

Oracle® Retail Analytics

Release Notes

Release 13.3

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This document announces the release of Oracle Retail Analytics 13.3, and the introduction of its second module, Oracle Retail Customer Analytics.

With the addition of Oracle Retail Customer Analytics, the documentation set addresses both modules under the single umbrella name of Oracle Retail Analytics. Note, however, that the modules, Oracle Retail Merchandising Analytics and Oracle Retail Customer Analytics, are licensed separately.

See the Oracle Retail Analytics Installation Guide for instructions on how to install the Oracle Retail Analytics 13.3 release as either a full installation or a patch.

- Customers who have not installed any previous release of Oracle Retail Analytics should skip all previous releases and install the Retail Analytics 13.3 package as a full base release.
- Customers who have installed Retail Analytics 13.2.4 can install Retail Analytics 13.3 as an upgrade.

Note: You may only perform an upgrade installation from release level 13.2.4.

Oracle Customer Support investigates submitted issues assuming that all released updates have been applied. It is the customer's decision when to apply a new release; however, delays in applying updates can complicate the support process.

Product Overview

Oracle Retail Analytics is an analytical application that provides multiple modules for analysis and reporting on different areas of retail management and operations. It is a modular software product; customers can license modules separately to best fit their analytical and reporting needs. The mandatory base module is Oracle Retail Merchandising Analytics. This release introduces a new optional module, Oracle Retail Customer Analytics.

Oracle Retail Analytics offers a rich business intelligence solution for retail industry users and is built using the latest Oracle technologies. Retail Analytics uses Oracle Data Integrator (ODI) to extract, load, and transform data from source systems. Oracle Business Intelligence Enterprise Edition (Oracle BI EE) is the web-based, mobile-enabled user interface for reporting and analysis.

Features

The following is a summary of some notable Oracle Retail Analytics features. For more details, see the *Oracle Retail Analytics User Guide* and the *Oracle Retail Analytics Implementation Guide*.

- Automated installation
- Robust data model

The Oracle Retail Analytics data model is based on Oracle Business Intelligence (BI) Applications and extended to support a retailer's business intelligence data needs. It is designed to maximize performance with Oracle Data Integrator and Business Intelligence Enterprise Edition.

- Prepackaged, high-performance integration

Oracle Retail Analytics provides packaged integration with select Oracle Retail source systems through Oracle Data Integrator (ODI) modules for extract, load, transform and aggregation processing. Parallel processing capabilities are built-in to ensure high performance, and batch shell scripts are provided for easy use with batch scheduler tools.

See the *Oracle Retail Analytics Installation Guide* for specifics on supported integration.

- Flexible aggregation

Retail Analytics provides a flexible aggregation framework that can be easily customized during implementation to achieve an aggregation strategy that best satisfies batch and reporting performance requirements.

- Reports and rich, high-performance metadata

Retail Analytics is packaged with over 50 reports and nearly 1400 metrics.

Retail Analytics metadata is built to optimize reporting performance, and it provides the following subject areas (catalogs) in the same Oracle BI instance:

- Retail Merchandising Analytics As-Was (historical)
- Retail Merchandising Analytics As-Is (current)
- Retail Merchandising Analytics Point in Time
- Retail Customer Analytics As-Was (historical)
- Retail Customer Analytics As-Is (current)
- Retail Customer Analytics Point in Time
- Retail Customer Analytics Data Mining

For more information, see the *Oracle Retail Analytics User Guide*.

- Support for multiple currencies

Retail Analytics supports up to five different currencies. Based on user selections, metrics are calculated accordingly.

- Support for multiple languages

Retail Analytics supports data for 18 different languages. The user interface is also translated into 18 languages.

- Role based security

Retail Analytics is packaged with sample user roles which leverage the Oracle BI EE security framework to manage dashboard and report access.

- Flexibility and extensibility

Retail Analytics ETL and reporting logic can be easily customized and extended to fit retailer-specific needs.

Functional Areas

The following are summaries of the functionality included in this release. Retail Analytics provides a wide breadth of data to enable detailed analysis of retail management and operations.

For more details on the functional areas included in Oracle Retail Analytics, see the *Oracle Retail Analytics User Guide*.

Facts

- Inventory position
- Inventory receipts
- Markdowns
- Net cost
- Net profit
- Planning
- Pricing
- Promotion actual
- Promotion budget
- Sales
- Sales forecast
- Sales packs
- Sales promotion
- Sales promotion forecast
- Stock ledger
- Supplier compliance
- Supplier invoices
- Trial and repeat
- Unit cost
- Wholesale/Franchise

Dimensions

- Calendar
- Customer
- Customer segment

- Employee
- Household
- Loyalty score
- Organization
- Product
- Promotion
- Retail type
- Season phase
- Supplier
- Time of day

Functional Enhancements

The functional enhancements below are included in Oracle Retail Analytics Release 13.3.

Customer

The two components of the Customer functional enhancement are described below.

Customer Profitability, Sales and Promotional Sales Analysis

Retailers who understand their customers' preferences and buying behavior can increase sales through up-selling efforts, targeting their customers for promotions, and preventing their defection to competitors. The Customer analysis tools in Retail Analytics enables the retailer to answer business questions such as the following:

- Who are my most profitable customers?
- Who are my most frequent shoppers?
- Are my customers only buying items from me when they are on promotion?
- What do customers buy from me on a typical shopping trip? Do their purchases vary by where they live or by how much money they make?
- Which of my departments appeal to which of my customers? That is, who is shopping in my stores and what are they shopping for?

Segmentation

Customer segmentation is the process of identifying and classifying customers according to demographic, geographic, behavioral and psychographic attributes, along with their current and future value to the business. Segmentation identifies the most and least valuable customer groups based on various attributes, including how frequently and recently customers within them have made purchases, and the monetary value and profitability of their transactions.

Market Basket Analysis

Market Basket Analysis is a data mining technique that produces outputs of the correlations among various items in a customer's basket. Oracle Retail Analytics 13.3 supports Market Basket Analysis by Customer Segment and Promotion and provides reports to help retailers understand which items sell with which other items, including probability of market baskets. Retailers can use these reports to plan promotions, optimize product placement, and support store planogram decisions. These reports can also help them understand the statistical relationship among the sales of different merchandise. Market Basket programs also calculate a halo metric in conjunction with affinity items. For example, when Item A, to which Item B has affinity, is promoted, any positive impact on Item B sales during this promotion period is referred to as halo.

Promotion

The two components of the Promotion functional enhancement are described below.

Baseline and Lift Analysis

Baseline analysis can be used by a buyer during category planning to establish expected sales for a category before promotions are added. This process can help identify the level of promotion needed for the category to hit sales targets. A planner might decide that sales goals can be reached without promotions, or by promoting very little, thus saving money and adding to category margins. Baseline metrics can also be used to calculate lift for promoted products; that is, how much over the baseline did sales increase when this category was promoted? If the difference between baseline and promoted weeks is large, and baseline sales are unacceptably low, a retailer might come to the conclusion that customers are shopping the category only for promoted items. Promotions might need to be cut back or changed to avoid conditioning customers to buy items only when they are on promotion. If the difference is too small, the promotions might not be effective and not worth the cost to run them.

Response and Redemption

Metrics and a dashboard have been added to measure and compare promotional budgets, actual cost, sales totals and profit. This feature provides useful insight into the processes of managing actual marketing cost, evaluating the financial performance of marketing tactics, and analyzing forecast and actual spending.

Trial and Repeat Analysis

Retailers want to analyze the impact of new item introductions and item promotions to determine whether customers come back a second and third time after trying something new. Something "new" may be a new item introduction, or the first time an item is put on promotion (perhaps as part of raising that item [or brand's] profile). Trial and Repeat Analysis can help a retailer analyze the repeat purchase behavior of a customer household for the merchandise.

Role-based Security

Retail Analytics is built with role-based access. Permissions are associated with roles. Users are made members of applicable roles, through which users acquire the permissions needed for their jobs.

The following groups and application roles are available:

- Buyers
- Buyer analysts
- Inventory analysts
- Inventory managers
- Merchandising executives
- Merchandise financial planners
- Planning executives
- Promotional planners
- Pricing analysts
- Retail Analytics developers

Technical Enhancements

The technical enhancements below are included in Oracle Retail Analytics Release 13.3.

Oracle Exadata Support

Retail Analytics 13.3 supports Oracle's Exadata hardware solutions to ensure optimal performance in high volume deployments. See the *Oracle Retail Analytics Installation Guide* for additional information.

Upgrade Support

The Retail Analytics 13.3 installer can upgrade existing 13.2.4 installations to Retail Analytics 13.3. See the *Oracle Retail Analytics Installation Guide* for additional information.

Software Operating Environment Upgrades

The following are enhancements to the software operating environment options for Retail Analytics 13.3:

- Oracle WebLogic Server
Oracle Retail Analytics Release 13.3 is supported for use with Oracle WebLogic Server 11gR1 (10.3.6).
- Oracle Business Intelligence Enterprise Edition
Oracle Retail Analytics Release 13.3 is supported for use with Oracle Business Intelligence Enterprise Edition 11.1.1.6.

Brazil Localization Support

The following Retail Analytics scripts and reporting metadata are not supported when part of a Brazil-localized Oracle Retail implementation in which Oracle Retail Fiscal Management (ORFM) replaces Oracle Retail Invoice Matching (ReIM):

- `sinvcstilsdsde.ksh` - Extracts supplier invoice match data from Oracle Retail Invoice Matching (ReIM)
- `sinvcstilsdsil.ksh` - Loads supplier invoice match data into Retail Analytics
- Invoice Number attribute
- Metrics: Qty, PO Unit Cost, Invoice Unit Cost, Tot PO Unit Cost, Tot Invoice Unit Cost, and Tot PO to Invoice Cost Diff
- Invoice Cost Details report

Fixed Issues

The issues below have been fixed in Retail Analytics Release 13.3.

Report Prompt Label Internationalization

Division, Group, and Chain prompt labels are only displayed in English, regardless of the user language setting.

Filter Value Descriptions

Filter value descriptions are only displayed in English, regardless of the user language setting. An example is the "Fiscal Period(s) between <period x> and <period y>" string located above the results in the Current Sales Scorecard report.

Merchandise Financial Planning (MFP) Integration

When the Channel dimension is updated, new rows are inserted for the updates in the following tables (Bug 13839608):

- `W_RTL_MFPOPR_SC_CH_WK_F`
- `W_RTL_MFPOPC_SC_CH_WK_F`

Known Issues

The following are known issues in Oracle Retail Analytics Release 13.3.

Summary

Source Independent Load (SIL) ODI modules for Customer and Customer Loyalty related data are not packaged with Retail Analytics 13.3. This issue is currently in development.

C_LOAD_DATES package_status values incorrectly remain 'In Progress' after successful completion for the following ODI jobs:

- SIL_RetailLoadControlSeedData.ksh
- SIL_TimeDimension_CalConfig.ksh
- timedaysil.ksh
- gregcaldaysil.ksh
- slsmkdnildsil.ksh

This causes incorrect execution status reporting and requires manual user intervention to check for errors and set status to 'complete' if no errors were found. This issue is currently in development.

The Oracle BI EE Date Pop-Up (Calendar Widget) cannot be used with variable prompts, which only display date values having associated data. For example, the Retail Analytics Customer Style Loyalty report uses list boxes to specify the To and From date parameters. In a production environment, these list boxes may display a large number of dates.

An enhancement request has been logged with Oracle BI EE.

Warehouse on-order quantities can be double counted. When a purchase order is created in Oracle Retail Merchandising (RMS) and distributed to Warehouse 1, the subsequent Retail Analytics extract batch increases Warehouse 1's on-order quantity accordingly. If the purchase order is later redistributed to Warehouse 2, the next RA extract batch increases Warehouse 2's on-order quantity but does not decrease Warehouse 1's on-order quantity. Warehouse 1's on-order quantity remains incorrectly inflated after the PO has been received at Warehouse 2. This issue is currently in development.

The source dependent extract (SDE) that extracts Item UDA descriptions contains an incorrect mapping, which results in the retrieval of incorrect descriptions. This issue is currently in development.

The Order Quantity reporting field is labeled incorrectly and should be changed to 'Invoice Quantity'. This affects the Invoice Cost Details report. This issue is currently in development.

The average cost formula in the Supplier Base Cost reporting metric is incorrect. This issue is currently in development.

The process that calculates promotional baseline data for each week that a promotion is active, and then continues to do so for 'x' weeks after the promotion has ended, does not generate the baseline metrics until the promotion has actually completed. This issue is currently in development.

Related Documentation

For more information, see the following documents in the Oracle Retail Analytics Release 13.3 documentation set:

- *Oracle Retail Analytics Data Model*
- *Oracle Retail Analytics Implementation Guide*
- *Oracle Retail Analytics Installation Guide*
- *Oracle Retail Analytics Operations Guide*
- *Oracle Retail Analytics User Guide*

Also see the Oracle Business Intelligence Enterprise Edition library of documentation for administrators, implementers, and end users.

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Value-Added Reseller (VAR) Language

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