

Oracle® Retail Curve

User Guide

Release 13.2

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Preface

The Oracle Retail Curve User Guide describes the application's user interface and how to navigate through it.

Audience

This document is intended for the users and administrators of Oracle Retail Curve. This may include merchandisers, buyers, and business analysts.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible to all users, including users that are disabled. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Accessibility standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For more information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

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Related Documents

For more information, see the following documents:

- *Oracle Retail Curve Release Notes*
- *Oracle Retail Curve Configuration Guide*
- Oracle Retail Predictive Application Server Documentation

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<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 re-create
- Exact error message received
- Screen shots of each step you take

Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 13.1) or a later patch release (for example, 13.1.2). If you are installing the base release, additional patch, and bundled hot fix releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch and bundled hot fix releases can contain critical information related to the base release, as well as information about code changes since the base release.

Oracle Retail Documentation on the Oracle Technology Network

Documentation is packaged with each Oracle Retail product release. Oracle Retail product documentation is also available on the following Web site:

http://www.oracle.com/technology/documentation/oracle_retail.html

(Data Model documents are not available through Oracle Technology Network. These documents are packaged with released code, or you can obtain them through My Oracle Support.)

Documentation should be available on this Web site within a month after a product release.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Introduction

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, 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.

Curve meets the need of operational systems (such as Oracle Retail Demand Forecasting [RDF] and Oracle Retail Merchandising System [RMS]) to have sales unit predictions at a more detailed level than those provided by planning programs. The planning process attempts to establish the correct balance between different products in order to maximize sales opportunities in the available sales space. The planning process is supported by the generation of an assortment plan, which provides details of your anticipated sales volumes and stock requirements at aggregated levels. However, operational systems like RDF requires data to be at the lowest level of execution (that is, item/store/week or item/store/day) because these systems are responsible for ensuring that the right quantity of each product is in the right store at the right time.

In the most basic sense, a profile represents the ratio of an aggregate dimension to the dimension for execution. For example, you may have a forecast generated at the item/store/week level, but for execution purposes the data must be spread down to the item/store/day level. It is the point of aggregation (source level) and the desired destination intersection (final profile) that are the unique identifiers of each profile. Using this example, the point of aggregation of the data (where the data equals 100%) is item/store/week, and the desired destination intersection (where all data ratios sum to 100%) is item/store/day.

There are several parameters within RDF that may take a Curve-generated profile as an input. These are: Causal Aggregation Profile, Causal Spread Profile, Seasonal Profile and Spreading Profile. The most common input from Curve that is required by RDF is the Spreading Profile. This profile can either be manually generated and approved by the user or dynamically generated as part of the RDF batch forecast process. For more information on the different profile parameters in RDF, refer to the *Oracle Retail Demand Forecasting User Guide*.

Dynamic Profiles

Dynamic Profiles are generated as part of the RDF forecast batch process to produce ratios used to spread source level forecasts to a final forecast level. To specify a profile to be generated in such a manner, the profile name (the level number of the profile, 01 for example) is entered in Spreading Profile field in RDF. When the batch forecast is executed, RDF produces an interim forecast at the final forecast level. This interim forecast becomes the Profile Data Source in Curve and is used to generate the final

profile. The final profile is then passed back to RDF to determine the final forecast results. For information on profile configuration for integration with RDF see both the *Oracle Retail Curve Configuration Guide* and *Oracle Retail Demand Forecasting Configuration Guide*.

Profile Maintenance Workbook

After setting default parameters for profile generation in the Profile Administration Workbook, the next step in profile generation is to select any subset of positions for which the values set in Profile Administration differ from the defaults. This step is necessary in those situations where it is not efficient to use the same parameters for all positions in the hierarchy data.

Creating a Profile Maintenance Workbook

As in Profile Administration, the first Profile Maintenance wizard screen prompts you to select a final profile level.

1. Within the Master, Local, or Simple domain; select **New** from the **File** menu.
2. Select the **Curve** tab to display a list of workbook templates for Profiling.
3. Select **Profile Maintenance**. Click **OK**.
4. The Profile Maintenance Wizard opens and prompts you to select the final profile. Make the appropriate selection, and click **Next**.
5. If the Location hierarchy is defined in the profile, select the locations to include in the workbook, and click **Next**.
6. If the Merchandise hierarchy is defined in the profile, select the products to include in the workbook, and click **Next**.
7. If the Calendar hierarchy is defined in the profile, select the time periods to include in the workbook, and click **Next**.
8. An additional wizard screen will prompt you to select any additional measures (that is, measures not standard in the Profile Maintenance Workbook) that you would like included. The measure options available in this screen are set in the RPAS Security Administration Workbook / Workbook Template Measure Rights Worksheet. Make the appropriate selections (if any). Click **Finish** to display the workbook.

Window Descriptions

Profile Maintenance Workbook

The Profile Maintenance Workbook allows edits to intersections that vary from the default values set in the Profile Administration Workbook.

Figure 2–1 Final Approval and Sourcing Worksheet

Product	Location	Profile Approval Method	Source Profile Override
10000009 Leather Loafer	Boston	Do Not Approve	No Override
	New York City	No Override	34 34 itgpstr->gpd1str
	San Francisco	Approve Use System	No Override
10000028 Leather Lace-up	Boston	Do Not Approve	No Override
	New York City	No Override	34 34 itgpstr->gpd1str
	San Francisco	Approve Use System	No Override
10000043 Kangaroo Pocket Sweater	Boston	Do Not Approve	No Override
	New York City	No Override	34 34 itgpstr->gpd1str
	San Francisco	Approve Use System	No Override

Field Descriptions

The following is a description of the measures contained in the Final Approval and Sourcing Worksheet:

Profile Approval Method

The Profile Approval Method displays the primary approval policy that is used for the profile. No Override is displayed in this field if the Default Approval Method is used. **Select Approve Use System** if profile results are to be automatically approved during the batch profile generation. Select **Do Not Approve** if profile results are to be manually approved by the user. If a profile is being generated dynamically (to support Source Level Forecasting) as part of the RDF batch forecast process, the Default Profile Approval Method should be set to Approve Use System.

Source Profile Override

Make edits to the Source Profile Override if the source level for an intersection varies from the Default Source Profile. No Override is displayed in this field if the value set in the Default Source Profile is to be used. When only a single source is configured for a profile, all profile results are calculated using the same intersections. Therefore, edits to this parameter are not required. When multiple sources are defined for a profile, some profile results are calculated using different intersections. Select the appropriate source level for an intersection.

Figure 2–2 Final Training Window Worksheet

Product	Location	System Training Window Begin	System Training Window End	Measure
10000009Leather Loafer	Boston	2/22/2008	3/20/2008	
	New York City	2/19/2008	3/20/2008	
	San Francisco	2/19/2008	3/21/2008	
10000028Leather Lace-up	Boston	2/29/2008	3/18/2008	
	New York City	2/22/2008	3/14/2008	
	San Francisco	2/12/2008	3/21/2008	
10000043Kangaroo Pocket Sweater	Boston	2/8/2008	3/24/2008	
	New York City	2/17/2008	3/10/2008	
	San Francisco	2/27/2008	3/21/2008	

Field Descriptions

The following is a description of the measures contained in the Final Approval and Sourcing Worksheet:

System Training Window Begin

Select a date in this field if this date is different from the default value set in the Training Window Start date in Profile Administration. Click the pop-up calendar to change the value in this field.

System Training Window End

Select a date in this field if this date is different from the default value set in the Training Window End date in Profile Administration. Click the pop-up calendar to change the value in this field.

Profile Administration Workbook

The Profile Administration Workbook allows you to set default parameters for profile generation, which is the first step in profile generation. These parameters are typically set during system implementation, and are configured based on your business practices and needs. This configuration can be updated if you need to change certain parameters over time. However, it is not practical to change the configuration on a regular basis. The Profile Administration Workbook gives you the flexibility to change profiling parameters as the need arises to improve both forecasting accuracy and computational efficiency.

Selecting a Final Profile to Edit

The Profile Administration wizard requires you to select the final profile that you want to edit. These profiles are determined during the system implementation/configuration.

1. Within the Master, Local or Simple domain, select **New** from the **File** menu.
2. On the **Curve** tab, select **Profile Administration**. Click **OK**.
3. Select the final profile to analyze. Click **Finish**.

Window Descriptions

Profile Parameter Worksheet

The Profile Parameter Worksheet allows you to specify default values for parameters effecting profile generation. The following image provides an example of the Profile Parameters worksheet in a Master Domain with three partitions/Local Domains, partitioned on Group.

Figure 3–1 Profile Parameter Worksheet

Product	Data
Group 1	11 week->dow Final
Default Phase End	12/31/2009
Default Phase Start	12/27/1997
Default Profile Approval Method	Approve Use Syster
Default Source Profile	12
Default Training Window End	12/31/2009
Default Training Window Start	12/27/1997
Normal Value	1.00
Profile Data Source	dpos
Profile Type	Daily
Renormalize	<input type="checkbox"/>
System Training Window Length	10
Training Window Method	Default And Override
Use Advanced Profile Features	<input checked="" type="checkbox"/>
Measure	

Field Descriptions

The following is a description of the measures that are contained in the Profile Parameter Worksheet:

Default Phase End

The Default Phase End defines the end date of the period in which profile results will be applied. Click the pop-up calendar to change the value in this field. If phase definitions are unavailable, the default phase end date will be used. When calculating time profiles, default dates are used for intermediate computations. For computational efficiency, use the most common phase definition as the default value.

Default Phase Start

The Default Phase Start defines the first date of the period in which profile results will be applied. Click the pop-up calendar to change the value in this field. If phase definitions are unavailable, the default phase start date will be used. When calculating time profiles, default dates are used for intermediate computations. For computational efficiency, use the most common phase definition as the default value.

Default Profile Approval Method

The Default Profile Approval Method displays the primary approval policy to be used for the profile. Select Approve Use System if profile results are to be automatically approved during the batch profile generation. Select Do Not Approve if profile results

are to be manually approved by the user. If a profile is being generated dynamically (to support Source Level Forecasting) as part of the RDF batch forecast process, the Default Profile Approval Method should be set to Approve Use System.

Default Source Profile

The Default Source Profile determines the primary source level that will be used to generate the profile. When only a single source is configured for a profile, all profile results will be calculated using the same intersections. When multiple sources are defined for a profile, some profile results will be calculated using different intersections. The Profile Maintenance Workbook may be used to define exceptions to the Default Source Profile.

Default Training Window End

The Default Training Window End defines the last date in history that will be used to calculate profile results. Click the pop-up calendar to change the value in this field. The default date will be used only if the training window method is set to Defaults and Overrides.

Default Training Window Start

The Default Training Window Start defines the first date in history that will be used to calculate profile results. Click the pop-up calendar to change the value in this field. The default date will only be used if the training window method is set to Defaults and Overrides.

Normal Value

If the profile is aggregated to the Aggregation Intersection, this will be the value in all the cells (or zero outside of the phase window). The desired setting for Normal Value is usually 1.00 (100%); however, there may be instances where it is desired to have the profile normalize to a value different than 1.00. For example, when generating seasonal profiles, such as by Week of Year, the Normal Value needs to be set to 52.

Profile Data Source

The Profile Data Source displays the name of the measure that contains the data to be used to generate the profile.

Note: For Dynamic profiles used by RDF, the profile Data Source can be left blank. Curve will use the Interim Forecast generated by RDF as the Data Source for generating the profile, and the value specified here will be ignored.

Profile Type

The Profile Type is a read-only measure that displays the value for this measure set in the Curve Plug-In. The Profile Type is used to determine the profile algorithm and validation required by the profile level. Profile Types are represented with pre-defined configuration information.

The following Profile Types share the same profile algorithm. The rationale for providing different types that have the same behavior is strictly to remind the user of the intent of the profile while using this workbook:

- **Store Contribution Profile** - The Store Contribution Profile is used to determine the data relationship between stores to aggregate dimensions in the location hierarchy.
- **Daily Profile** - The Daily Profile is used to determine the data relationship between a given day to the week in which it belongs.
- **Hourly Profile** - The Hourly Profile is used to determine the spreading ratios from aggregate dimensions to the hour, hour of day, or hour of week dimensions.
- **Product Profile** - The Product Profile is used to determine the data relationship between any two dimensions along the product hierarchy.
- **Size Profile** - Size profiles are used to determine the data relationship between any size in the product hierarchy and another dimension in the product hierarchy. Note that size can be configured as a dimension along an alternate rollup along the product hierarchy, such as itemParent-size.
- **User Defined Profile** - The User Defined Profile may be used to support any basic profile configuration.

The following Profile Types have unique behavior:

- **Diff Profile** - Diff Profiles are used to determine spreading ratios from aggregate dimensions in the Product hierarchy to diff dimensions. Used to support the spreading of data in RMS Allocation, Diff Profiles exhibit the same behavior as the previous profile types. However, unique to Diff Profiles is special validation of the relationship between the defined diff dimensions to dimensions along the main branch of the Product hierarchy. See the RDF Administration Guide for more information on validation criteria.
- **Daily Seasonal Profile** - The Daily Seasonal Profile is used to determine the data relationship between a given day of the week to aggregate dimensions in the calendar hierarchy. This profile type uses training window data to compute the profile. The resulting profile is then clipped to fit within the defined phase window.
- **Life Cycle Profile** - The Life Cycle Profile uses data along a user-defined training window, and then stretches or shrinks data to fit a user-defined phase window.

Renormalize

Renormalize is a Boolean measure. When set to TRUE, it will automatically renormalize the calculated profile result at the corresponding final level. Normally, the renormalization is not necessary. For example, if you have a source profile at week of season and its final profile is at day of season, you would need to renormalize the final level because going from week to day will do replication. At day level, the profile will sum up to greater than 1 for a season. Since it was a week to day, it will probably sum up to seven. The renormalize will force the final profile to sum to 1.00 (100%).

System Training Window Length

The System Training Window Length is necessary when Use Training Window is set as the Training Window Method for the profile. This field specifies the number of weeks of the most recent data to use as the training window for calculating the profile. The System Training Window Length defaults to 10 weeks.

Training Window Method

The Training Window Method is used to determine the default method that is used to define the training window. The options are:

- **Default and Overrides** - Uses the default dates as set in the Training Window Start Date and Training Window End Date measures.
- **Phase Definitions and Overrides** - Calculates the Training Window Start Date and Training Window End Date based on the Phase Start Date and Phase End Date measures.
- **Use Training Window** - Used with System Training Window Length to specify the number of weeks of the most recent data to use for calculating the profile.

Use Advanced Profile Features

This parameter is set to true (checked) by default; however, if dynamic profiles are being generated during the RDF batch process, setting this parameter to false (unchecked) improves batch performance by skipping unnecessary processes in the creation of the dynamic profiles.

When this is set to false, RDF will automatically roll the Training window and Phase windows forward with the forecasts for Dynamic profiles. If this is set to true, the user will have to manually manage any forecast date adjustments for these windows.

Profile and Source Level Intersection Worksheet

The Profile and Source Level Intersection Worksheet is a read-only view to the different intersections defined for the Profile and Source level configured in the Curve Plug-in. See the *RPAS Solution Extension Configuration Guide* for more information on defining these intersections during configuration of the Curve Solution.

Figure 3–2 Profile and Source Level Intersection Worksheet

	11 week->dow Final	12 week-dow	Data
Profile Agg Intersection	itemstr_	itemstr_	
Profile Approval Intersection	itemstr_		
Profile Intersection	dow_itemstr_	dow_itemstr_	
Stored Intersection	dow_itemstr_	dow_itemstr_	

Profile Agg Intersection

The Profile Agg Intersection is the intersection where the profile will sum to one (or 100%). If the profile is being used as the Spreading Profile in RDF, this Aggregation Intersection should be the same as the Source Forecast Level.

Profile Approval Intersection

Assigned only at the Final Profile, the Approval Intersection is the intersection where the profile is approved. Approval Intersection should be above or equal to the Aggregation Intersection. If the profile is being used as the Spreading Profile in RDF, this Approval Intersection should be the same as the Aggregation Intersection.

Profile Intersection

The Profile Intersection is the intersection where an intermediate profile is calculated. This intermediate profile is then replicated down or aggregated up to the Stored Intersection. If the Store Intersection is the same as the Profile Intersection, the values in intermediate profile are copied to the Stored Intersection. The Profile Intersection must be lower than the Aggregation Intersection. If the profile is being used as the Spreading Profile in RDF, this Profile Intersection should be the same as the Final Forecast Level.

Stored Intersection

The Stored Intersection is the destination intersection of the profile. The intermediate profile produce at the Profile Intersection is either replicated down to or aggregated up to the Stored Intersection. If the Store Intersection is the same as the Profile Intersection, the values in intermediate profile are copied to the Stored Intersection. The Stored Intersection not should be greater than the Aggregation Intersection. If the profile is being used as the Spreading Profile in RDF, this Stored Intersection should be the same as the Profile Intersection.

Profile Approval Workbook

The profiles generated at the historic levels must be viewed, analyzed, revised, and approved using the Profile Approval Workbook. In the approval process, you select the appropriate source level for each product/location combination. After you make any necessary changes to the profiles and commit the workbook, the profiles are normalized to preserve the appropriate ratios. At this time, Curve automatically spreads the source level profiles to the final level and combines them. After you commit your changes, you can refresh the data in your workbook to display the newly generated final level profiles.

Use the Profile Approval Workbook to view, analyze, revise, and approve the profiles generated at the historic levels. This workbook contains three tabs for each worksheet displayed:

- Final Worksheet
- Source Worksheet
- Approval Worksheet

Creating a New Profile Approval Workbook

1. With the Local or Simple domain, select **New** from the **File** menu.
2. Select the **Curve** tab to display a list of workbook templates.
3. Select Profile Approval. Click **OK**.
4. The Profile Approval Wizard opens and prompts you to select the final profile. Make the appropriate selection. Click **Next**.
5. If the Location hierarchy is defined in the profile, select the locations to include in the workbook. Click **Next**.
6. If the Merchandise hierarchy is defined in the profile, select the products to include in the workbook. Click **Next**.
7. If the Calendar hierarchy is defined in the profile, select the time periods to include in the workbook. Click **Next**.
8. An additional wizard screen will prompt you to select any additional measures (that is, measures not standard in the Profile Approval Workbook) that you want to include. The measure options available in this screen are set in the RPAS Security Administration Workbook / Workbook Template Measure Rights Worksheet. Make the appropriate selections (if any). Click **Finish** to display the workbook.

Window Descriptions

Final Profile Worksheet

Through this worksheet, you can view the system calculated final profile and make adjustments to this profile. Following is an example Final Profile Worksheet for a day of week profile.

Figure 4–1 Final Profile Worksheet

Product	Location	Measure		
10000010Leather Loafer - Black 6 B	Boston	Adjusted Profile 11 week-	Approved Profile 11 weel	System Profile 11 week->
Saturday		0.31	0.00	0.00
Sunday		0.00	0.00	0.00
Monday		0.11	0.00	0.00
Tuesday		0.11	0.00	0.00
Wednesday		0.11	0.00	0.00
Thursday		0.15	0.00	0.00
Friday		0.20	0.00	0.00

Field Descriptions

Adjusted Profile

This is the user-adjusted profile. If edits are necessary to the Adjusted Profile, it is first required to lock the Adjust Profile at the Aggregation Intersection. This will prevent the Normal Value from recalculating to a value different than 1.00 (100%) when the adjustments are made. To determine the Aggregation Intersection, view the intersection displayed on the Approval worksheet. Once adjustments are made to the profile, the user must go to the Final Profile Approval Worksheet and set the 'Do Not Approve' flag to true for the adjusted intersection. The Approved Profile measure will update with these changes.

Approved Profile

The Approve Profile displays the approved profile values. If a profile intersection is set to Do Not Approve, no value will be displayed in this field. The system will automatically approve all profile intersections set to Approve Use System. If changes are made to the Adjusted Profile, the values in this measure will update once the Manually Approved flag is set to true the Final Profile Approval worksheet.

System Profile

A read-only measure that displays the system-generated profiles calculated at the final profile's profile intersection.

Source Profile Worksheet

The Source Profile Worksheet displays the profiles generated at the source level for all product/location/calendar combinations selected to appear in the workbook. This worksheet displays the source system profiles (that is, the profiles that are calculated by the system during the profile generation process).

Figure 4–2 Source Profile Worksheet

Product	Location	Measure
10000010Leather Loafer - Black 6 B	Boston	
System Profile 12 week-d		
Saturday		0.20
Sunday		0.00
Monday		0.10
Tuesday		0.20
Wednesday		0.30
Thursday		0.10
Friday		0.10

The following measure is contained in the Source Level worksheet:

System Profile

A read-only measure that displays the system-generated profiles calculated at the source profile's profile intersection for each product/location combination displayed.

Profile Approval Worksheet

The Profile Approval Worksheet allows you to review and approve final profiles.

Figure 4–3 Final Approval Worksheet

Product	Location	Manually Approve 11 we	Profile Approval Date 11	Profile Approved By 11	Source Profile Override 1
10000010Leather Loafer - Black 6 B	Boston	<input checked="" type="checkbox"/>	2/7/2008	adm	No Override
	New York City	<input type="checkbox"/>	2/7/2008	adm	No Override
	San Francisco	<input type="checkbox"/>	2/7/2008	adm	No Override

The Profile Approval Worksheet contains the following measures.

Profile Approved By

This measure displays who approved the profile for a given product/location combination. For all profile intersections with an Approval Method set to Approve Use System and no adjustment occurs, the Approved By measure will contain System.

Profile Approval Date

Displays the date on which a profile was approved whether it is automatically approved by the system or manually approved by the user.

Manually Approve

A Boolean measure that must be activated (checked) for all profile intersections that are set to Do not approve or for intersections in which the user makes changes to the Adjusted Profile on the Final Profile worksheet.

Source Profile Override

This field displays the source level that was used to generate the profile. If the Default Source Level was used, this measure will display No Override.

Generate Profiles

The batch profile generation process creates profile results for all hierarchy positions set in the Profile Intersection. Profiles may be run from the backend of the domain using the 'curvebatch' executable or run manually using the Run Batch Profile template. For more information on 'curvebatch,' see the *Oracle Retail RPAS Administrators Guide*.

Generating a Profile Manually

1. With the Local or Simple domain, select **New** from the **File** menu.
2. Select the **Curve** tab to display a list of workbook templates. Select **Run Batch Profile** and click **OK**.
3. The Run Batch Profile Wizard opens and prompts you to select the profile(s) to generate. Select **Next** or **Finish**.

The Run Batch Profile wizard automatically executes 'curvebatch' within the Simple or Local Domain. If 'Next' is selected from the last wizard screen, the wizard will not advance to the completion message until the profile(s) have been generated. Depending on the data set, this process may take a several minutes before the system advances to the final screen.

