

Oracle® Retail Promotion Intelligence and Promotion Planning and Optimization

Release Notes

Release 13.0.0.1

June 2008

Welcome to Oracle Retail Promotion Intelligence and Promotion Planning and Optimization 13.0.0.1.

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:

Promote-13.0.0-274-200806060530-221594

PCE-13.0.0-256-200806060500-221594

Framework 1.7.1

Installer 2.3.1

Suite 1.7.1

StoreSets 2.3.1

What's New in Oracle Retail Promotion Planning and Optimization 13.0.0.1

This release of Promotion Planning and Optimization introduces these enhancements:

- Reporting:
 - Baseline MB count and Item MB Count Lift% have been added to the scorecard reports for Offers, Classes, and Subclasses.
 - The following metrics have been added to the scorecard reports by Offer Amounts for Department, Class, and Subclass: Item Ad MB Count, Avg Sales per Ad MB, Avg GM per Ad MB, Avg Units per Ad MB, and Avg Ad Units per Ad MB.
 - A new MB count has been created for offer amt at the subclass, class and department level.

Upgrade Procedure

Note: This release supports upgrading from version 12.0.9-26 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. Add the following entries to the ASH_CPL_TBL table:

Table 1 Required Entries to the ASH_CPL_TBL Table

INTERSECT_NAME	MERCHANDISE_LEVEL	LOCATION_LEVEL
PROMOTE_SCORECARD_MERCH_OFF_AMT_SUMM_3	DEPT	STORE
PROMOTE_SCORECARD_MERCH_OFF_AMT_SUMM_2	CLASS	STORE
PROMOTE_SCORECARD_MERCH_OFF_AMT_SUMM_1	SUBCLASS	STORE
PROMOTE_TAE_NONAD_PART_LEVEL_3	DEPT	CHAIN
PROMOTE_TAE_NONAD_PART_LEVEL_2	CLASS	CHAIN
PROMOTE_TAE_NONAD_PART_LEVEL_1	SUBCLASS	CHAIN

2. Add the following entry to the PR_DB_PARAMS table:

Table 2 Required Entry to the PR_DB_PARAMS Table

KEYWORD	VALUE
PROMOTE_SCORECARD_TOP_NONAD	10

3. Create a backup of the database accounts.
4. Backup the PCE configuration files from \$PCE_HOME/etc
5. Backup the mdc scripts directory.
6. Edit the install.properties file and ensure that all properties are set as follows:
 - *db.oracle.create=no
 - *db.oracle.upgrade=yes
7. Run the installer.
8. Stop and then start the application servers.
9. Update/merge the mdc/scripts and mdc/operations files.
10. Run the following mdc scripts:

- mdc/scripts/5.ppo_config/4.users_roles_security/doing.sh
 - //base/current/Edina/Deploy/mdc/scripts/1.base_config/7.views/
11. Merge/reconcile changes to the following configuration files:
promote.properties and promoteResource.properties.
 12. Manually reconcile the \$PCE_HOME/etc/kde_local.vars file with the backed up version. Do the same for \$PCE_HOME/etc/kde.properties. The upgrade will not preserve customization.
 13. Reapply the custom views as follows:
 - cd <mdcdir>/scripts/1.base_config/7.views/
 - bash doing.sh

Fixed Issues

The following issues have been fixed with this release:

Need more settings for the predicted baseline weightings (24600). The distance weighting algorithm does not allow clients set the reference period. It also does not allow clients to control the weightings separately.

The prediction engine does not currently support the scenario where an attribute value has never been seen before resulting in a failed forecast (24621). For example, if a model is never trained to understand what happens when the focus class is on the back page, putting a SKU from that class on the back page will not produce a forecast.

Model completeness information is missing: extension of TT24373 (24944).

Merge promote.properties and promoteResources.properties with Michael's changes (25046).

Make sure that mdc/scripts customizations get transferred to Production scripts/mechanism (25057).

Parallelization of TAE Runs In PROD (25298).

Need to document changes to supported columns in merchandise feed (25332). Promote 13.0 now supports promo_exclusion, first_eff_dt, and last_eff_dt in the merchandise feed. These were previously documented as not used.

PI Values not Calculating as Expected for Avg Discount% (25364). The Metric for Avg Discount% does not seem correct at a level higher than Item. When running the calculation outside of MS, either in Excel or on a calculator, the values do not always match MS. The changes were made to the metrics to use the approach $\text{sum}(A)/\text{sum}(B)$ instead of the $\text{sum}(A/B)$.

APE and APC summary process should only use historical promotions type_enum = 4 (25367). Non-historical promotions are now filtered out from these processes.

Bring darkweek data into product (25374). PCE currently needs to know which weeks are 'dark', i.e. no advertised promotions are run in the stores.

Clicking on a position partially covered/overlapped by another position does not bring it to front (25381). The covered position gets highlighted but is not brought to front. For overlapping positions, clicking on a position should bring it to front.

Add to the summary process the ability to create MB counts by offer_amt (25397). A new MB count has been created for offer amt at the subclass, class and department level.

Rename PI folder from Functional Reports to Administrative Reports (25401).

Invalid bean error when adding a blank page to a promotion (25403). The user should be able to add a blank page without incident.

Wrong page added when trying to add a page in Vehicle Design and the default page template is selected from Add Page dialog->page template dropdown (25406). The default page should be added without incident.

Unformatted error message when trying to save changes to a Vehicle template that has inactive pages (25407). The user should get a formatted message.

Audit Trail - pr_audit_event tbl old boolean values are not getting populated (25408).

Perf & What-If column minWidth not getting set properly (25413). The minimum width of a column on the Performance & What-If tab is not being set properly, thus cutting off field values on the Current Offer column when the browser window size is set small enough.

Approve/Deny buttons should be disabled if they are not valid for the selected offer (25441).

PPO Offer Tab Dept not Updating Correctly (25473). The Dept field in the Offers tab is not showing the correct dept for a specific offer.

Sku List details popup (invoked from merchandise hierarchy) shows as blank (25495).

Add ability to run APE summaries for a given date range (25499). APE summaries are created in bulk, i.e. for all available weeks. As this process may take long to complete, the ability to run APE summaries for a specified date range has been added.

APE summary creation process is very slow (25500).

Include db url in ppo version info (25506). In order to facilitate install/config verification, the db url has been added to the ppo version dialog.

Invalidate session on release locks and force logout on maint mode (25507). When executing the releaseLocks command, all locks are released from the server. However, all active user sessions are not invalidated. After executing the maintMode command, non admin users are prevented from logging in whereas non-admin active user sessions are not logged out.

Separate property "force" from status in forecast task (25508).

Add MB Count fields to additional Scorecard reports (Baseline) (25509). Baseline MB count and Item MB Count Lift% have been added to the scorecard reports for Offers, Classes, and Subclasses.

Forecast Graphs are Missing labels for the bars 'Green' and 'Orange' --what they stand for (25519).

Add regular MB Metrics to the scorecard MH - Offer Amt reports (25526). The following metrics have been added to the scorecard reports by Offer Amounts for Department, Class, and Subclass: Item Ad MB Count, Avg Sales per Ad MB, Avg GM per Ad MB, Avg Units per Ad MB, and Avg Ad Units per Ad MB.

Modify summary process to make use of oracle Rollup functionality to improve aggregation process (25530).

File arm_prepare_datetimes.sql needs to be updated in mdc/scripts (25554).

Process optimization approach for nightly batch forecasting with and without refresh (25556). Nightly batch forecasting processes have been optimized to utilize the forecast agent on three different servers (Michael's v. 12.0.9).

Total Incr Units on the What-if performance tab has a "\$" sign. It should not since it refers to a quantity (25576).

What-If forecasts produce incorrect metrics on all scenarios, including Current Offer (25586).

Fix backtester (25588). Affinities can be forecast using the backtester.

3 months period ARM run (for the pull-plus metric report) does not work and the process has to be adjusted (25598). The last step doesn't scale appropriately, i.e. hangs, takes a lot of time (days) to complete. The updated process aggregates the weekly runs into the quarterly numbers, without actually running the ARM.

What-If forecast metrics do not update after changes in the modify vehicles panel (25615). After making an initial forecast on the what-if screen, the metrics on what-ifs do not update after changing options in the modify vehicles panel and making another forecast.

MDC script - sequence of "5.ppo_config" script is wrong (25616). Inside MDC script group "5.ppo_config", user_roles_security data should be loaded first before templates. The scripts should be renumbered as follows: config_files, store_sets, images, user_roles_security, templates, image_servers, sku_lists.

New Integration tests need to be merged to the 13.0 branch (25638). TestPageInactivation and TestWhatIfTab have been added to the branch.

PR_MGMT_TASK_SEQ value is incorrect (25655). PR_MGMT_TASK_SEQ failed to increment properly after the upgrade to 13.0 on Michaels DEV.

BEE_ARM_* table structures not as expected (25657).

Preplan promotion data fails in transl tables for any vehicle type (Example:UNN,PUN....), only the one which works is (TAB) (25681).

Forecast status of preplanned offers are not accurate (25695).

PPO does not recalculate mapping of SKU's when the corresponding model has been deactivated (25702). As a workaround, if the client deactivates a model, and then would like the application to recalculate the model mapping, the following should be done:

- Remove all references to the deactivated model in pr_promo_offer_item

```
update pr_promo_offer_item
set model_id = NULL
where model_id =< model id of the model being deactivated
```

- Delete the model in pr_model

```
delete from pr_model
where model_id =< model id of the model being deactivated
```

- Login to PPO and do a force forecast of the affected offers. The model mappings are updated in the database.

Known Issues

The following are known issues with this release:

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.

Init failed error when creating a promotion (25575). User tried to create a promotion using a template that has workflow user assignments. This will be fixed for Phase 3.

MDC script error in 1.base_config/4.merch_loc_subs - pl_load_like_merchandise.sh (25704). An issue is present within MDC scripts (`mdc\scripts\1.base_config\4.merch_loc_subs\fix_like_merchandise_incr.sh`) which can cause failures when loading like merchandise relationships (`com.profitlogic.db.beech.LoadPromoLikeMerchandise`). The scenario which causes the failure is if a relationship defined as Item A is like Item B, and this relationship gets deleted, is attempted to be replaced with the reverse relationship (Item B is like Item A). This MDC script does not have the proper logic to filter out the deleted relationship, which will in turn cause errors when running this loader process. Additionally, this issue can also cause a like item relationship to become incorrectly reactivated.

Preplanned promotions (25707). Promo offers with no attribute provided in `promo_offer_attr` file are not picking up the `vehicle_exter_name`.

Oracle Retail Promotion Intelligence and Promotion Planning and Optimization, Release 13.0.0.1

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