

# Oracle® Retail Promotion Intelligence and Promotion Planning and Optimization

Release Notes

Release 13.0.2.1

November 2008

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Welcome to Oracle Retail Promotion Intelligence and Promotion Planning and Optimization 13.0.2.1.

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:**

Promote-13.0.2-403-200811170035-229631

PromoteCalcEngine-13.0.2-413-200811170005-229631

Framework 1.7.2

Installer 2.3.2

Suite 1.7.2

StoreSets 2.3.2

## **What's New in Oracle Retail Promotion Planning and Optimization 13.0.2.1**

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

- Seasonal Trend adjustment capability for seasonal SKUs.
- Scripts have been incorporated to perform Model Sets Merge.
- Refactoring of the Affinity Predictor to improve forecast performance.
- Media Details are now viewable in the Position Details screen of the Vehicle Design Tab.
- Minor layout changes to the What-If and Performance screen.

## **What's New in Promotion Intelligence 13.0.2.1**

This release of Promotion Intelligence introduces the following enhancements:

- A new report, Event Scorecard by Sub-class (Event/Weekly Comparison), has been added. This report provides users the ability to see the behavior of a promotional event compared against Class and Department totals for any other week as designated by the user.
- Addition and Removal of Scorecard Report Metrics. The following metrics have been added to or removed from all scorecard reports:

**Table 1    Removed Scorecard Metrics**

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**Metric Name**

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Allocated Non-Ad Sales  
Incr Allocated Non-Ad Sales  
Allocated Non-Ad GM  
Incr Allocated Non-Ad GM  
Allocated Non-Ad Baseline Sales  
Allocated Non-Ad Sales Lift%  
Allocated Non-Ad Baseline GM  
Allocated Non-Ad GM Lift%  
Allocated Non-Ad Units  
Allocated Non-Ad Baseline Units  
Incr Allocated Non-Ad Units  
Allocated Non-Ad Units Lift%

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**Table 2    Added Scorecard Metrics**

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**Metric Name**

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Allocated Non-Ad Affinity Sales  
Allocated Non-Ad Revenue Sales  
Incr Allocated Non-Ad Affinity Sales  
Incr Allocated Non-Ad Revenue Sales  
Allocated Non-Ad Affinity GM  
Allocated Non-Ad Revenue GM  
Incr Allocated Non-Ad Affinity GM  
Incr Allocated Non-Ad Revenue GM  
Allocated Non-Ad Affinity Baseline Sales  
Allocated Non-Ad Revenue Baseline Sales  
Allocated Non-Ad Affinity Sales Lift%  
Allocated Non-Ad Revenue Sales Lift%  
Allocated Non-Ad Affinity Baseline GM  
Allocated Non-Ad Revenue Baseline GM  
Allocated Non-Ad Affinity GM Lift%  
Allocated Non-Ad Revenue GM Lift%  
Allocated Non-Ad Affinity Units  
Allocated Non-Ad Revenue Units  
Allocated Non-Ad Affinity Baseline Units  
Allocated Non-Ad Revenue Baseline Units  
Incr Allocated Non-Ad Affinity Units

**Table 2 (Cont.) Added Scorecard Metrics**

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**Metric Name**

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Incr Allocated Non-Ad Revenue Units

Allocated Non-Ad Affinity Units Lift%

Allocated Non-Ad Revenue Units Lift%

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- Allocated Non-Ad Sales and Incremental Allocated Non-Ad Sales metrics have been recalculated. The new calculations are as follows:
  - Allocated Non-Ad Sales is now calculated as follows:  $\text{Item Ad Sales} * (\text{Baseline Units} / \text{Total Ad Units})$
  - Incr Allocated Non-Ad Sales is now calculated as follows:  $\text{Item Ad Sales} * ((\text{Total Ad Units} - \text{Baseline Units}) / \text{Total Ad Units})$

## Upgrade Procedure

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**Note:** This release supports upgrading from version 13.0.0.9 and 13.0.2. Instructions to upgrade from both of these versions are included below.

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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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## Upgrading From Promote 13.0.0.9

Complete the following steps to upgrade from Promote 13.0.0.9:

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/1.base\_config/2.promo\_metadata/doit.sh
  - ~/mdc/scripts/5.ppo\_config/4.users\_roles\_security/roles\_only\_doit.sh
  - ~/mdc/scripts/1.base\_config/7.views/doit.sh

## Upgrading from Promote 13.0.2

Complete the following steps to upgrade from Promote 13.0.2:

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
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/1.base\_config/7.views/doit.sh

## Post-Installation Tasks when Upgrading from Promote 13.0.0.9

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

1. Run TAE.
2. Migrate Models.
3. Run Store Base Count Summary.
4. Run Predict Baseline including OLF, Forecast Accuracy Metrics Calculation, and Seasonal Trend.
5. Forecast Offers.

## Post-Installation Tasks when Upgrading from Promote 13.0.2

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

1. Run Store Base Count Summary
2. Run Predict Baseline including OLF, Forecast Accuracy Metrics Calculation, and Seasonal Trend.
3. Forecast Offers.

## Fixed Issues

The following issues have been fixed with this release:

**On Performance & What-If Tab, user enabled field error indicators remain even when error is corrected (25684).**

**Potential affinity prediction calculation issues (25771).** Affinity effects not forecasted correctly for promotion with a duration of other than 7 days.

**Add Help to PPO (26533).** Online help links for Promotion Planning and Optimization will be available as of release 13.0.2.1.

**On Performance & What-If Tab, vehicles briefly show up marked as edited before forecast (26569).**

**When using the Apply button for a what-if scenario, field error highlighting does not clear properly (26571).**

**On Performance & What-If tab, slider panel fields are not validated before panels close (26572).**

**On the Performance & What-If tab, the system column closes when it should not (26573).** For example, this problem occurs when a user clicks the Current Offer vehicle button and then clicks Cancel. It can also occur when a user clicks the User Forecast button and then clicks OK without entering any values.

**The quick add feature does not search by display id (26584).** The quick add feature does not search by display id for locations on the versions tab or for merchandise on the offer definition tab.

**Error received when dragging a “Not Started” workflow event after trying to first drag a Started event (26586).**

**Error received when dragging workflow event to a different position within the same phase (26615).**

**On the Offer Details—Offer Definition tab, the operator column displays a value when no filters have been used (26618).**

**Versions delete usability issues (26620).** The Delete button on the Versions tab for store sets deletes all store sets rather than the store set selected for deletion.

**Text in version type dropdown is selectable (26621).** When an item from the version type drop down list, the text becomes selected when clicked. It should not be selectable.

**The Location, Store subset, Offer Definition, and User Forecast pop-up windows have usability issues with user/system fields (26625).** On the pop-up windows for Locations, Store subsets, Offer Definition, and User Forecast, the fields used for user entered values and system values are not clearly labeled.

**Versions do not show audit info (26626).**

**Ad Planner can start compute for all versions, then gets frozen (26634).**

**Confidence indicator hover does not work in what if scenarios (26635).**

**Starting an assignment (assigned to a phase in workflow tab) throws an unexpected error (26641).**

**'Include in Forecast' checkbox always checked (26651).** By default, the "Include in Forecast" checkbox is selected for all offers. If a user opens an offer and selects the "Include in Forecast" checkbox to exclude the offer from the forecast, the checkbox remains selected.

**The following metrics do not sort properly when clicking the column header in Buy SKU View: Lift%, Margin Lift%, Sales Lift%, Base Units/Store, Incr Units/Store, Base Units, Incr Units, Base Sales, Incr Sales, Base Margin, and Incr Margin (26653).** While viewing an offer using the Buy SKU View filter, if the user attempts to sort the metric columns, the columns do not sort properly.

**Metric values for status, avg retail, avg cost do not display in Performance & What-If for column 1, column 2, and the system column (26657).**

**In Performance & What-If if the current offer has a user forecast, the what-if scenarios incorrectly display a user forecast icon in the confidence column (26658).** The What-If scenarios do not have user forecasts and should not display confidence icons for user forecasts.

**Unexpected error when trying to move a phase in Workflow (26659).** After creating a new promotion and opening the Workflow tab, users get an unexpected error when attempting to move the "Created" phase. The error message should state that the phase cannot be moved.

**Error when moving tasks between phases in a Promotion template workflow (26663).**

**When assigning users to a task in the Workflow tab, the Available Users table does not get updated with removed/assigned users (26665).**

**Net Incr Gross Margin, Net Total Gross Margin, Incr Gross Margin, and Total Gross Margin displayed twice in Version View (26666).**

**Start/Complete buttons enabled for workflow phases in multi-user mode (26667).** The Start and Complete buttons on the Workflow tab are enabled when a

promotion is opened in multi-user mode. Only promotions opened in single user mode should have the Start or Complete buttons enabled on the Workflow tab.

**Start/Complete buttons acting inconsistently for tasks (26668).** After a task is started or completed within the Workflow tab, if it is selected again and the user clicks “Start” or “Complete”, an error message should be received stating the task is already started or completed. Instead, no errors are generated.

**Names under the Assigned To column disappear when a task is moved in a Promotion Template (26672).** When a task in the Workflow tab of a promotion template is moved to another row, the names under the Assigned To column disappear.

**Addition of offer metrics in single page view increases the performance of opening and closing pages (26675).** Position metrics have been added to single page layout view in Vehicle Design without adverse affects to performance.

**Single Page view position Metrics Base Units/Store, Incr Units/Store, Base Units, and Incr Units all have wrong units (26679).** Base Units/Store, Incr Units/Store, Base Units, and Incr Units are dollars instead of units.

**Gross Margin Offer List metrics do not match Current column what-if metrics (26694).** After forecasting, the values for these metrics in the Offer List do not match the values in the current column of the Performance & What-If tab.

**Summary Tab of the Promotion Manager is blurred when a promotion is opened from the Documents menu item in the Navigator panel (26702).**

**Model Apply Refactor Flag changes metrics (26713).**

**Display a position's image in single page layout view (26741).**

**Trying to complete a milestone in an invalid phase breaks the Workflow Tab (26747).** User should be able to Start/Complete any item in the Created Phase, including the created phase.

**Compute button enabled in Version Details panel for Ad Planner (26762).** The expected result is that the panel is read only and the compute button is disabled, as in version view.

**Confidence indicator icon for an offer with user forecast is not accurate (26764).**

**Clicking Reset on a what-if scenario changes the column selection to Current (26771).**

**Changing tabs with page changes causes an unexpected error (26779).**

**Apply button breaks the current offer column in Performance and What-If (26784).**

**Locations negatively affect the Tot Units calculation in a User Forecast (26790).**

**Deleting a category from Position Details returns an error (26796).**

**Deleting an offer from Position Details returns an error (26797).**

**Forecasting an offer from Offer Details does not mark it changed in the user interface, and as a result, the “Ok” button is not enabled (26809).**

**Offer metrics displayed in a single page list view shows system metrics when current metrics should be shown (26810).**

## Known Issues

The following are known issues with this release:

**Displaying historical data fails in Promotion Manager (19896).**

**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.

**The Button "OK" should be enabled on the Position detail screen (25782).** The "OK" button is enabled whenever changes are made to the Position (e.g., Position Name, Adding or Removing Offers). However, successfully forecasting offers within the position will not enable the "OK" button but it will save the forecast information.

**Difference in Promotion Dates for Canada and US will be problem for Versioning in Promote (25951).**

**Amount/Units chart does not always configure both axes/graph all metrics (26633).**

**The Metric sliders available within chart view sometimes overlap depending on the length of the slider and the minimum and maximum values (26661).**

**Switching to performance & what if tab is very slow (26677).**

**In the Workflow tab of a Promotion Template, there are no hover displays for columns and column values (26754).**

**Cannot paste into a Position in Vehicle Design (26842).**

**Metrics labels cut off in Performance & What-If tab (26763).**

**The campaign field is not highlighted in red when it is the source of an error (26778).**

**Campaign field retains error message even after clearing the invalid value (26827).**

**Version view shows up blank when there are no versions (26830).**

**Modify Versions panel OK button defaults to enabled (26832).**

**Modify Versions Ok button throws an error when there are no versions (26833).**

**Offer status can incorrectly switch to current when disabling a Version (26846).**

**Demand Drivers tab in the Offer Details window is blank when viewed in multi-user mode (26847).**



**Category Manager cannot position a newly created offer (26835).** The workaround is to first save and close the promotion, reopen the promotion, and then position the offer. The offer can also be positioned from the Offers Tab of the Position Details window.

**What-If scenarios are not updated when the current offer column changes in the Performance and What-If tab (26867).**

**Editing Filter By Category Details does not enable the Ok button (26868).** The workaround is to change the and/or radio button from its original position, and then switch the button back to the original position. The Ok button is enabled.

**When sorting Page Templates by Position Type, the sort arrow is displayed in the opposite direction of what it should be (26645).**

**Adding a category to Vehicle Design single page view can lead to an invalid bean error (26870).** The workaround is to add the category to the Categories tab before adding it to the Vehicle Design tab.

**Invalid metadata error when a category manager clicks on the Compute button in Version view in an offer he does not have write access to (26873).**

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