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Oracle MICROS Reporting and Analytics

Upgrade Cheat Sheet

Release 20.1.0.0

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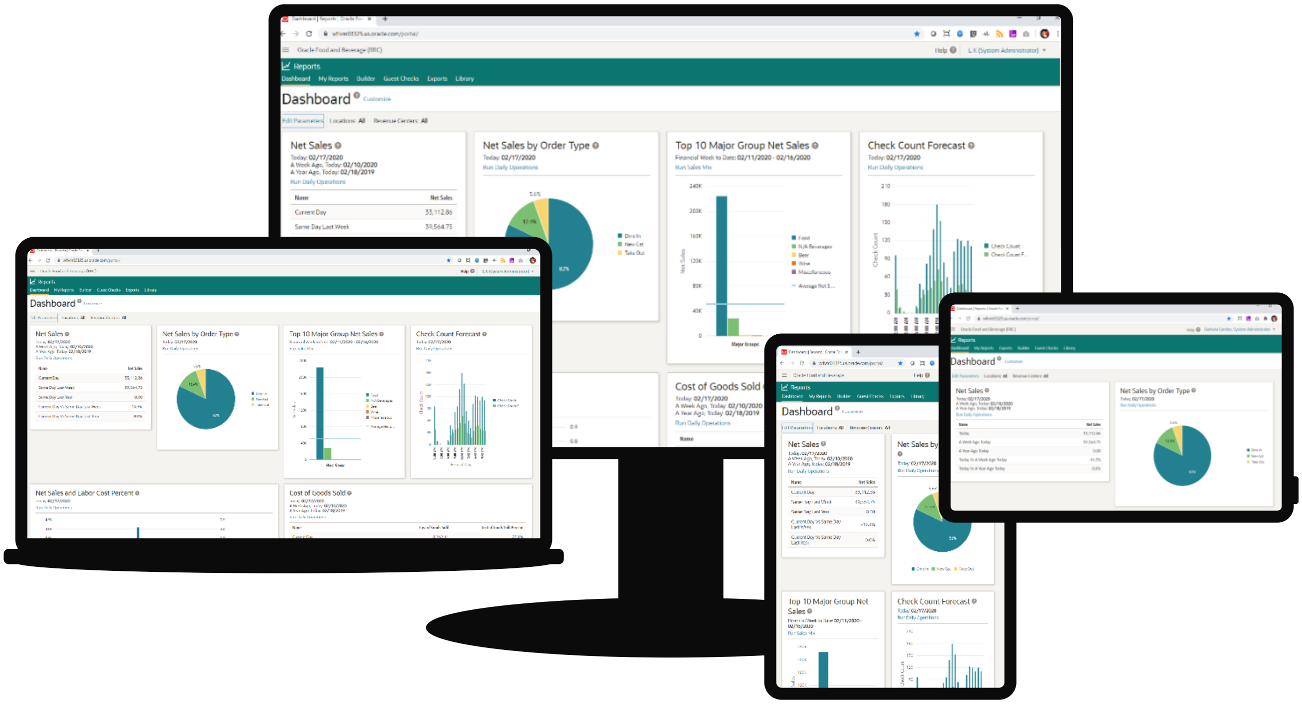
YOU ARE BEING UPGRADED FROM REPORTING AND ANALYTICS 9.1 TO 20.1!?

Here is, in short, what you need to know, what you need to do, and what you should be excited about!



REPORTING AND ANALYTICS 20.1 – WHAT'S NEW?

The release highlights include:

- The modern and redesigned User Interface and re-thought intuitive User Experience improve usability and thus reduce staff training needs
- Visualizations and several other reporting enhancements improve the consumability of data on reports and newly introduced dashboard tiles
- The new real time dashboard lets users configure tiles that show actionable data points for KPIs that are important for them and in a time granularity that aligns with how they need to consume the data in their job roles.
- An in-house developed Report Builder is targeted to non-technical users and allows creation of customized reports utilizing the same visualization components that are introduced to core reports.
- The new Self-Service Exports solution allows IT Managers to manage, maintain, create, and monitor all exports and integrations to keep on top of all their data access and exporting operations.
- The largely rewritten and redesigned backend implements new up-to-date cloud architectures and builds the foundation for improved performance and continuous feature delivery

TO-DO PRIOR TO THE UPGRADE…

Report Mail

- Note down which scheduled email reports (Report Mail) are configured in your enterprise. Because of the reporting and permission changes, scheduled reports need to be setup again after the application upgrade
- Tip: Use this opportunity to get rid of old and unused scheduled reports. Do the recipients even still work for you? Is it really necessary to send out the reports by mail – or are recipients actually just deleting them?

PRE-UPGRADE	POST-UPGRADE	TASK	VIDEO
X		How to - Capture Report Mail Configurations	https://youtu.be/0kslrazEs-s
	X	How to - Recreate Report Mail Configurations	https://youtu.be/3NQjxQdr7WM

Self-Service Reports

- Note down any Interactive Report configurations, or OBIEE Analysis Report configurations. These two modules are being replaced with a new, easy to use report building solution! All users who had access to the legacy modules, will automatically be granted access to the new solution and can start building and publishing reports right after the upgrade.
- Tip: To help and speed up recreating Interactive Reports or OBIEE Analysis Reports, write down which subject areas and data points you used on the current reports.
- Tip: Use this opportunity to clean up old and unused customized reports. Often the same report has been created by multiple users – now you just need to create it once and publish it to the Report Library. All users with data permissions to the custom report can then see, run, and add the report to their "My Reports"

The below videos show in more detail how to migrate existing reports to the go-forward solutions, and which activities need to be completed prior to, and after the upgrade:

PRE-UPGRADE	POST-UPGRADE	TASK	VIDEO
X	X	Overview - Migrate from Legacy Self Service Reporting	https://youtu.be/PgoBlc9demU
X		How to - Capture Configuration of OBIEE Reports	https://youtu.be/evzVtjtgwO0
X		How to - Capture Configuration of Interactive Reports	https://youtu.be/7-g4dOmibcU
X		How to - Migrate Reports to iQuery	https://youtu.be/05o7LrvsiSo
	X	Getting Started with Report Builder	https://youtu.be/6wRVWe9pzgY
	X	How to - Migrate a simple Report to Report Builder	https://youtu.be/MakNNkQK3Lk
	X	How to - Use advanced features in Report Builder	https://youtu.be/owJj3e4GZSw

System Administrator Account

- Simphony and Reporting and Analytics Advanced customers should make sure, that they are in possession of a user account that has System Administrator rights.
- Check:

1. Navigate to Admin – Portal – Roles –Roles and verify which of the roles has the checkmark in the "Sys Admin" column.
    - Make sure you have access to at least one user that is part of this role.
    - Users in this role will become the "Hierarchy Administrator" in Reporting and Analytics 20.1
2. Mavigate to Admin – Portal – Roles – Portlets and verify which roles have the "Portal" portlet assigned.
    - Users in these roles will become "Functional Administrators" after the upgrade

- Learn more about new Administrator types: https://docs.oracle.com/en/industries/food-beverage/back-office/20.1/rause/c_roles_set_hierarchy_functional_admin.htm
- Tip: Make sure all your users accounts have an email address configured, that way you can easily use the "I can't sign in" feature to reset passwords
- Note: When using Simphony in conjunction with Reporting and Analytics 20.1, you will not able to create, maintain, or edit Reporting and Analytics users from within the Simphony Enterprise Management Console (EMC) anymore. All Reporting and Analytics users have to be created and maintained from within Reporting and Analytics.

TO-DO AFTER THE UPGRADE…

Report Mail

- Recreate the scheduled email reports that are still needed using the new and updated reports
- Note: Emailed reports do not include visualizations.

PRE-UPGRADE	POST-UPGRADE	TASK	VIDEO
X		How to - Capture Report Mail Configurations	https://youtu.be/0kslrazEs-s
	X	How to - Recreate Report Mail Configurations	https://youtu.be/3NQjxQdr7WM

Self-Service Reports

- Recreate the customized ad hoc reports that are still needed. The new Report Builder provides all the same and more subject areas and data points that you could use in Interactive Reports as well.
- Tip: You can now create your own charts, too!
- Tip: You can add multiple components, like tables, or charts on a single report. All components can use different subject areas, so that you will be able to consolidate multiple reports into a single one!

PRE-UPGRADE	POST-UPGRADE	TASK	VIDEO
X	X	Overview - Migrate from Legacy Self Service Reporting	https://youtu.be/PgoBlc9demU
X		How to - Capture Configuration of OBIEE Reports	https://youtu.be/evzVtjtgwO0
X		How to - Capture Configuration of Interactive Reports	https://youtu.be/7-g4dOmibcU
X		How to - Migrate Reports to iQuery	https://youtu.be/05o7LrvsiSo
	X	Getting Started with Report Builder	https://youtu.be/6wRVWe9pzgY
	X	How to - Migrate a simple Report to Report Builder	https://youtu.be/MakNNkQK3Lk
	X	How to - Use advanced features in Report Builder	https://youtu.be/owJj3e4GZSw

Custom Reports

- Custom reports that were developed by Oracle's Professional Services Teams specifically for your enterprise will continue to work as they did prior to the upgrade. The major difference to core reports is their permissions handling.
- Check: All roles that had access to the custom report(s) prior to the upgrade will retain that access. All other roles are specifically blocked from accessing them. Any new roles created after the upgrade, will not be blocked from those custom reports by default.
- Hint: To grant access to those custom reports for existing or new roles, unblock them in the role configuration (Administration – Roles – Reports and Data - Blocked Reports)
- Caution: Do not confuse true custom reports with customized ad hoc reports built with Interactive Reports or OBIEE.

Verify report tax settings

- We are introducing a new flag at a location level, called “*Location Tax Settings*”. This flag indicates, if the location uses add-on taxes, or VAT taxes and it changes the tax break down and display of metrics on the Check Detail Report accordingly.
- During the upgrade process we are setting the default value that currently exists at an enterprise level for the display of taxes in InMotion Mobile, as the value for each location.
- To-Do: if you are operating stores globally in different tax jurisdictions, verify that the tax setting for each location is set correctly, in order to make sure that users see the correct Check Details. This is found under Left Drawer – Configuration – Portal Admin – Organizational Structure – Locations

Re-install Inventory Management Mobile Solutions

If your enterprise has been using the Inventory Management Mobile Solutions prior to the 20.1 upgrade, your mobile devices need to be upgraded to the latest version of the Mobile Solutions.
You need to use the installer(s) for the 20.1 release which are identified by having “_RNA2_” included in the file name:

- <*YYMMDD*>_HIM_MobileSolutionsSetup_RNA2_<*Version Number*>.zip
- <*YYMMDD*>_HIM_MobileWebService_RNA2_<*Version Number*>.zip
- <*YYMMDD*>_HIM_MSClient_RNA2_<*Version Number*>.zip

More information about installing the software can be found here: https://docs.oracle.com/en/industries/food-beverage/back-office/20.1/imicg/c_install_software.htm

Manage Reporting and Analytics users only from Reporting and Analytics

After the upgrade to Reporting and Analytics 20.1, the Reporting tab in Simphony EMC is no longer active or has been removed (depending on the SImphony version).
It is no longer possible to create or manage R&A users from within Simphony EMC. All R&A users need to be created from Reporting and Analytics – Administration – Users.
More information on EMC employee management can be found here: https://docs.oracle.com/en/industries/food-beverage/simphony/19.5/simcg/t_reporting_employee_privileges_reporting_analytics.htm
More information on manageing users in Reporting and Analytics can be found here:
https://docs.oracle.com/en/industries/food-beverage/back-office/20.1/rause/c_user_mgmt.htm

GOOD TO KNOW…

Documentation

- Documentation Library
  - https://docs.oracle.com/en/industries/food-beverage/back-office/20.1/index.html
- User Guide:
  - https://docs.oracle.com/en/industries/food-beverage/back-office/20.1/use.html
- Release Notes:
  - https://docs.oracle.com/en/industries/food-beverage/back-office/20.1/eborn/c_featuresandupdates_rna.htm#ReportingAndAnalytics-9D3EAE45

"I Cannot find my report!"

- For some reports, we adjusted the names to be more precise and descriptive. We also replaced existing reports with new reports, or merged the functionality of multiple reports into a single one. The table below lists the most important changes:

9.1 REPORT NAME	20.1 REPORT NAME
Manager Control eS Manager Activity Report	Authorized Transactions
LY, Budget, Forecast	Budget and Forecast Metrics Comparison
Emp Clsd Chk Rpt JournalImageList Rev Ctr Closed Chks	Closed Checks
Day Part Operations System Sales Summary Today's Operations	Daily Operations
Time Comparison	Daily Operations Date Comparison
Location Comparison	Daily Operations Location Comparison
Rvc Comparison (L&E)	Daily Operations Revenue Center Comparison
POS Category Report	Discounts Tender Media Service Charges
DaypartExceptionsSummary EmpControlReport Emp Exceptions eS Employee Activity	Employee Exceptions
Employee Fin Rpt eS Employee Balance	Employee Financial
Emp Item Sales Emp Sales Summary Employee Performance	Employee Sales Mix
Employee Advisory eS Employee Advisory	Employee Threshold Exceptions
Family Group Sales Major Group Sales	Item Group Sales Comparison
KDS Stations	Kitchen Display Summary
CompareKPIsByDate_HT eS KPI by Date with Historical Upload eS KPI by Store with Historical Upload KPIs by Date KPIs by Date -VAT KPIs by Loc -VAT KPI Loc openDays-VAT KPI Loc,RVC,Date-VAT KPIs by Store KPIs by Store -VAT Loc Comp. KPI Loc Comp. KPIs date LocRVCSlsMx-VAT Revenue Center Ops RVC Sales (Date)-VAT RVCSales-VAT Todays KPIs -VAT	Key Performance Indicator Comparison
Job Code Rpt	Labor Summary
MI Product. Planning	Menu Item Quantity Sold by Weekday
MI Sales RVC DMY MI Sales RVC DWM MI Sales Sys DMY MI Sales Sys DWM	Menu Item Sales Over Three Dates
FG Comp.by Date -VAT MG Comp.by Date -VAT MG (Day,Week,Month)	Menu Item Sales Comparison
Employee Opn Chk Rpt	Open Checks
FG Sales (Date) FG Sales (Date,RVC) FG Sales (RVC) Loc -VAT- MG by OrderType MG Sales (Date) MG Sales (Date,RVC) MG Sales (RVC) MI Cube Report MI Sales Sys Detail MI Sales by RVC Rpt MI Sls MI Sls(Date) MI Sls(Date,Def) MI Sls(Def,RVC) MI Sls(Def,RVC,Date) MI (Date,Def,Loc)	Sales Analysis

RVC by Order Type	
FnBFlash FnBFlashYTD Time Period Summary	Sales and Service for 2 Dates
Taxes by MG -VAT	Sales by Tax Type
SalesDayYear SalesDMY	Sales Comparison Over 3 Dates
Sales Comps by Day	Sales Variance

Today's Service	Service Performance
MMSystemFin_VAT Property Financial RVC Financial Rpt System Financial - VAT	System Financial
Labor Detail Rpt Labor Summary Rpt	Time Card Summary
Void Reason Report	Voided Menu Item

"I Cannot find the portlet!"

- We standardized the names of the portlets and sidemenus to make it easier to find what you are looking for. That also allows us to translated them
- Because of the redesign and rationalization some portlets are no longer needed or available. See below for a list of deprecated portlets
- Hint: You find the sidemenus in the left drawer that slides out, when you select the three horizontal bars in the top left corner

PORTLET NAME	SIDEMENU NAME	ENTERPRISE LEVEL ENABLEMENT (EMPTY IF NO DEPENDENCY)
Warehouse Admin	Configuration	
Portal Admin **Note: Users and Roles are now under "Administration"**	Configuration	
Category Group Hierarchies Category Groups Category Group Relationships	Configuration	
Administer API Users	Labor Management	Labor Management
Enterprise Locations Enterprise Levels Enterprise Hierarchy Relationships	Configuration	
Reporting Hierarchies Reporting Levels Reporting Hierarchy Relationships	Configuration	
Cost Tier Menu Item Cost Tiers	Configuration	
Day Parts	Configuration	
Financial Periods	Configuration	
InMotion Configuration	Configuration	
Audit & Analysis	Reports and Check Search	
More Forms	Reports and Check Search	
Alignment Rules	Alignment and Master Items	
Activity Master Discount Master Family Group Master Job Code Master Labor Category Master Major Group Master Menu Item Master Order Type Master Revenue Center Master Service Charge Master Tax Master Tender Media Master	Alignment and Master Items	
Discount Alignment Family Group Alignment Job Code Alignment Labor Category Alignment Major Group Alignment Menu Item Alignment Order Type Alignment Revenue Center Alignment Service Charge Alignment Tax Alignment Tender Media Alignment	Alignment and Master Items	
Report Mail Report Mail Wizard	Administration	
Enterprise Maintenance Services	Administration	
Export Maintenance	Administration	
Data Mapping	Administration	
RTA Admin	Administration	
RTA Download	Administration	
Clear Totals (new!)	Administration	
Form Bulk Operations	Administration	
Inventory Management	Inventory Management	Inventory Management
Forecasting – Forecast Forecasting – Events Forecasting - Admin	Forecasting	
Human Resources Payroll Preprocessing	Labor Management	Labor Management

Staffing – Profile Staffing – Admin Staffing – Requirements Scheduling – Admin Scheduling - Employee Self Service Scheduling – Schedule Enterprise Employee Interface TCA Download		
G&L Campaigning G&L Coupons G&L Gift, Payment, and Loyalty Configuration	Gift and Loyalty	Gift and Loyalty

G&L Account Administration G&L Account Upload Interface (new!)		
G&L Segmentation	Gift and Loyalty	Segmentation
Budget Interface Forecast Interface History Interface Menu Item Cost Interface Financial Form Interface	Upload Interfaces	

“I cannot add <XYZ> portlet or module”

This is most probably caused by using a user account, which does not have the appropriate System Administrator rights. Only users in roles, that have the “Functional Administrator” flag set, are allowed to configure everything, add or remove all privileges, data permssions, or portlets. Every other role can only remove from their existing rights, but cannot elevate themselves to use privileges, data permissions, or portlets that they not already have.

In order to reset an account, use the “I can’t sign in” functionality from the sign in page. An email with instructions will be sent to the email configured for the account.

User and Role Configuration

User and Role Maintenance

- User and Role maintenance is now under “Administration”, accessible from the left drawer
- Reporting and Analytics users can no longer be created or maintained from within Simphony EMC
- All password maintenance is self-service, and users can manage everything by themselves. All actions are confirmed and handled through emails send to the assigned email address.
- Improved Security: No more sending of emails containing passwords to users!
- Simplified: No more suspension of users after 90 days of inactivity. Users can always re-instate their account or reset their passwords without the help of a Sys Admin.
- Role management is streamlined, all aspects (permissions, navigation, portlets, reports, dashboard etc.) of a role are configured on a single dialog.

Navigation

- You will notice, that some of the navigation is changed, while others still work the same way as prior to the upgrade. User and Role Administration, as well as Reports are now accessed through the top level links behind the drawer menu (three bars in the top left corner)
- Other modules, products, features are in sidemenus in the left drawer, however the sidemenu names and the link names have been standardized and are now always the same, and translatable!

Data Permissions

- This is one of the biggest changes in this release, and important to understand.
- Recommendation: Make sure to review the topic in the user guide.
    - https://docs.oracle.com/en/industries/food-beverage/back-office/20.1/rause/c_subj_areas.htm

My Reports

- Concept: My Reports is the area where users access their preferred, and most often used reports. The list can be defined on a role basis
- New: Every user can add reports to his/her “My Reports” list!

Dashboard

- Concept: A real time and actionable view into the F&B data. Customizable with data points and time frames specific to an enterprise or a user's job role
- New: Every user can customize the dashboard for his/her needs, or use the role defined dashboard

Translation

- We support 20 different languages in Reporting and Analytics 20.1
- The language and country settings (e.g. number, and date formats) are set on a per-user basis. A system administrator can set it for a user, and each user can maintain it themselves.
- Translations now include sidemenu names, portlet names, report names, and report descriptions
- Tip: It is not necessary anymore to create separate roles with translated content. Just change the language on the user account!

Reports for different tax and market types

- You will notice, that some reports and dashboard tiles seem to exist two or four times. That is not by accident. In fact all those report variations are different. For most of the sales reports, we offer four different variations:
    - Add On Taxes and Table Service Market
    - Add On Taxes and Quick Service Market
    - VAT and Table Service Market
    - VAT and Quick Service Market
- Those reports differ in how they calculate and show taxes and sales totals, and in which KPIs they show dependent on the market segment (e.g. a quick service report does not show Guest Count metrics)
- Those reports are distinguished based on their descriptions, rather than their names. If you are a manager of a quick service burger joint in the EMEA region, you want to run the "*Daily Operations*" Report (same as the manager of a Table Service restaurant in the US), and not the "*Daily Operations, VAT, Quick Service*" Report.

Removed and replaced functionality

- Some functionalities have been removed or were replaced by new features and concepts.

REPLACED FEATURES AND FUNCTIONS
Oracle Business Intelligence Enterprise Edition (OBIEE) • OBIEE Self Service Reports (Self Service Analysis Reports) • OBIEE Dashboards • Send OBI reports through Report Mail **Functionality replaced with new Report Builder**
Pentaho • Pentaho Interactive Reports • Pentaho Ad Hoc Reports • Pentaho Dashboards • Pentaho Reports • Pentaho custom reports • Send Interactive Reports through Report Mail **Functionality replaced with new Report Builder**
• Mobile Reports **Functionality replaced with support for tablet devices and InMotion Mobile**

REMOVED FEATURES AND FUNCTIONS
• "Alerts" Type in Report Mail • Caption Config Portlet • CRM Admin Portlet • Daypart Overrides (part of Warehouse portlet) • Dept Mapping Interface (Upload Interface) • Document Viewer Portlet • EMS Security Setup Portlet • Fast Track Portlet • Gift and Loyalty – sending SMS • iPOS Portlet • Labor Management – sending SMS • Manager Log • Mobile User Session Management Portlet • MyTasks • MyTasks Client Download • OPERA integration to InMotion • Theoretical Labor • Theoretical Labor Allotted Hours (Upload Interface) • "URL" portlet type • Weather Applet • Welcome! Portlet • XBR Setup (part of Warehouse portlet) **All the listed features, portlet, modules, configuration options etc. were either already deprecated but never removed, or are not applicable anymore in the new design and architecture, or are not used by any customers.**

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