Oracle® Retail Analytics and Planning Applications

Release Readiness Guide

Release 24.2.401.0
G17500-02
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ORACLE®

Oracle Retail Analytics and Planning Applications Release Readiness Guide, Release 24.2.401.0

G17500-02

Contents

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.

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Noteworthy Enhancements

Oracle Retail Analytics and Planning 24.2.401.0 is a Critical Update.

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?
Inventory Planning Optimization (IPO) Cloud Service-Inventory Optimization Enhancements				
Location Lists for Replenishment Rules	Inventory Planning Optimization (IPO) Cloud Service-Inventory Optimization	Small	Yes	No
Batch Run Name Change	Inventory Planning Optimization (IPO) Cloud Service-Inventory Optimization	Small	Yes	No

Table 1-1   (Cont.) Noteworthy Enhancements

Feature	Module Impacted	Scale	Delivered	Customer Action Required?
Net Inventory Metrics	Inventory Planning Optimization (IPO) Cloud Service-Inventory Optimization	Small	Yes	No
Retail Insights Cloud Service				
Retail Home Content Updates	Retail Insights	Small	Yes	No
Replenishment Policy Reporting	Retail Insights	Small	Yes	No
Retail Predictive Application Server Cloud Edition Server Enhancements				
Dashboard Build Improvement	Admin	Small	Yes	No
Batch Restart Enhancement	Admin	Small	Yes	No
System Workbook Staging Enhancement	Admin	Small	Yes	No
Retail Predictive Application Server Cloud Edition Client Enhancements				
Allow Non-Admin Users the Ability to See the Task Status Dashboard	Usability	Small	Yes	No
Improvement in Product-Level Selection During Placeholder Creation	Usability	Small	Yes	No
Assortment Planning Enhancements				
Add Item Level Unit Price and Cost	Assortment Planning	Small	Yes	No
Merchandise Financial Planning Cloud Service and Assortment Planning Cloud Service Enhancements				
Improved Naming Convention of Markdown & Inventory Devaluation	MFP	Small	Yes	No
Update in Base Intersection of 'Enable OP Approval Task' Template	MFP	Small	Yes	No
Default Measure Update in Merchandise Financial Planning Template	MFP	Small	Yes	No

Table 1-1   (Cont.) Noteworthy Enhancements

Feature	Module Impacted	Scale	Delivered	Customer Action Required?
Cost of Goods Sold Calculation Update	MFP	Small	Yes	No

Inventory Planning Optimization (IPO) Cloud Service Enhancements

Location Lists for Replenishment Rules

In the AI Foundation Strategy & Rules UI, location groups are provided as criteria for replenishment rules. These location groups are sourced from location lists in the AIF data warehouse, which is populated from Merchandising Foundation Cloud Service or from a file.

Batch Run Name Change

The names generated for optimization batch runs contain the business date of the run instead of the system date when it was executed.

Net Inventory Metrics

New columns are added to the Replenishment Policies screen in the Inventory Planning Optimization (IPO) Cloud Service-Inventory Optimization UI to show the inventory values, such as Net Inventory Position and Net On-Hand Quantity.

Retail Insights Enhancements

Retail Home Content Updates

The following updates have been made to Retail Insights (RI) content exposed through the Retail Home application:

- The pre-built RI filters for tile analyses have been corrected to work with the latest version of Retail Home tile filters.
- A new tile template for top items with item images has been added in the RI catalog samples.
- The Top Items tile in the RI dashboards in Retail Home uses the new top items report template.

Replenishment Policy Reporting

Retail Insights has a new folder of metrics for replenishment policy reporting, which uses the output of the Inventory Optimization process in AI Foundation. These metrics were previously available as a database view in APEX, but they are now part of the standard RI reporting metrics.

Retail Predictive Application Server Cloud Edition Server Enhancements

Dashboard Build Improvement

When users share the same positions for a dashboard workbook, this is now built only once. This build is then duplicated to that group of users. This improves the overall build time of dashboards during batch processing.

Batch Restart Enhancement

When restarting a failed batch step, that step now continues from the failed sub-step rather than starting from the beginning of the parent step. This improves performance.

System Workbook Staging Enhancement

Performance has been improved by staging RHS measures prior to building. This reduces the re-fetching of common measure data across system workbooks. Adoption of this feature requires batch control file changes, which are documented in the *Retail Predictive Application Server Cloud Edition Administration Guide*.

Retail Predictive Application Server Client Enhancements

Allow Non-Admin Users the Ability to See the Task Status Dashboard

With this release, non-admin users can view the task status dashboard. Users can view the status of the tasks initiated by them; such as, workbook build, commit, and so on. This helps users track the progress of tasks and take action, if needed.

Improvement in Product-Level Selection During Placeholder Creation

While using placeholder creation, the users can now select the parent product position, which makes it easier for users to assign the right product hierarchy to the placeholder. Also, when the user selects a parent position, the child positions are filtered to make selection easier. For example, when the user selects class A, only the sub-class entries associated with class A are displayed for selection, rather than all sub-classes.

Assortment Planning Enhancements

Add Item Level Unit Price and Cost

This adds an optional, file-based RAP interface to add an Item level unit price and cost to use if the item/location level unit price and cost is not available from the source systems.

Merchandise Financial Planning Cloud Service Enhancements

Improved Naming Convention of Markdown & Inventory Devaluation

With this release, the naming convention of Markdown and Inventory deviation has been updated to **Markdown POS** and **Markdown Permanent** respectively. This makes a clear distinction between point-of-sale markdowns against permanent markdowns.

Update in Base Intersection of 'Enable OP Approval Task' Template

The base intersection has an 'enable OP approval task' template across the Merch plan and location plan and has been updated to 'Half Yearly'. This change helps align the base intersection between admin template and approval templates. This will also help admin users to make correct selections easily.

Default Measure Update in Merchandise Financial Planning Template

Shrink R% & Shrink C% is now updated as a default measure rather than Shrink R and Shrink C respectively

Cost of Goods Sold Calculation Update

The calculation of cost of goods (COGS) sold has been updated in MFP Retail. The planned cost of shrinkage is used in calculations instead of Shrink R. This change provides more accurate results.

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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).

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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.

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).