

# Oracle® Retail Promotion Intelligence and Promotion Planning and Optimization

Release Notes

Release 13.1.1.1

October 2009

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Welcome to Oracle Retail Promotion Intelligence and Promotion Planning and Optimization 13.1.1.1.

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

- [Functional Enhancements](#)
- [Upgrading to Promotion Intelligence and Promotion Planning and Optimization](#)
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**Build IDs:**

- Promote-13.1.1-181-200910100014-244788
- PCE-13.1.1-169-200910100003-244788
- Installer-3.1.0-63-200908252150-242966
- Suite-3.1.0-62-200908252115-242966
- StoreSets-3.1.0-62-200908252135-242966
- Framework-3.1.0-61-200908252100-242966

## Functional Enhancements

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

- [Copying Offers](#)
- [Position Renumbering](#)
- [Gathering MicroStrategy Usage Statistics](#)
- [New Configuration Parameters](#)

### Copying Offers

The Promotion Planning and Optimization application now includes the Copy Offers feature. This feature enables you to search for offers from any existing promotion, copy it to the current promotion, and create a new offer.

On the Offers tab, the Add button now appears with a drop-down menu with the following options:

- Add New – Use this option to create a new offer.
- Add from Offer – Use this option to copy an offer from an existing promotion.

To copy an offer:

1. On the **Offers** tab, click the **Add from Offer** option in the **Add** button drop-down menu. The **Promotions** search window appears. This window enables you to search for an existing promotion based on the name and time period.
2. Enter relevant information in the fields, and click **Search**.
3. Once the desired promotion appears in the list, select the promotion, and click **Next**. The **Promotion:<promotion-name>** search window for offers appears.
4. Use the fields on screen to set a search criteria and click **Search**.

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**Note:** Click the **Clear** button to clear the information entered in the fields.

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5. Once the desired offer appears in the list, select the offer, and click **Copy**.

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**Note:** **Copy** button is enabled only when at least one offer is selected.

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Or

Click the **Back** button to go back to the Promotions search window and select a different promotion.

When you click **Copy**, the selected offer gets copied to the current promotion. You can edit or override this offer. Once an offer is copied over, it is recommended that you open the offer to compute the amounts across versions, position the offer, and then forecast the offer.

## Position Renumbering

- The Promotion Planning and Optimization application now includes the following options that enables users to recalculate the position numbers based on the X/Y axes co-ordinates (top left corner of each position) in the Layout View:
  - For a promotion – On the Vehicle Design tab, the Renumber Positions option now appears for the Page button.
  - For a page template – In the Page Template window, the Renumber Positions button now appears on the Positions tab.
- The *promote.properties* configuration file now also includes the following configuration parameters that enables you to set the behavior of the Position Renumbering feature:
  - *promote.page.renumberTopDown* – sets the renumbering to sort based on "y,x" (Top and Down) or "x,y" co-ordinates. The default value is *false* and indicates that the positions will be renumbered based on x,y co-ordinates.
  - *promote.page.renumberRounding* – sets the decimal point rounding for the X/Y axes co-ordinates. The default value is *1* and indicates that the co-ordinates will be rounded to one digit after the decimal point.

## Gathering MicroStrategy Usage Statistics

A new *rdm\_report\_usage\_log* database table has been introduced that stores the MicroStrategy reports usage statistics. This table contains information to support the evaluation of the report statistics such as start/end times, frequency of use, and so on.

Although the database table is now available, you will need to set up the preferred method of extracting, reporting, and evaluating the usage statistics based on the requirements for your business and implementation.

## New Configuration Parameters

The following configuration parameters have been added to the *promote.properties* configuration file:

- *promote.positioned.offers.unique* – specifies that the offers can be positioned more than once (set to *true*).
- *promote.multiple.vehicles* – specifies that the promotions and promotion templates can have more than one vehicle (set to *true*). When set to *false*, the following screen elements will be disabled and appear greyed out:
  - For promotions:
    - Add and Delete buttons on the Vehicles tab.
    - Vehicle drop-down list on the Vehicle Design tab.
  - For promotion templates:
    - Add and Delete buttons on the Vehicles tab.
- *promote.vehicle.versions* – specifies that the promotion vehicles and vehicle templates can have versions defined (set to *true*). When set to *false*, the Versions tab will be disabled and may not appear on screen for promotion vehicles and vehicle templates.

- *promote.versioned.pages* – specifies that the promotion vehicle pages and vehicle template pages can be defined for different versions (set to *true*). When set to *false*, the Versions drop-down list will be disabled and appear greyed out on the Vehicle Design tab in the Promotion and Vehicle Template window.

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**Note:** When the *promote.positioned.offers.unique* is set to *true* and *promote.versioned.pages* is set to *false*, the version check boxes for the positioned offers will not be disabled. The version check boxes appear at the following locations in the application:

- Version Details panel from the Version View on the Offer Definition tab
  - Modify Versions panel for the Current Offer in the Performance & What-If tab.
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- *promote.forecast.storebase* – specifies whether the results of Promote Calc Engine's (PCE) store base coverage feature be used in the Promotion Planning and Optimization (PPO) forecast status and forecast ratio. When used, the PCE will provide the store base used in the prediction, so that the application accurately reflects the forecast status, ratio, and coverage.

## Upgrading to Promotion Intelligence and Promotion Planning and Optimization

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**Note:** This release supports upgrading from version 13.0.4 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:

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 have been fixed with this release:

**Table 1** Noteworthy Fixed Issues

Internal Reference Number	Description
13758	The PCE servers may stop responding when left running continuously for 2-3 days. They need to be restarted frequently to avoid any failures.
14220	A performance issue was identified with Predict Baseline Adjustment.
14224	A performance issue was identified where switching to the Vehicle Design tab was slow.
14309	When creating an offer criteria, dragging a category with a large number of SKUs to the offer was slow.
14310	Computing the offer roll ups for offers not forecasted was slow.
14311	Computing the category of an offer based on the included SKUs for permissions was slow.
14313	Cancelling a new large offer took a long time to complete.
14318	A performance issues was identified where the page loaded again each time a position was added.
14327	An error was reported when the value <i>enum3</i> was set for the parameter <i>column.Offers</i> in the <i>promote.properties</i> file.
14351	In the Offer List, hover text did not appear for the column headers or values.
14388	<p>The existing agent configurations caused performance issues in the operations scripts.</p> <p>The agent configurations have been refined to improve performance in the following manner:</p> <ul style="list-style-type: none"><li>■ Each agent now only processes the records that relate to the current task (refresh or forecast)</li><li>■ Agent configuration can now work without specifying an agent URL, and will now result in all processing to stay within the same JVM when run on multi JVMs. This feature provides true multi JVM support.</li><li>■ Agent configuration now supports hashed passwords when run in either single or multi JVM installations, with or without an agent URL.</li><li>■ Operations scripts no longer require removal of unprocessed records, and instead only require removal of failed records.</li><li>■ Record locks for all agent/forecasting operations are properly handled with either an agent URL or without an agent URL.</li></ul>

## Known Issues

This section lists the following known issue identified in this release:

- 14438 – Users with the Category Manager role may be able to renumber positions in the Vehicle Design tab.

## 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 Installation Guide*
- *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 Intelligence and Promotion Planning and Optimization Implementation Guide*
- *Oracle Retail Promotion Intelligence User Guide*
- *Oracle Retail Promotion Planning and Optimization User Guide*
- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Data Model*
- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Licensing Information*

## Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

- <https://metalink.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, 13.0) or a later patch release (for example, 13.0.4). 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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