

# Oracle® Retail Promotion Intelligence and Promotion Planning and Optimization

Release Notes

Release 13.2

May 2010

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Welcome to Oracle Retail Promotion Intelligence and Promotion Planning and Optimization 13.2.

This document highlights the enhancements, defect fixes, and known issues in this release. It also describes how you can upgrade to Release 13.2. It includes the following sections:

- [Hardware and Software Requirements](#)
- [Functional Enhancements](#)
- [Technical Enhancements](#)
- [Integration Enhancements](#)
- [Upgrading to Promotion Intelligence and Promotion Planning and Optimization](#)
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#### Build IDs:

- Promote-13.2.0-204-201004241714-252147
- PCE-13.2.0-205-201004241700-252147
- Installer-3.2.0-173-201004152245-251835
- Suite-3.2.0-173-201004152210-251835
- StoreSets-3.2.0-169-201004152245-251835
- Framework-3.2.0-188-201004152155-251835

## 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:

- [Copying Offers](#)
- [Version Grouping](#)
- [Block-Level Locking](#)
- [Inherited Pages](#)
- [Expanded Offer Attributes](#)
- [Copy, Export, and Print Options on Performance & What-If Tab](#)
- [Error Reporting](#)
- [Price Point Offer Rounding Rules](#)
- [Adding Multiple SKUs](#)
- [Offer Amounts in the Vehicle Design Tab-Layout View](#)
- [Offer Forecasts Export Update](#)
- [BEE\\_PROMO\\_VER Interface Update](#)

### Copying Offers

The Promotion Planning and Optimization application now includes the Copy Offers feature. This feature enables you to search for offers from any existing promotion, copy it to the current promotion, and create a new offer. For more information, refer to the *Oracle Retail Promotion Planning and Optimization User Guide*.

### Version Grouping

Promotion Planning and Optimization now supports version groups that enables you to define and group multiple versions where each version group is associated with multiple locations or store subsets. Version groups can be defined using the Version Groups screen that appears in the following areas of the application:

- For a promotion, the Version Groups screen appears when you click the Edit button next to the Version Groups field on the Summary tab of the Promotion Manager.
- For a promotion Vehicle, the Version Groups tab on the Vehicle Details window.
- For a promotion template, the Version Groups tab on the Promotion Templates screen.
- For a vehicle template, the Version Groups tab on the Vehicle Templates screen.

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

### Block-Level Locking

Promotion Planning and Optimization now includes an additional level of locking at the position level, called Block-Level Locking. This will enable multiple users to open the same page but lock, edit, and save different positions at the same time.

The application has also been enhanced to support a Page exclusive lock that is required when performing multi-position operations such as add, remove, or re-order positions. For more information, refer to the *Oracle Retail Promotion Planning and Optimization User Guide*.

## Inherited Pages

Promotion Planning and Optimization now supports the concept of a base version in a promotion's vehicle in such a manner that each subsequent version provides changes from the base version. This enables you to override individual positions in a page without overriding the whole page. Pages also line up across versions as opposed to being added to the version.

In all views, for versions other than the base version, inherited pages appear with dashed borders. In the List View, data in the inherited page rows appear italicized. You can click the inherited page and open it to override the positions. Metric data displayed in the List View is configurable using the `promote.versioned.position.rollup` parameter in the `promote.properties` file. In the Layout View, inherited pages appear with dashed borders. The page number links enable you to open and override positions. For more information, refer to the *Oracle Retail Promotion Planning and Optimization User Guide*.

## Expanded Offer Attributes

Promotion Planning and Optimization now extends support to the generic offers by appending attributes to its offer types. Each offer type can be associated with a variable set of attributes. Offer attributes are specific to the offer type per offer or offer version and apply to all items in the offer. The application enables you to view and edit the offer attributes. For example, the offer may be "%Off" with no minimum buy requirement. But in a version it may be required to have a fixed price with a minimum buy requirement.

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**Note:** In this release, the application enables you to view and capture the offer attributes information. This information is useful for analysis and future forecast modelling updates.

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

## Copy, Export, and Print Options on Performance & What-If Tab

The List View on the Performance & What-if tab now includes the following features on the right side of the toolbar:

- **Copy table data to clipboard** – copies the contents of the list into the clipboard of the operating system in a format that can later be pasted into a Microsoft Excel file.
- **Export table** – exports the table in a comma separated value (csv) format. When the users click the icon, they will be prompted with an Export dialog box that will enable them to open or save the file.
- **Print** – enables the user to print the table displayed on screen. When the users click the Print button, they will be prompted with a Print dialog box. In the printed page, the table will have only simple line borders without any background colors. The column widths will be identical to those on the screen. So if a column is

not wide enough to see all the text on screen, it will also be cut off in the printed page. It will print across and down as many sheets as necessary, depending on the printer configuration and paper size. Since the tables tend to be wide but do not have a lot of rows, it is recommended that the users change the printer settings to the landscape layout.

## **Error Reporting**

Promotion Planning and Optimization now enables you to report an unexpected error immediately using the Send Error Report right-click menu option. This feature enables you to send the relevant information directly to the support representative. For more information, refer to the Oracle Retail Promotion Planning and Optimization User Guide.

## **Price Point Offer Rounding Rules**

The price point offer rounding rules have been updated to better suit your business needs. The `promote.offerrule.exclude` and `promote.offerrule.versions` parameters have been added to the `promote.properties` file to make the offer rounding rules configurable.

## **Adding Multiple SKUs**

The Add SKU–Quick Add feature on the Offer Definition screen has been updated to handle multiple SKUs that display the criteria entered by users. This enables the users to use a wildcard to search for SKUs. If multiple rows are returned, a pop-up window appears listing the SKU information. Users can now select (or multi-select) SKUs from that pop-up window.

## **Offer Amounts in the Vehicle Design Tab-Layout View**

The Layout View in the Vehicle Design tab has been updated to display the Offer Amounts field. This is an optional configuration and can be switched on or off, based on your business need.

## **Offer Forecasts Export Update**

The Offer Forecasts export file has been updated to include the Override column.

## **BEE\_PROMO\_VER Interface Update**

The BEE\_PROMO\_VER interface has been updated to include the LOCATION\_COUNT information.

## Technical Enhancements

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

- [Health Check and Monitoring](#)
- [Database and Platform Support](#)
- [Password Stores](#)
- [Third-Party Libraries](#)

### Database and Platform Support

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

- Oracle Enterprise Linux 5.0 Update 3
- Sun Solaris 10

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

### Third-Party Libraries

The third-party libraries used in the Promotion Intelligence and Promotion Planning and Optimization applications have been upgraded. For more information, refer to the *Oracle Retail Merchandising Planning and Optimization Licensing Information*.

### Password Stores

As part of the Oracle Software Security Assurance (OSSA) program, sensitive information such as user credentials must be encrypted and stored in a secure location known as the password stores. The password stores are secure software containers that store the encrypted user credentials. You can retrieve the credentials using aliases that were set up when encrypting and storing the user credentials in the password store.

Once configured, the application installation and the other relevant scripts no longer need to use embedded user names and passwords. This reduces any security risks that may exist because user names and passwords are no longer exposed. When the installation starts, all the necessary user credentials will be retrieved from the Oracle Wallet, based on the alias name associated with the user credentials. For more information, refer to the *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Installation Guide*.

### Health Check and Monitoring

The Health Check and Monitoring feature provides a set of database tables and a framework to run user-defined SQL scripts or reports that can perform a non-intrusive health check on the data being used in the application. The scripts can be set up to run at different intervals and provide proactive recognition and investigation of many issues that could otherwise lead to poor system performance or abnormal results.

Based on the health check conditions you set up, the application database is monitored and the health check results are stored to the database (separate database tables are

dedicated for this feature). You can then consolidate and extract the results in a health check report that can be shared with the relevant users. For more information, refer to the *Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Operations Guide*.

## Column Header Configuration

A new configuration parameter (`list.header.maxHeight`) has been added to the `promote.properties` file that will limit the pixels created when wrapping column headers after a user resizes a column width. The minimum configurable value is 1 line. If the column header does not fit within the allowed pixels per this configuration then the column header will be truncated.

## Integration Enhancements

Promotion Planning and Optimization Release 13.2 now provides promotional lifts information that can be integrated with a demand forecasting solution such as Oracle Retail Demand Forecasting (RDF).

## Upgrading to Promotion Intelligence and Promotion Planning and Optimization

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**Note:** This release supports upgrading from version 13.1.1 only.

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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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Complete the following steps to upgrade to Release 13.2:

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/pcserver.log4j.properties. The upgrade will not preserve the customization.
12. Run the following mdc scripts:
  - ~/mdc/scripts/1.base\_config/7.views/doing.sh

## Post-Installation Tasks

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

- Run Market Basket Summaries again.
- Complete the following steps to support K-Nearest Neighbors (KNN) feature:
  1. Manually insert a row in the ASH\_CP\_TBL database table with the following data:
    - INTERSECT\_NAME: AE\_ANALYSIS
    - MERCHANDISE\_LEVEL: SKU
    - LOCATION\_LEVEL: COUNTRY
  2. Run the following external scripts:
    - 1.base\_config/0.patches
    - 1.base\_config/1.config\_files
    - 1.base\_config/2.promo\_metadata
    - 1.base\_config/7.views
    - 4.analyze\_history/5.knn

## Noteworthy Fixed Issues

The following issues has been fixed in this release:

**Table 1** *Noteworthy Fixed Issues*

<b>Internal Reference Number</b>	<b>Description</b>
10995	The Promote Calc Engine (PCE) API did not support the implementation of base affinity metrics.
12989	Although the What-if users were able to edit a page in the Vehicle Design tab, they were unable to save the changes.
13255	The Forecasted Margin% calculation was incorrect on the Vehicle Design Tab–Layout View when hovering on a block.
13555	An empty Merchandise Hierarchy file set the End Date on all items.
13866	A confusing error message appeared when users entered a higher than allowed number in the Position Details window.
13974	Performance issues were identified in the application when the KNN feature was enabled.
14024	In the What-If List View screen, the first row got selected when users tried clicking one of the last two rows.
14150	The error message was not cleared properly in the Promotion Details panel when creating a promotion.
14159	Invalid plan and actual completion dates were getting saved in the Summary tab of the promotion.
14243	Invalid offset days appeared in the Milestone Details window for a workflow.
14267	An unexpected error occurred when users tried to modify the other attributes on the Edit Version details panel for a positioned offer.
14250	The application user interface did not honor the new null sort high configuration for non-number data types.
14336	The Campaign selection pop-up window did not support the double-click functionality to select the corresponding campaign.
14353	An invalid bean error occurred when an ad planner tried to create an offer from the Vehicle Design tab.
14393	The Renumber Positions button was enabled even when no positions were available.
14394	Adding a store sub set to a store set did not automatically update the promotion versions.
14412	When editing the date fields in the Summary tab for a promotion, the Apply, Cancel, and Close buttons worked only after a second click.
14417	On the Position Details screen, users were able to create offers with different offer type or offer amount selected for the position than the offer type or offer amount from the existing offer.
14438	Users with the Category Manager role were able to renumber positions in the Vehicle Design tab.
14459	Users were unable to open any existing offers unless the offers were editable by the user.
14510	The incorrect category opened when users scrolled down in the category list.

**Table 1 (Cont.) Noteworthy Fixed Issues**

<b>Internal Reference Number</b>	<b>Description</b>
14548	After performing an Export Promotion Layout View (html), the Pages drop-down menu did not filter data.
14582	Systems metrics appeared in place of the current offer details.
14610	Unprocessed data files were identified that could interfere with weekly operations processing.
14746	Users were able to close a promotion even when its Versions panel was still open.
14871	On the Vehicle Design tab–Single Page view, after adding or deleting positions and then clicking Cancel, users got a confirmation message to save the changes. This confirmation message must not appear when the position added or deleted are automatically saved.
14910	On the Vehicle Design tab–Single Page view, the Add link was available for a position even when the page was not locked.
14940	SKUs without a predict baseline incorrectly showed a forecast status of "Unable/No Model".
14941	On the Vehicle Design tab–Single Page, the List View and Chart View did not get updated when the page was replaced by a dynamic type page template.
14948	Locations associated with inactive store sub sets (including the default/unassigned store sub sets) were being loaded.
15332	The Units, Height, and Width fields did not get disabled in the Add Page dialog box.

## 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).  
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 that result by positioning two copies of that same offer within the same version twice.
- 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).
- Promotion Intelligence and Promotion Planning and Optimization applications include many configuration settings and combinations. In Release 13.2, although certain configurations and combinations of configurations have been implemented to the configuration files, not all configuration settings are supported (HPQC 15415).

## 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://support.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, 13.2) or a later patch release (for example, 13.2.1). 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](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.

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Oracle Retail Promotion Intelligence and Promotion Planning and Optimization Release Notes, Release 13.2

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## Value-Added Reseller (VAR) Language

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- (ii) the **MicroStrategy** Components developed and licensed by MicroStrategy Services Corporation (MicroStrategy) of McLean, Virginia to Oracle and imbedded in the MicroStrategy for Oracle Retail Data Warehouse and MicroStrategy for Oracle Retail Planning & Optimization applications.
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