



Oracle Retail Cloud



Functional Next Gen Update Guide for Planning and Supply Chain Solutions

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Introduction

Document Summary

This document provides guidance for Oracle Retail customers with respect to planning / supply chain solutions and transitioning to Oracle's Next-Gen SaaS. All features and functionality will remain the same.

This Next-Gen Update Guide applies to Oracle Retail customers with the following products on version 19:

- Merchandise Financial Planning (MFP)
- Assortment Planning (AP)
- Retail Demand Forecasting (RDF)

The guide captures customer activities for updating to Next-Gen Architecture in the following three phases:

1. Prior to Next-Gen Update
2. During Next-Gen Update
3. After Next-Gen Update

This document is intended to help provide clarity and set expectations amongst all parties. It provides an overview of the Next-Gen update process and allows customers to ask key questions when working with technical teams and partners. Oracle recommends that customers read this document before starting their Next-Gen Update to enable them to ask technical teams and partners relevant questions for each phase, including User Acceptance Testing (UAT).

Next Gen Retail Planning and Supply Chain Update

Merchandise Financial Planning (MFP) and Assortment Planning (AP) customers will have a major update called the 'As Is' Functionality Update. The 'As Is' Functionality Update means that the customer's current business process will remain the same. However, the Next-Gen Platform offers significant enhancements to the planning process with a modern UI to improve resiliency.

For the 'As Is' Functionality Update, the Oracle team will work with the customer's existing data to maintain their current business functionality and offer additional benefits. The latest update will set them up for future roadmap enhancements. Most new features (For example: AI benefits, centralized data model, and so on) are disabled with the 'As Is' functionality update. The customer will choose if/when to enable them with 'Enhanced' Functionality'. This latest update requires more planning and coordination between the Oracle team and the customer's team than a typical major update.

The 'As Is' functionality update will provide the features and benefits detailed in the following table. However, the Supply Chain Next-Gen update requires the 'Enhanced' Functionality Update, with the benefits outlined below:

'AS IS' FUNCTIONALITY UPDATE (AI FOUNDATION FEATURES NOT ENABLED)	'ENHANCED' FUNCTIONALITY UPDATE (AI FOUNDATION FEATURES ENABLED)
• Reporting through Data Visualization • Redwood UI • Streamlined Planning UI • User Preference Module • Data Import Using Excel • Improved scalability and resiliency Note: The Oracle team will be responsible for moving the customer on "As Is' Functionality Update.	• Inclusion of all 'As Is' Functionality Update benefits • Availability of AI-native planning • Greater visibility of customer preference based on transaction-level data • Seamless integration across enterprise • Centralized data model • Easy enablement of additional solutions • Expansion of existing functionality with extensible framework • Reduced implementation complexity

Note: Customer will leverage their IT team and/or engage with their preferred SI, such as Oracle Retail Consulting, for the 'Enhanced' Functionality Update.

For the 'As Is' Functionality Update, Oracle Retail will be assisting customers at no additional cost (other than the customer's internal resources) and supporting customers' business continuity. The 'As Is' Functionality Update will provide several benefits to Planning customers, as shown in the above table, providing like-for-like functionality on Next-Gen SaaS.

To take full advantage of Next-Gen Update capabilities, all planning customers can eventually opt for the 'Enhanced' Functionality update, which is typically in partnership with a system implementor such as Oracle Retail Consulting (ORC); or they should have an IT team that has the ability to do the upgrade. This entails additional steps, such as loading transaction-level data and enabling currently unused AI Foundation capabilities. The decision to update through the 'Enhanced' Functionality update route is optional for the Planning customer. For the 'Enhanced' Functionality update, Oracle Retail will provide basic support and guidance; a system implementor or customer's IT team will primarily be responsible for setting up the new capabilities.

Getting Started

To start the process, customers should contact their Customer Success Manager (CSM) to receive more information about Oracle's Next-Gen architecture, discuss the steps laid out in this document, and identify target dates and timelines to complete the update. Customers may also raise a Service Request in Oracle Support to receive more information or request to schedule the update based on their specific business needs.

Customer Activities for 'As Is' Functionality Update

Prior to 'As Is' Functionality Update

Oracle Retail customers moving to Oracle's Next-Gen SaaS architecture will receive a notification of the update and an initial schedule. Each customer is highly encouraged to understand the value and benefits of Oracle's Next-Gen SaaS architecture. This will include reviewing the release notes, solution documentation (posted online) and training materials that are made available for customers to help understand the activities required for the 'As Is' Functionality Update. Please refer to the reference section at the end of this document.

Resource Allocation: Oracle Retail will provide support to each Oracle Retail customer for all phases of the 'As Is' Functionality Update process. This support includes:

- Confirming update readiness
- Provisioning environment
- Building stage environment
- Migrating data from v19 to Next-Gen SaaS architecture
- Validating migrated data and plan creation
- Support during UAT
- Conducting smoke tests prior to go-live.

Oracle Retail customers' team will collaborate with the Oracle Retail team for the 'As Is' Functionality Update. The following customer resources will be required to move to Oracle's Next-Gen SaaS architecture:

- Technical personnel (1-2) to adopt File Transfer Service and handle batch transition
- Project manager to serve as a single point of contact to collaborate and coordinate update readiness and timings with the Oracle Retail team
- Functional lead to conduct UAT (user acceptance test) in the Next-Gen stage environment and report feedback
- Project lead to sign off/approve

'As Is' Functionality Update Readiness: Oracle Retail customers will partner with the Oracle Retail team on the following details:

- Establish project plan with deliverables, timelines, roles, and responsibilities.
- Provide the integration files to the Oracle Development team with timelines. In a scenario where there are any anticipated delays, the Oracle team will need to be notified.
- Explain how the users are currently using the solution.
- Explain the current definition of user roles.
- Share customer configuration details with the Oracle development team, including any customizations or Java Special Expressions, batch control files, and dashboard files.
- Provide information about customer's hierarchy structure and whether hierarchy dimensions can be changed to align with GA. Alignment with GA hierarchies enables the customer to easily add further planning apps (such as AP) in the future and facilitates easier integration with AI Foundation features like the centralized data model.
- Provide inbound and outbound interface details for integration with third-party systems, including data elements, formatting, transformation, and file transfer.
- Share details regarding any integration points with other applications or anything planned for the future, along with the applications for which license has been procured.

The Oracle Retail team will determine the approach and initiate preparation based on customer configuration, data analysis, and the solutions owned by the customer. Oracle will start provisioning the environment with the timeline potentially varying by solution, number of solutions, and the complexity of configuration. The Oracle Retail team will work closely with the customers on the approach and timelines.

During 'As Is' Functionality Update

Oracle Retail customers will collaborate with the Oracle technical team to adopt the new File Transfer Service, which will be used to upload/download the files through a REST/HTTPS service. This is a replacement for the SFTP process used by v19.

The Oracle Retail team will export the v19 data and configurations from the existing environment to ready it for the updated version. The following list contains the configurations and data that will be updated to the Next-Generation SaaS architecture by the Oracle Development team:

- Planning configurations will be migrated to support updated functionalities
- Hierarchy data
- Measure/Fact data
- Batch control files
- UI Configurations
- Retail Process Orchestration and Monitoring (POM)
- Translations
- Security settings

The following are the user-specific data that will be updated to Next-Gen SaaS architecture:

- Styles (Workbook Template Formats)

Please note that the following will not be present in the updated environment:

- Existing workbooks
- Task history
- Existing notifications

The Oracle team will build the Planning Data Store (PDS) and import the migrated data into the updated environment. They will configure Process Orchestration and Monitoring (POM), run the daily/weekly batch, and conduct Quality Assurance (QA) validation.

After the updated version is in a stage environment, the Oracle Retail customer will conduct UAT (user acceptance testing) to verify that the integration and workflow matches with their current capabilities. The customer must provide feedback and approve the update before Oracle will move it into production.

After ‘As Is’ Functionality Update

Following approval by the customer, Oracle will start the process to move the updated version into production. Next-Gen SaaS planning leverages AIF forecasts. Customers using Planning forecasts will need to use POM to schedule their batches. POM batch schedules will change in the Next Gen SaaS Architecture. Please refer to the section “RPASCE Batch Schedule with POM” in the [RPAS Administration Guide](#) for information about setting up new schedules.

All user-adjusted and committed data, such as plans or forecasts, will be transferred to production. Oracle Retail will collaborate with customers to streamline the transition process and support customers’ business continuity. As a result, the ‘As Is’ Functionality Update will run in the Next-Gen SaaS environment in parallel with the customer’s existing application prior to a final cutover.

During the final cutover, the v19 production environment will be shut down to migrate the data over to and bring up the Next-Gen production environment. During this period, customers will be temporarily unable to access both v19 and the Next-Gen production environment. This will be done during a timeframe agreed upon with the customer. Oracle Retail will work closely with the customer’s IT team to coordinate such activities to avoid any inconvenience.

The customer will receive notification of the completed update and will be able to provide post-update feedback to the Oracle team. After the go-live, the customer will shift their work into the new Next-Gen production environment. They will have access to their v19 environment in a read-only capacity for four weeks, after which the v19 environment will be decommissioned.

Customers will receive a Welcome E-Mail sent by Oracle after the provisioning of their Next-Gen environment, which will contain a reference to the Retail Home application. Oracle Retail Home has been built as a single access point to all products. This simplifies users’ interactions with the data and applications that are most relevant to their roles, thereby empowering them to anticipate informed actions, hopefully with greater engagement. Customers will use the new URLs and the Retail Home application to navigate to the applications.

Oracle Retail customers will be responsible for the following:

- Workbook creation
- User training and communication (where applicable)

Customer Activities for ‘Enhanced’ Functionality Update

Prior to ‘Enhanced’ Functionality Update

Customers are highly encouraged to understand the benefits of Oracle’s Next-Gen SaaS architecture. All Supply Chain customers are required to perform the ‘Enhanced’ Functionality Update to move to the Next-Gen Platform; this involves engaging with system implementors for additional configurations to leverage enhanced functionalities along with loading transaction-level data.

Note: The Retail Demand Forecasting solution (RDF) is referred as Inventory Planning Optimization (IPO) in the Next-Gen architecture and encompasses additional capabilities such as Allocation and Replenishment.

If the Planning customer eventually decides to perform the ‘Enhanced’ Functionality Update, then they will have the option to partner with any system implementor, such as ORC, to take additional steps for loading their transaction-level data. This will be the first step to leverage ‘Enhanced’ Functionality Update benefits. If the customer has sufficient technical capabilities, then they can perform this work themselves. The participation of a system implementor can help reduce the overall risk, due to their prior expertise working with the new Next-Gen architecture. The decision to update to ‘Enhanced’ Functionality Update is optional for planning customers.

The ‘Enhanced’ Functionality Update will provide some benefits at no additional license cost. The ‘Enhanced’ Functionality Update enables the customer to take full advantage of the Next-Gen features and requires additional configuration settings and data feeds. The ‘Enhanced’ Functionality Update unlocks the power of AI Foundation with AI capabilities including customer segmentation, advanced clustering, size profiling, attribute extraction, customer decision trees, demand

transference, and affinity analysis. Customers will need to define the scope of their project and work with the system implementor on a plan to uptake some or all of the AI modules from AI Foundation. The 'Enhanced' Functionality Update will place the data and insights at the heart of their decision making.

In this Next-Gen Update Guide, we assume that the Planning customer is already in a steady state on 'As Is' Functionality Update with a provisioned Next Gen SaaS environment. There are base activities that need to be completed for the 'Enhanced' Functionality Update but these will be accomplished during the 'As Is' Functionality Update.

It will be efficient for planning customers to be initially on the 'As Is' Functionality Update and then move to the 'Enhanced' Functionality Update (exceptions may apply). In this manner, the Oracle Development team will have addressed any issues with the Next-Gen update during the 'As Is' Functionality Update phase. Supply Chain customers will be required to update directly to the 'Enhanced' Functionality Update.

Resource Allocation: With the 'Enhanced' Functionality Update, the customer determines the resources required by choosing to do the update themselves with their technical team or, if they prefer, to work with a system implementor (SI) who has prior experience with Oracle cloud services. In case the customer decides to use their own technical team, they will need a team with a project manager, development/ technical team, a functional lead and QA team.

If the customer decides to hire a system implementor such as ORC, then the system implementor will determine the required resources, roles, responsibilities, tasks, and timelines. The system implementor will provide the approach and initiate preparation based on customer configuration, data analysis, and the solutions owned by the customer. The timelines may vary by solution, number of solutions, the complexity of configuration, and time taken by the customer to provide all the data files to the system implementor.

'Enhanced' Functionality Update Readiness: The planning customer should already have the new, updated environment provisioned with the 'As Is' Functionality Update. As part of the move to the **'Enhanced' Functionality Update**, the data requirements will change to a much lower level of granularity. The customer will need to plan for resources to create an ETL process that will provide data at the transaction level. Current integration must be maintained to support the current production environment until the **'Enhanced' Functionality Update** is complete.

The same file transfer mechanism is used for both the 'Enhanced' Functionality Update and the 'As Is' Functionality Update. The customer must plan for resources to create new batch integration at the transaction level in parallel with the existing batch as part of the move to the 'Enhanced' Functionality Update.

During 'Enhanced' Functionality Update

The system implementor, such as Oracle Retail Consulting, will start the discovery process to identify how much change the customer would like to uptake, and investigate any source-side data inconsistencies prior to data integration. Generally, the system implementor will involve the following resources:

- Project Manager
- Business Consultant
- Application Consultant
- Technical Consultant

The system implementor will initiate Planning and Supply Chain data discussion and design. During the initial stage, all of the work will be performed in the stage environment.

During the 'Enhanced' Functionality Update, the system implementor will support the customer to provide Next-Gen data requirements that will be developed, loaded, and tested against the stage environment. The data requirements will vary depending on the capabilities of AI Foundation that the customer plans to use. The customer will continue to use the FTS file-integration mechanism enabled during the 'As Is' Functionality Update. For Supply Chain Next-Gen update, the system implementor will work on configurations because of enhanced capabilities to maximize supply chain efficiencies and accelerate optimal inventory management with in-depth analytics and reporting capabilities.

The system implementor will start data loading by checking data consistency and quality. Once approved, the data integration process will start by loading, testing, and validating data in the Next-Gen architecture. After that, the system implementor will configure updates and test integrations, conduct internal tests, identify any issues, and submit any Oracle service requests required against the stage environment.

During the move to the 'Enhanced' Functionality Update, the customer will work with their system implementor to test and validate their new batch and workflow. The new environment requires the adoption of Oracle Retail POM to support the new

batch requirements. The customer will work with the system implementor in testing the data integration and batch schedule in the stage environment. The security credentials and settings will have already been completed during the 'As Is' Functionality Update. After the 'Enhanced' Functionality Update. After completing the 'Enhanced' Functionality Update, then the Next-Gen environment will be ready for customer use. The previous environment will be decommissioned. The customer will go live and the system implementor will provide post-go-live support (as agreed upon).

References

Learn about the new features available with Planning and Supply Chain:

<https://docs.oracle.com/en/industries/retail/index.html>

- Merchandise Financial Planning Cloud Service:
<https://docs.oracle.com/en/industries/retail/merchandise-financial-planning-cloud/24.2.301.0/>
- Inventory Planning Optimization Cloud Service:
<https://docs.oracle.com/en/industries/retail/retail-inventory-planning-optimization-cloud/24.2.301.0/>
- Retail Assortment Planning Cloud Service:
<https://docs.oracle.com/en/industries/retail/retail-assortment-planning-cloud-service/24.2.301.0/>
- Retail Predictive Application Server Cloud Edition:
<https://docs.oracle.com/en/industries/retail/retail-predictive-application-server-cloud-edition/24.2.301.0/>
- Retail Process Orchestration and Monitoring:
<https://docs.oracle.com/en/industries/retail/retail-process-orchestration-monitoring/24.1.301.0/>
- Retail Insights Cloud Service:
<https://docs.oracle.com/en/industries/retail/retail-insights-cloud/24.2.301.0/>
- Retail AI Foundation Cloud Service:
<https://docs.oracle.com/en/industries/retail/ai-foundation-cloud-service/24.2.301.0/>
- *Retail Analytics and Planning Implementation Guide* in the Implement area of each RAP solution.
- Retail Home:
<https://docs.oracle.com/en/industries/retail/retail-home/latest/>
- Planning and Optimization (P&O) Documentation Library on MOS:
<https://support.oracle.com/epmos/faces/DocumentDisplay?id=2492295.1>
- Retail Insights and AI Foundation Documentation Library on MOS:
<https://support.oracle.com/epmos/faces/DocumentDisplay?id=2539848.1>

Glossary of Acronyms

- AI: Artificial Intelligence
- AIF: AI Foundation
- AP: Assortment Planning
- ETL: Extract Transform Load
- FTS: File Transfer Service
- HTTPS: Hyper Text Transfer Protocol Secure
- ORC: Oracle Retail Consulting
- PDS: Planning Data Store
- POM: Process Orchestration and Monitoring
- QA: Quality Assurance
- REST: Representational State Transfer
- RPASCE: Retail Predictive Application Service Cloud Edition

- SFTP : Secure File Transfer Protocol
- UAT: User Acceptance Testing
- UI: User Interface
- IPO: Inventory Planning Optimization

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