Oracle® Retail Demand Forecasting

Installation Guide

Release 13.3.2

E39683-01

March 2013

ORACLE®

Oracle Retail Demand Forecasting Installation Guide, Release 13.3.2

E39683-01

Primary Author: Melissa Artley

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Preface

Oracle Retail Installation Guides contain the requirements and procedures that are necessary for the retailer to install Oracle Retail products.

This document provides detailed instructions on how to install an RDF domain using a configuration created with the RPAS Configuration Tools. This document does not describe how to create the actual configuration. Refer to the *Oracle Retail Demand Forecasting Configuration Guide* for information on creating a configuration.

Supplemental Installation Guides

Supplemental installation guides are referenced in this document. These guides must be obtained before beginning the installation process:

- *Oracle Retail Predictive Application Server Installation Guide*
- *Oracle Retail Predictive Application Server Administration Guide for the Classic Client*
- *Oracle Retail Predictive Application Server Administration Guide for the Fusion Client*
- *Oracle Retail Predictive Application Server Configuration Tools User Guide*

Read these documents in their entirety before starting the installation.

Audience

This document is intended for an Management Information System (MIS) administrator that needs to install the RPAS software and create RDF domains.

This Installation Guide is written for the following audiences:

- Database administrators (DBA)
- System analysts and designers
- Integrators and implementation staff

Documentation Accessibility

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Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Related Documents

For more information, see the following documents in the Oracle Retail Demand Forecasting Release 13.3.2 documentation set:

- *Oracle Retail Demand Forecasting Release Notes*
- *Oracle Retail Demand Forecasting Implementation Guide*
- Oracle Retail Predictive Application Server documentation

Supplemental Documentation

The following document is available through My Oracle Support at the following URL:

https://support.oracle.com

Oracle Retail Demand Forecasting 13.3.2 Cumulative Fixed Issues (Note ID 1527992.1)

This document details the fixed issues and defects for all RDF, Curve, and Grade patch releases prior to and including the current release.

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

https://support.oracle.com

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 13.1) or a later patch release (for example, 13.1.2). If you are installing the base release, additional patch, and bundled hot fix releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch and bundled hot fix releases can contain critical information related to the base release, as well as information about code changes since the base release.

Oracle Retail Documentation on the Oracle Technology Network

Documentation is packaged with each Oracle Retail product release. Oracle Retail product documentation is also available on the following Web site:

http://www.oracle.com/technology/documentation/oracle_retail.html

(Data Model documents are not available through Oracle Technology Network. These documents are packaged with released code, or you can obtain them through My Oracle Support.)

Documentation should be available on this Web site within a month after a product release.

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

Full Installation

This document provides instructions on installing Oracle Retail Demand Forecasting. It provides detailed instructions on how to install a Demand Forecasting (RDF) domain using a configuration created through the RPAS Configuration Tools. This document does not describe how to create the actual configuration.

> **Note:** Supplemental installation guides are referenced in this document. The *Oracle Retail Predictive Application Server Installation Guide* and *Oracle Retail Predictive Application Server Configuration Tools User Guide* must be obtained before beginning the installation process. Read these documents in their entirety before starting the installation.

Read through this document completely before performing the installation steps.

Check for the Current Version of the Installation Guide

Corrected versions of Oracle Retail Installation Guides may be published whenever critical corrections are required. For critical corrections, the rerelease of an installation guide may not be attached to a release; the document will simply be replaced on the Oracle Technology Network Web site.

Before you begin installation, check to be sure that you have the most recent version of this installation guide. Oracle Retail installation guides are available on the Oracle Technology Network at the following URL:

`http://www.oracle.com/technology/documentation/oracle_retail.html`

An updated version of an installation guide is indicated by 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 an installation guide with part number E123456-01.

If a more recent version of this installation guide is available, that version supersedes all previous versions. Only use the newest version for your installation.

Hardware and Software Requirements

Table 1–1 provides information on the hardware and software requirements for RDF, Curve, and Grade:

Table 1–1 Hardware and Software Requirements

Requirement	Details
Supported RPAS Version	13.3.2
Required Software	Java Development Kit (JDK) 1.6 **Note:** There are specific JDK versions needed for each of the supported operating systems for the Oracle Retail Predictive Application Server (RPAS). For the list of JDK versions, see the *Oracle Retail Predictive Application Server Installation Guide*. **Note:** When installing Java, avoid enabling AutoUpdate because it may update the Java version without prompting.

Note: RPAS applications, such as RDF, run on the Oracle Retail Predictive Application Server (RPAS) platform. For information about the hardware and software requirements for RPAS, see the supported RPAS version of the *Oracle Retail Predictive Application Server Installation Guide*.

Supported Oracle Integration Technologies

The following Oracle integration technology is supported:

- Oracle Data Integrator (ODI) 11.1.1.5

Supported Oracle Retail Products

This sections lists the supported Oracle Retail products for RDF, Curve, and Grade.

RDF Supported Oracle Retail Products

Table 1–2 provides information about the supported Oracle Retail products for RDF.

Table 1–2 RDF Supported Oracle Retail Products

Product	Version
Oracle Retail Analytic Parameter Calculator for Replenishment Optimization (APC-RO)	13.3.0
Oracle Retail Analytic Parameter Calculator for Regular Price Optimization (APC-RPO)	13.3.2
Oracle Retail Merchandising System (RMS)	13.1.6, 13.2.4
Oracle Retail Promotion Intelligence and Promotion Planning and Optimization (PI-PPO)	13.2.3.1
Oracle Retail Replenishment Optimization (RO)	13.3.2
Oracle Retail Regular Price Optimization (RPO)	13.3.2

Curve Supported Oracle Retail Products

Table 1–3 provides information about Oracle Retail products that are supported for Curve.

Table 1–3 Curve Supported Oracle Retail Products

Product	Version
Oracle Retail Allocation	13.2.4

Grade Supported Oracle Retail Products

Table 1–4 provides information about Oracle Retail products that are supported for Grade.

Table 1–4 Grade Supported Oracle Retail Products

Product	Version
Oracle Retail Merchandising System (RMS)	13.1.6, 13.2.4

Installing RDF on UNIX Environments

The installation of the server-side RPAS components on UNIX operating systems is accomplished using Java-based installation programs that are included with the installation package.

The RPAS Installer automates the following tasks:

- Installs the RPAS server components
- Installs Configuration Tools on the server
- Defines the DomainDaemon port

The RDF Installer automates the following tasks:

- Installs the RDF mock install configuration
- Installs RDF plug-ins for the Configuration Tools
- Installs Language Translation files
- Creates a sample RDF domain

Note: Refer to chapter, "Creating a Multi-solution Taskflow" in the *Oracle Retail Predictive Application Server Configuration Tools User Guide* for information about the Multi-solution Taskflow.

Note: This document assumes that the RPAS Installer process (from the *Oracle Retail Predictive Application Server Installation Guide*) has been completed prior to using the RDF Installer.

Preparation

The RPAS server components required prior to this installation process are available from Oracle's E-Delivery web site, http://edelivery.oracle.com, and My Oracle Support, https://support.oracle.com.

Note: Before installing RDF, confirm that RPAS and all subsequent patches have been successfully applied.

Environment Variable Setup Script

Before running the solution installer, source your `retaillogin.ksh` script. The script is located in the root of the base directory where RPAS was installed unless the default was overwritten when specifying directory paths.

Source the script from inside the directory where the script is located:

```
. ./retaillogin.ksh
```

or

Include the full path after the period ".":

```
. /<base_directory>/retaillogin.ksh
```

Note: The preceding period and space (". ") must be included at the beginning of the command when executing the script.

Note: Include this path and script in the `.profile` in your home directory (`~/.profile`) if you want to have this environment setup script run during login.

This script sets up environment variables, such as RPAS_HOME and RIDE_HOME, which are required for RPAS to run properly.

HP Itanium

If you are installing any RPAS solution on HP Itanium, you need to set the 64-bit Configuration Tools environment variable for Java as shown:

```
export RIDE_OPTIONS=-d64
```

Downloading and Extracting the RDF Media Pack

The following procedure provides information about extracting the RDF Media Pack and its contents:

1. Create a directory to store the RDF Media Pack and download the media pack to this location. This directory will be referred to as [RDF Installation].
2. Extract the media pack to this location. Once extracted, two directories appear, CDROM and DOCS.

   The CDROM folder contains the following ZIP file:

   - `RDF.zip` - This file contains the RDF solution.

   The DOCS folder contains the RDF documentation. Within the DOCS you can find the RDF Guides, including:

   - Release Notes - This folder contains the *Oracle Retail Demand Forecasting Release Notes*.
   - Installation Guide - This folder contains the *Oracle Retail Demand Forecasting Installation Guide*.

Extracting the RDF Installation Package

Complete these steps to extract the installation package:

1. Create a directory to store the RDF Media Pack on the target server. This directory will be referred to as [RDF Installation]. It is the location where the RDF installation routine is run.
2. Using FTP in binary mode, transfer the RDF Media Pack to the [RDF Installation] directory on the target server.
3. Extract the package to the [RDF Installation] directory.

   cd [RDF Installation]

   unzip [RDF Package]
4. Extract the RDF Installer.

   ```
   cd CDROM

   unzip RDF.zip
   ```

Installation Instructions

Complete these steps to install RDF:

1. Begin the Installer by first changing to the root of the [RDF Installation] directory and running the following command:

   ./install.sh

   Note: The command must be executed with the preceding period and forward slash (./).

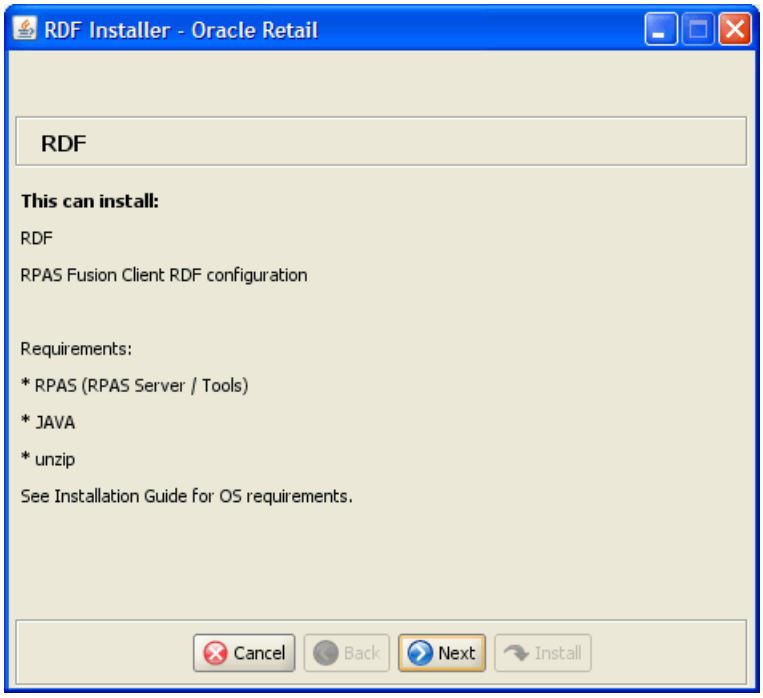
   If this process is being run on an X-Windows emulator (such as Exceed), a GUI to the Installer opens. If you are running in console mode through a terminal emulator, a text interface to the Installer opens.

   In both cases, the requested information is identical, but displayed differently. In the GUI, a check box may appear to signal whether or not you want a component installed. In text mode, a response of yes or no may be required.

   Note: In text mode, the default value appears in square brackets. To use the default value and continue, click **Enter**. If you want to use a different value, enter the new value. When prompted to create a directory, respond with **Y** or yes and click **Enter**.

2. The RDF Installer Window opens and shows the components that are installed during installation process as well as other required components. Click **Next** to continue.

Figure 1–1 RDF Installer Window



3. The Choose Components to Install Window opens.

   Select one or both of the following options and then click **Next** to continue.

Option	Description
RDF	Select this option to install the RDF application with the domain.
RPAS Fusion Client configuration	Select this option to install the RPAS Fusion Client configuration for RDF. For more information, see the following Special Case and the section, Configuration Files for the RPAS Fusion Client. If you do not want to install the RPAS Fusion Client configuration, clear this check box and skip steps 7 and 8.

Special Case

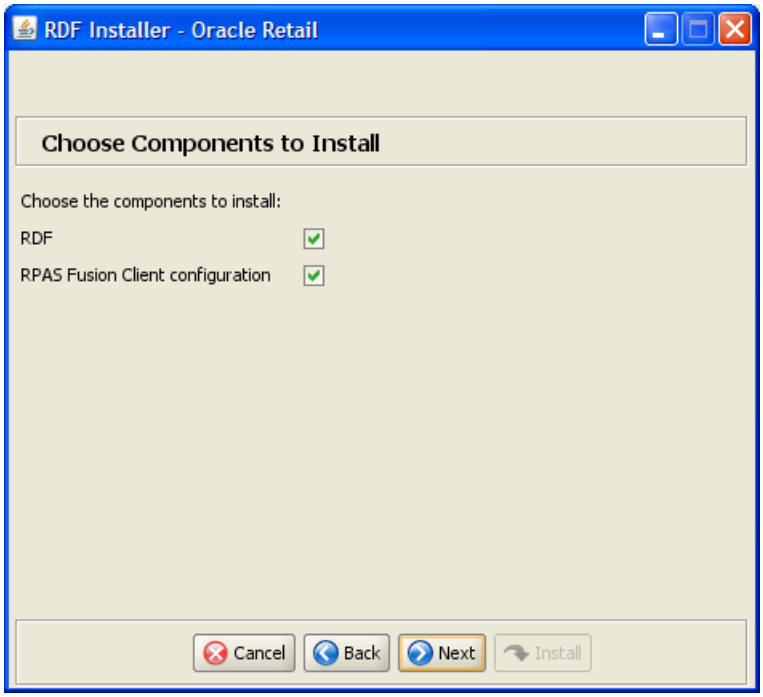
If you are not installing the RDF solution, but are installing the RPAS Fusion Client RDF configuration, then follow these steps:

a. Clear the RDF check box and select the RPAS Fusion Client configuration check box.

b. After installation, you must update the domain-path entry in the `Foundation.xml` on the RPAS Fusion Client server.

c. In the `Foundation.xml`, change `${input.RDF.dir}` to your RDF domain path.

Figure 1–2 Choose Components to Install Window



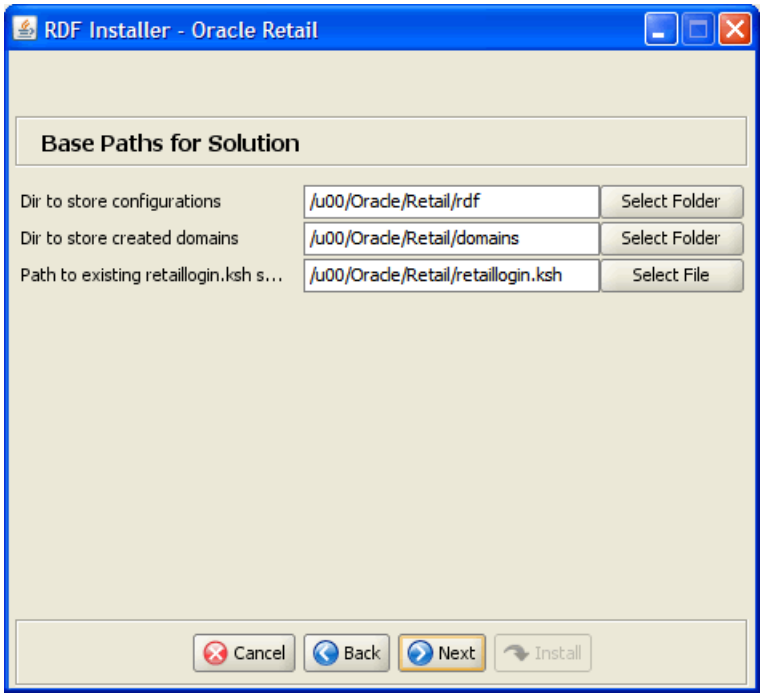
4. The Base Paths for Solution Window opens.

   Enter the relevant information in the following fields and then click **Next** to continue.

Field	Description
Dir to store configurations	Enter the target directory to store the configurations.
Dir to store created domains	Enter the target directory used to store created domains.
Path and file name to the retaillogin.ksh script	Enter the path and file name to the `retaillogin.ksh` script created during RPAS installation.

Note: Ensure that the installation paths are located outside of the installer directory [RDF_Installer].

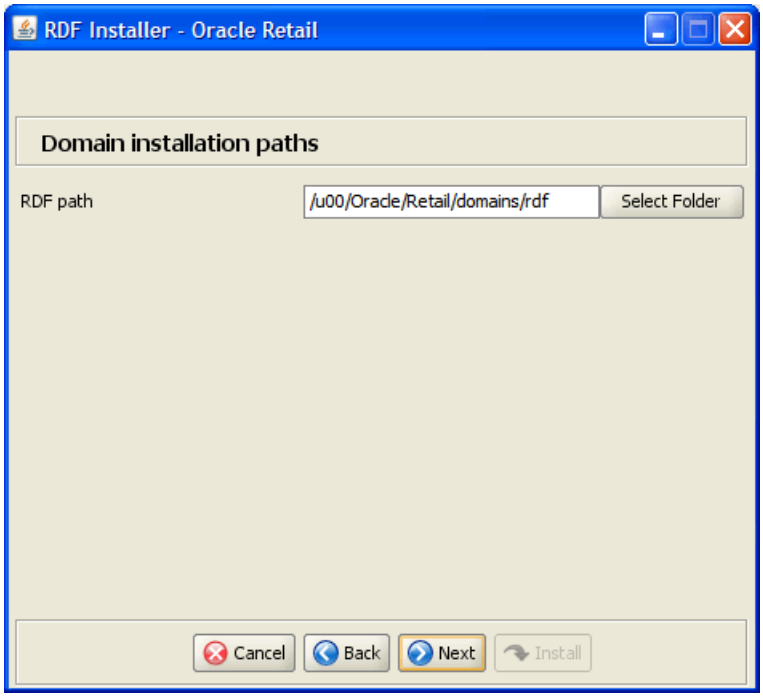
Figure 1–3 Base Paths for Solution Window



5. The Domain Installation Paths Window opens.

   Enter the path where the RDF domain will be created and click **Next**.

Figure 1–4 Domain Installation Paths Window



6. The Install Tasks Window opens.

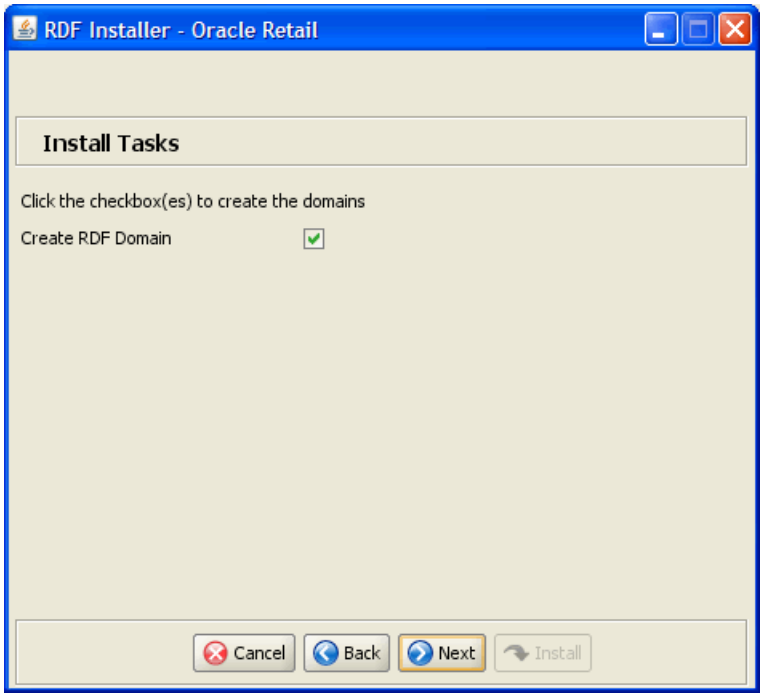
Note: Domain builds use the environment specified in the `retaillogin.ksh` environment setup script. If you change any environment details, edit the `retaillogin.ksh` script and any subsequent scripts called by `retaillogin.ksh`.

For more information about the `retaillogin.ksh` script, refer to the section: "Environment Variable Setup Script".

- If you want to create the RDF domain, select the **Create RDF Domain** option, which is selected by default.
- If you want to install all required components to support the RDF domain, but not create the actual RDF domain, clear the check box.

Click **Next** to continue.

Figure 1–5 Install Tasks Window



7. The Fusion Location Information Window 1 opens.

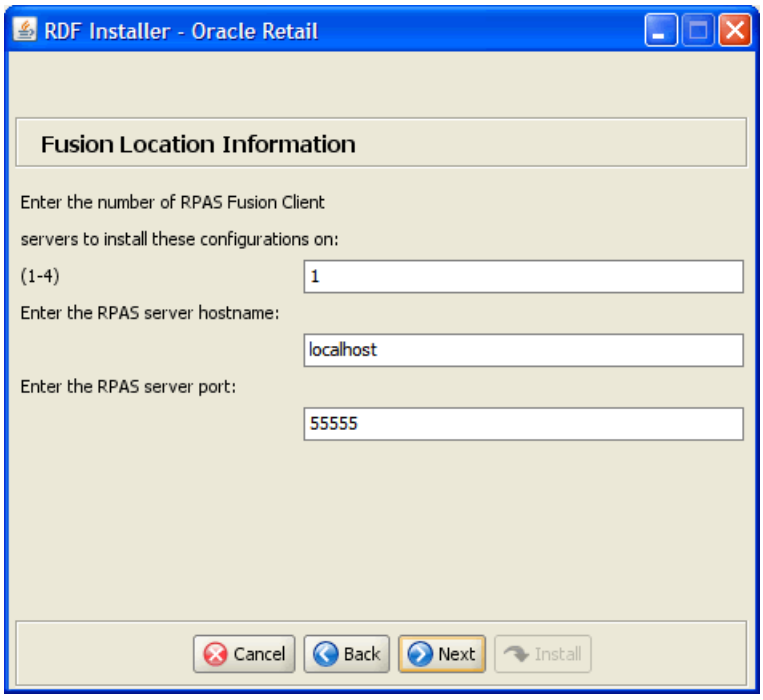
Note: The Fusion Location Information Window 1 opens when you select the RPAS Fusion Client configuration check box on the Choose Components to Install Window.

If you are not installing the RPAS Fusion Client configuration, proceed to step 9.

Enter the relevant information in the following fields and then click **Next** to continue.

Field	Description
Enter the number of RPAS Fusion Client servers to install these configurations on: (1-4)	Enter the number of servers running the RPAS Fusion Client where you want to install the RDF configuration. In case the RPAS Fusion Client is running on a single server, enter **1**. If you have a clustered installation, you can enter up to four servers.
Enter the RPAS server hostname.	Enter the hostname of the RPAS server.
Enter the RPAS server port.	Enter the port number of the RPAS server.

Figure 1–6 Fusion Location Information Window 1

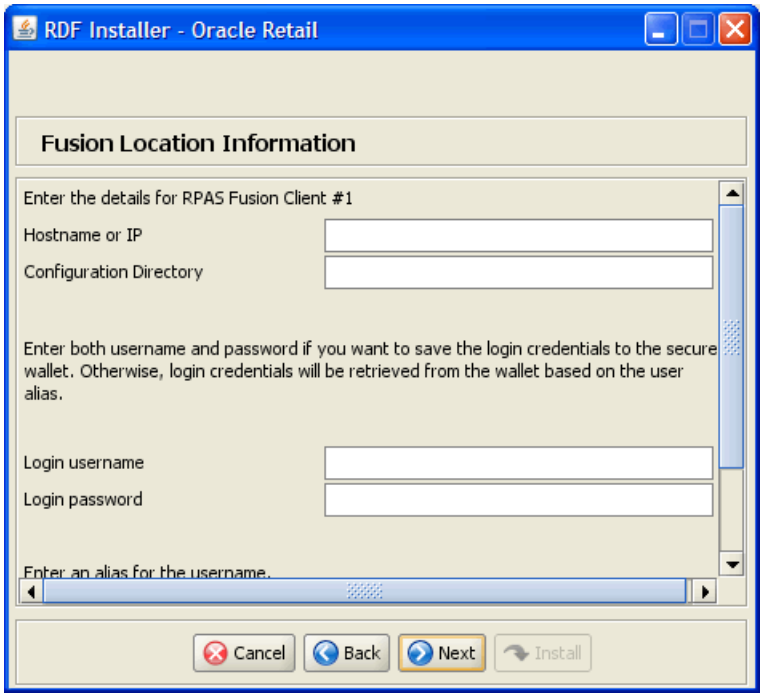


8. Based on the number of servers you entered, the Fusion Location Information Window 2 opens with the following set of fields for each server configuration.

   Enter the relevant information in the following fields and then click **Next** to continue.

Field	Description
Hostname or IP	Enter the host name or IP address of the server where the RPAS Fusion Client is installed
Configuration Directory	Enter the location of the config directory available at the location where the RPAS Fusion Client is installed.
Login username	Enter the user name to log on to the server where the RPAS Fusion Client is installed
Login password	Enter the password associated with the user name.
Login username alias	Specify an alias name for the administrative user. Specifying an alias name for the administrative user enhances the security for the application. When left blank, the alias name defaults to the administrative user name.

Figure 1–7 Fusion Location Information Window 2

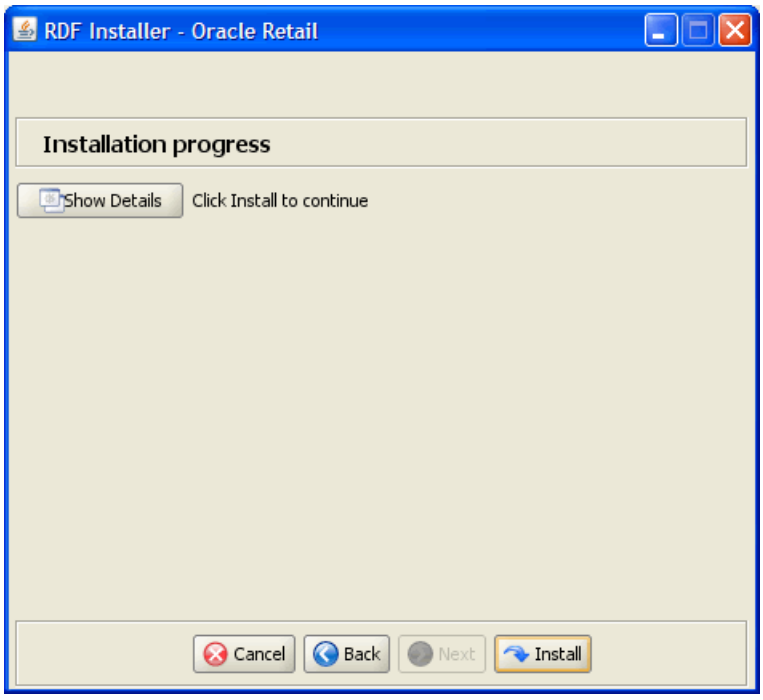


Note: As part of the Oracle Software Security Assurance, sensitive information such as user credentials for the RPAS Fusion Client are encrypted and stored in a secure location in the application installation directory. This location is called the Oracle Wallet.

When the installation starts, the administrative user credentials will be retrieved from the Oracle Wallet based on the alias name specified in this window.

9. The Installation Progress Window opens.

Figure 1–8 Installation Progress Window



To display the progress of the components and tasks being performed by the Installer, select **Show Details**. Click **Install** to start the installation process.

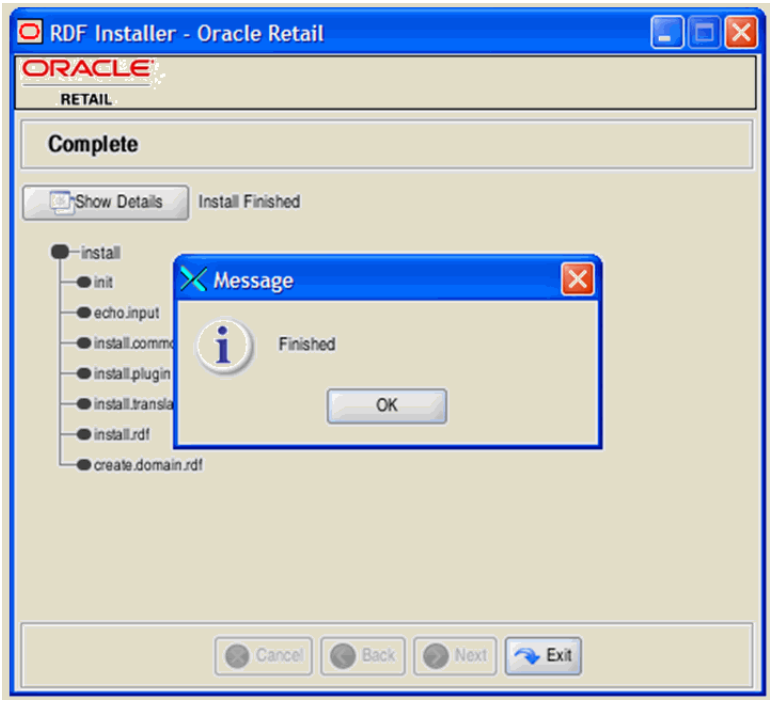
You can view the detailed mode at any time during or after the installation.

Note: If you chose to create the RDF global domain, installation time might take 30 to 60+ minutes depending on server specifications.

---

10. When the installation process is complete, the Complete Window opens with a Message dialog box. Click **OK** to close the dialog box.

Figure 1–9 Complete Window



11. To view the installation details, click **Show Details**. The window displays two tabs, *Output* and *Error*. It is recommended that you review these tabs for any issues that may have occurred during the installation process.

    If you wish to view the log again at a later date, a text copy was saved in the directory [RDF Installation]. The log file is named based on the product and time installer, followed by the `.log` extension.

    The `make_domain.rdf` file, located in the [Configurations Install Dir] entered during the install, is created during the installation process. This file contains all of the required parameters needed to support domain installation. If necessary this file may be modified if the default parameters are not appropriate for your particular environment.

    Note: The domain install process also includes postinstallation data loading scripts specific to the RDF configuration. These scripts may also be modified.

12. Click **Exit** to close the Installer.

Postinstallation Tasks

After you have installed RDF, perform the following postinstallation tasks.

- Start the DomainDaemon.
- If you are on AIX and you have re-installed RDF, you must edit a help file to use the RDF online help in the RPAS Fusion Client. Manually edit the `[fusion client installation dir]/config/ohwconfig.xml` file by removing the following duplicate line:

  ```
  <helpSet xmlns="" id="<shortProductName>"
  location="<shortProductName>/<shortProductName>-help.hs"/>
  ```

  Caution: If this duplicate line is not removed, a "500 Page Not Found" error occurs when attempting to access the online help in the RPAS Fusion Client.

Configuration Files for the RPAS Fusion Client

This section describes the optional installation method that involves setting up the RPAS Fusion Client configuration and online help for the RDF configuration. If you chose to install the Fusion Client configuration files using the RDF installer, you can skip this section.

Note: Before proceeding, ensure that you have appropriate access privileges on the server running the RPAS Fusion Client.

Along with the files to install the RDF solution and domain, the RDF installation media pack also includes the RPAS Fusion Client configuration and online help files that you must install if you want to use RDF on the RPAS Fusion Client.

These files are available at the following location within the [RDF Installation] directory:

```
[RDF Installation]/rdf/fusion
<server-name>{RPASServerName}</server-name>
```

During the RDF installation, these files are automatically copied over to the configuration directory where the RPAS Fusion Client is installed. The installation also ensures that the following RPAS Fusion Client configuration files are updated to reflect the RDF installation:

- `Foundation.xml` - Located in the [RPAS Fusion Client Installation]/ config/rpas directory, this XML file includes the domain configuration available for use with the RPAS Fusion Client.
- `ohwconfig.xml` - Located in the [RPAS Fusion Client Installation]/config/Help directory, this XML file includes the online help configuration for the RPAS Fusion Client.

If you did not install the Fusion Client configuration files during the RDF installation, you can choose to do one of the following tasks:

- Run the RDF installer again, and select to install only the RPAS Fusion Client configuration.
- Run the RPAS Fusion Client installer again, and specify the RDF domain configuration. For more information on the RPAS Fusion Client installation, refer to the *Oracle Retail Predictive Application Server Installation Guide*.
- Configure the RPAS Fusion Client for RDF manually. For more information, refer to the "Configuring Additional Domains" section in the *Oracle Retail Predictive Application Server Administration Guide for the Fusion Client*.

2

Patch Installation

When upgrading RDF, use the upgrade option that corresponds best to your system's requirements. Refer to Upgrade Scenarios for additional information.

> **Note:** Before patching an RDF domain, refer to Appendix B, "Patching RDF Domains."

RDF Upgrade Prerequisites

In order to upgrade RDF, first verify the following criteria for the RPAS system:

- Verify that RPAS is currently installed and is at Release 13.3 or later. If not, refer to the section, Upgrade to Key RPAS Versions.
- Verify that the UNIX operating system is updated to the currently supported version. Refer to the "Hardware and Software Requirements" section of the Oracle Retail Predictive Application Server Installation Guide.
- Verify that the environment variables are correctly set for both the server and PC; if they are not, follow these instructions to set them:
  - Change directories to the original RPAS installation directory (such as the one created by the most recent installer), and run `retaillogin.ksh` to set all environment variables. For example:

```
$ cd /retail
$ ../retaillogin.ksh
```

> **Notes:** Once you have run the script, verify that the environment variables all point to the correct locations on your environment.
>
> If you have updated Java since the last installation of RPAS, verify that the JAVA_HOME path is correct. If not, update your `retaillogin.ksh` script and source it again as previously outlined.

Upgrade Scenarios

Considerations for determining your upgrade options are provided in Table 2–1.

Table 2–1 Upgrade Scenarios

Current Release Version	Upgrade Release Version	Scenario	Recommended Upgrade Process	Comments
13.0.4.18 and earlier	up to 13.2.3	RDF went live using a version prior to 13.0.4.18 and you have already gone through the Hierarchy Conversion Upgrade Process.	Upgrade and Patch RPAS Release 13.0.4.19 or Later to RPAS Release 13.2.3	You only have to apply the Hierarchy Conversion Upgrade Process once. Afterwards you can upgrade using the Upgrade and Patch RPAS Release 13.0.4.19 or Later to RPAS Release 13.2.3.
		RDF went live using a version prior to 13.0.4.18 and you want to make the conversion to the newer format for class and subclass position names.	Hierarchy Conversion Upgrade Process	This *is* recommended for versions prior to 13.0.4.18. All future RDF releases assume this change has been made. This process creates aliases for the existing class and subclass positions using the new format. This is a feature of RPAS, and data can be accessed normally using these new position name aliases. You only have to apply the Hierarchy Conversion Upgrade Process once. After that, upgrade using the Upgrade and Patch RPAS Release 13.0.4.19 or Later to RPAS Release 13.2.3
		RDF went live using a version prior to 13.0.4.18 and you want to retain the older format for class and subclass position names.	Hierarchy Retention Upgrade Process	This is *not* recommended for versions prior to 13.0.4.18, but may be potentially applicable for customers who have a custom integration from RDF to RMS that handles the class and subclass information in a way where adding the underscores would be problematic. This process does not add class and subclass position name aliases. Instead, it attempts to modify RETL schema files and domain configuration information to match what is in the domain. If this path is chosen, the Hierarchy Retention Upgrade Process must be applied as part of every upgrade.
13.0.4.19 to 13.2.3.x	13.0.4.19 to 13.2.3.x	RDF went live using a version of 13.0.4.19 or later.	Upgrade and Patch RPAS Release 13.0.4.19 or Later to RPAS Release 13.2.3	The results of Hierarchy Conversion Upgrade Process are automatically included in your domain. The Hierarchy Retention Upgrade Process does not apply. Use the Upgrade and Patch RPAS Release 13.0.4.19 or Later to RPAS Release 13.2.3 process.
13.2.3.x	13.3.0 or later	RDF went live on any version up to and including 13.2.3.x and you want to upgrade to 13.3.0.	Upgrade and Patch to RPAS Release 13.3 or Later	This is required if you are upgrading to 13.3 or later from any version after 13.2.3. RPAS 13.3 made significant performance enhancements. All domains using RPAS 13.3 or later must apply a conversion process to run on RPAS 13.3 or later to benefit from the enhancements.

Upgrade Process

The following process outlines how to upgrade RDF from 13.0.4.19 to the current version using the RPAS Configuration Tools.

Extraction

The steps in this section only apply if you have a previous version of RDF.

The first step in upgrading to the most recent installation is to download the current upgrade from the My Oracle Support Web site (http://www.oracle.com/support/) to a staging folder (such as $PACKAGEDIR) that is accessible to all components of your current RPAS/RDF environment.

In this section, some steps must be performed on a server as well as on a Windows PC that has RPAS Configuration Tools installed. For brevity, the server is referred to as *server* and the Windows PC with RPAS Configuration Tools is referred to as simply *PC*.

Server Package Extraction

The following example describes a sample upgrade extraction to the server. These sample server commands are provided to guide you through the file extraction process and to identify the files provided in this upgrade.

1. Open a terminal session on the server that contains the RPAS environment.
2. Enter the following commands:

```
$ mkdir packagedir
$ cp RDF.zip packagedir
$ cd packagedir
$ export PACKAGEDIR=`pwd`
$ unzip RDF.zip
```

   The following files and directories may be extracted to the current directory:

   - `Configurations.zip`
   - `PlugIn.zip`
   - `Data.zip`
   - `README.html`
   - DOCS/

3. Unzip the files in the previous step by running the following commands:

```
$  unzip Configurations.zip
$  unzip PlugIn.zip
$  unzip Data.zip
```

   The following directories are extracted to the current directory:

   - configurations/
   - resources/
   - data/

4. Leave the terminal session window open for the RDF upgrade process described in the section, Upgrade and Patch to RPAS Release 13.3 or Later .

PC Package Extraction

The following example describes a sample upgrade extraction to a PC. These sample commands are provided to guide you through the file extraction process and to identify the files provided in this upgrade.

1. Using Cygwin, enter the following commands:

```
$ mkdir packagedir
$ cp RDF.zip packagedir
$ cd packagedir
$ export PACKAGEDIR=`pwd`
$ unzip RDF.zip
```

   The following files and directories may be extracted to the current directory:

   - `Configurations.zip`
   - `PlugIn.zip`
   - `Data.zip`
   - `README.html`
   - DOCS/

2. Unzip the `PlugIn.zip` file by running the following commands:

```
$  unzip PlugIn.zip
```

   The following directory is extracted to the current directory:

   - resources/

3. Leave the Cygwin window open for the RDF upgrade process discussed in the section, Upgrade and Patch to RPAS Release 13.3 or Later.

Upgrade to Key RPAS Versions

Before you upgrade to a Release 13.3 or later, ensure that you have upgraded and patched to RPAS Release 13.2.3. Additionally, you may need to initially upgrade and patch to RPAS Release 13.0.4.19 before you can upgrade and patch to RPAS Release 13.3 or later.

Note: If your domain is 13.0.4.18 or earlier then begin with an upgrade described in Upgrades for Versions Earlier than 13.0.4.18.

Note: If your domain is already upgraded and patched to RPAS Release 13.3, then continue with the typical upgrade described in Upgrade and Patch to RPAS Release 13.3 or Later.

This list defines the upgrade process that is described in the following sections.

1. Upgrade and Patch RPAS Release 13.0.4.19 or Later to RPAS Release 13.2.3
2. Convert for Integer Indexing
3. Upgrade and Patch to RPAS Release 13.3 or Later

Upgrade and Patch RPAS Release 13.0.4.19 or Later to RPAS Release 13.2.3

This section describes how to upgrade RDF from 13.0.4.19 or later to 13.2.3. Refer to Table 2–1 as to which upgrade version to use.

Upgrading your domain to a 13.3 RPAS domain requires that you first upgrade it to a 13.2.3 domain. For additional information instructions, see the "Upgrading and Patching Domains" section in the 13.2.3 release of either the Classic Client or Fusion Client version of the *Oracle Retail Predictive Application Server Administration Guide*.

After upgrading, you must run a configuration patch over the domain to ensure compatibility with the RPAS version, regardless of whether there are any configuration changes.

Convert for Integer Indexing

Upgrading to a 13.3 RPAS domain requires the use of the convertDomain utility, which may not copy the entire contents of the source domain to the destination domain. For files that are not copied by convertDomain, you may need to copy them manually.

For information about what is and is not copied, see the "convertDomain" section in the 13.3 release of either the Classic Client or Fusion Client version of the *Oracle Retail Predictive Application Server Administration Guide*.

Upgrade and Patch to RPAS Release 13.3 or Later

The following process outlines how to upgrade RDF to the RPAS domain Release 13.3 or later using the RPAS Configuration Tools.

In addition, if there is a setup directory in the original domain, you must manually copy the setup directory into the converted destination domain (master and local domains).

The RDF and Curve custom hooks will not work correctly if the setup directory is not manually moved. For additional information, refer to the steps listed in the section, For the Server.

> **Note:** After upgrading, you must run a configuration patch over the domain to ensure compatibility with the latest RPAS version, regardless of whether there are any configuration changes.

For the PC

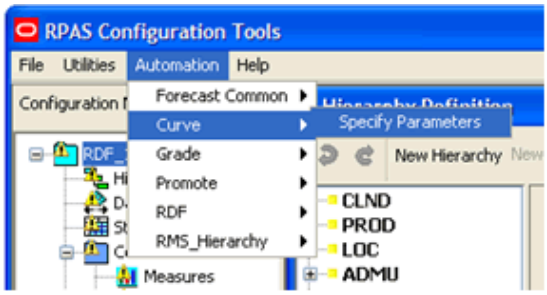
Follow these instructions for the PC to upgrade to the current version.

1. In Cygwin, copy the RDF plug-ins to the RPAS Configuration Tools.

   ```
   $ cp -R $PACKAGEDIR/resources $RIDE_HOME/
   ```

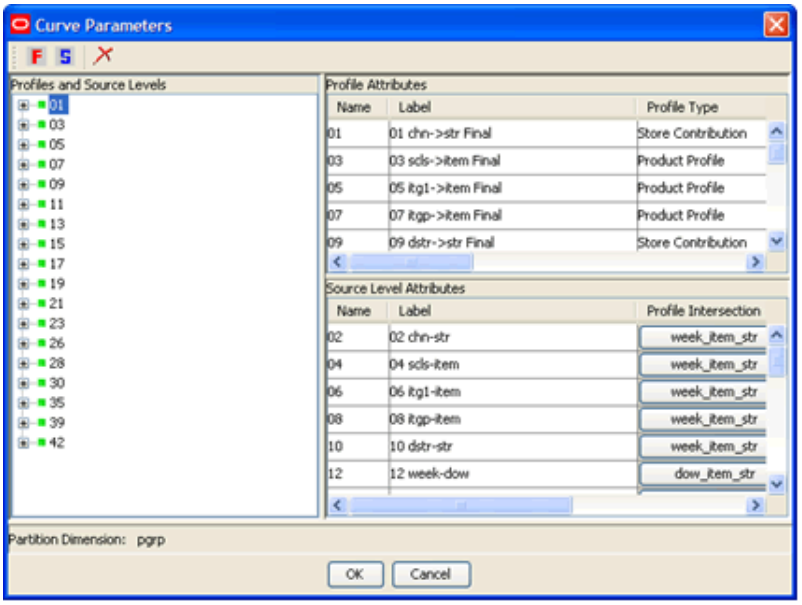
2. Open RPAS Configuration Tools.
3. In RPAS Configuration Tools, load the RDF configuration:
   a. From the Configuration Tools File menu, select **Open**.
   b. From the Open window, locate the configuration file and click **Open**.
4. Automate Curve, RDF and Promote (if applicable) by performing the following:
   a. For Curve: from the Automation menu, select **Curve**, then **Specify Parameters**.

Figure 2–1 Curve Automation in RPAS Configuration Tools



The Forecasting Parameters window opens. Click **OK**.

Figure 2–2 Curve Forecasting Parameters

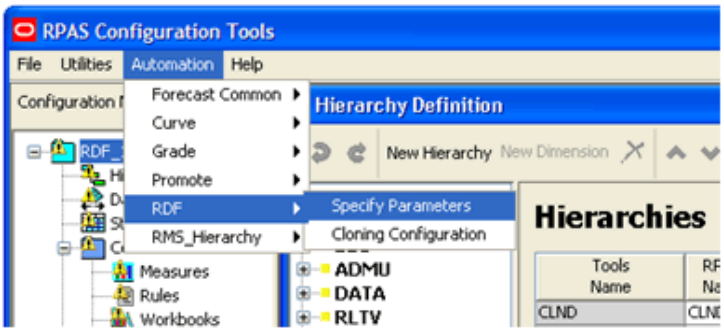


b. For RDF, set:

- Specify Parameters
- Cloning Configuration

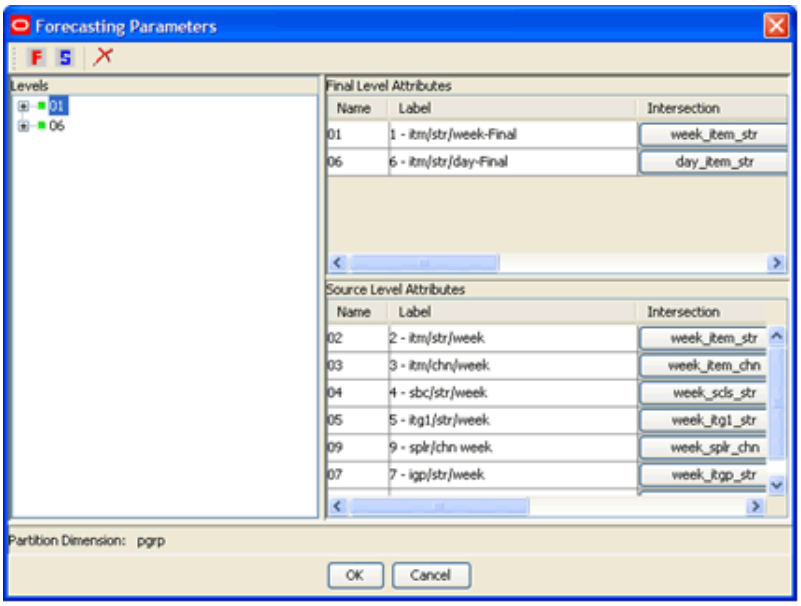
From the Automation menu, select **RDF**, and then **Specify Parameters**.

Figure 2–3 RDF Automation in RPAS Configuration Tools



The Forecasting Parameters window opens. Click **OK**.

Figure 2–4 RDF Forecasting Parameters

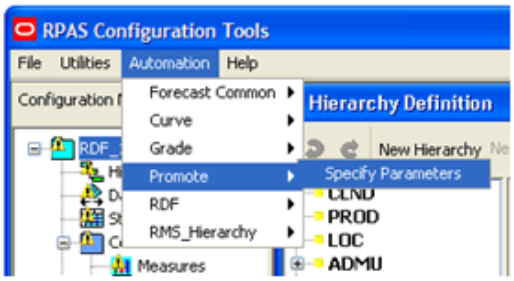


From the Automation menu, select **RDF**, and then **Cloning Configuration**.

The Cloning Configuration window opens. Click **OK**.

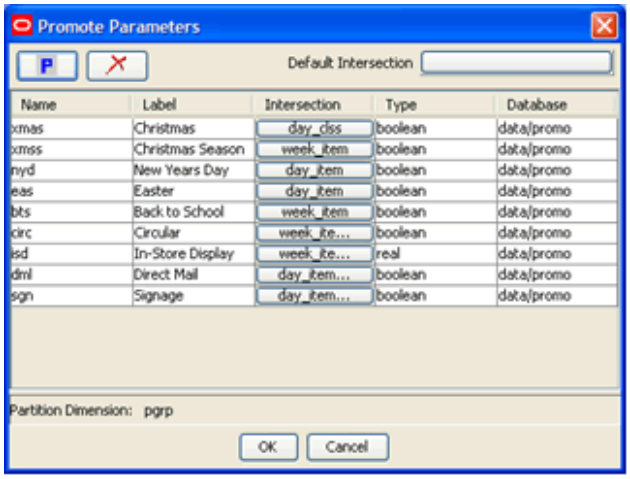
c. For Promote: from the Automation menu, select **Promote**, then **Specify Parameters**.

Figure 2–5 Promote Automation in RPAS Configuration Tools



The Forecasting Parameters window opens. Click **OK**.

Figure 2–6 Promote Forecasting Parameters



5. In the RPAS Configuration Tools File menu, click **Save** to save the configuration.
6. Zip the configuration in Cygwin and transfer the `.zip` file to the RPAS server. Note where it is saved. You will need this configuration for Step 2 of the section, For the Server.

For the Server

Follow these instructions for the server to upgrade to the current version.

> **Note:** For the upgrade, take note of the following steps:
>
> - Step 1 was already completed in the section, For the PC.
> - Step 2 is required when changes have been made to the configuration and are ready to be propagated to the domains.

1. Copy the RDF plug-ins to the RPAS Configuration Tools.

```
$ cp -R $PACKAGEDIR/resources $RIDE_HOME/
```

2. Unzip the updated configuration and note where it is extracted. You saved this configuration in Step 6 of the section, For the PC.
3. To upgrade the prior version of your RDF domain to the current release, you must manually copy the setup directory into the converted destination domain (master and local domains). The RDF and Curve custom hooks will not work correctly if the setup directory is not manually moved.
4. To use the regular price effect functionality when upgrading a previous version of RDF to Release 13.3 or later, perform these steps:
   a. Add a PROR hierarchy into your hierarchy. The PROR hierarchy is a duplicate of PROD hierarchy and they can share the same data file.
   b. Prior to patching the domain, the PROR hierarchy data file needs to be included into the input directory of the domain.

Upgrades for Versions Earlier than 13.0.4.18

When upgrading RDF, use the upgrade option that corresponds best to your system's requirements and which format you want to use for your class and subclass position names. For addional information refer to About Class and Subclass Hierarchy Information.

The old and new position names are considered distinct by RPAS. There are a special considerations for customers wishing to upgrade from a pre-13.0.4.18 version of RDF to a later version. These considerations along with the recommended upgrade process are summarized in Table 2–1, " Upgrade Scenarios".

In RDF 13.0.4.19, positions in the location hierarchy were renamed to ensure unique position names based on the RMS data. Due to these product hierarchy changes, customers upgrading from RDF 13.0.4.18 or prior versions who use the standard integration between RMS and RDF should use the product hierarchy conversion process before integrating with RMS as described in the Hierarchy Conversion Upgrade Process.

Customers upgrading from RDF 13.0.4.18 or prior versions who want to retain their existing displayed class and subclass information should follow the Hierarchy Retention Upgrade Process.

About Class and Subclass Hierarchy Information

In release 13.0.4.18, Oracle modified the way that class and subclass hierarchy information received from RMS through the RETL process is treated. The change was to insert an underscore (_) character between the RMS department, class, and subclass values. This was done as a precautionary measure to prevent potential data mapping issues.

With integration between RMS and RDF, it is crucial to keep data at class or subclass levels distinct. This upgrade process makes explicit the mapping of items at the class and subclass level between RMS and RDF.

As an example, assume that in RMS the department has a value of 11, the class has a value of 22, and the subclass has a value of 33. The following table shows the old and new values that the RETL process uses for the department, class, and subclass position names in RDF.

Field	RMS	RDF Pre 13.0.4.18	RDF Post 13.0.4.18
Department	11	11	11
Class	22	1122	11_22
Subclass	33	112233	11_22_33

Hierarchy Conversion Upgrade Process

Refer to Table 2–1, " Upgrade Scenarios" as to which upgrade version to use.

Typically, you will use this process when:

- Upgrading from RDF versions prior to 13.0.4.18 up to 13.2.3
- Using standard integration between RMS and RDF
- Storing data at class or subclass levels

Note: Users upgrading from a version prior to 13.0.4.18 must apply this process. In the future, if you are already on 13.0.4.18 or later, this process need not be followed again.

Hierarchy Conversion Upgrade Steps

Follow these steps to complete the Hierarchy Conversion Upgrade Process.

1. Point environment variable RPAS_HOME to the new RPAS_HOME.
2. Run the script `$RPAS_HOME/rfx/src/rmse_rpas_merchhier.ksh` to generate the `rmse_rpas_merchhier.dat file`. This file generates the new class and subclass position names.
3. Run `repos.ksh` with the `-a n` flag to produce the position rename file and run renamePositions without actually applying the changes.
4. Examine the log file `PRODrename.log` for errors.
5. When you are ready, run the `repos.ksh` script without the `-a y` flag to apply the changes.

Hierarchy Retention Upgrade Process

Refer to Table 2–1, " Upgrade Scenarios" as to which upgrade version to use.

Typically, you will use this process when:

- Upgrading to 13.0.4.18 or later (from any version) up to 13.2.3
- You want to retain your existing displayed class and subclass information

Hierarchy Retention Upgrade Components

Table 2–2 lists the environment variables needed for the Hierarchy Retention Upgrade Process.

Table 2–2 Environment Variables

Environment Variables	Description
UPGRADE_HOME	This variable should point to the path of Upgrade scripts where configuration files are present: ▪ `updateschemafiles.ksh` ▪ `updatetoolsconfiguration.ksh`
RDF_DOMAIN_PATH	The Path of RDF Domain which you are going to patch. The dimension field length of this RDF Domain is taken and applied to the Configuration and Schema files.
RDF_SCHEMA_DIR	The RETL RDF Schema files directory. It must be the latest release directory, which you are using for patching. It points to the Schema files location in the release, which you are using for patching the RDF domain.
TOOLS_CONFIG_DIR	The Configuration Tools XML files directory. It points to the directory where the `hierarchy.xml` file is present. It must be the latest release directory which you are using for patching.
UPGRADE_BACKUP_DIR	A backup of Schema and `hierarchy.xml` files is kept in this directory.

Table 2–3 lists the scripts needed for the Hierarchy Retention Upgrade Process.

Table 2–3 Upgrade Scripts

Script	Description
`updateschemafiles.ksh`	Updates the dimension field length of schema files to the length as available in the domain.
`updatetoolsconfiguration.ksh`	Updates the dimension field length of configuration files to the length as available in the domain.

Hierarchy Retention Upgrade Steps

Follow these steps to complete the Hierarchy Retention Upgrade Process.

1. Export the environment variables listed in Table 2–2, " Environment Variables".
2. Change the directory to UpgradeScripts directory:

   ```
   $ cd UpgradeScripts
   ```

3. Run the `updatetoolsconfiguration.ksh` script to update the `hierarchy.xml` file.

   ```
   $ ./updatetoolsconfiguration.ksh
   ```

4. Run the `updateschemafiles.ksh` script to update the RETL RDF Schema files

   ```
   $ ./updateschemafiles.ksh
   ```

A

Manually Installing RDF

This section provides the manual processes for building the RDF mock installation or other RDF configurations. The following components must be installed before manually installing RDF:

- RPAS Client
- RPAS Server - Also referred to as $RPAS_HOME
- RPAS Configuration Tools - Also referred to as $RIDE_HOME
- Java - Also referred to as $JAVA_HOME

> **Note:** See the *Oracle Retail Predictive Application Server Installation Guide* for instructions on the previously listed components.

Manually Installing RDF

Complete the following steps to manually install RDF.

> **Note:** The RDF plug-in now supports changing forecast level intersections in patching. This enhances the currently existing ability to change forecast data sources. However, the RDF plug-in does not support addition or removal of forecast or promotion levels.

1. Extract the RDF patch.
   a. Create a directory to store the RDF Media Pack on the target server. This directory will be referred to as [RDF Installation]. It is the location where the RDF installation routine is run.
   b. Download the package from My Oracle Support (https://support.oracle.com). Using FTP in binary mode, transfer the RDF Media Pack to the [RDF Installation] directory on the target server.
   c. Extract the package to the [RDF Installation] directory:

      ```
      cd [RDF Installation]

      unzip [RDF Package]
      ```

   d. Extract the RDF Installer:

      ```
      cd CDROM

      unzip RDF.zip
      ```

2. Copy the RDF plug-in to the Configuration Tools directory. The RDF Plug-in enables the RDF solution to be configured using the RPAS Configuration Tools. It also supports the domain installation process.
   a. Locate the plug-in directory by changing to the root of the [RDF Installation] directory.
   b. Navigate to [RDF Installation]/CDROM/rdf/rdf/plugin/ directory and copy the resources directory to the Configuration Tools installation ($RIDE_HOME).
3. Run rpasInstall to build RDF.

   The following command may be used to install the RDF configuration using the -p option to specify the partition dimension (pgrp) configured in this global domain environment:

   ```
   rpasInstall -fullinstall -dh <path to the domain> -cn RDF -ch
   <path to the configuration> -in <path to the data files> -log
   <path to the location and name of the installation log> -rf
   AppFunctions -rf RdfFunctions -rf LostSaleFunctions -rf
   ClusterEngine -p pgrp
   ```

   Note: The RDF installation requires the AppFunctions and RdfFunction functions. This configuration also includes the Grade solution, which requires both AppFunctions and ClusterEngine.

   For information on rpasInstall, refer to either the Classic Client or Fusion Client version of the *Oracle Retail Predictive Application Server Administration Guide*.

   Whether or not you are taking the latest configuration, a configuration patch must be run over the domain to ensure compatibility with the latest RPAS version. Refer to either the Classic Client or Fusion Client version of the *Oracle Retail Predictive Application Server Administration Guide*.

Example A–1 Install the RDF Configuration

```
rpasInstall -fullinstall -dh C:\RDF\Domains -cn RDF -ch C:\RDF\configurations -in
C:\RDF\input -log C:\RDF\configurations\install.txt -rf AppFunctions -rf
RdfFunctions -rf LostSaleFunctions -rf ClusterEngine -p pgrp
```

4. Load the sales measures.
   a. After the domain installation has completed, the sales data must be loaded into the domain using the `loadmeasure` utility.
   b. Open a command prompt from the master domain (/RDF) and type the following commands:

      loadmeasure -d . -measure dpos

      loadmeasure -d . -measure rsal

      loadmeasure -d . -measure csal

      loadmeasure -d . -measure psal
5. Use mace to calculate the Weekly Sales measures.

a. Open a command prompt from the local domain (/RDF/ldom0) and type the following command:

mace -d . -run -group common_batch

b. Repeat this step for each of the remaining local domains (`/RDF/ldom1` and `/RDF/ldom2`).

B

Patching RDF Domains

Before patching an RDF domain, confirm that the necessary RPAS client, server and Configuration Tools patch updates have been successfully applied. Refer to the *Oracle Retail Predictive Application Server Installation Guide* for RPAS installation instructions.

Patching an RDF Domain

> **Note:** When patching an RDF domain, you need the same -rf arguments of rpasInstall as a full install of the domain
>
> (For example, `-rf AppFunctions -rf RdfFunctions -rf LostSaleFunctions -rf ClusterEngine`)

Complete the following steps to patch your RDF domain.

> **Note:** The RDF plug-in now supports changing forecast level intersections in patching. This enhances the currently existing ability to change forecast data sources. However, the RDF plug-in does not support addition or removal of forecast or promotion levels.

1. Extract the RDF patch.
   a. Create a directory to store the RDF Media Pack on the target server. This directory will be referred to as [RDF Installation]. It is the location where the RDF installation routine is run.
   b. Download the package from My Oracle Support (https://support.oracle.com). Using FTP in binary mode, transfer the RDF Media Pack to the [RDF Installation] directory on the target server.
   c. Extract the package to the [RDF Installation] directory.

      ```
      cd [RDF Installation]

      unzip [RDF Package]
      ```

   d. Extract the RDF Installer.

      ```
      cd CDROM

      unzip RDF.zip
      ```

2. Copy the RDF plug-in to the Configuration Tools.

   The RDF plug-in enables the RDF solution to be configured using the RPAS Configuration Tools. It also supports the domain installation process.

   a. Locate the plug-in directory by changing to the root of the `[RDF Patch Install]` directory.

   b. Navigate to `[RDF Patch Install]/CDROM/rdf/rdf/plugin/` and copy the resources directory to the Configuration Tools installation ($RIDE_HOME).

3. Using the Configuration Tools on a Windows machine, auto-generate the RDF, Curve, Promote, or Grade solutions that are implemented.

   It is necessary to open the configuration in the patched version of the RPAS Configuration Tools and autogenerate each of the existing solution extension configurations on a Windows machine. This auto-generation step is also required if you are making a change to your existing configuration of a RDF, Curve, Promote, or Grade solution.

4. Copy the configuration files to the domain server.

   - Copy the updated configuration files from the Windows machine to the domain server. The location on the domain server should have the same structure as the Windows machine used to autogenerate the solution extensions.
   - If you are using WinZip to archive the configuration files, you must use unzip -a to unzip the archive on the UNIX server.

5. If you do not specify domain paths during the RPAS patching process, then run the RPAS `upgradeDomain` utility.

   For information on the `upgradeDomain` utility, refer to either the Classic Client or Fusion Client version of the *Oracle Retail Predictive Application Server Administration Guide*.

6. Run `rpasInstall` to patch the RDF domain.

   The following command may be used to patch the RDF configuration using the `-p` option to specify the partition dimension (`pgrp`) configured in this global domain environment:

   ```
   rpasInstall -patchinstall -dh <path to the domain> -cn RDF
   -ch <path to the configuration> -in <path to the data files>
   -log <path to the location and name of the installation log>
   -rf AppFunctions -rf RdfFunctions -rf LostSaleFunctions -rf
   ClusterEngine -p pgrp
   ```

   Note: The RDF installation requires the `AppFunctions` and `RdfFunction` functions. This configuration also includes the Grade solution, which requires the `AppFunctions` and `ClusterEngine` functions.

   For information on `rpasInstall`, refer to either the Classic Client or Fusion Client version of the *Oracle Retail Predictive Application Server Administration Guide*.

Example B–1

```
rpasInstall -patchinstall -dh C:\RDF\Domains -cn RDF -ch C:\RDF\configurations -in
C:\RDF\input -log C:\RDF\configurations\install.txt -rf AppFunctions -rf
RdfFunctions -rf LostSaleFunctions -rf ClusterEngine -p pgrp
```

C

Creating a Global Domain Configuration Directory (Optional)

Using globaldomainconfig.xml to Partition and Label Domains

If you are installing a Global Domain environment, an xml file may be created to determine how the domains will be partitioned and the label of each domain. If you take this approach, the `-configdir` option should be used when running `rpasInstall`. The following example is the structure of the `globaldomainconfig.xml` file:

- **Path**

  The location of the root of the domain. For the RDF configuration, RDF is the root to the Master domain.

- **Partitiondim**

  The partition dimension.

For RDF pgrp (Group) is the dimension in which the local domains will be partitioned. There can only be one partition dimension.

- **Subpath**:

  The path and name of the local (sub-domain) that contains a specific partition position.

- **ldom+#**

  The default name given by RPAS to local domains. For the RDF configuration, postinstall scripts are pre-configured to install and load data to the domains named **ldom0ldom1**, and **ldom2**.

- **Subposition**

  The position from the partition dimension that will be located in the local domain.

The RDF configuration will create three local domains. For example, **ldom0** will include all product positions at or below pgrp 1100 as shown in Example C–1.

Example C–1

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<rpas>
    <globaldomain>
        <path>/Domains/RDF</path>
        <partitiondim>pgrp</partitiondim>
        <subdomain>
            <subpath>/Domains/RDF/ldom0</subpath>
            <subpositions>1100</subpositions>
        </subdomain>
        <subdomain>
            <subpath>/Domains/RDF/ldom1</subpath>
            <subpositions>1300</subpositions>
        </subdomain>
        <subdomain>
            <subpath>/Domains/RDF/ldom2</subpath>
            <subpositions>2500</subpositions>
        </subdomain>
    </globaldomain>
</rpas>
```

Note: If you use the previous example XML file structure to install the RDF configuration, only the Path and Subpath to the domains may be changed; but the local domains (**ldom0, ldom1, ldom2**), partition dimension (**pgrp**), and subpositions (**1100, 1300 and 2500**) must be the same as previously listed.

D

Run rpasInstall to Install RDF Domains

The `rpasInstall` utility is used to install domains that support RDF. For more information on using rpasInstall, refer to either the Classic Client or Fusion Client version of the *Oracle Retail Predictive Application Server Administration Guide.*

During installation, RDF requires the following functions to be registered:

- AppFunctions
- RdfFunctions

Examples

Example D–1 Installing a Simple domain environment by using a simple domain configuration

```
rpasInstall -fullinstall -dh /Domain_Home -cn Simple -ch /configurations -in /Data
-log /Log/InstallLog.txt -verbose -rf AppFunctions -rf RdfFunctions
```

Example D–2 Installing a Global Domain environment by using a global domain configuration and the -p option to specify the partition dimension

```
rpasInstall -fullinstall -dh /Domain_Home -cn Global -ch /configurations -in /Data
-log /Log/InstallLog.txt -verbose -rf AppFunctions -rf RdfFunctions -p pgrp
```

Example D–3 Installing a Global Domain environment by using a global domain configuration and the -configdir option to specify the path to the globaldomainconfig.xml

```
rpasInstall -fullinstall -cn Global -ch /Configurations -in /Data -log
/Log/InstallLog.txt -verbose -rf AppFunctions -rf RdfFunctions -configdir
/ConfigDir
```

Note: AppFunctions and RdfFunction are required functions needed for the installation of RDF. RDF configurations that include the Grade solution require ClusterEngine to be registered as well.

For information on using `rpasInstall`, refer to either the Classic Client or Fusion Client version of the *Oracle Retail Predictive Application Server Administration Guide*.

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Appendix: Installation Order

This section provides a guideline for the order in which the Oracle Retail applications should be installed. If a retailer has chosen to use only some of the applications, the order is still valid, less the applications not being installed.

> **Note:** The installation order is not meant to imply integration between products.

Enterprise Installation Order

1. Oracle Retail Merchandising System (RMS), Oracle Retail Trade Management (RTM), Oracle Retail Sales Audit (ReSA), Optional: Oracle Retail Fiscal Management (ORFM)

   > **Note:** ORFM is an optional application for RMS if you are implementing Brazil localization.

2. Oracle Retail Service Layer (RSL)
3. Oracle Retail Extract, Transform, Load (RETL)
4. Oracle Retail Active Retail Intelligence (ARI)
5. Oracle Retail Warehouse Management System (RWMS)
6. Oracle Retail Allocation
7. Oracle Retail Invoice Matching (ReIM)
8. Oracle Retail Price Management (RPM)

   > **Note:** During installation of RPM, you are asked for the RIBforRPM provider URL. Since RIB is installed after RPM, make a note of the URL you enter. If you need to change the RIBforRPM provider URL after you install RIB, you can do so by editing the `remote_service_locator_info_ribserver.xml` file.

9. Oracle Retail Central Office (ORCO)
10. Oracle Retail Returns Management (ORRM)
11. Oracle Retail Back Office (ORBO) or Back Office with Labels and Tags (ORLAT)
12. Oracle Retail Store Inventory Management (SIM)

Note: During installation of SIM, you are asked for the RIB provider URL. Since RIB is installed after SIM, make a note of the URL you enter. If you need to change the RIB provider URL after you install RIB, you can do so by editing the `remote_service_locator_info_ribserver.xml` file.

13. Oracle Retail Predictive Application Server (RPAS)
14. Oracle Retail Demand Forecasting (RDF)
15. Oracle Retail Category Management (CM)
16. Oracle Retail Replenishment Optimization (RO)
17. Oracle Retail Analytic Parameter Calculator Replenishment Optimization (APC-RO)
18. Oracle Retail Regular Price Optimization (RPO)
19. Oracle Retail Merchandise Financial Planning (MFP)
20. Oracle Retail Size Profile Optimization (SPO)
21. Oracle Retail Assortment Planning (AP)
22. Oracle Retail Item Planning (IP)
23. Oracle Retail Item Planning Configured for COE (IP COE)
24. Oracle Retail Advanced Inventory Planning (AIP)
25. Oracle Retail Integration Bus (RIB)
26. Oracle Retail Point-of-Service (ORPOS)
27. Oracle Retail Markdown Optimization (MDO)
28. Oracle Retail Clearance Optimization Engine (COE)
29. Oracle Retail Analytic Parameter Calculator for Markdown Optimization (APC-MDO)
30. Oracle Retail Analytic Parameter Calculator for Regular Price Optimization (APC-RPO)
31. Oracle Retail Promotion Intelligence and Promotion Planning and Optimization (PI-PPO)
32. Oracle Retail Analytics
33. Oracle Retail Workspace (ORW)