Oracle® Retail Promotion Intelligence and Promotion Planning and Optimization

Release Notes

Release 13.1.1

September 2009

Welcome to Oracle Retail Promotion Intelligence and Promotion Planning and Optimization 13.1.1.

> **Note:** Although the release number is 13.1.1, this is a full base release of Oracle Retail Promotion Intelligence and Promotion Planning and Optimization. It is not a patch release.

This document highlights the enhancements, defects fixed, and known issues included in this release. It also describes how you can upgrade to this release. It includes the following sections:

- Release Number
- Hardware and Software Requirements
- Functional Enhancements
- Technical Enhancements
- Integration Enhancements
- Documentation Enhancements
- Upgrading to Promotion Intelligence and Promotion Planning and Optimization
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- StoreSets-3.1.0-62-200908252135-242966
- Framework-3.1.0-61-200908252100-242966

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Release Number

The previous release of Oracle Retail Promotion Intelligence and Promotion Planning and Optimization was 13.0.4. In order to align the release number for Promotion Intelligence and Promotion Planning and Optimization with the release number for the Merchandise Planning and Optimization products, this release of Oracle Retail Promotion Intelligence and Promotion Planning and Optimization is numbered 13.1.1.

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:

- **Vehicle Versions**

  - Multiple vehicles, each with their own versions, can be assigned to a promotion.

  - A promotional template can have its own versions assigned to it, allowing each version to define different pages and positions.

  - An Offer can be placed in multiple positions across different versions of a promotion.

- **What-If**

  - Using the Value Index metric within the Performance & What-If tab (in the Offer Details window), users can select the best offer from a group of what-if scenarios.

  - The Performance & What-If tab now displays two what-if scenarios by default. You can add up to nine what-if scenarios using the Add button. Although the attributes listed may be identical to those in the current offer, they are no longer pushed to the what-if scenarios when a change occurs in the current offer.

- **Position and Version Views on the Offer Definition Tab**

  - The Offer Definition tab (in the Offer Details window) now includes the Position View and Version View links that enable you to view all the relevant positions and versions for an offer.

- **Position and Version View Pop-up Windows in the Offer List Screen**

  - In the Offer List screen, the position count and version count columns now contain links that display a pop-up window with a list of positions or versions for the associated offer.

- **Overriding Store Counts**

  - Store counts can now be overridden on the Versions tab in the Promotion Manager and the Version Details window in the Offer Details window. The Offer Version data feed has also been modified to allow the use of the override value.

- **Moving or Resizing Positions in a Page**

  - When moving or resizing a position in a page, the X axis co-ordinates, Y axis co-ordinates, width, and height now appear as hover text on the position and display the current location and size.

- **Un-position Offers from the Vehicle Design Tab**

  - Offers can now be cleared (un-positioned) from the List View-Single Page on the Vehicle Design tab.

- **Clear Offer Overrides**

  - On the Performance & What-If tab (in the Offer Details window), the Modify Versions window for the what-if scenarios now includes a Clear Offer over-rides button that enables users to clear the Offer Type, Offer Amount, and Deal Amount fields for all versions of the specific what-if scenario.

- **Configurable List and Layout View on the Vehicle Design Tab**

  - The *promote.properties* configuration file now includes the *promotion.vehicleDesign.allPagesView* and *promotion.vehicleDesign.singlePageView* parameters that enables you to set the default view in the Vehicle Design tab.

- **Sales and Margin Forecasts for Offers with no SKUs**

  - Sales and margin values can now be calculated for offers without any SKUs. The promote.properties configuration file now includes the *promote.userforecast.empty.offers* parameter that enables the forecasts to be run for empty offers.

- **Partial Substrings Accepted in the SKU Quick Entry Field on the Offer Definition Tab**

  - In the Offer Details window, the SKU quick-entry field on the Offer Definition tab now accepts partial substrings to display the list of matches.

Technical Enhancements

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

- Multi-language Enablement

- K-Nearest Neighbors

- Database and Platform Support

- Upgrading to Release 13.1.1

Multi-language Enablement

Promotion Intelligence And Promote Planning And Optimization Now Support Nine Languages. The Languages Supported With This Release Include The Following:

- Chinese (Simplified)

- Chinese (Traditional)

- English

- French

- German

- Italian

- Japanese

- Korean

- Portuguese (Brazilian)

- Spanish

> **Note:** This release of Promotion Intelligence and Promotion Planning and Optimization does not support the Russian language.
>
> Support for the Russian language will be added in a future release and is dependent on the MicroStrategy platform extending its support for this language.

K-Nearest Neighbors

Promotion Planning and Optimization now implements a K-Nearest Neighbors (KNN) forecast methodology that ensures the performance of the past promotions for similar items are always considered and are at least as good as the average of the past sales performance.

Database and Platform Support

Promotion Intelligence and Promotion Planning Optimization now are also supported on the Oracle Database 11g Release 1, Enterprise Edition (11.1.0.7). The applications continue to be supported on the Oracle Database 10g Release 2, Enterprise Edition (10.2.0.3). Both the databases are now supported on the following platforms:

- Oracle Enterprise Linux 4.0

- Oracle Enterprise Linux 5.0 Update 2

- HP-UX 11i v3 Update 1 (11.31), Itanium-based

- IBM AIX 6.1 Technology Level (TL) 1 Service Pack 2 (SP2)

For more information, refer to the *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Installation Guide*.

Upgrading to Release 13.1.1

For new customers, Promotion Intelligence and Promotion Planning and Optimization Release 13.1.1 is a base release (a full product installation). Current customers who have installed Release 13.0.4 also have the option to upgrade to Release 13.1.1. For information about upgrading, see the following document at My Oracle Support (formerly MetaLink) at the following URL:

https://metalink.oracle.com

Oracle Retail Upgrade Guide (Doc ID 837368.1)

Because the upgrade process varies among Oracle Retail applications, the Oracle Retail Upgrade Guide describes the approach that each Oracle Retail application takes for the upgrading process, as well as product-specific upgrade assumptions and considerations. Actual procedures for the upgrade may be included in the application's Installation Guide.

Integration Enhancements

When deployed in the same environment, Promotion Intelligence and Promotion Planning and Optimization Release 13.1.1 can now leverage the base demand forecast generated by the Oracle Retail Demand Forecasting (RDF) Release 13.1.1. The capability of the Promote Calc Engine (PCE) has been extended to accept the base demand forecast from the Retail Demand Forecasting solution or any external source. For more information, refer to the *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Operations Guide*.

Documentation Enhancements

The Promotion Intelligence and Promotion Planning and Optimization documentation set now includes the following:

- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Implementation Guide* – This guide provides insight into the considerations for an implementation. It includes information on installing the application, configuring the user interface, database configuration, and staging and loading data. It also provides an overview on managing the applications.

- *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Data Model* – This Data Model provides information on the database objects such as Types, Tables, Views, Snapshots, Sequences, Triggers, Indexes, Synonyms, and Jobs for Promotion Intelligence and Promotion Planning and Optimization.

Upgrading to Promotion Intelligence and Promotion Planning and Optimization

> **Note:** This release supports upgrading from version 13.0.4 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. 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 TAE.

Noteworthy Fixed Issues

The following issues have been fixed with this release:

Table 1   Fixed Issues in this Release

Internal Reference Numbers	Description
HPQC 11800/TT 26639	When sorting by name in Page Templates - List View, names that start with a capital letter get sorted first before those that start with a small letter. The sort operation on the client did not seem to honor the same settings the server did. This issue has been fixed and the sort operation now honors the settings set in the promote.properties file.
HPQC 11806/TT 26645	Sorting issues were identified on the Calendar and Page Templates screens. This issue has been fixed.

Table 1   Fixed Issues in this Release

Internal Reference Numbers	Description
HPQC 11907/TT 26746	Users were able to clear the Start Date of a phase that had an already started event. This issue has been fixed and users can no longer clear the Start Date of a phase that has a started event. When users attempt to clear the Start Date, the following error message now appears: `You cannot clear the start date of a phase which has started events.`
HPQC 12226/TT 27065	On the Vehicle Design tab, the left/right arrows for the page selector and zoom selector remained enabled at the start or end of the lists. This issue has been fixed. The left/right arrows now appear disabled at the start or end of the lists. As part of the Vehicle Versioning enhancements, the left/right arrows with the Zoom button have been removed.
HPQC 12335/TT 27174	In the Pre-Plan Loader (PPL) BEE schema files, numeric fields with white spaces caused the data load to fail with an "ORA-01722: invalid number" error. This issue has been fixed.
HPQC 12656/TT 27495	The start and end dates for a new campaign, event, or promotion were inconsistently populated. This issue has been fixed.
HPQC 12829/TT 27668	An unexpected error was reported when users tried switching from the Calendar view by Month to Year. This issue has been fixed.
HPQC 12831/TT 27670	An unnecessary horizontal scroll bar appeared on the Page, Vehicle, and Promotion Template summary and Offer Status screens. This issue has been fixed and this horizontal scroll bar no longer appears on these screens.
HPQC 12888/TT 27728	The hover text over the Lock icon that appears on the read-only screens did not display the name of the user who was editing the child object (such as an offer). This issue has been fixed. The Audit Details window now displays the name of the user who is editing the child object.
HPQC 12896/TT 27736	An ActionScript error occurred when users tried clearing the planned start date and clicking OK in the Task pop-up window (Workflow tab). This issue has been fixed.
HPQC 12946/TT 27786	When users tried to create tasks from an opened Promotion template, tabbing was not enabled on the Task/Milestones details screen. This issue has been fixed.
HPQC 12947/TT 27787	An unexpected error was reported when users cleared and then selected the Active and InActive check boxes on the Promotion Templates screen. This issue has been fixed.

Table 1   Fixed Issues in this Release

Internal Reference Numbers	Description
HPQC 12949/TT 27789	When users were assigned to new tasks (in the Workflow tab), all user names with an underscore were not visible in the Selected User section. This issue has been fixed.
HPQC 12953/TT 27793	An invalid bean error was reported when users tried deleting an inactive page template from a vehicle template. This issue has been fixed.
HPQC 12967/TT 27806	For the Like Item added to an item through SKU List hierarchy, the Like Item SKU details were not displayed properly in the Like Item section of the SKU. This issue has been fixed.
HPQC 12977/TT 27816	On the Vehicle Design tab, with no page selected, the Page button was enabled when the Chart View, List View, or Thumbnail View was selected. This issue has been fixed.
HPQC 12987/TT 27826	The forecast status with User Forecast (system forecast of partial offers) did not sort correctly. This issue has been fixed.
HPQC 12990/TT 27829	When target allocation were added in categories, the error message included the text "label.PromotionCategory.totalTargetAllocation". This issue has been fixed.
HPQC 12996/TT 27835	In the Promotion Detail window, a horizontal scroll bar appears instead of the campaign name when the campaign name is of 40 characters. This issue has been fixed.
HPQC 13007/TT 27846	When a vendor deal is added, although an error message appears in case an invalid number is entered in the Min Space % field, the field is not highlighted in red. This issue has been fixed and the field is highlighted in red if an invalid number is entered.
HPQC 13020/TT 27859	When a user tries to associate another vehicle type for a promotion, an unexpected error appears. This issue has been fixed.
HPQC 13022/TT 27861	In each phase, users were unable to reorder the second task or milestone using the drag and drop action. This issue has been fixed.
HPQC 13028/TT 27867	In the Audit Details window, the Submitted by field displayed the name of the offer owner and not the user who submitted it. This issue has been fixed.
HPQC 13256	The last modified date for an offer was not properly updated after the user modified an offer version offer amount. This issue has been fixed.

Table 1   Fixed Issues in this Release

Internal Reference Numbers	Description
HPQC 13421	The *pr-offer* export did not include the Ad Item Total Sales/GM/Units fields. This issue has been fixed. The export now includes the following fields: ■ Ad Item Sales $ System and user override value. ■ Ad item GM $ System and user override value. ■ Ad item Units Sold System and user override value.
HPQC 13327	An offer could be added/deleted from a page position even when the page was locked with the user logged on in the multi-user edit mode. This issue has been fixed.
HPQC 13026/TT 27865	In the List View, when more than 16 duplicate positions were added incorrect results were displayed and the system did not respond. This issue has been fixed.
HPQC 12214/TT 27053	The olf_run.sh script (located in *./Script 7.build_predicted_ baseline/5.predict_baseline/*) failed to respond when the update_olf_ stats.sql statement was run. This issue has been fixed.
HPQC 12950/TT 27790	Incorrect values were displayed in the Calendar View based on Quarters. This issue has been fixed.

Known Issues

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

■ Positioning the same offer multiple times in the same version causes the forecast metrics to increase by the number of times the offer appears (HPQC 12826/TT 27665).

  The application does support the positioning of an offer multiple times through a configuration setting. However, the resulting metrics are not aggregated as desired. Also, the metrics produced by positioning the same offer within the same version twice do not equal the metrics by positioning two copies of that same offer within the same version twice.

■ When Promotion Planning and Organization is configured to be used in a language other than English, the *Drag a Category here* bar above the Target field in the Vendor Deals Detail window (Vendor Deals tab) may appear hidden by a horizontal scroll bar (HPQC 13909).

■ On the Offers tab-Chart View, the "$" (United States Dollar) currency symbol always appears for monetary metrics that are included in the graph. The application currently does not honor the currency format parameter in the *promote.properties* file (HPQC 13929).

■ The currency character does not adjust to the locale and language settings in the reports (HPQC 14002).

By default, the application uses the "$" (United States Dollar) currency symbol. During the implementation, you must manually change the currency format for all the monetary metrics.

- When Promotion Intelligence is configured to be used in a language other than English, the following issues have been identified:

  - Before the report is run, the prompts that appear for the filters (for example, *Choose from all elements of 'Event'*) do not adjust to the locale and language settings.

    In order to view the translated text for these prompts, you must use the Prompt Generation Wizard and clear the title and description in the *Provide general information for the prompt* screen for each prompt. Once you clear the title and description, you may need to click the Back button first, and then the Next button. For more information on the Prompt Generation Wizard, refer to the MicroStrategy documentation.

  - In the report, some attributes may appear with their alias in the English language.

    In order to view the translated strings for the attributes, you must manually remove the alias from all the attributes in the report. This will force the reports to use the actual attribute name that is included as part of the translation. For each report, the aliases are listed in the Display category of the Report Data Options window. For more information on the Report Data window, refer to the MicroStrategy documentation.

  - In the report, the titles for the drill maps that appear when you right-click on a hyperlinked metric do not adjust to the locale and language settings.

    In order to view the translated text for these drill maps, you must use the Drill Map Editor and clear the Drill Path Display Name field for all the items in the Templates section. For the changes to take effect, you must click the Save All and Close button. For more information on the Drill Map Editor, refer to the MicroStrategy documentation.

- In the What-If List View screen, the first row may get selected when you try clicking one of the last two rows (HPQC 14024).

- The Audit Report updates do not include the changes specific to the Vehicle Versioning feature (HPQC 14094).

- The Forecast Execution Report updates do not include the changes specific to the Vehicle Versioning feature (HPQC 14095).

- An unexpected error may occur when users try to modify the other attributes on the Edit Version details panel for a positioned offer (HPQC 14267).

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

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.