Oracle® Retail Analytics and Planning
Service Administrator Action List

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Oracle® Retail Analytics and Planning Cloud Service Service Administrator Action List

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Preface

This Service Administrator Action List describes the requirements and process for setting up Oracle Retail Analytics and Planning Cloud Services and integrating them with other software solutions.

Audience

This Service Administrator Action List is for the following audiences:

- Service administrators
- System administrators and operations personnel
- Integrators and implementation staff personnel

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To more quickly address critical corrections to Oracle Retail documentation content, Oracle Retail documentation may be republished whenever a critical correction is needed. For critical corrections, the republication of an Oracle Retail document may at times not be attached to a numbered software release; instead, the Oracle Retail document will simply be replaced on the Oracle Technology Network Web site, or, in the case of Data Models, to the applicable My Oracle Support Documentation container where they reside.

Oracle Retail product documentation is available on the following web site:

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

An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number E123456-02 is an updated version of a document with part number E123456-01.

If a more recent version of a document is available, that version supersedes all previous versions.

Oracle Help Center (docs.oracle.com)

Oracle Retail product documentation is available on the following web site:

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

(Data Model documents can be obtained through My Oracle Support.)

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1
Overview

The Oracle Retail Analytics and Planning solutions are the common and extensible delivery platform for analytics and planning applications.

The platform supports Oracle Retail applications across each major analytical category, including:

- Descriptive and diagnostic with merchandise, customer, and consumer insights.
- Predictive with demand forecasting, customer, and location clustering.
- Prescriptive with merchandise, financial, assortment, pricing, and inventory optimization.

The platform also supports Oracle Retail merchandise and inventory planning solutions. These solutions support business responsiveness through a highly interactive user experience and drive the best outcomes with the application of advanced analytics and artificial intelligence (AI).

Application Overview

Oracle Retail Insights is a software product that includes the following modules (all new subscriptions of RI include these modules by default):

- Merchandise Insights
- Customer Insights
- Consumer Insights

Oracle Retail AI Foundation Cloud Services are comprised of the following services:

- Retail AI Foundation Cloud Service (AIF)
- Retail Assortment and Space Optimization Cloud Service (RASO)
- Retail Lifecycle Pricing Optimization Cloud Service (LPO)

Oracle Retail Planning and Optimization Cloud Services comprise the following services:

- Oracle Retail Merchandise Financial Planning Cloud Service
- Oracle Retail Assortment Planning Cloud Service
- Oracle Retail Inventory Planning Optimization Cloud Service

Oracle Retail Merchandise Financial Planning Cloud Service (MFP Cloud Service) provides flexible and easy-to-use merchandise financial planning solution templates that enable retailers to create high-level strategic and low-level detailed financial plans. The solution guides users through best-practice planning processes in an efficient, streamlined manner while providing top-down and bottom-up functionality for developing, reconciling, and approving plans.

Oracle Retail Assortment Planning Cloud Service (AP CS) establishes the breadth and depth of your product offering for all Points-of-Commerce and for a given period of time. The analysis of past performance (such as color effectiveness, trend adoption, styling visualization, in-store placement, and geographic selling) are key inputs into revising a

currently planned/executed assortment or building a new assortment. AP helps the business anticipate and proactively manage exceptions by utilizing robust real-time alerts to highlight and focus a planner's attention on item issues that need immediate attention.

Oracle Retail Inventory Planning Optimization Cloud Service (IPO CS) is composed of the three modules below:

- Demand Forecasting
- Inventory Optimization
- Lifecycle Allocation and Replenishment

Demand Forecasting provides accurate forecasts that enable retailers to coordinate demand-driven outcomes that deliver connected customer interactions. Inventory Optimization recommends an initial service level. With your target service level defined, Inventory Optimization optimizes target stock levels which translate into item-location replenishment policies. Lifecycle Allocation and Replenishment is an automated allocation and replenishment planning system that constantly monitors inventory conditions. Based on these conditions, Lifecycle Allocation and Replenishment creates point-in-time replenishment orders or transfers to meet consumer demand, while considering various constraints.

When starting a Retail Analytics and Planning implementation, there are a number of key considerations and actions you will need to take. This document outlines the most important actions and provides a general timeline for when many of these actions should be completed to ensure success for your implementation. These actions are divided up in the following phases:

- Pre-Provisioning
- Provisioning
- Post Provisioning
- Implementation
- Deployment

Audience

This document is intended for your service administrator. The service administrator is the key person in your business that manages your Retail Analytics and Planning cloud services. Oracle will target important communications to the service administrator, such as the initial welcome e-mail that is described in this document. If the person who receives this e-mail is not the person or part of the group of people that will be taking responsibilities for the tasks in this document, please work with your Customer Success Manager (CSM) to have that name updated.

Subscription

Your subscription to any of the Retail Analytics and Planning cloud services includes one Production environment and one Non-Production environment. Additional Non-Production environments may be provisioned per your subscription agreements.

Each Production environment and Non-Production environment comes with:

- Oracle Cloud Infrastructure Identity and Access Management (OCI IAM)

- Retail Predictive Application Server Cloud Edition (RPAS CE) Platform, application configuration and Planning Data Schema (PDS) (if applicable)
- Process Orchestration and Monitoring (POM)
- Retail Home
- Oracle Analytics Server
- Application Express (APEX)
- Object Storage

> **Note:**
>
> Only one instance of OCI IAM is provisioned. This is shared across all of your Cloud Services and environments.

> **Note:**
>
> Oracle merged and upgraded Identity Cloud Service (IDCS) with OCI IAM. Customers provisioned in November 2021 or later will use OCI IAM for Cloud Identity, and existing customers will be automatically migrated. This document was written focusing on OCI IAM. For more details on Oracle Identity Cloud Service capabilities, see the following:
>
> https://docs.oracle.com/en/cloud/paas/identity-cloud/uaids/get-started.html
>
> To understand which service you have, refer to the Oracle Cloud Infrastructure documentation:
>
> https://docs.oracle.com/en-us/iaas/Content/Identity/getstarted/identity-domains.htm#identity_documentation

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Pre-Provisioning

Pre-provisioning is the period after contracts are signed, but before receiving your environments, where some key activities can occur related to your upcoming implementation. For Retail Analytics and Planning cloud service implementations, your Customer Success Manager (CSM) will be your main point of contact for these activities.

Activate Your Service into a Cloud Account

You will receive an activation e-mail from Oracle in the initial stages of provisioning — often immediately after your subscription order is booked. You need to activate your cloud service into a cloud account to begin the provisioning activities for your Oracle Retail service(s). Promptly complete the activations steps to better enable on-time environment delivery.

On activation of your cloud account, you have access to Oracle Cloud Infrastructure Console and the Identity and Access Management (OCI IAM) and your default Identity Domain is created. An identity domain is a container for managing users and roles, federating and provisioning of users, secure application integration through Oracle Single Sign-On (SSO) configuration, and OAuth administration. It represents a user population in Oracle Cloud Infrastructure and its associated configurations and security settings (such as MFA).

Your default identity domain with be of the Oracle Apps type. Each identity domain type is associated with a different set of features and object limits.

Oracle Retail Best Practice for Tenancy, Applications, and Identity Domains

Oracle Retail recommends that all retail applications use the same OCI IAM Domain. All retail application environments must reside within the same OCI IAM domain for Single Sign-On (SSO) to function across production and non-production environments.

If the customer requires separating the identity management for production and non-production environments, the tenancies, domains, and application environments must be organized such that all production (prod) applications are in the same identity domain and all non-production (stage, dev, and so on) applications are in the same identity domain.

For Oracle Retail enterprise integration, the server-to-server security credentials required to flow among the Oracle Retail Applications (for example, Merchandise Foundation Cloud Service to Planning), the applications must reside in the same tenancy.

> ✏ **Note:**
>
> Activation for OCI IAM does NOT impact billing or the subscription service period - those details are connected to the subsequent environment delivery of the Analytics and Planning cloud services.

Activating into a New Oracle Cloud Account

To start the setup, you'll click the Activate link provided in the e-mail received. Then the following steps are required:

1. Provide the desired name for the Oracle Cloud Account

   A best practice is to use a name which will encompass the scope of services to be managed in the account, such as a combination of your company name and "retail". For example, **mystoresretail**. After activation, you can adjust the displayed name for the cloud account.

2. Provide your e-mail address as the customer administrator who receives the activation e-mail.

   The e-mail address must match the initial e-mail. If you would like a different contact to be used as the administrator, this can be managed after activation in coordination with your CSM.

3. The activation success message will display and you will receive a new welcome e-mail with access credentials.

An Oracle Cloud Account is not the same as your My Oracle Support account. The Oracle Cloud Account exists within the OCI console and includes your identity domain(s) for managing user access and security.

Activate into an Existing Oracle Cloud Account

Activate your Retail cloud service within the Account Management section of your existing Oracle Cloud Account.

1. Log in to your existing Oracle Cloud Account.

   Clicking the **Activate** link brings you to the login page.

2. Within the Dashboard, click on the **Account Management** menu and then select the **Activate** tab.

   Available services to activate will be listed; you may need to select **Show: Pending Activations**.

3. Click the Cloud Service Account Setup button to complete setup. This setup enables you to select the current Oracle Cloud Account as the destination for the cloud service activation.

If you have any issues with the above, see the Frequently Asked Questions chapter.

Prepare Project Team

During this time, you will also be putting together your project plan for the deployment and go-live phases of your implementation. It is important to consider the following during this planning phase to prepare your project team for the Analytics and Planning implementation:

- **OCI Identity & Access Management** - As noted above, you will be using OCI IAM UI for user management for your Analytics and Planning cloud services. During the pre-provisioning timeframe, familiarize yourself with this solution and its features.

- https://docs.oracle.com/en-us/iaas/Content/Identity/home.htm

- **Project Team Training** - Consider the training that the members of your team will need in order to make your implementation successful. This includes both your employees and your systems integration partner. Suggested training topics to consider include:

  - Oracle Analytics Server (OAS)

  - Retail Insights functional documentation

  - AI Foundation Cloud Services functional documentation

  - Retail Learning Subscriptions (RLS)

  - RPAS Configuration Tools/Starter Kit including Starter Kit VMs

  - RPAS Application/Dashboard Configuration

  - Retail Predictive Application Server Cloud Edition documentation

  - RPAS Integrations (on-premise and other Retail SaaS), for example, with the Planning Data Schema (PDS)

  - Functional Business Process Changes (current state, future state)

- **Security Configurations** - During this phase, you should designate a portion of your team to becoming familiar with OCI IAM and the enterprise roles, duties, and privileges that will be part of the Retail Analytics and Planning cloud services you are implementing. For more details on the application-specific roles and configurations, please refer to:

  - The following documents are available in the associated Documentation Library for the applications on Oracle Help Center:

    * *Retail Insights Cloud Services Security Guide*

    * *Retail Insights Cloud Services Implementation Guide*

    * *Retail AI Foundation Cloud Services Security Guide*

    * *Retail AI Foundation Cloud Services Implementation Guide*

    * *Retail Analytics and Planning Implementation Guide*

    * *Merchandise Financial Planning Implementation Guide*

    * *Inventory Planning Optimization Implementation Guide*

    * *Assortment Planning Implementation Guide*

    * *Oracle Retail Application Server Cloud Edition Security Guide*

    * *Oracle Retail Application Server Cloud Edition Administration Guide*

  - For more information on OCI IAM, see Managing Users, User Accounts, and Roles

- **Data Conversion Preparations** - During this period you can start planning for the eventual data conversion by cleaning up your legacy data - purging outdated items or transactions, ensuring standardization of data, and so on. It will be important to have adequate resources available to extract, transform, and load your legacy data from on-premise or 3rd-party systems into the Oracle Cloud, which can be a time-consuming process depending on the quality and quantity of data involved.

- **Extensibility Configuration Options** - Your team can start reviewing the Generally Available configuration in your Planning & Optimization or solution to determine how the custom extensions can be used to cater to individual business processes. Work with your systems integrator to identify those you are unsure about or need to be considered in the program planning. For details on the GA configuration for each of the Planning &

Optimization cloud services, see the user guide for each cloud service. Extensibility options are detailed in the implementation guide for your cloud service.

- **System Options Configuration** - Start reviewing the system options available in all the Retail Analytics and Planning solutions to determine how these should be configured. Work with your systems integrator to identify those you are unsure about or need to be considered in the program planning. For details on the system options for each of the cloud services, see the implementation guide for each cloud service.

- **Integration Planning** - Start reviewing the available existing integrations available as part of the Retail Analytics and Planning cloud services to support internal Oracle integrations, as well as any integrations you may need to external solutions. This will also help you identify whether you require any custom integrations beyond the base cloud-to-cloud integrations provided by Oracle.

    - **RI/RSP Implementation Go-Live Checklist** - This document highlights all major project milestones and activities with a focus on data conversion and cloud cutover processes in order to get you to a successful go-live for an Insights and AI Foundation Cloud Services project. It can be found on My Oracle Support under Doc ID 2539848.1.

    - **Administration Guides** - Each cloud service has an administration guide that outlines system administration, user administration, Online Administration Tools, batches, and integrations that enable you to handle all administration-related activities.

    - **Interface Guides** - This document details the common data interfaces for Retail Analytics and Planning solutions along with the file specifications and will be referenced often throughout the project as it specifies required and optional interfaces by application. It can be found on My Oracle Support under Doc ID 2539848.1.

    - **Operations Guides** - Each cloud service has an operations guide that details standalone batches and integration programs. Note that all implementations leverage Retail Insights as an integration platform, even those not using Retail Insights itself.

    - **Retail Reference Library** - This tool is free to all Oracle Retail customers and can be downloaded from My Oracle Support under Doc ID 2058843.2. It is also available online from the Welcome page in your Retail Home environment. This tool is composed of multiple parts, but the most critical to become familiar with are the Retail Reference Models (business process flows) and the Retail Reference Architecture (integration diagrams, payloads, and so on).

3
Provisioning

Once your environments are ready for you, the person designated as your service administrator will receive a welcome e-mail: one for each environment type (stage, production, and so on).

This e-mail has several key pieces of information:

- Username
  - This user is referred to as the Service Administrator user in this document. A temporary password will be sent in a separate e-mail.
- Link to the OCI IAM Domains UI.
- Links to your cloud services through the Oracle Retail Home link.
- Customer Support (CSI) Number.

It is recommended that you save this e-mail for future reference, because at this point the service administrator is the only person with access.

Access OCI IAM

Once you receive your welcome e-mail, it is recommended that you, as the system administrator, log into the OCI IAM console to verify your access and create a new password. You will also be assigned the application administrator group for each service in both your production and pre-production environments. Note that the group for pre-production will have an added extension (`_PREPROD`) in order to differentiate between the two. These should not be deleted.

It is also recommended that you add additional administrators in order to have a backup administrator and share in user management administration, as at this point no one else in your organization will have access to OCI IAM or the Analytics and Planning solutions. For assistance in creating users or adding them to groups, see the following documents:

- Managing Users
- Understanding Administrator Roles

> **Note:**
>
> You may notice that there are a number of other user IDs set up in OCI IAM for Analytics and Planning (for example, `bdi_admin`, `jos_admin`). These users were seeded by the Oracle Cloud Operations team for use in Analytics and Planning batch and integration processes. These users will be managed by the Oracle Cloud Operations team and should not be modified or deleted.

Validate Cloud Service Access

Next, you should validate that you can successfully log into each of the cloud services for which you have been provisioned using the URLs provided in the Retail Home Application Navigator. Retail Insights use the following URL format:

```
https://{analytics-service-region}/{analytics-tenant-id}/analytics/
```

Access the AI Foundation Cloud Services and Control & Tactical Center screens using:

```
https://{service}.retail.{region}.ocs.oraclecloud.com/{solution-
customer-env}/orase/faces/Home
```

Access the Planning interfaces using:

```
https://{service}.retail.{region}.ocs.oraclecloud.com/{solution-
customer-env}/rpasceui
```

Note that the planning URL provides access to features including, but not limited to:

- Initial/Bootstrap Domain
- Application Domain (if applicable)
- Online Administration Tools to perform:
    - Build and Manage Application
    - User and Security Management within RPAS CE
    - Load Hierarchies and Measures
    - Build Planning Data Schema

For more details, refer to the Oracle Retail Planning & Optimization cloud services administration and implementation guides. The guides are available on Oracle Help Center at the following URL: https://docs.oracle.com/en/industries/retail/index.html

System Options Access

Once you have logged into the AI Foundation Cloud Services, click on the Pin icon ( ) in the main on the left task panel. Navigate to the following pages to validate you can access.

- **Common Components:** Settings > Application Properties
- **Database Setup and System Options:** Tasks > Control & Tactical Center > Strategy & Policy Management > Manage System Configurations

> **Note:**
>
> The System Configurations screen is applicable to all applications in the Retail Analytics and Planning Cloud Services, even if only one of the solutions has been purchased. This is the main screen for configuring database parameters for the inbound integration of foundation data to the entire platform, as well as for all other RI batch components.

- **Web Service Credentials:** Tasks > Control & Tactical Center > Manage Credential Stores

Validate that the screen opens without errors but do not make any changes at this time. Then you can sign out or close the page.

Planning Access

One you have logged into the Planning Solution, click the Pin icon ( ) in the main page on the left task panel. Navigate to the following pages to validate you have access.

- **Build Application** and **Template Status:** Administration > Online Admin Tools > Submit a New Admin Task

Refer to the *Merchandise Financial Planning Cloud Service Administration Guide*, *Inventory Planning Optimization Cloud Service-Demand Forecasting Administration Guide*, or *Assortment Planning Cloud Service Administration Guide* for more details about building the applications using those tasks.

Access Object Storage

To support uploading and downloading files in a SaaS implementation, a space in Oracle Cloud Infrastructure Object Storage is created for each customer environment. Oracle Cloud Infrastructure Object Storage service is an internet-scale, high-performance storage platform that offers reliable and cost-efficient data durability. Buckets are logical containers for storing objects. Access to the bucket is through a pre-authenticated request (PAR), which is a URL that requires no further authentication to upload or download files to the bucket. To retrieve a PAR, you must use the appropriate file transfer REST service. For more details on the file transfer REST services, see the *Retail Analytics and Planning Implementation Guide* section on "Object Storage".

Register Customer Support Identifier

The welcome e-mail will also include your Customer Support Identifier (CSI). This should be registered with My Oracle Support (MOS), which you will use to log questions or issues about these services. Follow link in the e-mail or access support.oracle.com to create a new account. If you already have a MOS account, remember to add your new CSI to your existing MOS account.

The first person to request access to a CSI will be checked by Oracle to ensure the domain of their e-mail address matches the domain associated with the CSI. Once approved, they will be made the Customer User Administrator of that CSI, and can approve others to use it. If someone else has already been made the administrator of that CSI, then the request will be

e-mailed to him or her for approval. For more information on the Customer User Administrator, see MOS ID 1544004.2.

> **Note:**
>
> You will not be able to register your CSI number until your production environment has been provisioned.

4

Post Provisioning

In the first few days after your initial provisioning, it is recommended that you do each of the tasks in this chapter, as they are applicable for your implementation. This will help ensure that any configuration or access issues are resolved earlier in your program to avoid delays. For each of the URLs below, the service, region, and the `solution-customer-env` portions of the URL should be replaced with the one specific for your implementation, which will be the same for most of your cloud service URLs.

Process Orchestration and Monitoring

The Retail Analytics and Planning Cloud Services have their own batch scheduler that will be used. The user interface for this scheduler is called Process Orchestration and Monitoring (POM). POM will allow you to schedule, track and manage nightly and intraday batch jobs.

As part of your implementation, you will need to evaluate which batches should be run for your business, based on the features in the product you intend to use. However, the first step will be to validate that you can connect to scheduler successfully. To do this, login using your same OCI IAM user ID. Use the URL information below to create the links for your environments. Refer to the *Process Orchestration and Monitoring JET UI User Guide* for more details on using this tool.

```
https://{service}.retail.{region}.ocs.oraclecloud.com/{solution-customer-
env}/POMJetUI
```

POM is a required batch management tool for all projects and will be used throughout the implementation. Ensure that the project team has adequate training on the tool by leveraging the POM documentation in the Oracle Retail documentation library.

In addition to POM, there is a configuration screen within Retail Home (discussed in a later section) that allows you to enable and disable entire batch modules rather than individual programs and processes. It is recommended to complete the Retail Home setup and then return to the POM configuration afterwards.

For Planning solutions such as Merchandise Financial Planning, the RPAS CE Batch Framework also provides a catalog of batch services the customer can use to define batch jobs by specifying one or more sequences of services in a control file. Each sequence has its own identifier that is used to schedule the batch job.

The scheduling of the RPAS CE Batch Framework is done through the native Online Administration Tools (OAT) interface within the RPAS CE Client. After a job is scheduled, its status can be tracked on the OAT Dashboard. When the job is in progress, its log file can be viewed and refreshed in a live window and, when it completes, can be downloaded. All of these tasks are in addition to the basic batch infrastructure that Planning solutions include within the POM scheduler.

Retail Home

Oracle Retail Home is a role-based, web portal for the retail enterprise and a user's launch pad to data and supporting solutions most relevant to their role: buyer, planner, inventory analyst, promotional manager, to name just a few. If you purchased Oracle Retail Insights as part of your Oracle Retail subscription, it can be populated with thousands of pre-integrated metrics through that platform. But even without Retail Insights, it can be used as a launch point for your users for your AI Foundation and Planning cloud services, as well as other Oracle Retail or legacy applications. For more details on how to configure and use this portal for your business, see the *Oracle Retail Home Administration Guide* and the *Oracle Retail Home Security Guide*.

```
https://{service}.retail.{region}.ocs.oraclecloud.com/{solution-
customer-env}/retailhome
```

Required Roles

To use Retail Home, the following user roles should be present for the logged in user:

*   RETAIL_HOME_ADMIN (RETAIL_HOME_ADMIN_PREPROD for Stage Environments) to do Retail Home Administration.

*   PLATFORM_SERVICES_ADMINISTRATOR (PLATFORM_SERVICES_ADMINISTRATOR_PREPROD for Stage Environments) to use Retail Apps Platform Services.

After logging on to Retail Home with the user provided from provisioning, click on the Tasks icon and go to Roles Screen to view available roles for the user. All users will have the ability to review their current role configuration in this manner once they are created in OCI IAM.

Application Navigator

The Application Navigator Setup page can be launched from the **Retail Home > Settings > Application Administration** section. The Application Navigator is how you configure the applications available to end-users (including external or on-premise links). It is also the place to configure the integration between your Retail Analytics and Planning Cloud Services and the Retail Home interface. Important configurations include:

*   Features - Displays whether these features are enabled for an application: Application Navigator, Notifications, Favorites, and Resource Bundle Customization. Your Retail Analytics and Planning cloud services generally support the Application Navigator and Resource Bundle Customization options and these should be enabled for each service, if they are not already checked.

*   Application Code - A unique code assigned to an Oracle Retail application. This code must be set for each application to enable services like Resource Bundle Customization (for example, the Retail Insights application should already be assigned a code of "RI").

*   Application Link - These URLs specify where end users will be sent when they select this application from the menu or click on the tile in a dashboard. These links should come pre-configured for your solutions.

- Platform Service - This URLs specify the path Retail Home will use to communicate with other application services. These links should come pre-configured for your solutions.
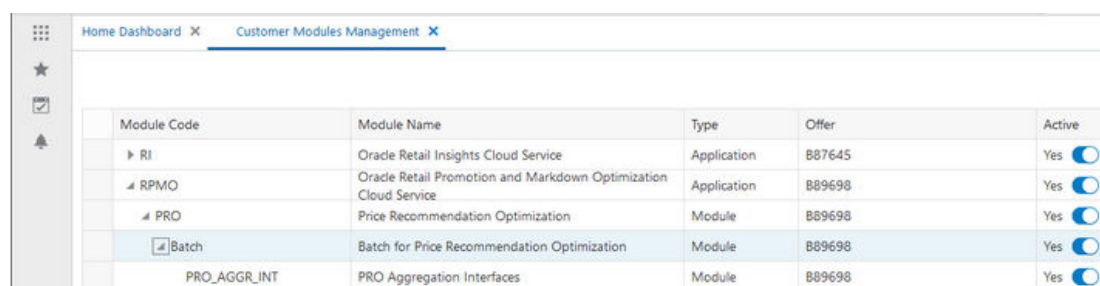
Customer Modules Management

The Retail Home Customer Modules Management page gives customer administrators the ability to activate or deactivate provisioned applications and modules. This screen must be reviewed by the customer administrator as well as the implementation partners to ensure the correct list of services have been enabled. Services which are not being implemented should be disabled. For example, within the RSP category you may enable the AC module (for advanced clustering services) but disable all other RSP modules as you do not plan to use them.

It is important to note that portions of the Retail Insights application should always be enabled here regardless of your implementation, because certain common components of the platform are shared across the solutions. This includes:

- **RAP > COMMON > ZIP_FILES** - One or more ZIP files must be enabled, because this is the method by which you will send foundation data files into Retail Analytics and Planning Cloud Services.

- **RAP > COMMON > SI CONTROLFILES** - If you are implementing any AI Foundation Cloud Services or Planning application, then you will need one or more of these modules enabled to specify which data files are being provided as part of nightly batch processing. If you are implementing MFCS in the cloud along with RAP however, then you may not require any of these.

- **RI > CONTROLFILES** - If you are implementing MFCS in the cloud along with RAP, or you already have MFCS, then enable the files you plan to load from this section.

- **RI > RSP > BATCH** - If you are implementing any AI Foundation Cloud Services application, then you will need one or more of these modules enabled, including `RSP_REQUIRED`.

Saving changes in this screen should apply the necessary updates to your POM schedules to enable or disable sets of jobs related to each module. For complete details on configuring this screen, refer to the *Retail Analytics and Planning Implementation Guide.*

Figure 4-1   Customer Modules Management Screen

Data Visualization

Data Visualizer (DV) is available as part of the Retail Analytics and Planning cloud service subscriptions. It allows you to create projects and reports using the latest Oracle visualization tools across multiple data sources (such as the RI subject areas, uploaded spreadsheets,

Planning Data Schema, and Innovation Workbench user-created content). It will also be used during implementation to access the underlying data model for purposes of debugging issues and reviewing data conversion activities. Ensure the URL below is accessible before starting the implementation.

```
https://{analytics-service-region}/{analytics-tenant-id}/dv/
```

BI Publisher

BI Publisher is available as part of the Retail Insights cloud service subscription. It allows you access to create custom reports against the Retail Insights logical model as an alternative to the main Oracle Analytics interface. Reports created in BI Publisher can be scheduled, exported into a spreadsheet or other document, or can be configured to output to email. For more information on using BI Publisher to create custom reports, see the *Retail Insights Administration Guide*. See also the Oracle Help Center documentation on BI Publisher.

```
https://{analytics-service-region}/{analytics-tenant-id}/xmlpserver/
servlet/home
```

Innovation Workbench

Innovation Workbench (IW) is a service that enables you to access read-only Insights and AI Foundation Cloud Services data using Oracle APEX and implement algorithms and analytics as an extension. This extension is a workbench for advanced analytics users that can be used to add new implementations via Oracle Advanced Analytic (Oracle R/ODM) algorithms that are implemented as SQL/PLSQL functions. IW is accessed by logging into the AI Foundation Cloud Services user interface. Then do the following:

1. Click the Tasks link in the main menu.

2. Go to **Innovation Workbench > Manage Workbench**. This should open a new browser tab for Oracle APEX (Application Express).

3. Select the appropriate workspace (e.g. RETAILWORKSPACE).

Once in this workspace, you can create additional users that will have access to the workspace for query or read/write access. If no workspace is available, contact Oracle Support as it must be configured for you after provisioning.

> ✎ **Note:**
>
> The users you are creating in Innovation Workbench should already exist in OCI IAM. If you have not yet created users in OCI IAM, you can add them to Innovation Workbench at another time. Refer to the *AI Foundation Cloud Services User Guide* for additional details. See also the Oracle documentation on Application Express.

Planning Data Schema Web Services (through ORDS)

Planning Data Schema (PDS) Web Services provides near-real-time integration through the use of Oracle REST Data Services (ORDS). Typical business use cases include intra-day integration or real-time reporting of data from RPAS CE-based solutions.

For more details on building PDS, see the "Planning Data Schema Administration" chapter in the *Oracle Retail Predictive Application Server Cloud Edition Administration Guide*.

Also, see the *Getting Started with RPAS CE Planning Data Schema Architecture* Release 19.0 Reference Paper available on My Oracle Support in the Oracle Retail Predictive Application Server (RPAS) Cloud for Planning and Optimization / Supply Chain Cloud Services Documentation Library at DOC ID: 2492295.1.

Planning Data Schema Web Services can be accessed through the following URLs:

- ```
  https://{service}.retail.{region}.ocs.oraclecloud.com/{solution-customer-
  env}/ords/pds/measures/all/
  ```

- ```
  https://{service}.retail.{region}.ocs.oraclecloud.com/{solution-customer-
  env}/ords/pds/measuredata/<measure name>/
  ```

> **Note:**
>
> You may get an error message if the PDS is empty. This is valid and expected. You can view the list of measures in PDS and the measure data after PDS has been built.

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Implementation

In the first few days after your provisioning, it is recommended that you do each of the following tasks, as they are applicable for your implementation.

Cloud Services Documentation

Refer to the Deployment chapter for a complete list of documentation, training materials, and information about the Oracle Retail community.

Cloud Services Access

Set up accounts for users who will be part of implementing the service. This includes, but is not limited to, business owners, implementation partners, IT personnel, planners, and approvers.

You need to determine the groups and level of access for each user, depending on their roles. For example, implementation partners need access to Online Administration Tools to build the RPAS CE domain, and may need to be part of the administration group.

Access My Oracle Support

Validate access to the My Oracle Support portal (see Register Customer Support Identifier for registration and access instructions) to ensure you have access to log Service Requests, view the knowledge base, and download content.

Cloud Service Policies and Release Process

As part of the initial orientation, your Customer Success Manager provides an overview of Cloud Service Policies and Cloud Service Release Process (also known as Blueprint to Cloud).

For the Planning & Optimization cloud services, this information is available in My Oracle Support DOC ID: 2492295.1

For Insights and AI Foundation cloud services, this information is available in My Oracle Support DOC ID: 2539848.1

Starter Kit

The Planning & Optimization Cloud Services come with a Starter Kit that provides the necessary tools to successfully implement your service. The Starter Kit can be downloaded from My Oracle Support under Patches & Updates for your respective cloud service.

> **Note:**
>
> If you have issues downloading the Starter Kit package from My Oracle Support, log a Service Request through which Oracle will provide a link to access the Starter Kit package.

The Starter Kit includes:

1. Configuration Tools

   The Oracle Retail Predictive Application Server Cloud Edition (RPAS CE) Configuration Tools provide a flexible means to configure and build RPAS CE-based applications with retailer-specific business parameters.

2. RPAS CE Virtual Machine

   The Oracle Retail Predictive Application Server Cloud Edition (RPAS CE) Virtual Machines (VMs) provide a preinstalled/preconfigured VM that can be deployed on a PC. This toolkit is designed to be used by partners to get quick access to the application and UI for learning and/or configuration design purposes.

   RPAS CE VMs are not meant to be a replacement or substitution for pre-production Cloud Environments.

3. GA Configuration and Sample Data

   Depending on the cloud service type, the starter kit will include GA configuration and sample data.

Data File Preparation

The Retail Analytics & Planning solutions are data-driven applications that operate primarily through the consumption of daily or weekly input files from your other Oracle and non-Oracle software solutions. There are several key resources you need to be aware of, which should be shared with the project team that will be responsible for data generation and integrations.

- There is a chapter in the *RAP Implementation Guide* dedicated to Data File Generation which covers the most commonly used files, the business rules for creating the data, and any special considerations. Go to the Retail Documentation library, access one of the pages for a Retail Analytics & Planning solution, then go to the Implement task and select the *Retail Analytics and Planning Cloud Service Implementation Guide*. Navigate to Chapter 8, "Data File Generation".

- A comprehensive interface file specification document can be downloaded from My Oracle Support that provides the field-level details of every interface file used by RAP applications. In My Oracle Support, go to DOC ID: 2539848.1 and locate the download link for the *Retail Analytics and Planning Cloud Services Data Interfaces Guide*.

- Also available in My Oracle Support is a set of sample data files for foundational inputs (files that are commonly used in RAP solutions). In My Oracle Support, go to DOC ID: 2539848.1 and locate the download link for *Data Samples*.

- A data validator utility is available for download and install to an on-premise database to aid you in building data files for RAP interfaces. The utility is listed in the Patches & Updates section of My Oracle Support under the product Oracle Retail AI Foundation Cloud Service, patch number 35300100.

- Your implementation partner should review the enablement trainings available through the Oracle Partner Network (OPN). Learning paths are available that group together relevant trainings for easy access, including data file requirements and preparation guidelines. Partners can access one of the following links and scroll down the page to the section titled *Retail Analytics and Planning Architecture* for an initial set of technical overviews.

  – MFP Technical Consultant

  – AP Technical Consultant

  – RDF Consultant

  – PMO / OO Consultant

  – Inventory Planning Optimization-Optimization Consultant

  – ASO Consultant

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Deployment

The deployment phase is when you'll be designing, configuring, and building the integration, conversions, training, reports, and any extensions needed to run the Analytics and Planning cloud services for your business. Here are some other things to consider as you transition into this phase.

Get Started

Review additional product-specific tools and resources that help you and your implementation team by referencing the Documentation libraries at this location: `https://docs.oracle.com/en/industries/retail/index.html`. Navigate to the Analytics section and review the pages relevant to your subscription to Retail Insights or any of the AI Foundation Cloud Services solutions. Navigate to the Merchandise Planning and Optimization section for content on Planning solutions.

Key documents for each cloud service, include:

- Implementation guide:
  - Configuration, data, and batch processing
  - Integration with Oracle Retail products
  - Planning Data Schema (PDS)
  - Translations
- Administration guide:
  - Batch tasks to load and export data and hierarchies
  - Management of users and roles with OCI IAM
  - Installation and patching of domains
  - Usage of common components and tools by customer administrators
- MFPCS/IPOCS/APCS Starter Kit guides:
  - Installation on a Windows environment
  - RPAS CE Virtual Machine
- Retail Insights and AI Foundation Cloud Services Documentation Library DOC ID: 2539848.1
  - Hot Fix Release Notes/ARNs/RVPs/Reference Papers
- Planning & Optimization and Supply Chain Cloud Services Documentation Library MOS DOC ID: 2492295.1
  - Hot Fix Release Notes/ARNs/Reference Papers

Leverage Oracle Support

Attend a session on Working Effectively with Support (WEWS) to learn about support policies and best practices when working with Oracle Support. Oracle Support representatives are ready 24/7 to answer questions and address issues about your service. Access the Oracle Support Contacts Global Directory to find the Oracle Support Hotline for your country, and explore the page on *Working Effectively with Oracle Support - Best Practices* found on My Oracle Support under Doc ID 166650.1

Get Connected

Register for RGBU support communities:

- Use My Oracle Support Community (Doc ID 2299812.1) to post technical questions and get resolution on technical issues.

  - See Get Started to learn how to use the Support Community.

- Use Oracle Retail Rack to view informative resources and participate in discussions around Retail Solutions.

- Join a Community, leverage your peers:

  - Register to join the Oracle Retail User Group (ORUG) Community by sending an email to OracleRetail-Community_ww@oracle.com, including member name, member email, and retailer name.

  - Follow ORUG on LinkedIn: https://oracle.com/orug-linkedin

- Read about all things Oracle Retail at www.oracle.com/retail

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Frequently Asked Questions

Cloud Account Activation

Because the Analytics and Planning cloud services are installed using the OCI IAM domain details, it is important to ensure any activation concerns are resolved during the pre-provisioning/provisioning period, as making changes after your Insights, AI Foundation, and Planning cloud services are provisioned may require extended downtime.

What should I do if I cannot activate my service into an existing Oracle Cloud Account?

Inform your CSM or sales representative if you run into issues, providing the following information:

- Existing Oracle Cloud Account name

- Subscription ID of a service in the account

- Administrator e-mail for the account

What do I do if I experience errors or failures while attempting to activate my Cloud Account?

The administrator e-mail address must match the e-mail which received the activation notification. If this does match and you are still running into issues, inform your CSM or sales representative, providing the following information:

- Intended activation approach (new Oracle Cloud Account or activate within an existing)

- Any error or failure messages received - include screen shots if possible

Can I use another identity management solution?

Only OCI IAM is supported in Retail Analytics and Planning Cloud Service implementations, however OCI IAM could also be integrated with external identity management providers, like Active Directory, using its APIs.

I have multiple pre-prod environments and want to have different security configurations for the same users/roles in each, can I do that?

Retail Analytics and Planning cloud services only provide one set of OCI IAM roles for pre-prod environments and they are shared across them.

Why do I see other users in my OCI IAM instance (for example, batchuser)?

The Oracle Cloud Operations team will also seed a set of integration users required by the solutions as part of the provisioning process. These are users used for integration or internally for batch and other processing and **should not be deleted**.

Cloud Services Access

Why don't I see any links in the task list when I access my cloud service?

Validate that you have the correct group/role assigned to your user in OCI IAM. You should have the administrator job assigned for each solution. In the **production** environment, these are:

- Retail Insights: RIApplicationAdministrators_JOB
- AI Foundation Cloud Services Configuration: ADMINISTRATOR_JOB
- Retail Home/Platform Services: RETAIL_HOME_ADMIN and PLATFORM_SERVICES_ADMINISTRATOR
- Assortment and Space Optimization: SPACE_ADMINISTRATOR_JOB
- IPO Optimization: INVENTORY_ANALYST_JOB
- Lifecycle Pricing Optimization: TARGETED_OFFER_JOB and PRICING_ADMINISTRATOR_JOB
- Innovation Workbench: DATA_SCIENCE_ADMINISTRATOR_JOB

If you are accessing a **pre-production** environment, then the job roles will have a _PREPROD extension.

If you are associated to the correct group/role above and are still having issues with seeing links in the task list or logging into the application, please log an SR for further assistance.

Why can't I create or access reports in Retail Insights?

Make sure that the logged-in user has been configured with the necessary BI roles in OCI IAM. Retail Insights has the following tiers of user permissions which control access to Oracle Analytics core functionality:

- BIConsumer_JOB - Allows for opening Oracle Analytics content created by others
- BIAuthors_JOB - Allows for creating new content in Oracle Analytics
- RIApplicationAdministrators_JOB - Allows for managing content permissions and scheduling agents and BI Publisher reports

Additionally, Retail Insights requires one or more roles to define the access level within the metadata (a.k.a. Subject Areas). RetailAnalysts_JOB is a super-user role with complete Subject Area access.

Why can't I log into the Innovation Workbench tool?

Innovation Workbench is built on top of Oracle APEX and requires various configurations be performed as part of provisioning the environment. If you are able to access the APEX Login screen but do not see any workspaces available, then a configuration step was not completed and a Service Request should be logged.

Why do I not see any task links in Process Orchestration and Monitoring (POM)?

Make sure that you have the Batch Administrator Job group/role assigned to you in OCI IAM, which should provide you with the privileges to see all the links. For details on the all the roles, duties, and privileges used by POM, see the *Oracle Retail Process*

Orchestration and Monitoring Security Guide. If you are assigned to this group/role and still are not able to see any tasks in POM, then log an SR for further assistance.

Why do I not have access to create reports in BI Publisher?

Confirm access to the required BI Publisher groups by clicking on the username in the upper right corner, then select My Account. In the My Account popup click the My Groups tab. You should see the following groups listed:

- BI Consumer
- BI Content Author
- RIApplicationAdministrator

These groups are assigned as part of selecting a Retail Insights BI group in OCI IAM (such as BIAuthors_JOB). If you are still having issues, please log an SR for further assistance.

Other

I want other users in my company to receive notifications about upgrades, planned downtime, and maintenance periods. How do I add other users?

As the Service Administrator, initially you will be the only person receiving Oracle notifications about upgrades, monthly updates, planned downtime, and maintenance periods. Identify the key personnel in your organization who should also receive critical notifications about your Cloud Service. These could include backup administrators, project managers, implementation partners, and other project team members.

Oracle recommends setting up a distribution list at your company and registering your distribution list for the notifications. If you need to make changes that require Oracle's involvement, you can raise a Service Request (SR) on My Oracle Support. Refer to DOC ID: 2364511.1 for details on how to log the SR and what information to provide.

I have multiple retail cloud services included in my subscription. How do I confirm the correct application name to use in the URLs for tools common to all of my services, such as Retail Home or Process Orchestration and Monitoring?

You can raise a MOS Service Request or reach out to your CSM to learn the correct URL.

A

List of Key URLs

Solution/Tool	URL

Retail Insights	`https://{analytics-service-region}/{analytics-tenant-id}/analytics`
	For Example:
	`https://ocacs.ocs.oraclecloud.com/d5ocvl9he3lzxj2tz/analytics/`

Data Visualization	`https://{analytics-service-region}/{analytics-tenant-id}/dv/`
	For Example:
	`https://ocacs.ocs.oraclecloud.com/d5ocvl9he3lzxj2tz/dv/`

AI Foundation Cloud Services	`https://{service}.retail.{region}.ocs.oraclecloud.com/{solution-customer-env}/orase/faces/Home`
Planning & Optimization (MFP and RDF)	`https://{service}.retail.{region}.ocs.oraclecloud.com/{solution-customer-env}/rpasceui`
Planning Data Schema Web Services	`https://{analytics-service-region}/{analytics-tenant-id}/ords/pds/measures/all`
BI Publisher	`https://{service}.retail.{region}.ocs.oraclecloud.com/{solution-customer-env}/xmlpserver/servlet/home`

Innovation Workbench	`https://{analytics-service-region}/{analytics-tenant-id}/ords`
	For Example:
	`https://ocacs.ocs.oraclecloud.com/d5ocvl9he3lzxj2tz/ords/`

Process Orchestration and Monitoring (POM)	`https://{service}.retail.{region}.ocs.oraclecloud.com/{solution-customer-env}/POMJetUI`
Retail Home	`https://home.retail.{region}.ocs.oraclecloud.com/{solution-customer-env}/retailhome`
Starter Kit/ Configuration Tools	URL not available, installed locally on the PC. The Starter Kit can be downloaded from My Oracle Support under Patches & Updates for your respective cloud service.

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