

Oracle® Retail Analytics and Planning Applications

Release Readiness Guide



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The Oracle logo, consisting of a solid red square with the word "ORACLE" in white, uppercase, sans-serif font centered within it.

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Preface

This guide outlines the information you need to know about the Oracle Retail Analytics and Planning applications that have new or improved functionality in this update, and describes any tasks you might need to perform for the update. Each section includes a brief description of the feature, the steps you need to take to enable or begin using the feature, any tips or considerations that you should keep in mind, and the resources available to help you.

Audience

This document is intended for the users and administrators of the Oracle Analytics and Planning applications.

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Oracle Help Center (docs.oracle.com)

Oracle Retail product documentation is available on the Oracle Help Center at <https://docs.oracle.com/en/industries/retail/index.html>.

(Data Model documents can be obtained through My Oracle Support.)

Comments and Suggestions

Please give us feedback about Oracle Retail Help and Guides. You can send an e-mail to: retail-doc_us@oracle.com

Oracle Retail Cloud Services and Business Agility

Oracle Retail Analytics and Planning applications are hosted in the Oracle Cloud with the security features inherent to Oracle technology and a robust data center classification, providing significant uptime. The Oracle Cloud team is responsible for installing, monitoring, patching, and upgrading retail software.

Included in the service is continuous technical support, access to software feature enhancements, hardware upgrades, and disaster recovery. The Cloud Service model helps to free customer IT resources from the need to perform these tasks, giving retailers greater business agility to respond to changing technologies and to perform more value-added tasks focused on business processes and innovation.

Oracle Retail Software Cloud Service is acquired exclusively through a subscription service (SaaS) model. This shifts funding from a capital investment in software to an operational expense. Subscription-based pricing for retail applications offers flexibility and cost effectiveness.

1

Feature Summary

This chapter describes the feature enhancements in this release.

Noteworthy Enhancements

This guide outlines the information you need to know about new or improved functionality in the Oracle Retail Analytics and Planning applications update and describes any tasks you might need to perform for the update. Each section includes a brief description of the feature, the steps you need to take to enable or begin using the feature, any tips or considerations that you should keep in mind, and the resources available to help you.

Column Definitions

- **Feature:** Provides a description of the feature being delivered.
- **Module Impacted:** Identifies the module impacted associated with the feature, if any.
- **Scale:** Identifies the size of the feature. Options are:
 - **Small:** These UI or process-based features are typically comprised of minor field, validation, or program changes. Therefore, the potential impact to users is minimal.
 - **Large:** These UI or process-based features have more complex designs. Therefore, the potential impact to users is higher.
- **Delivered:** Is the new feature available for use immediately after upgrade or must the feature be enabled or configured? If no, the feature is non-disruptive to end users and action is required (detailed steps below) to make the feature ready to use.
- **Customer Action Required:** You must take action before these features can be used. These features are delivered disabled and you choose if and when to enable them.

Table 1-1 Noteworthy Enhancements

Feature	Module Impacted	Scale	Delivered	Customer Action Required?
AIF DATA Process Orchestration and Monitoring Schedule Improvements	Analytics and Planning	Large	Yes	No
Sales Audit Integration	Analytics and Planning	Small	Yes	Yes
Planning Channel Integration	Analytics and Planning	Small	Yes	No
Innovation Workbench – DataStudio Upgrade to v23.3.0	AI Foundation	Small	Yes	No

Table 1-1 (Cont.) Noteworthy Enhancements

Feature	Module Impacted	Scale	Delivered	Customer Action Required?
AI Foundation Integration with Retail Home	AI Foundation	Small	Yes	No
Mapping Run Types to Retail Insights App Code for Merchandising Export	AI Foundation	Small	Yes	No
Profile Science Filters to View Profiles Based on Their Status/Alerts	AI Foundation	Small	Yes	No
Enhanced Profile Science View for Exporting Profiles Based on Attribute Groups	AI Foundation	Small	Yes	No
New Status for Partially Successful Runs	Inventory Optimization Cloud Service	Small	Yes	No
Configurable Time Limit for Trade-Off Analysis Runs	Inventory Optimization Cloud Service	Small	Yes	No
Allow Higher Merchandise Levels for RSE_INV_WHSE_LC_PR_ALLOC_S TG	Promotion and Markdown Optimization Cloud Service	Small	Yes	No
Retail Data Extractor Extraction of Consignment Data	Retail Insights Cloud Service	Small	Yes	No
Import Data through Excel Sheet	Retail Predictive Application Server Cloud Edition	Large	Yes	No
Ability to Download the Manage Workspaces Dashboard	Retail Predictive Application Server Cloud Edition	Large	Yes	No
Improved Notification Message and Commit Status	Retail Predictive Application Server Cloud Edition	Large	Yes	No

Table 1-1 (Cont.) Noteworthy Enhancements

Feature	Module Impacted	Scale	Delivered	Customer Action Required?
Improvement in Merchandising – Merchandise Financial Planning Integration	Merchandise Financial Planning Cloud Service	Small	Yes	No
Addition of Extended Measures in Merchandise Financial Planning (Retail and Cost)	Merchandise Financial Planning Cloud Service	Small	Yes	No

New Feature Description

This section describes the new features.

Analytics and Planning

In this release, the RI POM batch schedule has been relabeled to "AIF DATA" to better reflect its usage within the broader suite of Analytics and Planning applications. Future release notes and documentation updates will no longer refer to the RI POM schedule unless it is specific to the Retail Insights product only.

AIF DATA Process Orchestration and Monitoring Schedule Improvements

The following changes were made to the AI Foundation's AIF DATA schedule in Process Orchestration and Monitoring (POM). Please review each change carefully as it may impact your existing environments and ongoing implementation projects.

- The standalone process `LOAD_DIM_INITIAL_ADHOC` has had a significant number of new jobs added to it to support loading additional dimensions used by Retail Insights (RI) and AI Foundation (AIF) applications. Make sure you review the jobs enabled in this process after upgrade and disable any that you do not wish to run.
- New standalone and intraday cycle processes were added to support loading of Wholesale/Franchise Sales fact. If you are using the intraday cycles to load sales data, make sure you review the enabled jobs and disable any new additions that you do not wish to use. Wholesale/Franchise jobs will generally have `SLSWF` in the job name. New standalone process names are:
 - `HIST_STG_CSV_SALES_WF_LOAD_ADHOC`
 - `HIST_STG_SALES_WF_LOAD_ADHOC`
 - `HIST_SALES_WF_LOAD_ADHOC`
- More than ten (10) standalone processes were added to support ad hoc loading of additional fact areas that are used by Retail Insights or AIF applications. The intent of the new processes is to allow for historical data loading across more functional areas as well as one-time data loads for making corrections and adjustments to existing data. Review

the list of standalone processes in the AIF DATA schedule after upgrade and check the *AIF Operations Guide* for more details.

- New hierarchy data validations have been added in the PROD and ORG validator jobs. The product validations check for multiple IDs or descriptions at the top level of the hierarchy (which is not allowed and causes errors in AIF and Planning Data Storage (PDS) imports). The organization validation checks for valid values in ORG_TYPE_CODE, which must only contain values in the set S, W, or E. Any other value will result in validation errors when loading the data in PDS. All of these validations will result in batch failures if the rules are violated.
- The intraday schedule for fact loads has had configuration changes to automatically enable all jobs on initial creation of the job entries. Any newly added jobs in the intraday schedule should be enabled by default, so it is recommended to review your enabled/disabled jobs in Batch Administration after upgrade.

Sales Audit Integration

Integration with Sales Audit for sales transactions has been modified in this release with two new mandatory jobs in the AIF DATA schedule in POM. These jobs must be enabled after upgrade or sales will not be properly integrated from Sales Audit. Be sure to verify their status in POM before the first nightly batch executes.

- RDE_SETUP_INCRMNTL_RESA_JOB – Configures the C_RDE_INCRMNTL_TBL_CTRL control table with the range of CSN_NBR values extracted for sales (from Merchandising tables SA_EXPDW_RDWT_HEAD and SA_EXPDW_RDWT_DETAIL)
- RDE_INCRMNTL_AUDIT_PRG_JOB – This is a cleanup job that deletes records from the C_RDE_INCRMNTL_TBL_CTRL_AU table for very old audit records.

Planning Channel Integration

New fields have been added to the ORGANIZATION.csv input interface for RAP in support of the Channel level of the planning hierarchies in Planning applications. These fields will be integrated with PDS as part of the existing data flow for the location hierarchy. They are also available to AI Foundation to optionally be included as part of an alternate location hierarchy configuration. If you want to use the new level in Merchandise Financial Planning (MFP) as your primary planning level, then you must also configure the alternate hierarchy in AIF to include this level.

Field Name	Description
PLANNING_COUNTRY	This will contain the planning country ID for the location; for example, US
PLANNING_CHANNEL_ID	This will contain the planning channel ID for the location, which is a combination of country and channel; for example, US_1
PLANNING_CHANNEL_NAME	This will contain the label for the planning channel; for example, US Brick & Mortar or US Direct/Online

AI Foundation Cloud Service

Innovation Workbench – DataStudio Upgrade to v23.3.0

The upgraded version of DataStudio now allows a new user to be entered into the system by calling any ReST API and going through successful authentication. Built-in resources of linkable entities can now also be overwritten during tenant initialization. Along with this, DataStudio 23.3.0 also allows users to cancel the whole notebook run.

AI Foundation Integration with Retail Home

With this release, users can now view tiles in Retail Home for AI Foundation applications, like Offer Optimization, Affinity Analysis, Advanced Clustering, Demand Transference and Customer Segmentation. The tiles that are visible to them depend upon the roles that they have, and the data displayed is specific to the current user.

Mapping Run Types to Retail Insights App Code for Merchandising Export

In the Map Train stop within the Manage Forecast Configurations screen, Run Types can be mapped to a new app: Retail Insights (RI). It helps the user choose which forecasts need to flow to Merchandising for reporting purposes. The RI app can be activated from the `RSE_APP_SOURCE` table available from the Manage System Configurations screen. More information can be found in the “Control and Tactical Center” chapter in the *Oracle Retail AI Foundation User Guide*.

Profile Science Filters to View Profiles Based on Their Status/Alerts

Users will be able to filter profiles based on various criteria like over-corrected, kink exception, and so on. This feature is available in the Run Output screen as well as the Submitted Profiles screen.

Enhanced Profile Science View for Exporting Profiles Based on Attribute Groups

With this release, an enhanced version of the view (`spo_export_data_vw`) that is used in one of the custom export jobs (`SPO_CUSTOM_EXPORT_ADHOC_JOB` and `SPO_CUSTOM_EXPORT_JOB`) is available.

Inventory Optimization Cloud Service

New Status for Partially Successful Runs

A new status of “partially successful” has been introduced. The status of time-phased and trade-off runs will be set to partially successful (instead of failed) if a run fails for some but not all of the product/locations.

Those applications that want to read the successful runs from Inventory Optimization should modify their filtering criteria to look for runs with the status of `PARTIALLY_SUCCESSFUL` or `RUN_STATUS_SUCCESSFUL`.

Configurable Time Limit for Trade-Off Analysis Runs

There is now a time limit on the run time of simulation steps in trade-off analysis. For each trade-off job (that is, each product-parent/location-parent) as soon as the time limit is

reached, the simulation stops running and the training/inference steps run with the SKU/stores that were simulated within that time limit. This will allow users to put an upper limit on the amount of time spent in the simulation step. The time limit can be configured using the `IO_TRADEOFF_TIMEOUT` parameter in `RSE_CONFIG`.

Promotion and Markdown Optimization Cloud Service

Allow Higher Merchandise Levels for `RSE_INV_WHSE_LC_PR_ALLOC_STG`

With this release, this interface supports intake of warehouse allocation percentages or mapping at a higher merchandise level instead of just leaf-node level in the merchandise hierarchy. For example, previously, a user needed to send the `SKU-STORE-PZ-WH` level, and now they can send the `CHAIN-STORE-PZ-WH` level.

Retail Insights Cloud Service

Retail Data Extractor Extraction of Consignment Data

Retail Data Extractor (RDE) ad hoc and nightly jobs for the following facts now extract consignment/concession data from Merchandising Foundation Cloud Service (MFCS) when available. RI has similarly been adjusted to accept this data into the existing facts.

- Inventory Adjustments – now process and load transaction codes 122 and 123
- Inventory Receipts – now process and load transaction code 120
- Inventory Transfers – now process and load transaction codes 130, 132, 137, 138

Retail Predictive Application Server Cloud Edition

Import Data through Excel Sheet

Users can now import data into writeable measures within workbooks from a templated Excel worksheet. This allows users to directly bring data into the application UI without requiring additional IT or administrative assistance.

Ability to Download the Manage Workspaces Dashboard

With this release, users can download the Manage Workspace dashboard to an Excel spreadsheet. This helps users to track user activities, space consumption, last refresh information, and so on, which will help in regular maintenance of the system.

Improved Notification Message and Commit Status

Notification has been improved, providing better information on commit rule execution when linked with a custom menu. The user now receives a notification when a commit is initiated on a successful execution of a custom menu. This indicates the progress of the custom menu process to the users. The commit status displayed on the workspace is updated only after the commit execution.

Merchandise Financial Planning Cloud Service

Improvement in Merchandising – Merchandise Financial Planning Integration

In the new ecosystem, all applications are closely connected by using the same data set. The hierarchy nomenclature between Oracle Retail Merchandising Cloud Services and Merchandise Financial Planning (MFP) is tightly coupled. Merchandising Area is now addressed as Area in MFP as well. The Fulfillment level in MFP has been changed to Channel to plan at the channel level.

This is a change to a GA process and has no impact on any of the existing implementations. A similar change has been implemented for Oracle Retail Assortment Planning Cloud Service (APCS).

Addition of Extended Measures in Merchandise Financial Planning (Retail and Cost)

The Extensibility option in MFP allows customers to edit some of the listed measures to cater to the tailored business needs of each retailer. This list has been improved to edit more measures/rules according to the tailored business requirements.

2

Browser Requirements



Note:

Oracle Retail assumes that the retailer has ensured its Operating System has been patched with all applicable Windows updates.

The following browsers are supported:

- Mozilla Firefox
- Microsoft Edge
- Google Chrome (Desktop)

Microsoft has deprecated Internet Explorer 11 in Windows 10 and recommends using Edge as the default browser. Refer to the [Oracle Software Web Browser Support Policy](#) for additional information.

3

Noteworthy Fixed Issues

Affected Component	Defect Number	Summary
Foundation Data Load	35495782	E\$ rejected record tables not available in APEX after job runs
Foundation Data Load	35402249	Missing interface in RAP_INTF_CFG for replenishment attributes
Foundation Data Load	35543983	Unique constraint error on loading W_RTL_PRICE_CLR_IT_LC_DS table
RPASCE Client	35388025	The File Transfer Service (for Object Storage) was missing the “translations” file prefix for each planning application. This has now been added.
RPASCE Client	35523136	Some users were occasionally seeing an error when loading the workspace view. This was due to an issue with the underlying merge and sort API; this has now been resolved.

4

Deprecated Features

As part of the continuous delivery model for cloud services, features and technical components of a solution may be removed or replaced to enhance the security, performance, and overall quality of the cloud service. When this occurs, the deprecation of a feature or component will be announced in advance, allowing Customers sufficient time to anticipate the change and transition to any enhanced replacement feature/component. After the deprecation is announced, the deprecated feature or component will remain in the solution until the planned removal date and will not be enhanced or made compatible with other new features.

For a full list of declared Planning and Supply Chain deprecated features, see Oracle Retail Predictive Application Server (RPAS) Cloud for Planning and Optimization / Supply Chain Cloud Services Documentation Library (Doc ID [2492295.1](#)).

For a full list of declared AI Foundation Cloud Services and Retail Insights Cloud Service deprecated features, see the Oracle Retail Insights Cloud Service and AI Foundation Cloud Services Documentation Library (Doc ID [2539848.1](#)).