

# Oracle® Retail Demand Forecasting

Release Notes

Release 14.0.1

May 2014

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Oracle Retail Demand Forecasting (RDF) is a statistical and promotional forecasting solution. It uses state-of-the-art modeling techniques to produce high quality forecasts with minimal human intervention. Forecasts produced by the Demand Forecasting system enhance the retailer's supply chain planning, allocation, and replenishment processes, enabling a profitable and customer-oriented approach to predicting and meeting product demand.

All Oracle Retail Grade and Oracle Retail Curve documentation is included with the RDF documentation. The packaging and delivery of Curve and Grade remains the same.

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**Note:** Because RDF, Curve, and Grade use the Oracle Retail Predictive Application Server (RPAS) platform, Oracle Retail recommends that you review the *Oracle Retail Predictive Application Server Release Notes* for fixed and known issues that may affect RDF.

In addition, RPAS 13.3 and later releases have significant technical enhancements related to hierarchy management (such as integer indexing) that have an effect on the configuration and maintenance of RDF, Curve, and Grade. You must upgrade to key RPAS versions and complete the upgrade process as described in the chapter, "Patch Installation" in the *Oracle Retail Demand Forecasting Installation Guide* before upgrading to a 14.0.1 RDF domain.

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## Grade Overview

Grade is a clustering tool that provides insight into how various parts of a retailer's operations can be grouped together. Typically, a retailer may cluster stores over item sales to create logical groupings of stores based upon sales of particular products. This provides increased visibility to where products are selling, and it allows the retailer to make more accurate decisions in merchandising. Beyond this traditional use of clusters, Grade is flexible enough to cluster any business measure based on products, locations, time, promotions, customers, or any hierarchy configured in the solution.

Key Grade functionality includes:

- Two methods of creating Grades/Clusters:
- Breakpoints: the sorting of data points into groups based on user-defined indexes
- Clustering, or the BaNG Algorithm: the optimization of data points into clusters based on the user-defined number of clusters

- Group By capabilities: support the segmentation of clusters for more detailed and focused cluster generation
- Clustering statistics: provide insight into the relationship of members within a cluster and how all clusters relate to one another
- Cluster What-if: allows user changes to members assigned to clusters and the review of recalculated clustering statistics

Regardless of the method employed to create clusters, Grade is designed to support the decision-making process necessary to create effective and actionable groupings of data.

## Curve Overview

Curve is an optional automated predictive solution that can generate ratio arrays from historical data at user-specified intersections. The profiles generated by Curve can be used for various purposes; for example, they can be used to convert the organization level assortment plans into base level weekly sales forecasts and to generate seasonal forecasts, daily forecasts, or new product forecasts using lifecycle profiles.

## Important Steps to Address RMS/RPAS/RDF Integration

This section describes important steps to address the RMS/RPAS/RDF integration.

### Change of Class and Subclass Naming

Oracle Retail Merchandising System (RMS) sends hierarchy files to Oracle Retail Demand Forecasting (RDF). RMS ensures that a class is unique to only its department and a subclass is unique to only its own class. In other words, Dept10 and Dept. 20 both can contain Class 100. However, within RPAS, unless class names are unique across the domain, it results in a multi-parent problem. Prior to Release 13.1.2, RDF tried to ensure uniqueness by concatenation of positions as follows:

- RDF Class = RMS Dept + RMS Class
- RDF Subclass = RMS Dept + RMS Class + RMS Subclass

However, this can result in a multi-parent problem. For example:

RMS Department	RMS Class	RPAS/RDF Class
10	110	10110
101	10	10110

In this scenario, Clss10110 rolls into both Dept10 and Dept101. This is not acceptable in any RPAS application.

## Resolution

Position names are made unique by adding an underscore. In the previous example, the classes would be named `Clss10_110` and `Clss101_10`. However, when these position names are corrected and new hierarchy files are created, the existing class/subclass name no longer exists. Therefore, if the upgrade process is not specifically followed, any data that was stored at the class or subclass level (such as `Clss10110`) is erased.

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**Important:** Failure to follow these upgrade instructions could result in data loss.

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The following upgrade process needs to be followed only by the customers who:

- Use standard integration between RMS and RPAS based applications (other than AIP).
- Have stored data at class or subclass levels.
- Upgrade from a version prior to 13.0.4.18 to 13.0.4.18 or later. Those customers must apply the [Upgrade Process for Class and Subclass Naming](#). In the future, customers already on 13.0.4.18 or later do not need to use this process again.

### Upgrade Process for Class and Subclass Naming

1. Point the environment variable `RPAS_HOME` to the new `RPAS_HOME`.
2. Run the script `$RPAS_HOME/rfx/src/rmse_rpas_merchhier.ksh` to generate the `rmse_rpas_merchhier.dat` file. This is how the new position names are generated.
3. Run `repos.ksh` with the `-a n` flag to produce the position rename file and run **renamePositions** without applying the changes. Examine the log file `PRODrename.log` for errors.
4. When ready, run the `repos.ksh` script without the `-a y` flag to apply the changes.

## Change of Position Label Widths

Fields lengths for RDF hierarchies were increased to accept wider labels from RMS. These new field lengths are currently not patchable directly in any RPAS domain. Therefore, the following upgrade process must be followed:

### Upgrade Process for Field Lengths

All customers using 13.0.4.18 and earlier should perform the following steps every time a new hot fix is applied.

1. Export the following environment variables in the environment before running the upgrade scripts.
  - `UPGRADE_HOME`: This variable should point to the path of upgrade scripts where `environment.ksh`, `updateschemafiles.ksh`, `updatetoolsconfiguration.ksh`, and other configuration files are present.
  - `RDF_DOMAIN_PATH`: The path of RDF domain which you are going to patch. The dimension field length of this RDF domain is taken and applied to the configuration and schema files.
  - `RDF_SCHEMA_DIR`: The RETL RDF schema files directory. This must be the latest release directory, which you use for patching. It points to the `SCHEMA` files location in the release, which you use for patching the RDF domain.

- TOOLS\_CONFIG\_DIR: The Configuration Tools XML files directory. It points to the directory where the hierarchy.xml file is present. It must be the latest release directory which you use for patching.
  - UPGRADE\_BACKUP\_DIR: A backup of SCHEMA and hierarchy.xml files is kept in this directory.
2. Set up the following upgrade scripts:
    - The updateschemafiles.ksh script updates the dimension field length of schema files to the length as available in the domain.
    - The updatetoolsconfiguration.ksh script updates the dimension field length of configuration files to the length as available in the domain.
  3. Change the directory to UpgradeScripts directory.

```
$ cd UpgradeScripts
```
  4. Run updatetoolsconfiguration.ksh. This updates the hierarchy.xml file.

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$ ./ updatetoolsconfiguration.ksh
```
  5. Run updateschemafiles.ksh. This updates the RETL RDF schema files.

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$ ./ updateschemafiles.ksh
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**Note:** For added visibility for retailers, these instructions are included in both the *Oracle Retail Demand Forecasting Release Notes* and the *Oracle Retail Demand Forecasting Installation Guide*. For more information, see the *Oracle Retail Demand Forecasting Installation Guide*.

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## Upgrade Note

While not directly related to RDF, the 13.3 Release of Oracle Retail Predictive Application Server (RPAS) has undergone a major change to simplify hierarchy administration. Full details of these changes are outlined in the 13.3 *Oracle Retail Predictive Application Server Release Notes*. Due to these changes, configuration updates have been made to RDF, and you will need to perform additional steps to upgrade your RDF domain, such as setting dimension sizes. The upgrade to RPAS 13.3 or later for this application includes a conversion process in addition to the normal upgrade process. Details are provided in the chapter, "Patch Installation", in the *Oracle Retail Demand Forecasting Installation Guide*.

## Hardware and Software Requirements

See the Oracle Retail Demand Forecasting Installation Guide for information about the following:

- Hardware and software requirements
- Oracle Retail application software compatibility information

## Noteworthy Defect Fixes

The following table contains issues that have been fixed for the current release.

Affected Component	Fixed Issue/Defect	Defect Number
Process	Purged items are not being removed from the cloning map measure, causing the cloning procedure to fail. This issue has been addressed by allowing the process to continue and issuing a warning when such a case is encountered.	17938229
Calculations	Changed the Oracle Winters - Decomposition algorithm to avoid generating unreasonably high forecast values.	18183073
Batch Scripts	Several batch scripts do not work with all RPAS log levels.	18251939, 18251155
Demand Transference	RDF generating Demand Transference effects for a final level when they were not enabled.	18252250
Integration	Resolved issues with AIP integration scripts.	18269594, 18253700
Forecast	Causal generated a forecast although it was setup to generate effects only. This issue has been resolved.	18303183
Workbook	Fixed a cumulative interval issue in the Forecast Approval workbook	18383820

## A Note Regarding the Order of Hierarchies

In the Configuration Tools, the relative calendar's order needs to be modified so that it is before product and location and after calendar.

## Known Issues

The following table contains issues that have been identified for the current release.

Known Issue/Defect	Defect Number
Currently, in Halo batch, the promotion variable (paggxlcirc) that calculates the system forecast is from the previous batch. If users change the promotion indicator between the previous batch and Halo batch, then the change does not occur.	17799032
When building the Promo Maintenance workbook and selecting promotions, if the base intersection contains dimensions that are not on the main branch of the respective hierarchies, the build fails. Additionally, subsequent builds of the workbook fail. The work-around solution is to manually delete the selection file for the workbook.	18308110

Known Issue/Defect	Defect Number
<p>In an RDF domain using the RPAS Classic Client built using the Generally Available configuration, the Promotion Parameters worksheet is hidden after building a Promotion Maintenance workbook and selecting any level other than level 1.</p> <p>Follow this work-around to resolve the issue:</p> <ol style="list-style-type: none"> <li>1. Click the Window menu and select the unhide option.</li> <li>2. Click <b>OK</b> to display the worksheet.</li> </ol>	18712982
<p>When upgrading to version 14.1, if the current version is older than 14.0 and a lifecycle profile was configured in Curve, then the domains need to be rebuilt. Patching will not work.</p>	Not applicable

## Related Documentation

For more information, see the following documents in the Oracle Retail Demand Forecasting 14.0.1 documentation set:

- *Oracle Retail Demand Forecasting Implementation Guide*
- *Oracle Retail Demand Forecasting Installation Guide*
- *Oracle Retail Demand Forecasting Release Notes*
- *Oracle Retail Demand Forecasting Online Help for the RPAS Fusion Client*
- *Oracle Retail Demand Forecasting User Guide for the RPAS Classic Client*
- *Oracle Retail Demand Forecasting User Guide for the RPAS Fusion Client*
- Oracle Retail Predictive Application Server documentation

## Previous Releases

For additional information on previous Oracle Retail Demand Forecasting release enhancements and additional information, refer to the release notes and documentation that accompany the previous release.

## Documentation Accessibility

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<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

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