



Oracle Retail Cloud



Functional Next Gen Update Guide for Planning and Supply Chain Solutions

November 2023 | Release 23.2.401.0
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TABLE OF CONTENTS

Disclaimer	1
Introduction	3
Document Summary	3
Next Gen Retail Planning and Supply Chain Update Choices	3
Getting Started	4
Customer Activities for Planning and Supply Chain Core Update	4
Prior to Core Update	4
During Core Update	5
After Core Update	5
Customer Activities for Planning and Supply Chain Core Plus	6
Prior to Core Plus	6
During Core Plus	7
After Core Plus	7
References	7
Glossary of Acronyms	8

Introduction

Document Summary

This document provides guidance for Oracle Retail customers with respect to planning / supply chain solutions and transitioning to Oracle's Next-Gen SaaS. All features and functionality will remain the same.

This Next-Gen Update Guide applies to Oracle Retail customers with the following products on version 19:

- Merchandise Financial Planning (MFP)
- Assortment Planning (AP)
- Retail Demand Forecasting (RDF)

The guide captures customer activities for updating to Next-Gen Architecture in the following three phases:

1. Prior to Next-Gen Update
2. During Next-Gen Update
3. After Next-Gen Update

This document is intended to help provide clarity and set expectations amongst all parties. It provides an overview of the Next-Gen update process and allows customers to ask key questions when working with technical teams and partners. Oracle recommends that customers read this document before starting their Next-Gen Update to enable them to ask technical teams and partners relevant questions for each phase, including User Acceptance Testing (UAT).

Next Gen Retail Planning and Supply Chain Update Choices

For the Planning Next-Gen Update, there are two options, named Core Update and Core Plus, that provide the features and benefits detailed in the following table. However, the Supply Chain Next-Gen update requires the Core Plus route, with the benefits outlined below:

CORE UPDATE (AI FOUNDATION FEATURES NOT ENABLED)	CORE PLUS (AI FOUNDATION FEATURES ENABLED)
<ul style="list-style-type: none">• Unified intelligence-driven forecasting• Comprehensive platform data integration for agile decision making• Enhanced error handling• Improved disaster recovery• Reporting through Data Visualization <p>Note: The Oracle team will be responsible for moving the customer on Core Update.</p>	<ul style="list-style-type: none">• Inclusion of all Core Update benefits• Availability of AI-native planning• Greater visibility of customer preference based on transaction-level data• Seamless integration across enterprise• Centralized data model• Easy enablement of additional solutions• Expansion of existing functionality with extensible framework• Reduced implementation complexity <p>Note: Customer will leverage their IT team and/or engage with their preferred SI, such as Oracle Retail Consulting, for a Core Plus update.</p>

For Core Update, Oracle Retail will be assisting customers at no additional cost (other than the customer's internal resources) and supporting customers' business continuity. The Core Update will provide several benefits to Planning customers, as shown in the above table, providing like-for-like functionality on Next-Gen SaaS.

To take full advantage of Next-Gen Update capabilities, all customers are required to move to the Core Plus route, which is typically in partnership with a system implementor such as Oracle Retail Consulting (ORC); or they should have an IT team that has the ability to do the upgrade. This entails additional steps, such as loading transaction-level data and enabling currently unused AI Foundation capabilities. The decision to update through the Core Plus route is optional for the Planning

customer. For Core Plus Update, Oracle Retail will provide basic support and guidance; a system implementor or customer's IT team will primarily be responsible for setting up the new capabilities.

Getting Started

To start the process, customers should contact their Customer Success Manager (CSM) to receive more information about Oracle's Next-Gen architecture, discuss the steps laid out in this document, and identify target dates and timelines to complete the update. Customers may also raise a Service Request in Oracle Support to receive more information or request to schedule the update based on their specific business needs.

Customer Activities for Planning and Supply Chain Core Update

Prior to Core Update

Oracle Retail customers moving to Oracle's Next-Gen SaaS architecture will receive a notification of the update and an initial schedule. Each customer is highly encouraged to understand the value and benefits of Oracle's Next-Gen SaaS architecture. This will include reviewing the release notes, solution documentation (posted online) and training materials that are made available for customers to help understand the activities required for Core Update. Please refer to the reference section at the end of this document.

Resource Allocation: Oracle Retail will provide support to each Oracle Retail customer for all phases of the Core Update process. This support includes:

- Confirming update readiness
- Provisioning environment
- Building stage environment
- Migrating data from v19 to Next-Gen SaaS architecture
- Validating migrated data and plan creation
- Conducting smoke tests prior to go-live.

Oracle Retail customers' team will collaborate with the Oracle Retail team for the Core Update. The following customer resources will be required to move to Oracle's Next-Gen SaaS architecture:

- Technical personnel (1-2) to adopt File Transfer Service and handle batch transition
- Project manager to serve as a single point of contact to collaborate and coordinate update readiness and timings with Oracle Retail team
- Functional lead to conduct UAT (user acceptance test) in the Next-Gen stage environment and report feedback
- Project lead to sign off/approve

Core Update Readiness: Oracle Retail customers will partner with the Oracle Retail team on the following details:

- Establish project plan with deliverables, timelines, roles, and responsibilities
- Provide the integration files to the Oracle Development team with timelines. In a scenario where there are any anticipated delays, the Oracle team will need to be notified
- Explain how the users are currently using the solution
- Explain the current definition of user roles
- Share customer configuration details with the Oracle development team, including any customizations or Java Special Expressions
- Provide information about customer's hierarchy structure and whether hierarchy dimensions can be changed to align with GA. Alignment with GA hierarchies enables the customer to easily add further planning apps (such as AP) in the future and facilitates easier integration with AI Foundation features
- Provide inbound and outbound interface details for integration with third-party systems, including data elements, formatting, transformation, and file transfer

- Share details regarding any integration points with other applications or anything planned for the future

The Oracle Retail team will determine the approach and initiate preparation based on customer configuration, data analysis, and the solutions owned by the customer. Oracle will start provisioning the environment with the timeline potentially varying by solution, number of solutions, and the complexity of configuration. The Oracle Retail team will work closely with the customers on the approach and timelines.

During Core Update

Oracle Retail customers will collaborate with the Oracle technical team to adopt the new File Transfer Service, which will be used to upload/download the files through a REST/HTTPS service. This is a replacement for the SFTP process used by v19.

The Oracle Retail team will export the v19 data and configurations from the existing environment to ready it for the updated version. The following list contains the configurations and data that will be updated to the Next-Generation SaaS architecture by the Oracle Development team:

- Planning configurations will be migrated to support updated functionalities
- Hierarchy data
- Measure/Fact data
- Batch control files
- UI Configurations
- Retail Process Orchestration and Monitoring (POM)
- Translations
- Security settings

The following are the user-specific data that will be updated to Next-Gen SaaS architecture:

- Styles (Workbook Template Formats)

Please note that the following will not be present in the updated environment:

- Existing workbooks
- Task history
- Existing notifications

The Oracle team will build the Planning Data Store (PDS) and import the migrated data into the updated environment. They will configure Process Orchestration and Monitoring (POM), run the weekly batch, and conduct Quality Assurance (QA) Validation.

After the updated version is in a stage environment, the Oracle Retail customer will conduct UAT (user acceptance testing) to verify that the integration and workflow matches with their current capabilities. The customer must provide feedback and approve the update before Oracle will move it into production.

After Core Update

Following approval by the customer, Oracle will start the process to move the updated version into production. Next-Gen SaaS planning leverages AIF forecasts. Customers using Planning forecasts will need to use POM to schedule their batches. POM batch schedules will change in the Next Gen SaaS Architecture. Please refer to the section “RPASCE Batch Schedule with POM” in the [RPAS Administration Guide](#) for information about setting up new schedules.

All user-adjusted and committed data, such as plans or forecasts, will be transferred to production. Oracle Retail will collaborate with customers to streamline the transition process and support customers’ business continuity. As a result, the Core Update will run in the Next-Gen SaaS environment in parallel with the customer’s existing application prior to a final cutover.

During the final cutover, the v19 production environment will be shut down to migrate the data over to and bring up the Next-Gen production environment. During this period, customers will be temporarily unable to access both v19 and the Next-Gen production environment. This will be done during a timeframe agreed upon with the customer. Oracle Retail will work closely with the customer’s IT team to coordinate such activities to avoid any inconvenience.

The customer will receive notification of the completed update and will be able to provide post-update feedback to the Oracle team. After the go-live, the customer will shift their work into the new Next-Gen production environment. They will have access to their v19 environment in a read-only capacity for four weeks, after which the v19 environment will be decommissioned.

Customers will receive a Welcome E-Mail sent by Oracle after the provisioning of their Next-Gen environment, which will contain a reference to the Retail Home application. Oracle Retail Home has been built as a single access point to all products. This simplifies users' interactions with the data and applications that are most relevant to their roles, thereby empowering them to anticipate informed actions, hopefully with greater engagement. Customers will use the new URLs and the Retail Home application to navigate to the applications.

Oracle Retail customers will be responsible for the following:

- Workbook creation
- User training and communication (where applicable)

Customer Activities for Planning and Supply Chain Core Plus

Prior to Core Plus

Customers are highly encouraged to understand the benefits of Oracle's Next-Gen SaaS architecture. All Supply Chain customers are required to take the Core Plus route for the Next-Gen Update; this involves engaging with system implementors for additional configurations to leverage enhanced functionalities along with loading transaction-level data.

Note: The Retail Demand Forecasting solution (RDF) is referred as Inventory Planning Optimization (IPO) in the Next-Gen architecture and encompasses additional capabilities such as Allocation and Replenishment.

If the Planning customer decides to update to Core Plus, then they will have the option to partner with any system implementor, such as ORC, to take additional steps for loading their transaction-level data. This will be the first step to leverage Core Plus benefits. If the customer has sufficient technical capabilities, then they can perform this work themselves. The participation of a system implementor can help reduce the overall risk, due to their prior expertise working with the new Next-Gen architecture. The decision to update to Core Plus is optional for every customer.

The Core Update option will provide some benefits at no additional license cost. The Core Plus option enables the customer to take full advantage of the Next-Gen features and requires additional configuration settings and data feeds. Core Plus unlocks the power of AI Foundation with AI capabilities including customer segmentation, advanced clustering, size profiling, attribute extraction, customer decision trees, demand transference, and affinity analysis. Customers will need to define the scope of their project and work with the system implementor on a plan to uptake some or all of the AI modules from AI Foundation. Core Plus will place the data and insights at the heart of their decision making.

In this Next-Gen Update Guide, we assume that the Planning customer is already in a steady state on Core Update with a provisioned Next Gen SaaS environment. There are base activities that need to be completed for Core Plus but these will be accomplished at no customer cost during the Core Update.

In several cases, it will be efficient for customers to be initially on Core Update and then move to the Core Plus route (exceptions may apply). In this manner, the Oracle Development team will have addressed any issues with the Next-Gen update during the Core Update phase. However, it is important to note that this approach will vary from customer to customer and there will be cases when updating directly to Core Plus would be more efficient and cost effective. Supply Chain customers will be required to update directly to Core Plus.

Resource Allocation: With Core Plus, the customer determines the resources required by choosing to do the update themselves with their technical team or, if they prefer, to work with a system implementor (SI) who has prior experience with Oracle cloud services. In case the customer decides to use their own technical team, they will need a team with a project manager, development/ technical team, a functional lead and QA team.

If the customer decides to hire a system implementor such as ORC, then the system implementor will determine the required resources, roles, responsibilities, tasks, and timelines. The system implementor will provide the approach and initiate preparation based on customer configuration, data analysis, and the solutions owned by the customer. The timelines may vary by solution, number of solutions, the complexity of configuration, and time taken by the customer to provide all the data files to the system implementor.

Core Plus Readiness: The customer should already have the new, updated environment provisioned with the Core Update. As part of the move to Core Plus, the data requirements will change to a much lower level of granularity. The customer will need to plan for resources to create an ETL process that will provide data at the transaction level. Current integration must be maintained to support the current production environment until the Core Plus Update is complete.

The same file transfer mechanism is used for both Core Plus and Core Update. The customer must plan for resources to create new batch integration at the transaction level in parallel with the existing batch as part of the move to Core Plus.

During Core Plus

The system implementor, such as Oracle Retail Consulting, will start the discovery process to identify how much change the customer would like to uptake, and investigate any source-side data inconsistencies prior to data integration. Generally, the system implementor will involve the following resources:

- Project Manager
- Business Consultant
- Application Consultant
- Technical Consultant

The system implementor will initiate Planning and Supply Chain data discussion and design. During the initial stage, all of the work will be performed in the stage environment.

During the update to Core Plus, the system implementor will support the customer to provide Next-Gen data requirements that will be developed, loaded, and tested against the stage environment. The data requirements will vary depending on the capabilities of AI Foundation that the customer plans to use. The customer will continue to use the FTS file-integration mechanism enabled during Core Update. For Supply Chain Next-Gen update, the system implementator will work on configurations because of enhanced capabilities to maximize supply chain efficiencies and accelerate optimal inventory management with in-depth analytics and reporting capabilities.

The system implementor will start data loading by checking data consistency and quality. Once approved, the data integration process will start by loading, testing, and validating data in the Next-Gen architecture. After that, the system implementor will configure updates and test integrations, conduct internal tests, identify any issues, and submit any Oracle service requests required against the stage environment.

During the move to Core Plus, the customer will work with their system implementor to test and validate their new batch and workflow. The new environment requires the adoption of Oracle Retail POM to support the new batch requirements. The customer will work with the system implementor in testing the data integration and batch schedule in the stage environment. The security credentials and settings will have already been completed during Core Update.

After Core Plus

After completing the Core Plus update, then the Next-Gen environment will be ready for customer use. The previous environment will be decommissioned. The customer will go live and the system implementor will provide post-go-live support (as agreed upon).

References

Learn about the new features available with Planning and Supply Chain:

<https://docs.oracle.com/en/industries/retail/index.html>

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<https://docs.oracle.com/en/industries/retail/merchandise-financial-planning-cloud/23.2.401.0/>
- Inventory Planning Optimization Cloud Service:
<https://docs.oracle.com/en/industries/retail/retail-inventory-planning-optimization-cloud/23.2.401.0/>
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<https://docs.oracle.com/en/industries/retail/retail-process-orchestration-monitoring/23.2.401.0/>
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<https://docs.oracle.com/en/industries/retail/retail-insights-cloud/23.2.401.0/>
- Retail AI Foundation Cloud Service:
<https://docs.oracle.com/en/industries/retail/ai-foundation-cloud-service/23.2.401.0/>
- *Retail Analytics and Planning Implementation Guide* in the Implement area of each RAP solution.
- Retail Home:
<https://docs.oracle.com/en/industries/retail/retail-home/23.1.401.0/>
- Planning and Optimization (P&O) Documentation Library on MOS:
<https://support.oracle.com/epmos/faces/DocumentDisplay?id=2492295.1>
- Retail Insights and AI Foundation Documentation Library on MOS:
<https://support.oracle.com/epmos/faces/DocumentDisplay?id=2539848.1>
- Core vs Core Plus video:
https://videohub.oracle.com/media/Core%20vs%20Core%20Plus/1_0k5gserj
- Next Generation Update video:
https://videohub.oracle.com/media/Next%20Generation%20Update/1_35mei6fr

Glossary of Acronyms

- AI: Artificial Intelligence
- AIF: AI Foundation
- FTS: File Transfer Service
- ORC: Oracle Retail Consulting
- PDS: Planning Data Store
- POM: Process Orchestration and Monitoring
- QA: Quality Assurance
- RPASCE: Retail Predictive Application Service Cloud Edition
- UAT: User Acceptance Testing
- UI: User Interface
- IPO: Inventory Planning Optimization

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