Oracle® Retail Promotion Intelligence and Promotion Planning and Optimization

Release Notes

Release 13.0.2

October 2008

Welcome to Oracle Retail Promotion Intelligence and Promotion Planning and Optimization 13.0.2.

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-13.0.2-387-200810310035-228635

PCE-13.0.2-395-200810310005-228635

Framework 1.7.2

Installer 2.3.2

Suite 1.7.2

StoreSets 2.3.2

Note the following:

- OEL 4 - 64 bit is now supported for all servers (DB, UI and PCE farms)
- 64-bit JVM is supported for PCE
- Oracle 10g RAC is now supported for the DB

What's New in Oracle Retail Promotion Planning and Optimization 13.0.2

This release of Promotion Planning and Optimization introduces these enhancements:

- Offers:
    - Versioning. Versions support the ability to have a single ad or event with variations in different markets.
        * Addition of Location and Store Set Hierarchies. Location and store set hierarchies have been added to the allowing users to define which locations or store sets are being promoted. Stores can span multiple ad zones or multiple stores.
        * Price Versioning. Pricing can be computed for each version of an offer based on its retail price and location.

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* Version Forecasts. An offer specific forecast can be generated that reflects the stores for that offer.

* What–If. Versions can also be used to perform what–if analysis. Versions can be enabled or disabled for inclusion in the analysis.

- Get Lists. In coordination with the Buy One, Get One Offter Type, users have the ability to define a Buy and Get list. One group of SKUs is specified in the Buy list, and another group of SKUs is specified in the Get list.

■ Forecasting:

- Forecast Confidence Indicator. Confidence indicator icons are available to provide visibility into the accuracy of the system generated, forecast metrics. A column for forecast confidence is available within the following areas of Promotion Planning and Optimization: the Offers tab of the Promotion Manager, the Performance & What–If tab of the Offer Details window, SKU View and Version View of the Offer Definition window, the promotion performance metrics accessible from the Vertical Tab, and the Offers tab of the Position Details window in the Vehicle Designer.

- Forecasting Offer Level. This feature has been implemented to improve the forecast coverage and accuracy. The predicted baseline window has been made adjustable to not regenerate PBL for the specified number of upcoming weeks. The number of forecastable vehicle types has been increased.

■ Usability Enhancements.

- Improved Charting Capabilities. Stacked bar and Bubble charts are now available within the Graph feature. Users also have the ability to filter views of the metric data displayed within the charts.

- Column Mouseovers. The ability to see column names via mouseovers is now available.

■ Additional Enhancements:

- Multiple Offers—Previously, when using Layout View for a single page in the Vehicle Designer, only the name of the first offer assigned to a position would be displayed. This enhancement allows users to view multiple offers within a page block. An indicator also exists that will display when more offers exist than can fit on the screen.

- Categories Visible—Previously, when using Layout View for a single page in the Vehicle Designer, categories assigned to a position were displayed as a comma separated list of values. This list could only be shown on one line and additional categories would be truncated. The user would then need to hover over the block to see the full names of additional categories. This enhancement provides users with the ability to view multiple categories as a comma separated list in full without any truncation.

- Visibility to Block Level Performance—This enhancement provides the ability to view the metrics associated with a block in table view or as a hover in layout view within the Vehicle Designer.

- Block Level Offer Criteria—A new optional field has been added to the Position Detail window within the Vehicle Designer. This field allows users to specify the type of offer that can be added to the block.

- Indent Hierarchy Tree—This enhancement has additional spaces to the indents used to display children within the Hierarchy.

- Security Roles—This enhancement provides certain users with the ability to perform What–If analysis yet prevent any changes to be submitted for an offer.

- Several standard export views have been added.

What's New in Promotion Intelligence 13.0.2

This release of Promotion Intelligence introduces the following:

- Forecast Accuracy Report. This new report compares the system and user predicted forecast from a promotion created in Promotion Planning and Optimization to the actual sales results that were imported into Promotion Intelligence. Analysis is offered at the event level.

Upgrade Procedure

> **Note:** This release supports upgrading from version 13.0.0.9 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/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

Post–Installation Tasks

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

1. Run TAE.
2. Run build_lift_model.
3. Run Predict Baseline including OLF.
4. Run Forecast Accuracy metrics calculation job.

Fixed Issues

The following issues have been fixed with this release:

Affinity (Pull) Report -Some of the Items are labeled as Unlikely when they should be Inconclusive (25630). The threshold values on the pull metric on the Affinity(plus) report have been modified.

Offer Performance Graph does not work for offers with user-defined forecast (25682).

Issue when a User tries to update promote.properties file and refresh procs from cmd line without shutting down the server (25797).

If a user tries to forecast an offer that is excluded, the offer status changes to 'Unable to forecast' within the Offer List (25821). Excluded offers should remain excluded (forecast status).

Once Promotion is in the completed Phase, User should not be able to edit Name,Description or status of the promotion on the summary page (25822).

Unable to Complete a promo by using the phase details pop up (25823). User is not able to start or complete the 'COMPLETED' phase from the phase details pop.

Promote should not allow the same item in multiple offers with in a promotion (25843).

Dynamic page template name not refreshed when added to existing promotion in vehicle design tab (25853). When adding a Fixed page template in the Vehicle Design page, the correct name for the page template should be displayed.

Page template—deleting a position does not refresh remaining positions in the List view (25866).

CSV export doesn't include headers for positioned offers (25870).

Price elasticity while low (-0.4) should still result in higher incremental units for deeper discounts (25900).

ROI % and Lift % metrics rollups are displayed incorrectly (26060).

The default store coverage for no-sale but with inventory base week is 1 (26123).

The store sets loader does not work with the store sets UI (26195).

Location hierarchy folders do not have the correct store count (26210).

All Metrics are the same, even if there are different offers for each version (26211).

Model escalation picks model with inactive attribute (26398).

$off and fixed price offers are not computing discount correctly (26448).

Known Issues

The following are known issues with this release:

Displaying historical data fails in PromotionManager (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.

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

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).

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).

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

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

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

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

When sorting Page Templates by position type, the sort arrow appears in the opposite direction of what it should be (26645).

'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.

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

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

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.

Performance switching to performance & what if tab is very slow (26677).

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.

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

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