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Oracle Retail Analytics and Planning Cloud Service

Next Gen Cloud Update Guide

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Introduction

Document Summary

This document provides general enablement for Oracle Retail customers moving to Oracle's Next Generation Retail Analytics and Planning SaaS architecture. These checklists and resources capture major customer activities and milestones. Retailers should use these checklists early in the Next Gen Cloud Update phase. The checklists allow retailers to ask key questions while working with technical staff and partners. In addition, the checklists provide considerations for implementation planning. Once completed, the checklists can be used to set expectations among all parties and saved for future reference.

Overview of Next Generation SaaS Architecture

All of Oracle's Planning, Retail Insights, and Retail AI Foundation Cloud Services are moving to Oracle's Next Generation SaaS Architecture. This is a cloud-native architecture that provides a secure, highly scalable foundation with increased system availability. This new architecture yields the following benefits:

- Significantly reduced downtime.

- Full adoption of OAuth 2.0 for all REST services.

- Significant improvements in middle-tier and application-tier scalability.

- Improved, simplified intra-Oracle Retail integration.

- A centralized Oracle Retail Business Intelligence instance for easier reporting administration.

- Retirement of SFTP in favor of a service-based approach.   Refer to "Managing File Transfers" section in the *RAP Administration Guide*.

- Version 19 should be read-only once the Next Gen production update is complete and and the environment is handed over to the customer.

Assumptions

Note the following assumptions regarding the Next Gen Cloud Update:

- Update of a Non-production environment in the New Gen Cloud occurs first to enable the customer to perform their development activities and prepare before the Production update.

- All batch files in the Version 19 (or earlier) environment must be processed, and there should be no files remaining in the SFTP folder.

- Update activity will be performed after the Weekly or Nightly batch cycle in the version 19 environment is complete. No jobs should be pending.

- If all the Oracle Retail Cloud services are currently using the same IDCS or OCI IAM instance, then no changes should be made to the IDCS or OCI IAM. If you are using different IDCS or OCI IAM instances for different Oracle Retail Cloud services, they will be merged into a single instance. There is then a customer action to reset the passwords after the merge.

Retail Analytics and Planning Solutions Next Gen Update Choices

AI Foundation and Retail Insights Next-Gen Update
Updating to the Next-Gen Architecture for these solutions is a complete update process and all features and functionality currently available are unchanged. This also covers any solution built on AIF: □   Inventory Optimization (IO) □   Promotion & Markdown Optimization (PMO) □   Offer Optimization (OO) □   Assortment & Space Optimization (ASO)

There are two choices when updating Planning Solutions: Core Update and Core Plus Update. Refer to Planning Core Update vs Planning Core Plus Update for more information.

Planning Core Update	Planning Core Plus Update
1. Unified Intelligence-Driven Forecasting 2. Real-time Data Integration for agile decision making 3. Enhanced error handling 4. Improved disaster recovery 5. Reporting through Data Visualization	1. Seamless integration across the enterprise 2. Centralized data model 3. Enable additional solutions with ease 4. AI native planning is available 5. An extensible framework enables the expansion of existing functionality. 6. Greater visibility of customer preference based on transaction-level data 7. Reduced implementation complexity

Getting Started

To get the process started, please reach out to your Customer Success Manager (CSM) to receive more information about Oracle's next-generation architecture, discuss the steps laid out in this document, and identify target dates and timelines that you want to follow to complete the upgrade. You may also raise a Service Request in Oracle Support to obtain more information or to request that Oracle schedule the upgrade for you based on your business needs.

Customer Actions for Retail Planning Solutions

Due to the technical changes in Oracle's Next Generation SaaS architecture, the actions below are to be performed by the customer. This section applies to any current customer of a Retail Planning or Supply Chain solution based on the Retail Predictive Application Server (RPAS) architecture.

Oracle will provision next-gen Cloud Services environment and migrate your existing configurations and data before it is handed over to you for validation. For details, please refer to the following sections.

Along with the steps mentioned below, please refer to Next Gen Update Video for detailed information.

Updated Solution URLs

☐	STEP 1	Configure all application and REST service calls to your internal applications to use the new URLs.	Resources: Refer to your Welcome E-Mail which contains a reference to the Retail Home application. Use the Retail Home application to navigate to your Retail Analytics and Planning applications.

Authentication Changes

☐	STEP 1	Review your Users and Groups in OCI IAM if you were migrated from an older IDCS or OAM instance as part of the update. Configure new Users and Groups in OCI IAM. New groups have been provisioned for Planning Applications of Merchandise Financial Planning (MFPCS), Retail Demand Forecasting (RDFCS), and Assortment Planning (APCS). Users with the corresponding old groups convert to new groups during the update.	Resources • Refer to the "Managing User Security" section in the *RAP Administration Guide* Retail Analytics and Planning Administration Guide - Managing User Security • Refer to the "User and Role Maintenance" section in *MFPCS Administration Guide* Oracle Retail Merchandise Financial Planning Cloud Service Administration Guide • Refer to the "Managing User Security" section in the *RDFCS Administration Guide* Oracle Retail Demand Forecasting Cloud Service Administration Guide • Refer to the "User and Role Maintenance" section in the *APCS Administration Guide* Oracle Retail Assortment Planning Cloud Service Administration Guide

	STEP 2	Update the Authentication mechanism to use the OAuth2.0 authentication (rather than basic authentication). This applies to all the REST services. Basic authentication is no longer supported.	Resources: Refer to the "OCI IAM Authorized Access to PDS Web Services in APEX/ORDS" section in the _RPAS Administration Guide_

📝 File Transfer Services

	STEP 1	Use the new File Transfer Services to upload/download the files to/from Object Storage. This is a replacement for the SFTP process.	Resources: • Refer to the "Managing File Transfers" section in the RAP Implementation Guide: Retail Analytics and Planning Implementation Guide - Managing File Transfers • Refer to the "Sample Public File Transfer Script for Planning Apps" section in the _RAP Implementation_ Guide: Retail Analytics and Planning Implementation Guide - Sample Public File Transfer Script for Planning Apps • Refer to the "Sample Public File Transfer Script for RI and AIF" section in the _RAP Implementation_ Guide: Retail Analytics and Planning Implementation Guide - Sample Public File Transfer Script for RI and AIF • Refer to the MFPCS, RDFCS and APCS Implementation Guides for details regarding integration of planning solutions with other solutions (for example, RMFCS, AI Foundation and Retail Insights)

📝 Retail Analytics and Planning Core Update

	STEP 1	Update of the data from Version 19 to Version 22 or later.	Oracle will update the following set of data from version 19 environments to Next Generation SaaS environments
			
			• The following are the configurations and data that will be updated to Next Generation SaaS architecture:
			   • Planning configurations will be migrated to support upgraded functionalities
			   • Hierarchy data
			   • Committed Measure/Fact data
			   • Batch control files
			   • UI Configurations
			• The following are the user-specific data that will be updated to Next Generation SaaS architecture:
			   • Styles and Formatting at User, Group and Template levels
			• Oracle Retail Customers will be responsible for the following:
			   • Workbook Creation
			• The following will not be present in the updated environment:
			   • Task History
			   • Existing saved workbooks
			   • Existing notifications

☐	**STEP 2**	Batch Process and Forecast	Next Gen SaaS Planning leverages AIF for forecast. Customers using planning forecast will need to use POM to schedule their batches.
☐	**STEP 3**	Hierarchies	Customers having multiple applications should have the same names for dimenions/levels across all applications. For example, Store could be "STOR" in both MFPCS and APCS. As part of Next Gen Update, Oracle will rename the dimensions/levels after receiving confirmation from the customer.

📝 Retail Analytics and Planning Core Plus

☐	**STEP 1**	Centralized model and Planning is built on AI Foundation	☐	Along with Retail Analytics and Core Update, following are the additional capabilities.
			☐	Built on top of AI Foundation for Analytics, Reporting, Data Mining, Intelligence, and Forecasting
			☐	Plans and Forecasts are sent/received to/from AI Foundation. Oracle Retail AI Foundation provides specific insight and value to planning, buying, selling, and moving decisions through Customer Segmentation, Advanced Clustering, Demand Transference, Affinity Analysis, and Size Profiling and can be expanded to support broader retail uses as required. Refer to the *Oracle Retail Analytics and Planning Implementation Guide* for Planning integration with AI Foundation:
			☐	Refer to the *Retail AI Foundation Cloud Service* guides here for more information on AI Foundation:
☐	**STEP 2**	Batch Process	☐	Customers choosing Core Plus are expected to use POM to schedule their batches.

Customer Actions for Retail Insights and AI Foundation Solutions

Due to the technical changes in Oracle's Next Generation SaaS architecture, the actions below are performed by the customer. This section applies to any current customer of Retail Insights, AI Foundation, and all associated applications such as Offer Optimization and Inventory Optimization.

Updated Solution URLs

☐	**STEP 1**	Configure all application and REST service calls to your internal applications to use the new URLs.	Resources: Refer to your Welcome E-Mail which contains a reference to the Retail Home application. Use the Retail Home application to navigate to your Retail Analytics and Planning applications.

Authentication Changes

☐	**STEP 1**	Review your Users and Groups in OCI IAM if you were migrated from an older IDCS or OAM instance as part of the update.
		
		For AI Foundation applications, user and group management has not changed. If you are being moved into a new OCI IAM instance then your existing AIF users and groups will still be available.
			Resources
			
			• Refer to the "Managing User Security" section in the *RAP Administration Guide*:
			   Retail Analytics and Planning Administration Guide - Managing User Security
			
			• Refer to the Administrative Tasks section in the AI Foundation Administration Guide
			   AIF Administration Guide

☐	**STEP 2**	RI/OAS/DV groups have had a change you will need to account for. Groups are now prefixed with the tenant ID linked to the cloud service environment. For example, your stage and production next-gen environments will have different IDs and therefore different sets of groups.	• Refer to the "Managing User Security" section in the *RAP Administration Guide*: Retail Analytics and Planning Administration Guide - Managing User Security
☐	**STEP 3**	APEX/IW access setup has changed and will require you to reconfigure your administrative access. You must create the RTLWSP_ADMIN user in IDCS/IAM if it does not exist and use that account to log in to APEX as an administrator.	• Refer to the "Managing APEX and Extensions" section in the *RAP Administration Guide*: Retail Analytics and Planning Administration Guide - RAP Administration GuideManaging APEX and Extensions

📝 File Transfer Services

☐	**STEP 1**	Use the new File Transfer Services to upload/download the files to/from Object Storage. This is a replacement for the SFTP process.	Resources: • Refer to "Managing File Transfers" in the *RAP Administration Guide* for File Transfer Services and APIs to access File Transfer Services: Retail Analytics and Planning Implementation Guide - File Transfer Service APIsManaging File Transfers • Refer to the "Sample Public File Transfer Script for RI and AIF" section in the *RAP Implementation Guide*: Retail Analytics and Planning Implementation Guide - Sample Script for AI FoundationSample Public File Transfer Script for RI and AIF

Customer Actions for POM

POM batch schedules will change in 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.

📝 Update Service Endpoint URLs

☒	**STEP 1**	Configure service endpoint URLs in the customer systems to point to the new URLs. For example, Execution Request Creation and Execution Request Tracking should now point to the new URL.	Resources: Refer to the "Integration" chapter of the *POM Implementation Guide*: Oracle Retail Process Orchestration and Monitoring Implementation Guide - Integration

📝 Authentication Changes

☐	**STEP 1**	Update the Authentication mechanism to use OAuth2.0 authorization, rather than basic authentication. This applies to all REST services. Basic authentication is no longer supported.	Resources: Refer to the "Invoking POM Services Using OAuth" chapter of the *POM Implementation Guide*: Oracle Retail Process Orchestration and Monitoring Implementation Guide - Invoking POM Services Using OAuth

References

Refer to the Release 22.2.302.0 documentation at the following URL:

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

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