

# Oracle® Retail Analytics and Planning Applications

## Release Readiness Guide



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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

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](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.

Feature	Module Impacted	Scale	Delivered	Customer Action Required?
<b>Analytics and Planning (RAP)</b>				
<a href="#">Integration and Interface Updates</a>	Analytics and Planning	Medium	Enabled	No
<b>AI Foundation</b>				
<a href="#">Preprocessing Review UI</a>	AI Foundation	Medium	Enabled	No
<a href="#">Estimation Review – Promotions</a>	AI Foundation	Medium	Enabled	No
<a href="#">Ability to Sync Application Labels from Retail Home</a>	AI Foundation	Medium	Enabled	No
<b>Inventory Planning Optimization (IPO) Cloud Service</b>				
<a href="#">Use Supplier Minimums in Auto Approval</a>	Inventory Optimization	Medium	Enabled	No
<a href="#">Override Recommended Allocate Quantity</a>	Inventory Optimization	Small	Enabled	No
<a href="#">Export Approved Allocations</a>	Inventory Optimization	Medium	Enabled	No

Feature	Module Impacted	Scale	Delivered	Customer Action Required?
Preview and Resolve Alerts in Time-phased Plan	Inventory Optimization	Large	Enabled	No
Support Cross Dock Lead Time in Optimized Min/Max	Inventory Optimization	Small	Enabled	No
Custom Export Job in Intra-Day Batch IPO	Batch	Small	Enabled	No
<b>Lifecycle Pricing Optimization (LPO) Cloud Service Enhancements</b>				
LPO Rules-Based Regular Pricing Optimization	Regular Price Optimization	Medium	Disabled	Yes
Clearance Failure Status in LPO	Pricing CS Integration	Small	Enabled	No
<b>Retail Insights (RI)</b>				
Regular Price Optimization Ratio Forecast	RI Reporting	Small	Enabled	No
<b>Retail Predictive Application Server Cloud Edition Server Enhancement</b>				
Ability to download Reports from BI Publisher OAS to RPAS	RPASCE	Small	Enabled	No
<b>Retail Predictive Application Server Cloud Edition Client Enhancements</b>				
Improved Export to Excel – Ability to Export All Slices into a Single Excel Sheet	UI	Small	Enabled	No
Uncommitted Badge Removal when Commit Rule is not Configured	UI	Small	Enabled	No
Oracle Digital Assistant	UI	Small	Enabled	No
<b>Merchandise Financial Planning Cloud Service Enhancement</b>				
MFP Integration with Portfolio Optimization	MFP	Medium	Enabled	No

## Analytics and Planning Enhancements

### Integration and Interface Updates

This release of Retail Analytics and Planning (RAP) applications includes the following updates to data integrations:

- The item integration from the AIF data warehouse to the Planning Data Store (PDS) has a new option to allow non-sellable items on the W\_PDS\_PRODUCT\_D interface. By default, this option is disabled to align with current behavior. When enabled, both sellable and non-sellable items are integrated to PDS without any restriction.
- The AIF DATA standalone process LOAD\_PLANNING5\_DATA\_ADHOC has been updated with COPY and STG jobs to load the plan data from a file instead of directly from



Assortment Planning (AP), when AP is not being used and you need to perform an ad hoc load of plan data.

- The AIF DATA batch schedule has been updated with a new job RDE\_CHECK\_GGH\_STATUS\_JOB which verifies the status of data replication between Merchandising, Customer Engagement, and RAP. If the data replication processes are not active or have an error status, then this job will fail.

## AI Foundation Cloud Service

### Preprocessing Review UI

AIF was enhanced to allow the review of sales preprocessing. The preprocessing step is correcting for outside factors and transforms sales in unconstrained demand before becoming the forecasting data source.

### Estimation Review – Promotions

AIF was enhanced to allow the review of the impact of promotions on demand. The impact can be viewed by offers and promotions, and can be sliced and diced by different levels on the product and location hierarchies.

### Ability to Sync Application Labels from Retail Home

AIF was enhanced with logic to automatically populate flexible groups. Grouping item/location combinations with similar lifecycles captures relevant demand patterns and produces more accurate forecasts.

## Inventory Planning Optimization (IPO) Cloud Service-Inventory Optimization Enhancements

### Use Supplier Minimums in Auto Approval

Supplier foundation data captures supplier-related inventory management parameters such as supplier minimums. A supplier minimum defines the minimum threshold a purchase order must meet to be considered for automatic approval. Purchase orders not meeting the minimum will remain in IPO requiring user review before being exported. Supplier minimums must be configured in Merchandising Foundation CS and integrated to IPO before they can be applied.

### Override Recommended Allocate Quantity

A new field has been introduced to allow the inventory planner or allocator to enter an override quantity that will be used in place of the system recommended allocation quantity. The total quantity allocated must not exceed the quantity available.

### Export Approved Allocations

User-approved allocations can now be exported to Merchandising Foundation Cloud Service in real time.

## Preview and Resolve Alerts in Time-phased Plan

Generating a time-phased preview will now evaluate alerts for the preview, so you can see if the parameters changes have resolved alerts or introduced new inventory issues.

When a new time-phased plan is published, the alerts are reevaluated to give you the most accurate view of inventory issues.

## Support Cross Dock Lead Time in Optimized Min/Max

Optimized Min/Max parameter calculation will use both warehouse and store lead times.

## Custom Export Job in Intra-Day Batch IPO

A hook is added to the intra-day batch to allow the export of custom measures. For instance, when a manual transfer is performed, users may want to add comments and send them to downstream applications such as Merchandising Foundation Cloud Service. While the export of transfers are GA functionality, the export of the comments are leveraging this functionality.

# Lifecycle Pricing Optimization (LPO) Cloud Service Enhancements

## LPO Rules-Based Regular Pricing Optimization

LPO has been enhanced to support regular pricing strategies by leveraging rule-based pricing to generate price recommendations based on predefined rules and strategies. To activate this, set RSE\_CONFIG.PRO\_LPO\_REGULAR\_LITE\_ENABLED\_FLG to Y.

Key capabilities include:

- Rules-based pricing recommendations triggered by factors such as cost changes, margin adjustments, competitor pricing, and so on.
- Separation of business rules based on Forecast-Based (requiring historical data) vs. Non-Forecast-Based. When the PRO\_LPO\_REGULAR\_LITE\_ENABLED\_FLG flag is set to 'Y,' forecast rules will be hidden.
- Business rule violations for soft constraints will be shown in the UI.
- Daily batch processing to update input data extracts.

## Clearance Failure Status in LPO

When LPO is integrated with RPCS, the system now displays the 'Export Failed' status in the LPO screen for failed clearance webservice responses.

## Retail Insights Cloud Service Enhancements

### Regular Price Optimization Ratio Forecast

A new reporting folder will be added in the Retail Insights As-Is subject area containing data from Regular Price Optimization's (RPO) demand forecast metrics. The metrics for this folder will be sourced from the PMO\_RPO\_RATIO\_DMD\_FCST table.

## Retail Predictive Application Server Cloud Edition Server Enhancements

### Ability to download Reports from BI Publisher OAS to RPAS

This integration allows the customer to download Reports from BI Publisher OAS OS into RPAS using batch. Batch control files in RPAS have been enhanced to support this functionality. Configuring batch control provides the ability to pull files from OAS OS using OAT or POM. The batch service copyfromBI is the service introduced to download files in RPAS OS from BI publisher OAS OS.

## Retail Predictive Application Server Client Enhancements

### Improved Export to Excel – Ability to Export All Slices into a Single Excel Sheet

The Export to Excel feature has now been enhanced to export all the slices into a single Excel sheet with each slice becoming a tab in the Excel sheet. This allows the user to download all the slices into a single sheet to save all the plans locally in one sheet and also allows better collaboration with other teams while sharing the plan.

### Uncommitted Badge Removal when Commit Rule is not Configured

Workspace usability has been improved by removing the uncommitted badge if the workspace does not have commit rules defined. This badge will appear only if there is uncommitted data in the workspace. When the user executes a custom menu or chooses to close the workbook to commit the data, the uncommitted badge will disappear.

## Oracle Digital Assistant

Oracle Digital Assistant (ODA) is a chatbot supporting natural language interactions and uses machine-learning to respond to user questions in English. In this release, the chatbot will be able to respond to questions concerning application functionality. Users can assess the responses they receive by pressing thumbs up or down, which will be used to improve this

functionality. ODA appears as a chat icon within the UI. ODA will be enabled for Merchandise Financial Planning (MFP) and Assortment Planning (AP).

## Merchandise Financial Planning Cloud Service Enhancements

### Merchandise Financial Planning (MFP) Integration with Portfolio Optimization

With this release, users can now utilize Portfolio Optimization output in MFP to make decisions for business growth. Users can seed the MFP plans with Portfolio Optimization output to have a base line for initiating the plan. This option is available for the Merch Target and Merch Plan templates.

# 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

## 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](#)).