Oracle Retail Promotion Planning and Optimization 13.0.3

This release of Promotion Planning and Optimization introduces these enhancements:

- Forecasting:
 - Refactoring of the Affinity Predictor to increase performance and scalability (TT 25720).
 - Ability to exclude promoted items from the Affinity Forecast (TT 26470).
 - Ability to include miscellaneous affinity items within the Affinity Forecast (TT 26480).
- Pre-Planned Promotions:
 - Enhance pre-planned promotion loader to support offer user forecast and custom fields (TT 26863).
 - Enhance pre-planned promotion loader to support promotion/offer version details (TT 26864).
- Merchandise Hierarchy:
 - Empty sub-classes can now be loaded into the merchandise hierarchy and used within offers (TT 26843).
- Workflow:

- Additional phases and new workflow configuration capabilities made available (TT's 27482, 27483, and 27484).
- Vehicle Design:
 - Reduce contention issues by making vehicle designer page invalidation logic more granular (TT 27477).

Pre-Upgrade Task: Avoiding the Oracle for J2EE (OC4J) Out of Memory Exception for Oracle Application Server

An issue has been identified for Oracle Application Server 10g (MetaLink Note 368342.1). When the upgrade is initiated, the installation replaces any existing applications deployed over the OC4J instance with new ones. During this operation, the OC4J instance may run out of physical memory space and generate an Out of Memory (PermGen space) exception. Once this exception occurs, the instance will no longer be available for use and a server restart will be necessary to continue operations.

To avoid an Out of Memory exception during the upgrade, you must first complete the following steps:

1. Navigate to the following location in the Oracle Application Server Home directory:

```
<OAS_HOME>/opmn/conf/
```

2. Edit the **opmn.xml** and ensure that it includes the following values within the **category id** tag (in the **ias-component id** section):

```
-Djava.awt.headless=true -Xmx512m -Xms256m -XX:MaxPermSize=256m
```

Note: The **-Xmx512m**, **-Xms256m**, and **-XX:MaxPermSize=256m** memory arguments are recommendations for a typical configuration. You can choose to set up a different memory argument that best fits your hardware configuration.

3. Log on to the Enterprise Manager for the application server by typing the following address in a Web browser:

```
http://mycompany.domain.com:<admin-port>/em
```

Once logged on, the **Cluster Topology** page appears.

4. On the **Cluster Topology** page, under the **Members** section, select the check box next to the following application components:

- **c4p**
- **ImageServer**
- **ppohelp**
- **promote**
- **StoreSets**
- **StoreSetsHelp**
- **SuitePropertiesManager**

- SystemInformationTool
 - UMHelp
 - UserManagement
5. Click **Stop**. The **Confirmation** page appears.
 6. On the **Confirmation** page, review the components selected, and click **Yes**.
 7. Restart the application server.

Upgrade Procedure

Note: This release supports upgrading from version 13.0.0.x only.

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 PPO configuration files from \$installdir/config/
4. Backup 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 start the application servers.
7. Run the installer.
8. Stop and then 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:
 - promote.properties
 - promoteResource.properties
 - AllOffersDetailExportTemplate.xslt
 - AllOffersForecastExportTemplate.xslt
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 customization.

12. Run the following mdc scripts:

- ~/mdc/scripts/5.ppo_config/4.users_roles_security/roles_only_doit.sh
- ~/mdc/scripts/1.base_config/7.views/doit.sh

Post-Installation Tasks

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

1. Run build_lift_model.
2. Run Store Count Base Summary.
3. Run ARM Summaries.
4. Run TAE.
5. Run RYG II.
6. Run Historic Baseline.
7. Run Predict Baseline including OLF.

Fixed Issues

The following issues have been fixed with this release:

- If a page is deleted and if a new page is added to replace the deleted page, the new page is hidden fully or partially in the Vehicle Designer (22800).
- The forecast button is displayed when adding an offer through Vehicle Design (25906).
- There is a UI performance problem when opening, saving, reverting, and closing offers (26036).
- There is a duplicate entry error on the Vehicle Design tab in page list view when content is cut and pasted between two positions (26444).
- The \$off and fixed price offer types are not computing discounts correctly (26448).
- On the Workflow tab of the Promotion Template, there are no hover displays for columns and column values (26754).
- The campaign field is not highlighted in red when it is the source of an error (26778).
- Deleting a category from Position Details should only delete offers belonging to that category (26825).
- The Campaign field retains an error message even after clearing the invalid value (26827).
- Version view shows up blank when there are no versions (26830).
- The modify versions OK button throws an error when there are no versions (26833).

- A position cannot be pasted in the Vehicle Design tab (26842).
- Offer status can incorrectly switch to “Current” when disabling a Version (26846).
- The Demand Drivers tab in the Offer Details window is blank when viewed in multi-user mode (26847).
- Category Managers cannot position newly created offers (26835).
- What-If scenarios are not updated when the current Offer column changes (26867).
- Using the “Filter By” option on the Category Details screen does not enable the OK button (26868).
- Adding a category to Vehicle Design single page view can lead to an invalid bean error (27100).
- Invalid metadata error when a user with the category manager role clicks on the Compute button in Version view for an offer that he/she does not have write access to (26873).
- Memory leak and performance penalty when positioning offers (26876).
- The behavior of the Apply button is inconsistent in a user forecast (26880).
- Overrides to the Version Forecast do not change version metrics (26916).
- The Demand Drivers for Radio and TV are unable to create a offer (26928).
- When vehicle types with modelable demand drivers are inactivated, it causes a problem with saving positioned offers (26940).

Known Issues

The following are known issues with this release:

- Displaying historical data fails in Promotion Manager (19896).
- The System Column does not expand when the user enters a user forecast (27250).
- A new page appears on the Vehicle Design tab immediately after a user clicks on Add to add a new page (25359).
- Keyboard shortcuts do not function consistently when a user edit page layout 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 are 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.
- The 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.

- The Start Date and End Date fields in a promotion allow a semicolon (25894). When creating a new promotion, the start date and end date fields allow the user to enter a semi-colon. If a semicolon is entered, an error message is generated instructing the user to enter an acceptable value. Special characters are not valid for entry.
- The Promotion Budget field character limit accepts unlimited characters but will truncate the entered value if more than 21 numbers are entered (25895).
- The Amount/Units chart does not always display the graph and metrics correctly when the sliding filter is used (26633).
- When sorting Page Templates by position type, the sort arrow appears in the opposite direction of what it should be (26645).
- The Metric sliders available within chart view sometimes overlap depending on the length of the slider and the minimum and maximum values (26661).
- Performance is slow when a user switches to the What-If tab (26677).
- On the Modify Versions panel, the OK button defaults to enabled (26832).
- There is a spacing issue in the Modify Vehicle slider screen (26930). The spacing between vehicle types is too large.
- The Merchandise Hierarchy is not reset to the Browse tab upon opening the Hierarchy in a promotion (27012).
- In the Vehicle Design tab, the left/right arrows for page selector and zoom selector should be disabled when the user is viewing an item at the end of a list (27065).
- The Offers tab opens in “Chart View” based on the state of a previously opened promotion (27142).
- The promotion template header is displayed in Vehicle and Page templates when no data is available (27146).
- Enabling dynamic affinity in pce causes significant performance problems in forecasting (27177).
- A page is not positioned correctly when a user clicks Cancel->Yes on the Vehicle Design tab (27183).
- Wrong validation while creating vendor deals of type Volume Purchase (27226).
- There is an error when a vendor deal of type “Ad Space” with target “Category/Item” is selected (27227).
- Upon removing an unsaved category from a position, the corresponding unsaved offer does not get cleared (27253).
- In the Offers Tab, incorrect offer status-text displays in the pop-up when doing a compute for all versions (27304).
- In the Workflow tab, an empty notes field displays incorrect text when the cursor is hovered over it (27306).
- Incorrect validation while creating page of type “Blank Page” for height and width (27318).
- The size of the Campaign search pop up window changes when the campaign description spans multiple lines (27372).

- The forecast status of “Not Forecasted” does not display properly in version view (27379).
- SKU counts do not refresh after a category is deleted in the Offer Details panel (27398).
- After selecting the phase “Created” and clicking the Start/Complete button, the validation message “Actual date cannot be in the future” is displayed even though there is no start date entered for the phase (27405).
- On the Offer Details screen, offers have a status of “Submitted” after the user defined high and low values are removed (27498).
- The links for the “Event Scorecard by Offer/Dept” and “Event Scorecard by Class” reports from the Navigator do not work properly (27424).
- The What-if role should not be allowed to forecast from the Offer List Screen (27428).
- In the Offer Details window, the performance metrics for Tot Units/Store, Avg Cost, Avg Ad Price, and Deal Amount are rounded if they end in zero (27463).
- Start and end dates for new campaigns, events, and promotions are inconsistently populated (27495).
- An Ad Planner who does not have permissions in the next phase can start that phase if he has permissions in the current phase (27516).
- There is an error when a user with assigned tasks attempts to delete himself from a task (27561).
- A note is added to an offer with a status of “In Process”. When the offer is submitted from the Offers tab, the note and bubble icon (visible in the Offer List) disappear (27591).

Oracle Retail Promotion Intelligence and Promotion Planning and Optimization, Release 13.0.3

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