

# Oracle® Retail Demand Forecasting

Release Notes

Release 15.0.2

January 2017

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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 15.0.2 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.

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

```
$ ./ 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*.

### Upgrading to 15.0

When upgrading to RDF version 15.0.2, if the current version is older than 14.0 and a life cycle profile was configured in Curve, then the domains need to be rebuilt. Patching will not work.

The GA version of CPEM is not upgradeable to version 15.0 from any other previous versions. The two main reasons are the changes in the cannibalization level, and the requirement for item/store level data.

## 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
Override Option	Revised 15.0 Retail Demand Forecasting User Guides provide an override option for the approval method in the Forecast Maintenance workbook.	19467391
Installer	The RDF Installer was updated to create the correct domain path in Foundation.xml for RDF and CPEM.	23228539
Workbook	The Forecast Approval workbook fails to build using auto workbook build or alert manager. This issue has been resolved.	24427626
Data	In the Interactive Forecast workbook, changing the Forecast Start date has no effect on the forecast data. This issue has been addressed by observing the changed forecast start date.	24447592
Alerts	The rdf_find_alerts.ksh script is incorrectly logging error messages. This issue has been resolved by creating the CPeak measures only if the Forecast alert and Causal are enabled for that level.	24489457
Calculation	The rule Calc_PrePopSlsNum in the PrepDemandCommon solution is not doing the right calculation of the number of weeks of an item. This issue has been resolved.	24573961
Integration	The RMS Forecast export file is not generating the flat file in correct format. This issue has been addressed by correcting the format.	24623139
Workbook	The custom menu inside the Promo Effectiveness workbook does not work if there is only one time series included in the workbook. This issue has been resolved.	24847803
Workbook	Refresh rules were added to the Curve Profile Maintenance workbook.	24913151
Calculation	The Forecast Approval Default Alert Threshold Parameters have unexpected values. They have been corrected to more realistic values.	24969288
Calculation	There are RDF Alert Threshold Parameters with incorrect labels. The labels have been updated to reflect calculations.	25031307
Calculation	The calculation window of the total cloned sales is off by a week. This causes a very small difference on the adjustment factor. This issue has been addressed by correcting the calculation window.	25243277

## Known Issues

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

Affected Component	Known Issue/Defect	Defect Number
Grade Workbooks	When navigating through the wizard selections for certain Grade workbooks, the selections are being duplicated on screen. The workbooks include Generate Grade Breakpoints and Generate Clusters.	18196485
Translation Files	There may be issues when loading translated strings into RDF.	20923721

## Related Documentation

For more information, see the following documents in the Oracle Retail Demand Forecasting Release 15.0.2 documentation set:

- *Oracle Retail Demand Forecasting Installation Guide*
- *Oracle Retail Demand Forecasting Release Notes*
- Oracle Retail Predictive Application Server documentation

The following documentation may also be needed when implementing RDF:

- *Oracle Retail Planning Batch Script Architecture Implementation Guide*

## Supplemental Documentation

The following document is available through My Oracle Support at the following URL:

<https://support.oracle.com>

### **Oracle Retail Demand Forecasting 15.0.2 Cumulative Fixed Issues (Note ID 2221086.1 )**

This document details the fixed issues and defects for all RDF, Curve, and Grade patch releases prior to and including the current release.

## Supplemental Training on My Oracle Support

The following document is available on the My Oracle Support Web site. Access My Oracle Support at the following URL:

<https://support.oracle.com>

### **Transfer of Information (TOI) Material (ID 732026.1)**

Online training is available to Oracle supported customers at product release. These online courses provide release-specific product knowledge that enables your functional and technical teams to plan, implement and/or upgrade and support Oracle Retail applications effectively and efficiently.

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