

# Oracle® Retail Analytics and Planning Applications

## Release Readiness Guide



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## 2 Noteworthy Fixed Issues

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## 3 Deprecated Features

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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.

## Documentation Accessibility

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## Access to Oracle Support

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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](mailto: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.

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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

## 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.
  - **Medium:** These UI or process-based features are typically comprised of field, validation, or program changes. Therefore the potential impact on users is moderate
  - **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?
<b>Retail Analytics and Planning</b>				
<a href="#">Retail Insights Limited-Use Model</a>	Analytics and Planning	Medium	Disabled	Yes
<a href="#">Initial Item Cost and Retail Integrations</a>	Analytics and Planning	Small	Enabled	No
<a href="#">Pack Item Data and Integrations</a>	Analytics and Planning	Medium	Enabled	No
<a href="#">Batch Process Changes</a>	Analytics and Planning	Small	Disabled	Yes
<b>AI Foundation Cloud Service</b>				

**Table 1-1 (Cont.) Noteworthy Enhancements**

Feature	Module Impacted	Scale	Delivered	Customer Action Required?
<a href="#">AI Foundation Private Endpoint Cloud Service: Database Access</a>	AI Foundation	Medium	Yes (with purchase)	Yes, see the <i>AI Foundation Private Endpoint Cloud Service: Database Access Implementation Guide</i>
<a href="#">Cumulative Intervals for Forecasts</a>	AI Foundation	Small	Enabled	No
<a href="#">Forecast Integration Between (IPO-DF) and (IPO-IO)</a>	AI Foundation	Small	Enabled	No
<a href="#">Customer Decision Trees (CDT) Moves to Jet User Interface</a>	AI Foundation	Medium	Enabled	No
<b>Inventory Planning Optimization (IPO) Cloud Service</b>				
<a href="#">Access the Plan Preview</a>	Inventory Planning Optimization	Small	Enabled	No
<a href="#">Enable or Disable Truck Scaling</a>	Inventory Planning Optimization	Small	Enabled	No
<a href="#">Create Optimization Runs in Debug Mode</a>	Inventory Planning Optimization	Small	Enabled	No
<b>Lifecycle Pricing Optimization (LPO) Cloud Service</b>				
<a href="#">User Filter Layout in Manage Recommendation</a>	Lifecycle Pricing Optimization	Small	Enabled	No
<b>Retail Insights Cloud Service</b>				
<a href="#">Size Profile Reporting</a>	Retail Insights	Small	Enabled	No
<a href="#">Buy Plan Measures from Merchandise Financial Planning (MFP) and Assortment Planning (AP)</a>	Retail Insights	Small	Enabled	No
<a href="#">Removing Support for JRAF Tiles</a>	Retail Insights	Small	Enabled	No
<b>Retail Predictive Application Server Cloud Edition Server Enhancements</b>				



**Table 1-1 (Cont.) Noteworthy Enhancements**

Feature	Module Impacted	Scale	Delivered	Customer Action Required?
Cancel Retail Predictive Application Server Cloud Edition (RPASCE) Tasks Using POM	All	Small	Yes	No
Ability to Use Relative Date for POM Business Date for RPAS Batches	All	Small	Yes	Yes
Ability to Add a Timestamp to a File Name through Transform File	All	Small	Yes	Yes
Improved Workspace Management	All	Small	Yes	Yes
<b>Retail Predictive Application Server Cloud Edition Client Enhancement</b>				
Quick Calculation on Pivot Table	Usability	Medium	Yes	No
Ability to Drag and Drop Measure Columns / Rows	Usability	Small	Yes	No
Display Dimension Attributes on Wizard for Position Selection	Usability	Medium	Yes	No
Additional Exception Formatting Condition for Numeric Measure	Usability	Small	Yes	No
<b>Merchandise Financial Planning and Assortment Planning Cloud Service</b>				
BOS Override Measure in GA	MFP	Small	Yes	No
Updated Batch Schedule Template to New Process Orchestration and Monitoring (POM) Format	MFP	Small	Yes	No

## Retail Analytics and Planning Enhancements

## Retail Insights Limited-Use Model

This release will enable limited use of Retail Insights (RI) for other customers of a Retail Analytics and Planning (RAP) solution. The limited-use model allows for a subset of the full RI functionality to be used without a full RI subscription. This includes access to some RI metadata and subject areas to build reports and visualizations from Data Visualization (DV) workbooks. The available functionality will depend on which other RAP solutions you currently use and will still require that you implement the required components of RI before you can start using it, such as populating Business Intelligence (BI) aggregation tables and enabling additional POM jobs in the nightly batch. Complete details on the limited-use RI model for RAP applications will be available in the *Retail Insights User Guide*.

## Initial Item Cost and Retail Integrations

This release will add two new measures in the item dimension integration from Merchandising to RAP for the initial item unit cost and retail values that are created prior to the item being ranged to any locations. These values will be written into the existing W\_PRODUCT\_ATTR\_DS interface and also added as new fields in the non-Merchandising interface PRODUCT.csv. The values will be exported to PDS on the existing W\_PDS\_PRODUCT\_D table for use in customizations and extensions. Customers will not be required to populate these fields if they do not wish to use them; they will be nullable and backwards-compatible with earlier file formats. Refer to the *Retail Analytics and Planning Interfaces Guide* in My Oracle Support for details.

## Pack Item Data and Integrations

This release will begin updates to platform architecture for pack items in several areas of the Retail Analytics and Planning (RAP) solution suite. The updates are intended to support future enhancements and are not a complete end-to-end solution in this patch update.

- A new interface will be added for pack-level inventory positions (W\_RTL\_INVPK\_IT\_LC\_DY\_FS), which will be held in a new base fact table (and related aggregate tables) in the data warehouse. This patch adds the interface file (INVENTORY\_PACK.csv) along with all the nightly batch jobs to process data on the AIF DATA tables and include it in the PDS export of W\_PDS\_INV\_IT\_LC\_WK\_A. Jobs added to the batch schedule mirror the table names, such as W\_RTL\_INVPK\_IT\_LC\_DY\_F\_JOB and W\_RTL\_INVPK\_IT\_LC\_WK\_A\_JOB. The RDE job updates and history load programs are not included in this release.
- The interface for inventory positions (W\_RTL\_INV\_IT\_LC\_DY\_FS) will have new columns added to separate the stock on hand between the pack component quantities and the non-pack unit quantities for the same items. This patch adds the column changes starting from INVENTORY.csv all the way through W\_RTL\_INV\_IT\_LC\_WK\_A and W\_PDS\_INV\_IT\_LC\_WK\_A output tables. The RDE job updates are not included in this release.
- The interface for purchase order data (W\_RTL\_PO\_ONORD\_IT\_LC\_DY\_FS) will have new columns for pack information, and these columns will be exported to PDS for use in IPO. This patch adds the column changes starting from ORDER\_DETAIL.csv all the way through W\_RTL\_PO\_ONORD\_IT\_LC\_DY\_F and W\_PDS\_PO\_ONORD\_IT\_LC\_DY\_F output tables. The RDE job updates are not included in this release.
- The Merchandising interface for transfer details (W\_RTL\_TSF\_IT\_LC\_DY\_FS) has removed the spreaddown logic to split packs into their components and will now extract the transfers at their original item level. This makes the interface consistent with the allocation details interface, which already allowed pack item data. The existing PDS interface

W\_PDS\_TSF\_IT\_LC\_DY\_F will get the pack level transfers automatically where they exist and a new PACK\_FLG column will be added to differentiate the item types. The PACK\_FLG will also be added to W\_PDS\_ALC\_IT\_LC\_DY\_F for consistency.

## Batch Process Changes

This release includes numerous changes to POM processes in the AIF DATA schedule that will impact all customers:

- A new process W\_PRODUCT\_D\_RTL\_CUR\_TMP\_AGG\_PROCESS with job AGG\_UTILITY\_PRE\_JOB is a mandatory job for the AIF DATA nightly batch and must be enabled in all environments. It will be enabled by default on upgrade.
- A new job ORG\_PROD\_RECLASS\_HIST\_JOB is added to the nightly AIF DATA batch cycle and will be enabled by default on upgrade. It captures the history of reclassification activity for a number of days set in C\_ODI\_PARAM value RI\_RECLASS\_HIST\_DAYS.
- 10+ new jobs relating to the inventory pack changes above will be added to AIF DATA nightly schedule, but they will be disabled by default and should not be enabled unless you require this data flow for your RAP solutions.
- LOAD\_DIM\_INITIAL\_STAGE\_ADHOC has been deleted. The same jobs are now available in the DAT\_REPROCESS\_ADHOC process as a POM flow, which allows for parallel execution of jobs.
- RDE dimension extract processes are deleted and replaced with POM flows RDE\_DIM\_FLOW\_ADHOC and RDE\_CE\_DIM\_FLOW\_ADHOC.
- RDE fact initial extract is deleted and replaced with POM flow RDE\_FACT\_FLOW\_ADHOC.
- AIF DATA job descriptions have been updated to contain meaningful information about the job functions, which can be viewed from the Batch Monitoring screen.

For the ad hoc POM flows, you will need to configure them after upgrade to enable/disable jobs to align with your prior usage of the deleted processes.

## AI Foundation Cloud Service

### AI Foundation Private Endpoint Cloud Service: Database Access

This Cloud Service provides direct, secure, inbound database access to Innovation Workbench (IW) and Retail Insights schemas from external hosts. The AIF Private Endpoint (PE) extends access to the IW schema within the customer's virtual cloud network (VCN) on Oracle Cloud Infrastructure or to other networks peered to the VCN such as their corporate network. That is, they can access IW from hosts within their VCN or from their on-premises network. Without the PE, IW data can only be accessed via AIF-VCN-resident Oracle Analytics Server, Oracle Application Express (APEX), custom APEX apps, and custom Oracle REST Data Service services. The PE extends access to tools and apps that support a familiar configurable connection (that is, host, port, and credentials). The PE supports any technology that communicates using SQL\*Net, including JDBC, ODBC, Oracle Client.



**Note:**

Before Oracle enables the Endpoint, you may be required to upgrade to the latest product version of your Retail Analytics and Planning solutions.

## Cumulative Intervals for Forecasts

Customers with an Inventory Planning Optimization-Demand Forecasting (IPO-DF) license already have visibility to the cumulative interval values, along with the forecasts in the IPO-DF interface. For other AI Foundation customers, after the forecast is generated in AIF, cumulative interval values will now be calculated and will also be pushed to Merchandising Foundation Cloud Service both at weekly and daily levels.

## Forecast Integration Between (IPO-DF) and (IPO-IO)

An enhancement was made so that IPO-IO will be able to use week-level forecasting that is reviewed and approved in IPO-DF. To use a week-level forecast in IPO-IO, a user will need to set up the forecast run type at week-level and map it to both IPO-IO and IPO-DF. In this case the spread-to-day level option should NOT be selected when setting up the run type. Because IPO-IO requires day-level forecast, the spread from week to day level will happen in AIF after the approved forecast is imported from IPO-DF.

## Customer Decision Trees (CDT) Moves to Jet User Interface

The Customer Decision Trees (CDT) application has been converted to Oracle Jet UI. The converted UI's look and feel will be similar to the other Jet applications, like SPO, IPO, and LPO. The new Overview screen provides a dashboard to give users ease of navigation between CDT screens. The Generate CDT screen workflow remains the same, with some reports moved to the dashboard for ease of viewing. The CDT application on the older ADF platform will continue to be available for some time.

# Inventory Planning Optimization (IPO) Cloud Service Enhancements

## Access the Plan Preview

The inventory plan preview, which was previously accessed from the notifications, will now be accessible from the contextual area in the Inventory Planning (IP) screen. User will be able to see a list of previews, open the complete preview runs and re-submit the failed ones.

## Enable or Disable Truck Scaling

A new feature was added in the Inventory Optimization (IO) Create Run screen such that a user can enable or disable truck scaling. Previously, truck scaling was always done by default as part of the time-phased inventory optimization.

## Create Optimization Runs in Debug Mode

A new feature was added in the Inventory Optimization (IO) create run screen to create and execute optimization runs with the options to retain input data and store on the object store and/or in the database.

## Lifecycle Pricing Optimization Cloud Service Enhancements

### User Filter Layout in Manage Recommendation

The Manage Recommendation User filter currently opens from the top, but with this release, will now open from the right. When the user clicks the filter icon, the user filter will open from the right side of the screen. There will not be any change in the functionality offered by the user filter: it is intended to improve user experience only.

## Retail Insights Enhancements

### Size Profile Reporting

This release will add new folders to the RI subject area for Size Profile Optimization (SPO) output data. You will now be able to access the latest size profiles at the item/location level and combine that data with other RI functional areas such as sales and inventory. You will also have access to SPO validation results which checks for invalid size configurations such as multiple size ranges for items within the same style. This allows you to more easily create operational reports or alerts for data issues.

### Buy Plan Measures from Merchandise Financial Planning (MFP) and Assortment Planning (AP)

New fields have been added to the existing MFP and AP plan extracts to Retail Insights for buy plan and OTB measures. These fields will be loaded into the existing PLAN1 through PLAN5 interfaces and will have associated metrics added to the RI subject areas. The generic file-based interfaces will also be updated with the additional columns.

You will not have data in these fields initially, unless you are using the GA templates for these solutions. For non-GA planning customers, you will need to update your interface mappings to define which measures will be exported to RI from MFP/AP. Once the measures are mapped appropriately, the rest of the integration will happen automatically for PDS to RI data movement, assuming you are already running the POM jobs for these interfaces

### Removing Support for JRAF Tiles

In a future release, we will be removing Java application framework (JRAF) libraries from the Retail Insights architecture. These libraries are currently only used in displaying Java-based information tiles in Analytics Classic dashboards. Once the libraries are removed, these custom tile visuals will stop functioning. If you are using custom information tiles in legacy dashboards, remove them as soon as possible to avoid future disruptions to functionality when JRAF libraries are removed.

## Retail Predictive Application Server Cloud Edition Server Enhancements

### Cancel Retail Predictive Application Server Cloud Edition (RPASCE) Tasks Using POM

RPASCE now provides the ability to cancel ongoing tasks. With this enhancement, an Administrator will also be able to cancel the RPASCE tasks using Oracle Retail Process Orchestration and Monitoring (POM).

### Ability to Use Relative Date for POM Business Date for RPAS Batches

An Administrator can now use a relative date for the POM Business Date to run RPAS Batches. A new variable `RPAS_TODAY_DELTA_JOS_POM` has been introduced that will allow the Administrator to determine if the batch needs to be run for `RPAS_TODAY+1` day, `RPAS_TODAY+2` days, and so on. This will provide better flexibility for customers on the batch runs.

### Ability to Add a Timestamp to a File Name through Transform File

To improve the ability to identify transformed files generated at various times, an additional parameter has been introduced. When this optional P parameter is added to the batch control files, the transform operation will append the transformed files with a timestamp.

### Improved Workspace Management

Workspace management has been improved by enhancing the ability to retain the segment while deleting workspaces. Segments have the wizard selections that users would have made during the business activity. The user can build multiple workspaces within a segment without going through the wizard selections. An additional parameter, keep segments, has been introduced which can be added to batch control files with the workspace delete step. This ensures that only workspaces in the chosen segment are deleted while retaining the segment.

## Retail Predictive Application Server Client Enhancements

### Quick Calculation on Pivot Table

The application now allows users to select the number of cells, or columns, or rows and view the calculated results of simple arithmetic operations such as sum, average, min, max, median, and count. Users can make quick decisions by using the quick calculation. For example, while planning, a user can filter the product with sales unit less than 1000. With this feature, the user can view the total sales U across the filtered product position by simply selecting the cells and right-clicking to select the context menu option **Quick Calc**.

### Ability to Drag and Drop Measure Columns / Rows

The user can now rearrange the order of the measure columns and rows on the Pivot Table by simple drag and drop functionality on the application's user interface. This feature will allow

users to save the time of navigating to edit the view dialog every time they need to change the sequence of the measures. The changed measure order on the pivot table will appear in the Edit View dialog; users can choose to save it as a new measure profile.

## Display Dimension Attributes on Wizard for Position Selection

RPASCE now allows users to view the dimensional attributes on the wizard to make the position selection based on attributes. This will help users to make the bulk position selection quickly for a group of positions related to attributes. For example, a planner can select the stores based on the attribute store open date or store status.

## Additional Exception Formatting Condition for Numeric Measure

An additional condition “>=AND<=” has been added in exception formatting. Users can highlight cells with values greater than or equal to AND less than or equal to in two separate formatting styles for two values. For example, a planner can highlight sales units measure with a green background cell color when the value is greater than or equal to 100 units AND the red background cell color when the units value is less than or equal to 50 units.

## Merchandise Financial Planning Cloud Service Enhancements

### BOS Override Measure in GA

The BOS measure has been updated to be an editable measure for overriding the BOS value. This change is made in MFP Merch Plan, Merch Target, and Location Plan workbooks. This measure will provide flexibility to users to enter the BOS Reg+Promo and BOS Clr U/R/C values that will be used for BOP at the start of the season rather than EOP from last season.

### Updated Batch Schedule Template to New Process Orchestration and Monitoring (POM) Format

The Batch Schedule templates RPASCE\_Batch\_Schedule.xlsm and RPASCEXX\_Batch\_Schedule.xlsm will be moved to the new POM format to utilize the latest simplified POM template version. Along with this change, the MFP / AP are scheduled to use daily batches to run every day except Sunday and weekly to run only on Sunday to align with IPO. Also, all ad hoc jobs are also added with the new parameter `restartstep=#SysOpt.restartstep`, so that those can be restarted at any step.

# 2

## Noteworthy Fixed Issues

For the Noteworthy Resolved Issues document for this release, see the following on My Oracle Support (MOS):

- Oracle Retail Insights Cloud Service and AI Foundation Cloud Services Documentation Library (Doc ID [2539848.1](#)).
- Oracle Retail Predictive Application Server (RPAS) Cloud for Planning and Optimization / Supply Chain Cloud Services Documentation Library (Doc ID [2492295.1](#)).



# 3

## 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](#)).