



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 the ["Managing File Transfers"](#) section in the *RAP Administration Guide*.
- Version 19 should be read-only once the Next Gen production update is complete 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 Planning Optimization (IPO) – Inventory Optimization module • Lifecycle Pricing Optimization (LPO) • Assortment & Space Optimization (ASO)

Merchandise Financial Planning (MFP) and Assortment Planning (AP) customers will have a major update named the 'As Is' Functionality Update. The 'As Is' Functionality Update means that the customer's current business process will remain the same. 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 sets them up for future roadmap enhancements. This latest update requires more planning and coordination between Oracle team and customers' team than a typical major update.

Most new features are disabled with the 'As Is' functionality update. The customer will choose if/when to enable them with 'Enhanced' Functionality'. 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	Enhanced Functionality Update
1. Reporting through Data Visualization 2. Redwood UI 3. Streamlined Planning UI 4. User Preference Module 5. Data Import Using Excel 6. Enhanced error handling 7. Improved disaster recovery	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.
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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), Inventory Planning Optimization (IPOCS), 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 <i>RAP Administration Guide</i>: Retail Analytics and Planning Administration Guide - Managing User Security - Refer to the “User and Role Maintenance” section in <i>MFPCS Administration Guide</i>: Oracle Retail Merchandise Financial Planning Cloud Service Administration Guide - User and Role Maintenance - Refer to the “User and Role Maintenance” section in the <i>IPOCS Administration Guide</i>: Oracle Retail Inventory Planning Optimization Cloud Service-Demand Forecasting / Inventory Planning Optimization Cloud Service-Lifecycle Allocation and Replenishment Administration Guide - User and Role Maintenance - Refer to the “User and Role Maintenance” section in the <i>APCS Administration Guide</i>: Oracle Retail Assortment Planning Cloud Service Administration Guide - User and Role Maintenance
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□	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 <i>RPAS Administration Guide</i>: RPAS Administration Guide - OCI IAM Authorized Access to PDS Web Services in APEX/ORDS
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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 <i>RAP Administration Guide</i>: Retail Analytics and Planning Administration Guide - Managing File Transfers - Refer to the “Sample Public File Transfer Script for Planning Apps” section in the <i>RAP Implementation Guide</i>: 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 <i>RAP Implementation Guide</i>: Retail Analytics and Planning Implementation Guide - Sample Public File Transfer Script for RI and AIF - Refer to the MFPCS, IPOCS and APCS Implementation Guides for details regarding integration of planning solutions with other solutions (for example, RMFCS, AI Foundation and Retail Insights)
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Retail Analytics and Planning “As Is” Functionality 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 forecasting. 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 dimensions/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 “Enhanced” Functionality Update

☐	STEP 1	Centralized model and Planning is built on AI Foundation	• Along with the Retail Analytics and Planning “As Is” Functionality 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. • For integration instructions: • Refer to the Oracle Retail Merchandise Financial Planning Cloud Service Implementation Guide for integration with Merchandise Financial Planning. • Refer to the Oracle Retail Assortment Planning Cloud Service Implementation Guide for integration with Assortment Planning. • Refer to the Oracle Retail Inventory Planning Optimization Cloud Service-Demand Forecasting/ Inventory Planning Optimization Cloud Service-Lifecycle Allocation and Replenishment Implementation Guide for integration with IPO Demand Forecasting. • Refer to the Retail AI Foundation Cloud Service guides for more information on AI Foundation.
☐	STEP 2	Batch Process	• Customers choosing “Enhanced” Functionality Update 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.
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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 <i>RAP Administration Guide</i>: Retail Analytics and Planning Administration Guide - Managing User Security
☐	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 <i>RAP Administration Guide</i>: 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 <i>RAP Administration Guide</i>: Retail Analytics and Planning Administration Guide - Managing 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 <i>RAP Administration Guide</i> for File Transfer Services and APIs to access File Transfer Services: Retail Analytics and Planning Implementation Guide - Managing File Transfers - Refer to the “Sample Public File Transfer Script for RI and AIF” section in the <i>RAP Implementation Guide</i>: Retail Analytics and Planning Implementation Guide - Sample Public File Transfer Script for RI and AIF
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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 <i>POM Implementation Guide</i> : Oracle Retail Process Orchestration and Monitoring Implementation Guide - Integration
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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” chapter of the <i>POM Implementation Guide</i> : Oracle Retail Process Orchestration and Monitoring Implementation Guide - Invoking POM Services
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Glossary

- AIF – AI Foundation
- AP - Assortment Planning
- APCS - Assortment Planning Cloud Service
- APEX – Application Express
- ASO – Assortment & Space Optimization
- DV – Data Visualization
- IDCS – Identity Cloud Service
- IPO – Inventory Planning Optimization
- IPOCS - Inventory Planning Optimization Cloud Service
- LPO – Lifecycle Pricing Optimization
- MFP – Merchandise Financial Planning
- MFPCS – Merchandise Financial Planning Cloud Service
- OAM – Oracle Access Manager
- OAS – Oracle Analytics Server
- OCI IAM – Oracle Cloud Infrastructure Identity and Access Management
- ORDS - Oracle REST Data Services
- POM – Process Orchestration and Monitoring
- RI – Retail Insights
- RPAS – Retail Predictive Application Server
- RAP – Retail Analytics and Planning
- SaaS – Software as a Service
- SFTP – Secure File Transfer Protocol

References

Refer to the Release 25.1.101.0 documentation at the following URL:

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

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