

Oracle® Retail Analytics and Planning Applications

Release Readiness Guide



Release 23.2.401.0

F86821-02

October 2023

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

ORACLE®

Oracle Retail Analytics and Planning Applications Release Readiness Guide, Release 23.2.401.0

F86821-02

Copyright © 2023, Oracle and/or its affiliates.

Contents

1 Feature Summary

Noteworthy Enhancements	1-1
New Feature Description	1-2
Inventory Planning Optimization (IPO) Cloud Service Announcement	1-2
Inventory Planning Optimization (IPO) Cloud Service-Demand Forecasting	1-3
Inventory Planning Optimization (IPO) Cloud Service-Inventory Optimization	1-3
Inventory Planning Optimization (IPO) Cloud Service-Lifecycle Allocation and Replenishment	1-3
Lifecycle Pricing Optimization (LPO) Cloud Service Announcement	1-4
Analytics and Planning	1-4
Load Aggregate Facts to Planning	1-4
AI Foundation Cloud Service	1-4
Automatically Determine Forecast Source	1-4
Ability to Override Prices on the Daily Interface	1-5
Ignore Partial Calendar Years	1-5
Alternate Hierarchy Setup Changes	1-5
Inventory Optimization Cloud Service	1-5
Upcoming Name Changes	1-5
Promotion and Markdown Optimization Cloud Service	1-5
Upcoming Name Changes	1-5
Retail Demand Forecasting Cloud Service	1-6
Upcoming Name Changes	1-6
Retail Insights Cloud Service	1-6
New Reporting Metrics	1-6
Retail Predictive Application Server Cloud Edition	1-6
Ability to Build and Edit Workspace from Recent Plans	1-6
Ability to Search a Metric in the Edit Measure View for a Selected Metric	1-6
Ability to Override Date Format	1-6
Dimension Attributes Manager	1-6

2 Browser Requirements

3 Noteworthy Fixed Issues

4 Deprecated Features

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.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

<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

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

Retail Analytics and Planning 23.2.401.0 is a Critical Update.

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?
Inventory Planning Optimization (IPO) Cloud Service Announcement				
Inventory Planning Optimization (IPO) Cloud Service Announcement	All	Large	No	Yes
Lifecycle Pricing Optimization (LPO) Cloud Service Announcement				
Lifecycle Pricing Optimization (LPO) Cloud Service Announcement	All	Large	No	Yes
Retail Analytics and Planning				

Table 1-1 (Cont.) Noteworthy Enhancements

Feature	Module Impacted	Scale	Delivered	Customer Action Required?
Load Aggregate Facts to Planning	Integration	Small	Yes	No
AI Foundation Cloud Service				
Automatically Determine Forecast Source	Forecasting	Small	Yes	No
Ability to Override Prices on the Daily Interface	Integration	Small	Yes	No
Ignore Partial Calendar Years	Integration	Small	Yes	No
Alternate Hierarchy Setup Changes	Integration	Small	Yes	No
Inventory Optimization Cloud Service				
Upcoming Name Changes	User Interface	Small	Yes	No
Promotion and Markdown Cloud Service				
Upcoming Name Changes	User Interface	Small	Yes	No
Retail Demand Forecasting Cloud Service				
Upcoming Name Changes	User Interface	Small	Yes	No
Retail Insights Cloud Service				
New Reporting Metrics	Reports	Small	Yes	No
Retail Predictive Application Server Cloud Edition				
Ability to Build and Edit Workspace from Recent Plans	Usability	Small	Yes	No
Ability to Search a Metric in the Edit Measure View for a Selected Metric	Usability	Small	Yes	No
Ability to Override Date Format	Usability	Small	Yes	No
Dimension Attributes Manager	Usability	Small	Yes	No

New Feature Description

This section describes the new features.

Inventory Planning Optimization (IPO) Cloud Service Announcement

With this update, Oracle is announcing the new IPO Cloud Service. A retailer's most significant investment is its inventory. IPO Cloud Service offers retailers the ability to best predict how much demand there will be and enables them to deploy their inventory to optimize the demand throughout the course of an item's lifecycle. Throughout this lifecycle, the solution is able to react to changes in consumer behavior to 'right size' inventory deployment and demand methodologies. The end result allows retailers to manage their current and future inventory at scale, to ensure the right products and quantities are in the right place for the right customers at the right time.

IPO Cloud Service is composed of the modules below.

Inventory Planning Optimization (IPO) Cloud Service-Demand Forecasting

Inventory Planning Optimization (IPO) Cloud Service-Demand Forecasting provides accurate forecasts that enable retailers to coordinate demand-driven outcomes that deliver connected customer interactions. With a single view of demand, IPO Cloud Service-Demand Forecasting provides pervasive value across retail processes. Exception-driven and prioritized alerts allow users to maximize the value of their time. Enhanced AI capabilities and models within the forecast allow the application to make more sense of large and disperse data sets, driving increased accuracy over time. The ability to simulate various casual factors allows users to understand the components that impact their demand. Forecasting allows retailers to maximize the value of their inventory by accurately predicting how much inventory is needed and where to place it.

Inventory Planning Optimization (IPO) Cloud Service-Inventory Optimization

Inventory Planning Optimization (IPO) Cloud Service-Inventory Optimization allows users to optimize the settings that drive their replenishment process. Understanding the inventory necessary to achieve a target service level is critical to achieving business goals, and doing so with the least investment reduces need for markdowns and/or missed sales due to out of stocks. The curve in IPO Cloud Service-Inventory Optimization helps you to understand the trade-off between service levels and the cost of associated inventory. IPO Cloud Service-Inventory Optimization recommends an initial service level. With your target service level defined, IPO Cloud Service-Inventory Optimization optimizes target stock levels, which translates into item-location replenishment policies. The replenishment policies are used to complete a full replenishment simulation, giving you visibility into the resulting purchase and into the placement of inventory in a time-phased plan. Finally, IPO Cloud Service-Inventory Optimization drives successful outcomes in end-of-life by recommending rebalancing transfers between stores to increase sell-through in order to avoid markdowns. Rebalancing can be disabled for lower-margin categories where transferring goods is most often cost-prohibitive.

Inventory Planning Optimization (IPO) Cloud Service-Lifecycle Allocation and Replenishment

Inventory Planning Optimization (IPO) Cloud Service-Lifecycle Allocation and Replenishment is an automated allocation and replenishment planning system that constantly monitors inventory conditions and lifecycle phases. IPO Cloud Service-Lifecycle Allocation and Replenishment enables users to create strategies that control how an item is allocated and

replenished from introduction to end of life. IPO Cloud Service-Allocation and Replenishment uses strategies, inventory positions, and the demand forecast, along with operational constraints of the retailer's supply chain network, to create orders and transfers. The strategies automatically adjust deployment methodologies as products go through their different lifecycle phases to ensure the best deployment method. When new products or locations are introduced, the system can automatically determine which strategy applies and raise an alert for its review. Dynamic business rules can be set up in order to alert users and drive an exception-driven workflow and maximize the value of users' time. IPO Cloud Service-Lifecycle Allocation and Replenishment dynamically deploys inventory throughout an item's lifecycle and allows users to spend their time managing exceptions. Ultimately, this increases the inventory efficiency and margin across a product's lifecycle.

Lifecycle Pricing Optimization (LPO) Cloud Service Announcement

With this update, Oracle is announcing the new LPO Cloud Service.

LPO Cloud Service manages various aspects of lifecycle pricing, optimizing promotions and markdowns to drive higher in-season sell-through, as well as increasing revenue and/or gross margin throughout the end of life. Additionally, LPO Cloud Service drives engagement and revenue from key customers and segments through the optimization of Customer Targeted Offers. LPO delivers this functionality by enabling retailers to forecast demand of their customer segments as well as to understand which customer segment has the highest probability of redemption for marketing offers. LPO Cloud Service leverages a variety of AI models in order to determine who, what, when, where and for how much, the price of various items should be throughout their lifecycle in order to maximize return on investment.

Analytics and Planning

Load Aggregate Facts to Planning

The aggregate fact interfaces previously added to the AIF data warehouse are now also integrated with PDS. These tables are intended for use only when you cannot provide SKU/store level data for core foundational areas like sales and inventory, and you instead wish to load pre-aggregated fact measures at your target intersections for Planning applications. These pre-aggregated measures will be loaded into AIF and PDS at the same intersection you provide them at. The integration is not pre-defined; as part of your implementation you would be expected to configure each interface and provide the mappings to AIF and PDS so the applications know which measures will be used and at what levels. Many advanced AIF features will not be available if pre-aggregated data is used, such as Offer Optimization and CDTs, because they require transaction data at SKU/store level.

AI Foundation Cloud Service

Automatically Determine Forecast Source

Previously, the choice of approved forecast source was a global choice for an environment made by setting the `RSE_APPROVED_FCST_SOURCE` parameter in the `RSE_CONFIG` table in the Manage System Configurations screen. The choices were RDF or AIF. The choices remain the same, but it will now be automatically determined

for each run type. As a result, `RSE_APPROVED_FCST_SOURCE` configuration has been removed. Whenever a forecast run type is mapped to RDF (regardless of which other apps the same run type is also mapped to), then the approved forecast source automatically becomes RDF. Otherwise, the approved forecast source automatically becomes AIF.

Ability to Override Prices on the Daily Interface

The `PRICE.csv` interface has been updated with 2 additional columns on the end of the file:

- `ORIG_SELLING_UNIT_RTL_AMT_LCL` – original price override
- `LST_REG_RTL_AMT_LCL` – last regular price override

These columns will be used to directly update the same-named fields in the Price fact table when they are provided. They can be provided in scenarios where you need to override the value already in the database, or you can use them to set the full price for an item/location at the same time that item/location is marked down.

Ignore Partial Calendar Years

Previously, the calendar load from RI to AIF would fail if the first year is a partial year, which forced users to load the first year as a full year. This change will allow the data load to complete by just ignoring the first year if it is a partial year. The load would only process from the 2nd year onwards into the AIF calendar tables.

Alternate Hierarchy Setup Changes

The RI tables `W_INT_ORG_DTS` and `W_INT_ORG_DS` can be declared as data sources for alternate hierarchies in AI Foundation. When you are looking to use a “standard” hierarchy level as one of your alternates, you will specify `W_INT_ORG_DTS` as the table source for that level, even if you are not populating this table directly. The ETL programs will know how to obtain the standard hierarchy level data any time `W_INT_ORG_DTS` is specified for a standard hierarchy level like region or area.

Inventory Optimization Cloud Service

Upcoming Name Changes

The user interface and task menu for Inventory Optimization will be renamed to Inventory Planning Optimization (IPO) Cloud Services in this release. This is a name change only and should not impact your usage of the applications.

Promotion and Markdown Optimization Cloud Service

Upcoming Name Changes

The Offer Optimization and Promotion & Markdown Optimization user interfaces and task menus will be renamed to Lifecycle Pricing Optimization (LPO) Cloud Services in this release. This is a name change only and should not impact your usage of the applications.

Retail Demand Forecasting Cloud Service

Upcoming Name Changes

The user interface and task menu for Demand Forecasting will be renamed to Inventory Planning Optimization (IPO) Cloud Services-Demand Forecasting in this release. This is a name change only and should not impact your usage of the applications.

Retail Insights Cloud Service

New Reporting Metrics

Retail Insights subject areas will be updated with additional and updated metrics for Sellthrough, Spot Cover, and Available Inventory calculations.

Retail Predictive Application Server Cloud Edition

Ability to Build and Edit Workspace from Recent Plans

Users can now build and edit the workspace directly from the Recent Plans action menu. The Build action initiates the building process for the selected workspace. The Edit action opens the wizard for the selected workspace for users to make edits for the position selection. This saves users the time of navigating to the wizard window every time to edit or build the workspace.

Ability to Search a Metric in the Edit Measure View for a Selected Metric

With this release, users can now search for a measure in the selected measure list (right hand side) of the Edit Measure view.

Ability to Override Date Format

This feature allows the Administrator to override the default date format for all locales and all users. The configured date format will appear in the pivot table, Administration dashboard, Recent Plans, and Last Committed Status.

Dimension Attributes Manager

The ability to register, unregister, or get a report of Dimension Attributes is now provided through an Online Administration Tools (OAT) task. On certain occasions, customers/implementers will need visibility into all the registered dimension attributes. Previously, this was done by raising an SR to the Cloud support group. The ability to register, unregister, and generate a report on the existing dimension attributes will allow the customer/implementer to access this information quickly and make an informed decision.

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

This section highlights specific key fixes that are scheduled to be included in this upcoming release. In some cases, only a percentage of the overall fixed defects are listed.

Affected Component	Defect Number	Summary
AIF Data Interfaces	35856726	Flex fields for Markdown and Receipts facts in AIF DATA loads were not using additive load logic like the rest of the data fields on these interfaces.
AIF Data Interfaces	35862600	Supplier data on <code>PRODUCT.csv</code> was not being properly integrated to <code>W_RTL_IT_SUPPLIER_D</code> when the supplier on an item changed.
AIF Data Interfaces	35889789	The organization data load using <code>ORGANIZATION.csv</code> file no longer creates duplicate hierarchy records when the Manager (MGR) columns are populated.
AIF Data Interfaces	35805372	Item differentiator loads into AIF (such as the jobs for <code>ITEMDIFF</code> , <code>STYLE</code> , <code>FABRIC</code> , and <code>SIZE</code> data) will no longer fail when incremental and item re-use flags are both set to <code>Y</code> .
AIF Data Interfaces	35895044	Sales data to RAP no longer causes failures when a return transaction has multiple stores on different lines. This can happen if a return is converted to be against the original selling locations.
AIF Data Aggregation	35856775	The AIF data aggregation utility was not using the proper configuration leading to very poor performance of inventory aggregations.
IPOCS-Demand Forecasting	35732679	The Periods Kept for Approval measure was not documented in the user guide. This issue has been addressed.
IPOCS-Demand Forecasting	35845877	Plug-in not working as expected, causing failure during domain build.

Affected Component	Defect Number	Summary
MFCS Integration	35869810	Diff aggregate IDs were not being captured for fashion items from Merchandising when incremental extracts were used.
MFCS Integration	35904265	The MFCS interface to RAP for wholesale and franchise transactions (SDE_RETAILWHOLESALEFRANCHISEFACT) no longer fails when REF_NO fields contain non-numeric data.
MFCS Integration	35879612	The MFCS interface to RAP for item attributes will no longer fail when a column contains a value > 255 characters in length.
RPASCE Server	35677508	The loading of Dimension data into Planning Data Schema (PDS) was failing because of the older files in one of the directories. This has been fixed by improving the dimension load feature to purge the existing files first and then load the new files.
RPASCE Server	35776546	Some of the data was not aggregating correctly after loading the product hierarchy and historical data. This occurred because of the stale data left in the tables after reclassification. This has been fixed.
RPASCE Server	35784956	A left-over lock on a segment prevented the end user from building the segment back. This has been fixed.
RPASCE Client	34922053	In the case of multiple application environments, when the application names were updated in the global configuration setting, it was not showing the correct names for the different applications. This has been fixed.
RPASCE Client	35742974	A workspace that has multiple views set up on Real Time Alert was not opening from the Exception dashboard and it was displaying an error. This has been fixed.

Affected Component	Defect Number	Summary
RPASCE Client	35756591	The cell was not changing to edit mode when the R/r or D/d letters were entered in the cells. This has been fixed.
RPASCE Client	35908971	Patching of the environment was failing because of the lesser buffer limit set for character string. This has been set to maximum value to accommodate volume and future changes.
RPASCE Client	35915272	Users were facing Login issues as some of the server components weren't starting because of space issues resulting from unwanted file downloads. This has been fixed.
RPASCE Client	35929572	During a simultaneous, multi-user stress test, a small portion of workbook builds hit locking issues leading to failure. This has been fixed.

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](#)).