Oracle®Retail Insights Cloud Service
Release Readiness Guide

Release 23.1.101.0

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ORACLE®

Contents

Preface

This guide outlines the information you need to know about Oracle Retail Insights Cloud Service 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 Retail Insights Cloud Service.

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 following website https://docs.oracle.com/en/industries/retail/html

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 Insights Cloud Service is 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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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 Insights Cloud Service 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 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	Scale	Delivered	Customer Action Required?
Oracle Analytics Server 6.4 Upgrade	Large	Enabled	No
Dimension Support for Reloads	Small	Disabled	Yes
Product Incremental Loads	Small	Disabled	Yes
Attributes from Multiple Sources	Small	Disabled	Yes
Transaction Count Enhancements	Small	Disabled	Yes
Plan Interface Support for Alternate Hierarchy Levels	Small	Enabled	No
Aggregate Utility Updates	Small	Enabled	No

Table 1-1   (Cont.) Noteworthy Enhancements

Feature	Scale	Delivered	Customer Action Required?
Implementation Self-Service Updates	Small	Enabled	No

Oracle Analytics Server 6.4 Upgrade

Retail Insights version 23 includes an automatic upgrade to OAS version 6.4, which is the latest available release of Oracle Analytics Server. This is a major release of OAS that includes many new features and functionality as well as a reformatted user interface to align with Oracle Redwood styling.

Review the feature summary for OAS 6.4 here:

https://docs.oracle.com/en/middleware/bi/analytics-server/whats-new-oas/index.html#OASWN-GUID-1B23BC2D-11BD-4032-B3A7-2ABF1F31E5E0

Customer Action

While OAS versions should be fully backwards compatible, it is still recommended to perform testing of critical reports, agents, and other business objects when taking any new OAS version. Verify critical business processes in your non-production environment before taking the upgrade to production.

Dimension Support for Reloads

The ad hoc loads for product and organization dimensions and hierarchy data have been replaced with new programs that support reloading the data multiple times in the same business date and with reclasses or other major changes. This effectively maintains the product hierarchy as a Type 1 SCD dimension during the history load phase of a project, where reclasses are not applied to fact tables and will simply overwrite your dimensions. The normal Type 2 SCD jobs are still used by the nightly batches and are unchanged by this update. Because the product data is loaded using type 1 behavior, it has the side effect that hierarchy levels introduced by one data load, but no longer used in later files, are still considered active in W_PROD_CAT_DH and other tables. This can result in orphaned hierarchy nodes with no active items assigned to them. A separate job in the process flows in POM will close orphaned hierarchy nodes, if enabled.

Customer Action

New POM jobs are disabled by default and must be enabled by the implementer from Batch Administration screen before using them. You must enable these new jobs before attempting any new adhoc product or organization loads. The new jobs contain TYPE1 in the name to easily identify them. If you have an in-progress implementation and need to reload product or organization data, make sure you understand the differences in load behavior described above before sending new files in.

Product Incremental Loads

The PRODUCT.csv interface behavior for incremental data loads has changed in this release. The data model requires full snapshots of active hierarchies, but the CSV interface does not provide this like the RMFCS integration would. For this reason, RI will automatically assume all existing hierarchies should be kept active/current when an incremental PRODUCT.csv file is sent and the system is configured for incremental loading. This may result in orphaned hierarchies where they are no longer being used in the source system, but RI continues to keep them active. A new batch job has been added in the nightly and adhoc flows to automatically close hierarchy levels which have no children after a dimension load is complete. You may disable this job if you wish all hierarchies (past and present) to remain active indefinitely, even if they do not have any valid items assigned to them currently.

Customer Action

The W_PROD_CAT_DH_CLOSE_JOB should be enabled in your nightly and standalone POM schedules for RI, unless you do not want this behavior and you instead wish to allow all hierarchy levels to remain active indefinitely even when they are not being used by any items. This does not apply if you are using RMFCS integrations, you can leave it disabled in that case.

Attributes from Multiple Sources

The ATTR.csv and PROD_ATTR.csv files can now be used to load non-Oracle attributes even when RMFCS integration is turned on for this data. New POM jobs have been added to the RI schedule which use MERGE behavior instead of INSERT behavior when loading from these tables. If you are using RMFCS integration for product attributes, you will have to enable these additional jobs in order to also use the ATTR.csv/PROD_ATTR.csv interface files. This new integration path also only supports the specific attribute types of ITEMUDA and ITEMLIST. Other types such as item differentiators cannot come from two sources, because they are a core component of the item definitions in RMFCS and must not be updated by non-Oracle inputs.

Customer Action

The new POM jobs are disabled by default and should be enabled in the nightly RI schedule before they can be used to combine CSV data with RMFCS data. Refer to the RAP Implementation Guide chapter on Extensibility for details on this feature.

Transaction Count Enhancements

The Sales Trx Count metrics have had their logic altered to handle cases where a sales transaction comes to RI with zero values on a transaction line. Previously these rows were included in the transaction counts despite not contributing to overall sales values. In this release, all such rows are excluded from the counts. This does not apply to Return Trx Count (which was already using logic that excluded zero rows). It also does not apply to the more generic Trx Count metrics, as those perform a "count(distinct SLS_TRX_ID)" formula with no other logic to limit the count.

Also added in this release are two new aggregate tables for pre-calculating the Sales and Return Trx Count metrics at the levels of Group and Division (previously the metrics were only pre-calculated for Dept/Class/Subclass levels of the merchandise hierarchy). With this addition, the Sales Trx Count and Return Trx Count metrics should return values at any level of the merchandise hierarchy at Subclass or above when used.

Customer Action

New POM jobs are disabled by default and should be enabled in the nightly RI schedule before they can be used. Make sure to enable the following jobs if the new tables are required to be loaded in your nightly RI batch:

- W_RTL_SLS_CNT_DV_LC_DY_A_JOB
- W_RTL_SLS_CNT_DV_LC_DY_CUR_A_JOB
- W_RTL_SLS_CNT_GP_LC_DY_A_JOB
- W_RTL_SLS_CNT_GP_LC_DY_CUR_A_JOB

A historical data correction also needs to be applied to re-calculate all count facts after upgrade. If the sales count tables are not showing corrected data then the historical correction scripts may not have been applied. Raise a Service Request to ask for the data corrections on the sales transaction count tables.

Plan Interface Support for Alternate Hierarchy Levels

All PLAN interfaces (PLAN1 through PLAN5) into Retail Insights will have support for alternate hierarchy levels specified using the PRODUCT_ALT.csv and ORGANIZATION_ALT.csv foundation files. You should use these new configurations specifically when customizing MFP or AP to plan at an alternate hierarchy level and you need to send the plans back to AI Foundation for in-season forecasting or reporting. The configurations are set in C_ODI_PARAM_VW using parameter values of FLEX1 through FLEX30, which denotes the column in the hierarchy file that contains the unique identifiers of the planning level. The hierarchy IDs used for this purpose must be numerical, they cannot contain any letters or special characters.

Customer Action

No action required. New configurations are not used by default. Update the parameters in the Control & Tactical Center in AIF to take advantage of the new options.

Aggregate Utility Updates

The RI aggregation utility has had several updates in this release. A new parameter has been added to C_ODI_PARAM to control the starting and ending dates that the utility uses for aggregation. Depending on the setting, the start/end dates provided by the user can be extended to the beginning of the week or month automatically to fill each partition on the target aggregate tables. This guarantees that each aggregation fully populates partitions with data instead of loading only partial periods due to mismatched dates from the user. Additionally, several mappings that previously used a MIN function have been changed to a SUM to ensure the proper aggregation totals are calculated. Details on the aggregation utility usage can be found in the *AI Foundation Cloud Services Operations Guide*.

Customer Action

No action required. If you are currently using the aggregation utility, be aware of the new behavior regarding start/end dates as it may result in more aggregated data for a given week/month than previously expected, if the dates used are mid-week.

Implementation Self-Service Updates

he following changes are being made to support new and ongoing implementations of RI or any other Retail Analytics & Planning (RAP) application. These changes are only available in next-generation environments, they will not be released in current-gen architecture.

- RDX data exchange tables will be made visible to APEX

- POM logs will suppress benign "TypeError" messages that do not indicate the real cause of failure

- Staging tables in certain schemas (RADM01 and RASE01) can be directly updated from APEX so you can fix data issues and reload without uploading a new file

- You can now perform custom DB statistics collection on the RI database using the COLLECT_STATS_JOB job and the newly exposed C_MODULE_DBSTATS table in the Control Center

Customer Action

No action required. If you are currently implementing any RAP application, you may begin using the new self-service features after upgrade.

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Browser Requirements and Compatibility

The following operating system is supported:

- Microsoft Windows 10 with Microsoft Office 2013

> **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.

Supported Oracle Retail Analytics and Planning Cloud Services Products

Product	Version
AI Foundation Cloud Service	23.1.101.0+
Assortment and Space Optimization Cloud Service	23.1.101.0+
Inventory Optimization Cloud Service	23.1.101.0+
Offer Optimization Cloud Service	23.1.101.0+
Promotion and Markdown Cloud Service	23.1.101.0+
Merchandise Financial Planning Cloud Service	23.1.101.0+
Retail Demand Forecasting Cloud Service	23.1.101.0+
Assortment Planning Cloud Service	23.1.101.0+

Supported Oracle Retail On-Premise Products

Product	Version
Oracle Retail Merchandising System (RMS)	19.0+

Product	Version
Oracle Retail Xstore Suite	18.0+
Oracle Retail Store Inventory Management (SIM)	16.0.2+
Oracle Retail Customer Engagement	18.0+

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Noteworthy Resolved Issues

This following table highlights specific key fixes that are included in this release. In some cases, only a percentage of the overall fixed defects are listed.

Affected Component	Description
Reporting	Inventory Position day-level reporting had poor performance when using item/loc/day base fact
Batch	RTV export to PDS was not using correct aggregation levels
Batch	Alphanumeric characters in SLS_TRX_ID resulted in batch failures on certain sales aggregate programs
Batch	W_RTL_CLSTR_GRP_HDR_LC_D_JOB failed due to single row subquery returns more than one row error
Batch	Price history load job failed to perform quarterly seeding when no staging table records exist on the first day of the quarter
Batch	Intraday schedule for fact loads were missing dependencies which could cause inventory receipts to load out of order relative to inventory position
Batch	Fact history load programs should no longer fail intermittently with CANNOT QUERY JOB STATUS FOR TASKID[NULL] OR DISJOBTYPE[ODI_JOB_RUN]
Integration	RDE Purchase Order fact job was not handling component item costs correctly for pack item orders
Integration	Removed use of FORECAST_FLG in sales load from RI to RDF
Integration	Defaulted value of STOCKHOLDING_IND to Y on Organization export to PDS to prevent losing data with null flag values
History Loads	W_RTL_INV_IT_LC_G can now be loaded as part of history loads

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Known Issues

This following table highlights certain known issues that remain in this release. These issues are typically raised by customers or have customer-facing impacts that should be reviewed.

Affected Component	Summary
Inventory Position	Transfer and RTV Reserved metrics are not using the Gregorian Month inventory aggregate table
Sales	Sales LLY metrics do not return results with sales attributes
Sales	Grand Total row is not correct for Simple Pack Total metrics
Planning	Planning facts above location level do not show results when Comp Anchor Year is used
Clusters	Metrics in the Cluster subject area are not returning the expected values.

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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.

Affected Component	Summary
History Loads	The use of DAT files for historical data loads into RI is deprecated and will be removed in a future release. The CSV file format should be used going forward (unless no such CSV file exists). When new jobs and processes in POM are added, they will only be using the CSV form of the history files.
ReSA Integration	The integration of Employee records from Sales Audit is deprecated. The RDE POM job responsible for the integration will not be available in the next-generation architecture. Employee data should be loaded directly to RI, or the seeding option should be enabled to create employee records from sales transactions.
OBIEE Classic Reports	All of the classic OBIEE reports packaged with RI (report objects in the catalog outside of the Custom, Retail Home, and Error Admin folders) are being deprecated as they were built on old versions of the product and do not leverage the latest Data Visualization (DV) toolset. If any of those objects are still desired, they can be obtained via service request.