

Oracle® Retail Price Optimization

Installation Guide

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Preface

This guide enables you to install the server-side components required for using the Price Optimization application.

Audience

This guide is intended for system administrators and assumes that you are familiar with the following:

- Installing and configuring application server software
- Installing and configuring relational database management systems
- Installing and configuring distributed client/server applications on a UNIX-based local area network

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Related Documents

For more information about using Price Optimization, see the following documents:

- *Price Optimization Configuration Guide*
- *Price Optimization Operations Guide*
- *Price Optimization Administration Guide*
- *Price Optimization User Guide*
- *Merchant Desktop User Guide* (optional)

Conventions

The following text conventions are used in this document:

Convention	Description
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	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.

This chapter contains the following sections:

- [Overview of Price Optimization](#)
- [Overview of the Price Optimization Architecture](#)
- [Roadmap for Implementing Price Optimization](#)

Overview of Price Optimization

Price Optimization is a web-based application that enables retailers to attain maximum gross profit margins and clear inventory at specified outdates.

What Are the Price Optimization Components?

Price Optimization contains the following components:

- Price Optimization - includes application logic and a web interface to user management, the business rules manager, and to the Price Optimization console. Price Optimization requires only one instance, which resides on the application server machine.
- Calculation Engine - runs in the background, controlling the flow of a run process, responding to optimization requests, and generating forecasts and pricing recommendations that are displayed later on the user interface.

The Calculation Engine may reside on any networked machine--whether it is the application server machine or its own computational machine used specifically for heavy data processing.

Price Optimization requires only one instance of the Calculation Engine. However, you can install multiple Engines to boost performance. The Engine is scalable across your network: you can install all Engines on a single machine or distribute them across machines as needed.

- Merchant Desktop (Optional) - produces a customized view of your business data by means of its Retail Data Mart database. By default, Merchant Desktop uses the MicroStrategy business intelligence tool, which is also optional.

How Does Price Optimization Turn My Data Into Business Information?

Once a week (or any other defined time interval), a system administrator uploads a set of your business data, which include your relevant business data (for example, your business policies, specified effective dates, ticket prices, full prices, and so forth) and relevant historical data (for example, new sales, inventory, price levels, planned promotions, and other relevant data). This data load process is called the standard load. The only data that is gathered is what you have specified in your business rules.

The Calculation Engine analyzes this data and generates forecasts that calculate all possible price trajectories for applicable items. Price Optimization saves the best forecast trajectory as a recommendation, which you can view from the Price Optimization user interface. You can either accept these recommendations or modify them if you prefer an alternative markdown strategy.

At the end of the week, or any other more granular time interval, (such as daily) you generate a sendback file, which contains any changes that have been made using the Price Optimization user interface. This keeps your data up to date.

For detailed information about configuring and implementing your specific business rules, data configuration, and Price Optimization user interface, see the *Price Optimization Configuration Guide*.

How Does Price Optimization Help Me Reach My Business Goals?

During the week, retailers use the Price Optimization web interface to conduct day-to-day markdown planning to achieve two goals:

- Attain maximum gross margins - by applying the pricing recommendations calculated for in-season merchandise
- Clear inventory - to specified levels at specified outdates

For example, the Price Optimization What If feature enables you to create and test possible scenarios in order to forecast demand and select alternative prices. For information on using What If and other aspects of the Price Optimization user interface, refer to the *Price Optimization User Guide*. You can also access online help by clicking Help from the Price Optimization user interface.

Price Optimization enables you to customize the way the user interface displays information, sorts and filters data, and generates reports. For information on customizing the Price Optimization user interface, see the *Price Optimization Configuration Guide*.

Overview of the Price Optimization Architecture

[Price Optimization Enterprise Components](#) describes the optional and required software. For information about specific versions required, see [Chapter 2, Planning Your Environment](#).

Price Optimization Enterprise Components

Price Optimization is a distributed application, using an application server as the platform for the services, a database, and several other software components.

Client System Tier

- Microsoft Windows, Office, and Internet Explorer.
- ActiveX control (installs automatically when Price Optimization is run).
- JRE for Merchant Desktop (optional).

Application Server Tier

- Application server software.
- Price Optimization - resides on your application server machine. You can install and run multiple instances on multiple application server machines.

- Calculation Engine - installs on the application server machine by default. To improve performance, you can run install and run multiple Engines and move them to any other production server within your environment as needed.
- Optional. Merchant Desktop application.

Database Server Tier

- Relational database management system.
- Price Optimization Database - contains historical sales and other business information that originates from systems external to Price Optimization.
- The database also contains the Retail Data Mart (RDM), a set of data generated and used internally by Price Optimization.

Optional Components

- Optional. Merchant Desktop (an optional component) requires a Windows server for MicroStrategy.
- Optional. Additional computational servers for implementing the Calculation Engine in a large-scale environment.
- Optional. Additional application server machines for implementing Price Optimization for a large number of users.

Roadmap for Implementing Price Optimization

This guide explains how to install and set up the required and optional software and the Price Optimization applications.

The instructions in this guide assume knowledge of application servers, databases, and application installation, and are intended for system administrators and experienced IT personnel. Before carrying out any of these activities, ensure that you understand UNIX commands (including shell configuration and scripting), directory operations, and symlinks.

In order to implement Price Optimization for production, you perform these tasks in the following sequence:

1. Plan your environment as described in [Chapter 2, "Planning Your Environment."](#)
2. Install your database as described in [Chapter 3, "Installing Your Database."](#)
3. Install your application server as described in [Chapter 4, "Installing Your Application Server."](#)
4. Install Price Optimization as described in [Chapter 5, "Installing Price Optimization."](#)
5. Configure your business rules as described in the *Price Optimization Configuration Guide*.
6. Load data and evaluate the results, as described in the *Price Optimization Configuration Guide*.
7. Optional. Modify the Price Optimization user interface to accommodate your business needs, as described in the *Price Optimization Configuration Guide*. Concurrent with this activity, complete the remaining steps in this roadmap. You can continue refining the user interface iteratively, as needed.
8. Optional. If you are using Merchant Desktop and MicroStrategy, see [Chapter 6, "Integrating with MicroStrategy."](#)

9. Set up user login accounts and introduce end users to the application.
10. Maintain the application as described in the *Price Optimization Operations Guide*.

What's Next?

Next, you need to plan your hardware and software environment as described in [Planning Your Environment](#).

Planning Your Environment

This chapter helps you plan your implementation. This chapter contains the following sections:

- [Overview of the Planning Process](#)
- [Supported Configurations](#)
- [What's Next?](#)

Overview of the Planning Process

This section contains the following topics:

- [Planning Your Environment](#)
- [Planning for Optimal Price Optimization Performance](#)

Planning Your Environment

Complete the following steps to plan and prepare the product environment.

1. Plan the infrastructure. Design the hardware and software infrastructure, including system requirements, consider the following:
 - Hardware and associated software requirements
 - Prerequisite software (and licensing)
 - Load balancing and clusters
 - Capacity data gathered
 - Data security
 - Backup and recovery strategies
2. Determine the size of the implementation.
3. Identify source systems. Identify the systems that will trade data with Price Optimization.

Planning for Optimal Price Optimization Performance

Complete the following steps to plan and prepare the product environment.

1. Determine the Price Optimization metrics relevant to your business needs.
2. Determine your relevant business policies. The business policy is a statement of what rules govern the application processes. You need to develop a business

policy based on your business rules. For more information about business rules, see the *Price Optimization Configuration Guide*.

3. Plan periodic batch loading of business and historical databases. Plan business and historical databases, including the data feeds needed from the external systems for nightly, weekly, and periodic batch updates and recycling.

Supported Configurations

This section describes the Price Optimization network architecture and outlines the supported options as follows:

- [Network Requirements](#)
- [Database Requirements](#)
- [Application Server Requirements](#)
- [Merchant Desktop Requirements](#)
- [Client System Requirements](#)

Network Requirements

This section describes basic requirements for your network infrastructure:

- For connections between servers use the following:
 - Minimum: 100 MBps switched ethernet
 - Recommended: 1000 MBps
- For connections to the desktop, 100 MB is sufficient.

Clusters and Multi-Server Requirements

Price Optimization supports any combination of the following cluster configurations:

- Application Cluster - two or more server nodes that enable instances of Price Optimization and its related applications to remain highly available
- Calculation Engine Cluster - two server nodes that enable instances of the Calculation Engine to remain highly available

For clustered and multi-server implementations, a hardware load balancer may be required. Cisco CSS series is supported.

Database Requirements

Price Optimization supports the use of the Oracle database as described in the following table.

Table 2-1 Oracle Database Requirements

Software	Requirement
Operating System	Solaris 9 and 10
Database	Oracle 10g R2 (10.2.0.2)
Utilities	file transfer protocol utility (ftp or ssh/scp/rsync) sudo utility

Application Server Requirements

Price Optimization supports the use of the following application servers:

- Oracle Application Server
- WebLogic Application Server

Oracle Application Server

If you are running Oracle Application Server, see the following table.

Table 2–2 Oracle Application Server Requirements

Software	Solaris
Operating System	Solaris 8
Application Server	Oracle Application Server 10g 10.1.3 with patches 4645524 and 4968168.
JVM	Sun JDK 1.4.2_08 (32 bit) or above

WebLogic Application Server

Price Optimization supports the use of WebLogic on the following platforms:

- Solaris
- Linux

WebLogic Configuration on Solaris If you are running WebLogic on Solaris, see the following table.

Table 2–3 Solaris Requirements for WebLogic

Software	Solaris
Operating System	Solaris 8
Application Server	WebLogic 8.1 SP 5
JVM	Sun JDK 1.4.2_08 (32 bit) or above

WebLogic Configuration on Linux If you are running WebLogic on Linux, see the following table.

Table 2–4 Linux Requirements for WebLogic

Software	Requirement
Operating System	Red Hat Enterprise Linux 3.0
Application Server	WebLogic 8.1 SP 5
JVM	WebLogic Jrockit 1.4.2_08

Merchant Desktop Requirements

Merchant Desktop is optional. If you are using Merchant Desktop, see the following table for the supported configuration.

Optionally, if you are using Merchant Desktop with MicroStrategy, Merchant Desktop requires MicroStrategy to be installed on your application server node.

Table 2–5 Merchant Desktop Server Requirements

Software	Requirements
Operating System	Windows Server 2003
Business Intelligence Tool	MicroStrategy 7.5.3
Java	Sun JDK 1.4.2_05 (32 bit)

Client System Requirements

For the supported client system options, see the table below.

Table 2–6 Client System Environment

Software	Requirements
Windows XP Pro SP2 (with Office 2003)	<ul style="list-style-type: none"> ■ MS Office 2003 ■ Internet Explorer 5.5 SP2 ■ Sun JRE 1.4.1_05 (32-bit) for Merchant Desktop
Windows XP Pro SP2 (with Office 2002)	<ul style="list-style-type: none"> ■ MS Office XP (Office 2002) ■ Internet Explorer 6.0 ■ Sun JRE 1.4.1_05 (32-bit) for Merchant Desktop
Windows XP Pro SP2 (with Office 2000)	<ul style="list-style-type: none"> ■ MS Office 2000 ■ Internet Explorer 6.0 ■ Sun JRE 1.4.1_05 (32-bit) for Merchant Desktop
Windows NT 4.0 SP6	<ul style="list-style-type: none"> ■ MS Office 97 SR-2 ■ Internet Explorer 5.5 SP2 ■ Sun JRE 1.4.1_05 (32-bit) for Merchant Desktop

What's Next?

Now you can install your database software as described in [Chapter 3, "Installing Your Database."](#)

Installing Your Database

This chapter describes how to install and configure your database management system for Price Optimization. This chapter contains the following sections:

- [Before You Begin](#)
- [Creating the Price Optimization Database](#)

Before You Begin

Read this section before setting up your Price Optimization database.

Note: If your database requires multi-byte support, specify the following properties in your init.ora file:

```
CHARACTER_SET=AL32UTF8  
NLS_LENGTH_SEMANTICS=CHAR
```

Overview of the Price Optimization Database Installation

Price Optimization requires the following database instances:

- Business database
- History database
- RDM database
- Optimized data database

Installing the Prerequisite Software

Install your database before you install your application server and Price Optimization. For database prerequisites and other requirements, see [Chapter 2, "Planning Your Environment"](#). Then install your database as follows.

Install the following software, using the documentation specific to your database for guidance:

- Oracle application software
- Oracle J Accelerator
- Install the JVM into Oracle

Creating the Price Optimization Database

Note: The size of tablespaces depends on the amount of data being stored. For any sizing recommendations, see [Table 3–1, Price Optimization Tablespaces](#).

Creating the Price Optimization database involves the following steps:

1. [Creating the Initialization Parameter File](#)
2. [Creating the Price Optimization Database](#)
3. [Creating the System Data Dictionary](#)
4. [Specifying Users and Permissions](#)
5. [Creating the Schema](#)

Creating the Initialization Parameter File

Create an init.ora file in the <ORACLE_HOME>/dbs directory, specifying the following parameters:

```
db_block_size = 8192
shared_pool_size = 500M
db_cache_size = 1500M
large_pool_size = 20M
log_buffer = 524288
pga_aggregate_target = 500M
workarea_size_policy = AUTO
undo_management = AUTO
global_names = FALSE
optimizer_mode = CHOOSE
cursor_sharing = SIMILAR
query_rewrite_enabled = TRUE
query_rewrite_integrity = TRUSTED
compatible = 9.2.0
optimizer_features_enable = 9.2.0
parallel_automatic_tuning = TRUE
db_file_multiblock_read_count = 64
log_checkpoints_to_alert = TRUE
session_cached_cursors = 100
timed_statistics = TRUE
log_checkpoint_interval = 100000000
log_checkpoint_timeout = 0
```

Creating the Price Optimization Database

The Price Optimization database requires the following system tablespaces.

Table 3–1 Price Optimization Tablespaces

Tablespace	Description
DATA_01	Required. Default tablespace for Price Optimization table. Recommended: 5 GB.
INDEX_01	Required. Tablespace for indexes of Price Optimization, STG, and ASH. Recommended: 5 GB.

Table 3–1 Price Optimization Tablespaces

Tablespace	Description
ITEM_DATA_PIN	Required. Tablespace for ITEM_DATA table of the Price Optimization schema. Recommended: 5 GB.
SYSTEM	System tablespace used for metadata.
SUSAUX	System tablespace used for system monitoring.
TEMP	Typical but not required. System tablespace used for temporary system swap space for Price Optimization, STG, and ASH. Recommended size: 10 GB.
RBS	Typical but not required. System tablespace for resolving data write clashes. Recommended size: 5 GB.

Creating the System Data Dictionary

To create the system data dictionary, log in as the sys user and run the following scripts:

```
<ORACLE_HOME>/rdbms/admin/catalog.sql
<ORACLE_HOME>/rdbms/admin/catproc.sql
<ORACLE_HOME>/sqlplus/admin/pupbld.sql
```

Specifying Users and Permissions

Specify the default privileges to Oracle schemas as follows:

- Resource
- Select any table
- Query rewrite
- Create materialized view
- Drop any table
- Create view
- Execute any procedure
- Java permissions as follows:

```
call dbms_java.grant_permission('RDM_USER',
'oracle.aurora.security.JServerPermission', 'Verifier', '');
```

Creating the Schema

After the default privileges to schemas are assigned, carry out the following steps to create the schema. (This assumes a script named price.sql and a schema named price.)

```
sqlplus <user>/password@databasename@price.sql
```

To create the bufferpool:

Run the CREATE BUFFERPOOL command for each bufferpool, using the following recommended values:

```
CREATE BUFFERPOOL "BP_8K_DATA_01" SIZE 40000 PAGESIZE 8192 NOT EXTENDED STORAGE;
CREATE BUFFERPOOL "BP_8K_INDEX_01" SIZE 40000 PAGESIZE 8192 NOT EXTENDED STORAGE;
CREATE BUFFERPOOL "BP_8K_TEMP_01" SIZE 40000 PAGESIZE 8192 NOT EXTENDED STORAGE;
CREATE BUFFERPOOL "BP_8K_DATA_02" SIZE 40000 PAGESIZE 8192 NOT EXTENDED STORAGE;
CREATE BUFFERPOOL "BP_16K_ITEM_DATA" SIZE 1000 PAGESIZE 16384 NOT EXTENDED
```

```
STORAGE;  
CREATE BUFFERPOOL "BP_16K_TEMP_02" SIZE 1000 PAGESIZE 16384 NOT EXTENDED STORAGE;
```

Merchant Desktop and RDM Performance

To improve the performance of the report generation process you can add indexes relevant to the user interface you are using as follows.

Planning for Optimal Merchant Desktop Performance

The RDM database abstracts forecasting and historic data from Price Optimization for use with either the Merchant Desktop or the MicroStrategy user interface.

Planning for RDM Storage Requirements

Typically, the following tables can be very large objects in the RDM:

- RDM_ACTIVITES (extracted from Price Optimization)
- RDM_FORECAST_ACTIVITIES

The RDM_FORECAST_ACTIVITIES and the summary tables can be very large. When RDM is installed, allocate extra storage in the amount of the sum of Activities and Forecast Activities. For example, if the size of the Price Optimization dataset is 10 GB, the size of Activities is 3 GB, and Forecast Activities is 1 GB, RDM requires an addition 4 GB of space.

- RDM_MERCHANDISE_TBL (extracted from Price Optimization)
- Summary tables and indexes

Increasing the Speed of the Report Generation Process

To improve the performance of the report generation process you can add indexes relevant to the user interface you are using as described in this section.

Merchant Desktop Reports

The speed of data drilling during report generation depends on the number of product hierarchies you company has implemented.

To increase the speed of the Merchant Desktop report generation process, you can index specific hierarchy columns within the MERCHANDISE_TBL and RDM_MV_ACT_BASE2_1 tables as needed. For example, if the maximum optimization level is 8, you can improve performance by creating an index on the HIERARCHY8_PID column in the MERCHANDISE_TBL and RDM_MV_ACT_BASE2_1 tables.

MicroStrategy Reports

If you are using MicroStrategy, you can increase the speed of the report generation process by adding indexes to the RDM tables for the summary levels that are described in [Chapter 6, "Integrating with MicroStrategy."](#)

What's Next?

Install your application server as described in [Chapter 4, "Installing Your Application Server."](#)

Installing Your Application Server

This chapter contains the following sections:

- [Before You Begin](#)
- [Installing and Configuring Oracle Application Server](#)
- [Installing and Configuring WebLogic](#)
- [What's Next?](#)

Before You Begin

This chapter describes how to install your application server.

For information about the supported version and other requirements, see [Chapter 2, "Planning Your Environment."](#)

If you are clustering instances of your application server, create them before installing Price Optimization—otherwise any managed servers must be added manually. For information about managing clusters, see the documentation for your application server.

Installing and Configuring Oracle Application Server

To install and configure Oracle Application Server, use these sections in the following sequence:

1. [Installing Oracle Application Server](#)
2. [Configuring Oracle Application Server](#)

Installing Oracle Application Server

Install Oracle Application Server, referring to the Oracle Application Server documentation for guidance.

During the installation, accept the default values for the multicast IP address and port settings; these settings will be automatically updated, as needed, when you run the Price Optimization Installer. If you want your OAS instance to be part of a cluster, specify the information relevant to your cluster topology.

In the *Price Optimization Installation Guide*, the Oracle Application Server installation directory is referred to as the <OAS_HOME> directory.

Next, you need to specify properties in the Oracle Application Server configuration files.

Configuring Oracle Application Server

To specify Oracle Application Server configuration properties:

1. Edit the `j2ee/home/config/server.xml` file, and specify the following:

```
<application-server xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:noNamespaceSchemaLocation="http://xmlns.oracle.com/oracleas/schema/applicat
ion-server-10_1.xsd" localhostIsAdmin="true"
  application-directory="../applications"
  check-for-updates="adminClientOnly"
  deployment-directory="../application-deployments"
  connector-directory="../connectors"
  global-jndi-lookup-enabled="true"
  schema-major-version="10" schema-minor-version="0" >
```

2. Edit the `opmn/conf/opmn.xml` file, and specify the configroot and memory as follows:

```
<category id="start-parameters">
  <data id="java-options" value="-Xrs -server
  -Djava.security.policy=$ORACLE_HOME/j2ee/home/config/java2.policy
  -Dcom.profitlogic.configroot=/pricecluster/config
  -Djava.awt.headless=true -Xmx512m -Xms512m -XX:MaxPermSize=256m
  -Dhttp.webdir.enable=false
  -Xrunjdw:transport=dt_socket,server=y,suspend=n,address=5005"/>
</category>
```

Note: Setting the headless abstract window toolkit class to "true" enables the What If graphics to display on your application server.

Installing and Configuring WebLogic

To install and configure WebLogic, use these sections in the following sequence:

1. [Installing WebLogic](#)
2. [Creating a WebLogic Domain](#)
3. [Editing the WebLogic Startup Script](#)

Installing WebLogic

Install WebLogic referring the WebLogic documentation for guidance. In this guide, the WebLogic installation directory is referred to as the `<WL_HOME>` directory.

Next, you can create and configure a domain, using the WebLogic Configuration Wizard.

Creating a WebLogic Domain

Price Optimization uses a WebLogic domain consisting of one administration server, a cluster of one or more managed servers, and other logically related resources and services. The WebLogic Configuration Wizard prompts you to specify all of the settings required by the application domain.

To create a WebLogic domain:

From `<WL_HOME>/common/bin/config.sh`, start the WebLogic Configuration Wizard create a new domain and server, using the values specified in [Table 4-1, Settings for the WebLogic Configuration Wizard](#).

Table 4–1 Settings for the WebLogic Configuration Wizard

Setting	Description
<i>Define Logical Grouping</i>	
Domain Type	Select WLS Domain .
Server Type	Select Admin Server with Clustered Managed Server(s) .
Domain Name	Enter the domain name to use for Price Optimization. Recommended value: Prepend the domain name with a three-character acronym that represents your company name. For example, ABC Company would enter abcProdPrice.
<i>Define the Administration Server</i>	
Administration Server Name	Name of the server that controls the cluster. Recommended value: admin0
Administration Server Listener Port	Important: Select a unique port number that is not in use by other applications. Recommended value: 8000 Tip: You can ensure that 8000 is an unused port number by entering the following UNIX command: netstat -ae grep 8000
Administration Server SSL Listener Port	Number of the server listener port, incremented by 1. Recommended value: 8001
<i>Configure Managed Servers</i>	
First Server Name	Recommended value: price0
First Server Listen Address	Recommended value: 0.0
First Server Listen Port	Recommended value: 8040
First Server SSL Port	Number of the managed server port, incremented by 1. Recommended value: 8041
Second Server Name	Name of the first managed server, incremented by 1. Recommended value: price1
Second Server Listen Address	Recommended value: 0.0
Second Server Port	Recommended value: 8044
Second SSL Port	Port number of the first managed server, incremented by 1. Recommended value: 8046
<i>Join the Nodes in the Cluster Together</i>	
Cluster Name	Recommended value: price-cluster
Cluster Multicast Port	Recommended value: 7777
Cluster Port	
Cluster Listen Address	Same as host number.

Editing the WebLogic Startup Script

Edit the startWebLogic.sh script, and add the following:

```
CONFIG_ROOT="<PRICE_HOME>/price/config"
JAVA_OPTION="-Dcom.profitlogic.configroot=${CONFIG_ROOT}
-Djava.awt.headless=true
-Dweblogic.management.username=${WLS_USER}
-Dweblogic.management.password=${WLS_PW}"
MEM_ARGS="-Xmx256m -Xms256m"
WLS_USER= Set so the script can run in the background without prompting the user.
WLS_PW= Set so the script can run in the background without prompting the user.
```

Note: Setting the headless abstract window toolkit class to "true" enables the What If graphics to display on your application server.

What's Next?

Now you are ready to install Price Optimization as described in [Chapter 5, "Installing Price Optimization."](#)

Installing Price Optimization

After you have set up your database management system and application server, you can install Price Optimization as described in this chapter. This chapter contains the following sections:

- [Overview of the Installation Process](#)
- [Installing Price Optimization](#)
- [Troubleshooting Installation Issues](#)
- [Registering Merchant Desktop Alerts](#)
- [What's Next?](#)

Overview of the Installation Process

Note: Although options for IBM AIX, DB2, and WebSphere display on the Oracle Installer, they are not supported in this release.

In order to install Price Optimization, your first task is to obtain the installation media.

Then you should choose which installation mode you prefer. Whichever mode you use, you first need to set up the Price Optimization properties file. The two modes are as follows:

- Graphical mode - In graphical mode, the Oracle Installer displays a graphical user interface and prompts you to enter or modify the value of properties specified in the properties file.

Note: The graphical mode **does not** support application server clusters. If you are clustering instances of your application server, you **must** install Price Optimization in silent mode.

- Silent mode - In silent mode, the installer processes the properties file with no manual intervention required.

To begin the installation process, see [Installing Price Optimization](#).

Installing Price Optimization

Installing Price Optimization consists of the following tasks:

- [Accessing the Installation Software](#)
- [Setting Up Your Installation Properties File](#)

- [Installing Price Optimization in Silent Mode](#)
- [Installing Price Optimization Using the Graphical Oracle Installer](#)

Accessing the Installation Software

In order to install Price Optimization, you first need to obtain the software media, which is available on DVD or from a ZIP file. This section explains how to download the Price Optimization software ZIP file from the Oracle E-Delivery site.

To download the Price Optimization software:

1. From the application server where you will be installing Price Optimization, open a browser and navigate to the following URL:

<http://edelivery.oracle.com/>

The **Oracle E-Delivery** download page displays.

2. Select a language and click **Continue**.

The **Export Validation** screen displays.

3. Respond to the following and click **Continue**.

- **Full Name** - Enter your full name.
- **Company Name** - Enter your company name.
- **E-mail Address** - Enter your e-mail address.
- **Country** - Select your country.
- **License Agreement** - Click the checkbox.
- **Export Restrictions** - Click the checkbox.

The **Media Pack Search** screen displays.

4. Respond to the following and click **Go**.

- **License List** - Review the list to determine which Product Packs you need to download.
- **Product Pack** - Select **Oracle Retail Applications**.
- **Platform** - Select the desired operating system. Optional.

The **Oracle Retail Price Optimization Media Pack** screen displays.

5. In the **Select** column, click **Download**.

Oracle E-Delivery writes a ZIP file to the default location you have selected for downloads.

6. Unpack the ZIP file to a temporary directory. In this guide, the directory that contains the installation media is referred to as the <PRICE_CD_IMAGE> directory.

Now you can set up your Price Optimization properties file.

Setting Up Your Installation Properties File

In order to install Price Optimization, you first need to specify the properties to use during the installation process. These properties are specified in the install.properties file.

To set up your install.properties file:

1. Ensure that your <PRICE_CD_IMAGE> directory exists and is populated as described in [Accessing the Installation Software](#), on page 5-2.
2. Navigate to the <PRICE_CD_IMAGE> directory and copy the reference.price.install.properties file to the same directory, naming it price.install.properties.
3. Edit the price.install.properties file, specifying values as described within the file, and save it.

Now you can install Price Optimization, using either of the following modes:

- [Installing Price Optimization in Silent Mode](#)
- [Installing Price Optimization Using the Graphical Oracle Installer](#)

Installing Price Optimization in Silent Mode

This section describes how to install Price Optimization in silent mode. Silent mode is non-interactive.

To install Price Optimization in silent mode:

1. Ensure that you have completed "[Setting Up Your Installation Properties File](#)" on page 5-2.
2. Make sure that your application server is running.
3. From your application server machine, enter the following command. **Note:** For more information about this command, see the [install.sh](#) command on page 5-3.

```
bash install.sh
```

install.sh

The install.sh command enables you to install Price Optimization.

Syntax

```
install.sh [-s] [-p <path-to-install.properties>]
```

Arguments

Use any arguments listed below as needed.

Argument	Description
-s	Optional. Silent mode. If you omit this option, the Oracle Installer user interface displays.
-p <path-to- install.properties>	Optional. Specifies an alternate path to the install.properties file. Defaults to ./install.properties.
-l, --log-config	Optional. Specifies an alternate log4j configuration file (to change the verbosity level or the log file output location). Defaults to ./Install/conf/log4j.properties. The log4j log file is used for troubleshooting.
-y -n	Optional. Specifies whether or not to overwrite existing files. Defaults to -y (overwrite).
-d <XML path>	Optional. Specifies an alternate path to the XML install scripts. Defaults to ./InstallScripts.
-x <filename.xml>	Optional. Specifies an alternate XML install script file within the ./InstallScripts directory.

Argument	Description
-i, --websphere -b, --weblogic	Optional. For specifying your application server.
-h	Optional. Prints a help message.

Return Value

When run in silent mode (install.sh -s), the script displays a trace message to stdout (the console). When run in Oracle Installer mode (the default), the script displays a graphical user interface.

Output

The Price Optimization installation creates the Price directory structure, populates it with appropriate files, and when the installation finishes, it generates a log file and two properties files.

When the installation successfully completes, see [What's Next?](#) on page 5-15.

If the installation resulted in issues, see [Troubleshooting Installation Issues](#).

Installing Price Optimization Using the Graphical Oracle Installer

If you prefer to use a guided user interface, you can use the graphical Oracle Installer.

Note: The graphical user interface **does not support clusters**. If you are clustering instances of your application server, install Price Optimization in the **silent mode**.

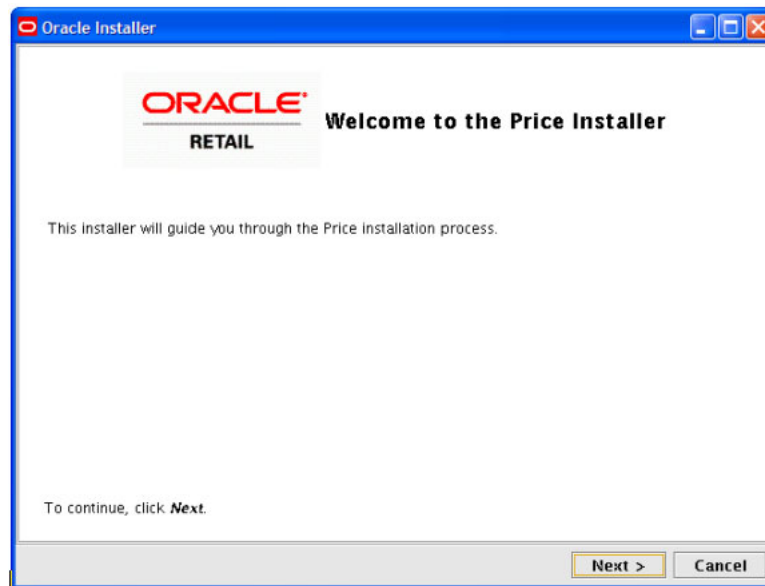
To install Price Optimization using the Oracle Installer:

1. Ensure that you have completed "[Setting Up Your Installation Properties File](#)" on page 5-2.
2. Make sure that your application server software is running.
3. If you are viewing the installer from a Windows client:
 - On the Windows client, start an Xserver program that enables you to emulate the X terminal.
 - On the application server, set the display for the Windows client where you want the Oracle Installer to display as follows:
4. From your application server machine, enter the following command. Note: for more information about this command, see [Installing Price Optimization in Silent Mode](#).

```
export DISPLAY=<IP address>:0.0
```

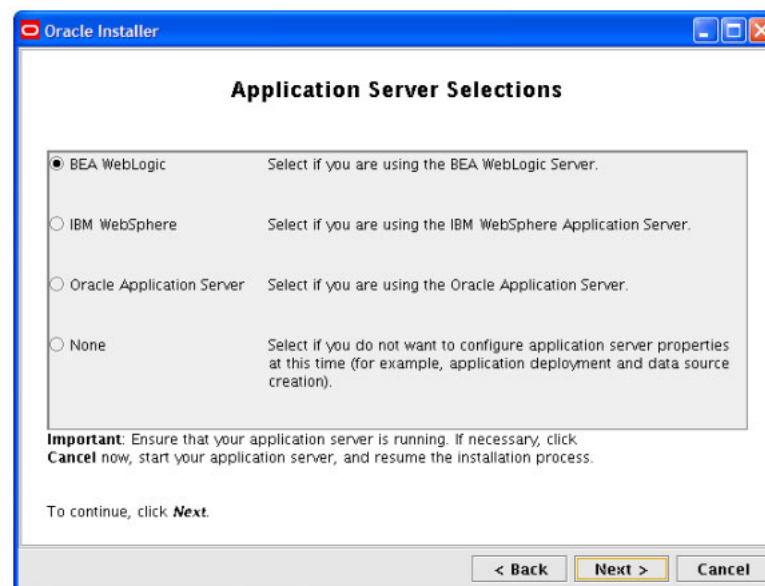
```
bash install.sh
```

The **Welcome** screen displays.

Figure 5–1 Welcome Screen

5. Click **Next**.

The **Application Server Selections** screen displays.

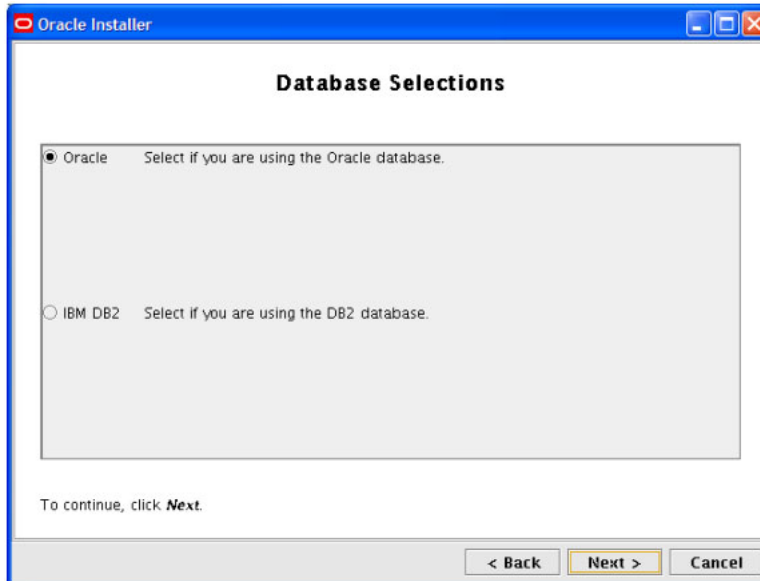
Figure 5–2 Application Server Selections Screen

6. Specify application server options as follows:

- **BEA WebLogic** - Select this to configure WebLogic properties.
- **IBM WebSphere** - Select this to configure WebSphere properties.
- **Oracle Application Server** - Select this to configure Oracle Application Server properties.
- **None** - Select this if you are not configuring an application server (for example, if you are only configuring your database).

Click **Next** and the **Database Selections** screen displays.

Figure 5–3 Database Selections Screen

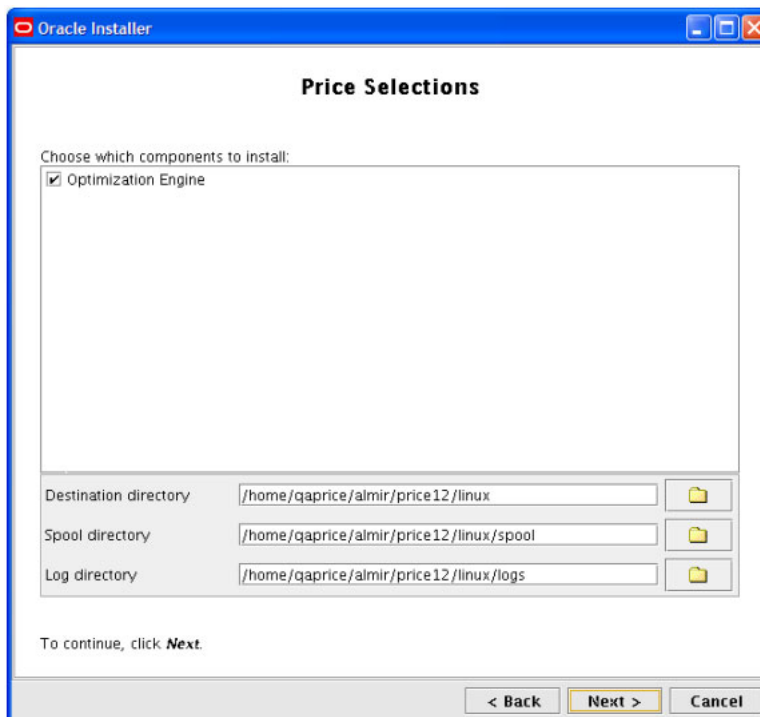


7. Specify database options as follows:

- **Oracle** - Select this to configure Oracle.
- **IBM DB2** - Select this to configure DB2.

Click **Next** and the **Price Selections** screen displays.

Figure 5–4 Price Selections Screen



8. Specify options as follows:
 - **Optimization Engine** - Select this to install the Price Calculation Engine.
 - **Destination Directory** - Specify the location the Price target directory.
 - **Spool Directory** - Specify the path to the Price spool directory.
 - **Log Directory** - Specify the path to the Price installation log files.

Click **Next** and the **RDM Materialized Views** screen displays.

Figure 5-5 RDM Materialized Views Screen

9. Specify options as follows:
 - **Do you want to install Materialized Views now?** - This screen is optional.
 - If you do not need to optimize data to enhance database performance when creating reports in Merchant Desktop enter **N**, and click **Next**.
 - If you want to improve the database performance when creating reports in Desktop Merchant enter **Y**, and specify the following options.
 - **Number of Summary views (MVIEWES) already created** - Specify how many summary views you have already created. You can create up to a total of four summary views, which includes any views you may have already created.
 - **Price Merchandise Optimization Level** - Specify the level in the merchandise hierarchy at which you want optimization to take place.
 - **Price Location Optimization Level** - Specify the level in the location hierarchy at which you want optimization to take place.

Note: The combination of the Merchandise and Location levels specifies the ITEM level.

- **Summary View Levels** - Specify the hierarchy level for each summary view level you want to add. The minimum number of summary levels is one, and the maximum number is four.

For example, if you only need two summary levels, you would specify the location and merchandise hierarchy values for the first four **Summary View Levels** fields, and leave the remaining four **Summary View Levels** fields blank.

- Click **Next** and the **Retail Data Mart** screen displays.

Figure 5–6 Retail Data Mart Screen

The screenshot shows a window titled "Oracle Installer" with a sub-header "Retail Data Mart". The main content area contains the instruction "Enter the following:" followed by two text input fields. The first field is labeled "Please Enter DB User of Price or Plan Back End" and contains the text "qam_plano_as". The second field is labeled "Please Enter DB User of Price or Plan Front End" and also contains "qam_plano_as". Below the input fields, the text "To continue, click Next." is displayed. At the bottom of the window, there are three buttons: "< Back", "Next >" (which is highlighted with a yellow border), and "Cancel".

10. Specify Retail Data Mart options as follows:

- **Please Enter DB User of Price or Plan Back End** - Enter the name of the database link.
- **Please Enter DB User of Price or Plan Front End** - Enter the username associated with the Application database schema.

Click **Next** and the **Network Properties** screen displays.

Figure 5–7 Network Properties Screen

Oracle Installer

Network Properties

Enter the following:

Gateway host name

Gateway port number

Protocol to use (https or http)

To continue, click **Next**.

< Back Next > Cancel

11. Specify network options as follows:

- **Gateway host name** - Enter the hostname or IP address of the server or load balancer hosting the user management, business rules, and Price components.
- **Gateway port number** - Enter the port number of the gateway host.
- **Protocol to use (https or http)** - Specify using lower-case characters.

Click **Next** and the **Engine Properties** screen displays.

Figure 5–8 Engine Properties

Oracle Installer

Engine Properties

Enter the following:

Architecture (linux_i686, sunos_sun4u, aix_powerpc)

To continue, click **Next**.

< Back Next > Cancel

12. Specify Engine Properties options as follows:

- **Architecture** - Specify the your operating system on which your Optimization Engine runs as follows:

- Linux - specify linux_i686
- Sun - specify sunos_sun4u
- AIX - specify aix_powerpc

Click **Next** and the **Database Properties** screen displays.

Figure 5–9 Database Properties

Specify Price database options as follows:

- **Database driver** - Select the appropriate driver from the drop-down list.
- **Database server address** - Enter the name or IP address of the destination server for the database.
- **Database server port** - Enter the server port number associated with your database.
- **Database name** - Enter the name used to identify your database.
- **Database alias** - Enter the database alias, which is typically the same name as the database.
- **User ID** - Enter the user name associated with the database.
- **Password** - Enter the password associated with the database.
- **Leave database "as is"** - Select this if you have an existing database schema that you do not want to modify. This enables you to configure datasources, EAR files, and so forth, without affecting the database.
- **Create tables** - Select this if you are installing a new database schema for Price Optimization. The Oracle Installer drops all schemas and creates new ones.
- **Upgrade tables** - Select this if you have an existing database schema that you want to update. Any existing data remains intact and modified on a

row-by-row, column-by-column basis, depending on the actions specified in the database patches.

Click **Next** and the **Database Properties Retail Data Mart** screen displays.

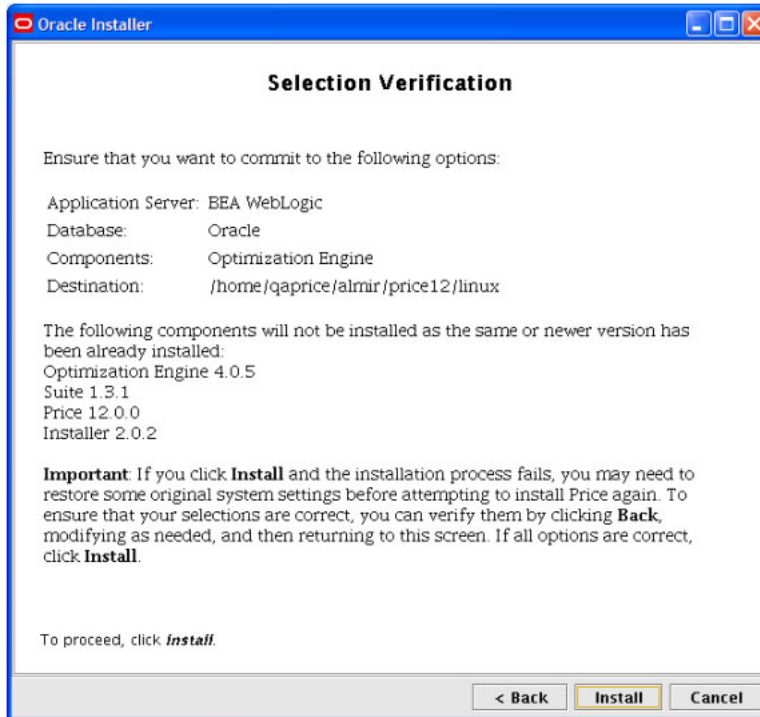
Figure 5–10 Database Properties Retail Data Mart Screen

13. Specify Database Properties Retail Data Mart options as follows:

- **Database driver** - Select the appropriate driver from the drop-down list.
- **Database server address** - Enter the name or IP address of the destination server for the database.
- **Database server port** - Enter the server port number associated with your database.
- **Database name** - Enter the name used to identify your database.
- **Database alias** - Enter the database alias, which is typically the same name as the database.
- **User ID** - Enter the user name associated with the database.
- **Password** - Enter the password associated with the database.
- **Leave database "as is"** - Select this if you have an existing database schema that you do not want to modify. This enables you to configure datasources, EAR files, and so forth, without affecting the database.
- **Create tables** - Select this if you are installing a new database schema for Price Optimization. The Oracle Installer drops all schemas and creates new ones.
- **Upgrade tables** - Select this if you have an existing database schema that you want to update. Any existing data remains intact and modified on a row-by-row, column-by-column basis, depending on the actions specified in the database patches.

Click **Next** and the **Selection Verification** screen displays.

Figure 5–11 Selection Verification Screen

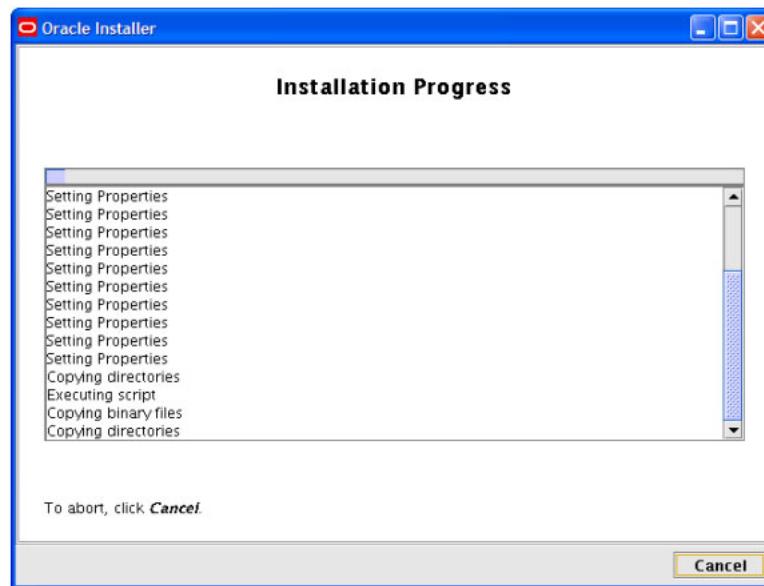


14. The **Selection Verification** screen is the last screen before the Oracle Installer commits these selections to disk.

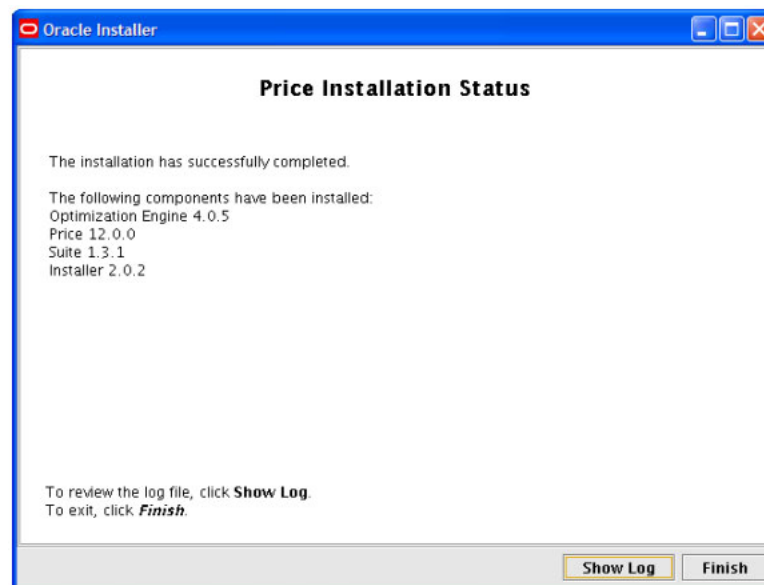
Verify your selections and click any of the following as needed:

- **Back** - to modify any of the selections you have made.
- **Cancel** - to terminate the installation process. The **Installation Status** screen appears, displaying a message that the installation was cancelled by the user. Choosing **Cancel** stops the installation process before anything has been written to disk.
- **Install** - if all selections are correct and you are ready to start the installation process.

The **Installation Progress** screen displays.

Figure 5–12 Installation Progress Screen

15. If you need to abort the installation, click **Cancel**. Otherwise, the installation proceeds. At the completion, the **Price Installation Status** screen displays as follows:

Figure 5–13 Price Installation Status Screen

16. Select options as follows:
- **Show Log** - Select this if you want to review the actions taken.
 - **Finish** - Select this to exit the Oracle Installer.

When you click **Finish**, the Oracle Installer creates the Price Optimization directory structure and populates it with appropriate files, and generates a log file and two properties files. For more information, see "[install.sh](#)" on page 5-3.

If the installation resulted in issues, see [Troubleshooting Installation Issues](#) on page 5-14.

If the installation successfully completes, see the [What's Next?](#) section.

Troubleshooting Installation Issues

The Oracle Installer simplifies the process of integrating and configuring multiple applications (for example, your database software, your application server software, and Price Optimization).

Because of this complexity and the state of your own environment, there may be some situations that you need to troubleshoot and resolve. This section enables you to understand and resolve Price installation issues.

Ensure that you thoroughly understand the messages being output by the Oracle Installer.

Understanding Trace Output Messages

Note that the Oracle Installer displays messages that originate from multiple sources. Some messages are Price-specific, such as the directories being created. Other messages are redirected stderr output from third-party applications; as a result, the message content depends on what the software vendor wants to display.

As a result, refer to the documentation associated with the relevant application when troubleshooting, which will help you determine if the error message is even valid and how to correct any existing problems.

For example, during database installation, if a error messages indicate class deployments issues, see the documentation associated with your database management software. The documentation will explain whether the message is spurious (and to be ignored) or valid. If the error is actually valid, the documentation will explain how to correct the problem.

Installation Does Not Complete

If the installation process fails before the application has been completely installed, an onscreen message prompts you to review the log files to determine the cause of the errors. However, since the installation had not completed, no log file was generated.

Instead, review the onscreen trace messages to determine the origin of the error.

Installation Completes with Errors

If the installation completes but has errors, an onscreen message prompts you to review the log. Also, you may want to review the generated properties files.

The file naming convention of the log file is as follows:

```
install-<YYYYMMDD>-<HHMMSS>.log
```

where HH is in 24-hour format.

Configuring Merchant Desktop

If you are using Merchant Desktop, you may need to configure it as described in the following sections:

- [Configuring a Proxy Server](#)
- [Registering Merchant Desktop Alerts](#)

Configuring a Proxy Server

If you are using a proxy server to connect with the Internet, you need to configure Merchant Desktop to recognize that server as follows:

1. Edit the modules/MerchantDesktop/MerchantDesktop.ear/dashboard.ear/dashboard.war/WEB-INF/conf/JetspeedResources.properties file and specify your proxy server values for the following properties:

```
services.URLManager.proxy.http.host=  
services.URLManager.proxy.http.port=
```

2. Restart your application server for the changes to take effect.

Registering Merchant Desktop Alerts

If you are using Merchant Desktop alerts, you need to register them.

Note: If you have previously registered alerts, run the following script using `unregister` instead of `register`.

To register alerts:

Run the following script:

```
cd ../ProfitLogic/modules/tools/admin  
bash ./registerAlerts.sh <wls|was> <app_server>:<7001> register|unregister
```

What's Next?

Now that you have installed Price Optimization, restart your application server software and proceed with any option as follows:

- If you are using MicroStrategy with Merchant Desktop, configure it as described in [Chapter 6, "Integrating with MicroStrategy."](#)
- If you are ready to start working with your business data, load your data as described in the *Price Optimization Configuration Guide*.
- If you want to maximize system performance, you can tune your Calculation Engine.

Integrating with MicroStrategy

If you are using MicroStrategy, you must configure it to map to the RDM database and the Merchant Desktop user interface. This chapter explains how to configure mapping between the two applications. This chapter contains the following sections:

- [Getting Started](#)
- [Using the MicroStrategy Configuration Wizard](#)
- [Migrating the Metadata](#)
- [Configuring MicroStrategy to Access the RDM Database](#)
- [Mapping RDM and MicroStrategy Summarization Levels](#)
- [Mapping the Display of Hierarchy Levels](#)
- [Configuring the User Link](#)
- [What's Next?](#)

Getting Started

Tip: Before you begin, ensure that users *have not* been added to the RDM user management tables—it will save you time later.

This section explains what you need to install in order to get started integrating Price Optimization with MicroStrategy.

- [Installing Your MicroStrategy Applications](#)
- [Creating Your Merchant Desktop Data Source](#)

Installing Your MicroStrategy Applications

Install the following components, using MicroStrategy documentation for assistance as needed:

- MicroStrategy Intelligence Server
- MicroStrategy OLAP Services
- MicroStrategy Desktop

Next, create the Merchant Desktop Data Source.

Creating Your Merchant Desktop Data Source

Set up the project source for Access Metadata.

To copy the project data source:

1. Copy the **MDPriceMetadata.zip** file from the Price Optimization CD. Save it to the computer where MicroStrategy Desktop is installed. Unzip the file, naming it **MDMetadata.mdb**.
2. From Microsoft Windows, navigate to **Start > Settings > Control Panel > Administrative Tools > Data Sources (ODBC)**.

Select the **System DSN** tab, and click **Add**.

3. Select **Microsoft Access Driver (*.mdb)** and click **Finish**.
4. In the database section, click **Select** and navigate to your ODBC datasource (for example, C:\temp\MDMetadata.mdb) and click **OK**.

The data source is now available.

5. Exit the ODBC Manager.

Now you can use the MicroStrategy Configuration Wizard to begin setting up MicroStrategy.

Using the MicroStrategy Configuration Wizard

Use the MicroStrategy Configuration Wizard as described in the following sections:

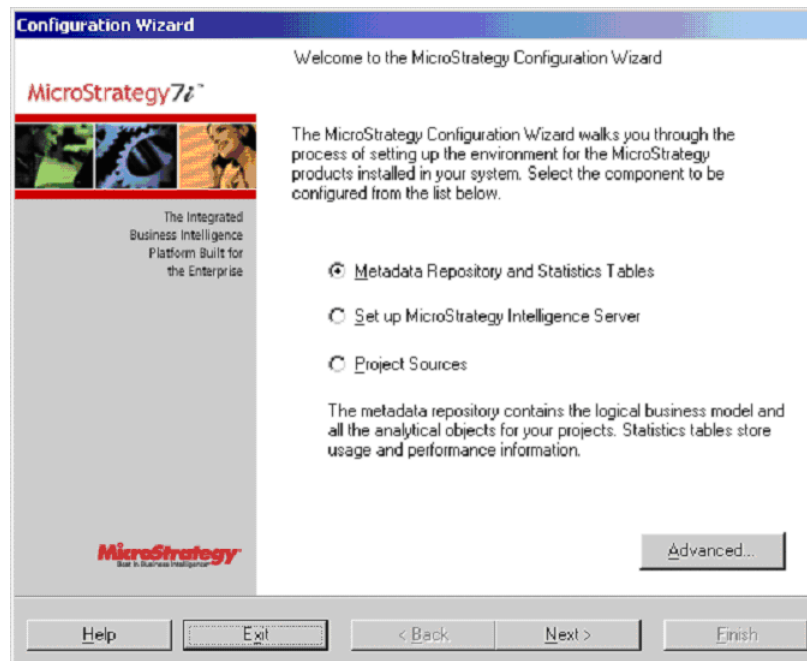
- [Creating the Metadata Repository and Statistics Tables](#)
- [Configuring MicroStrategy Intelligence Server](#)
- [Configuring Project Sources](#)

Creating the Metadata Repository and Statistics Tables

To create the metadata repository and statistics tables:

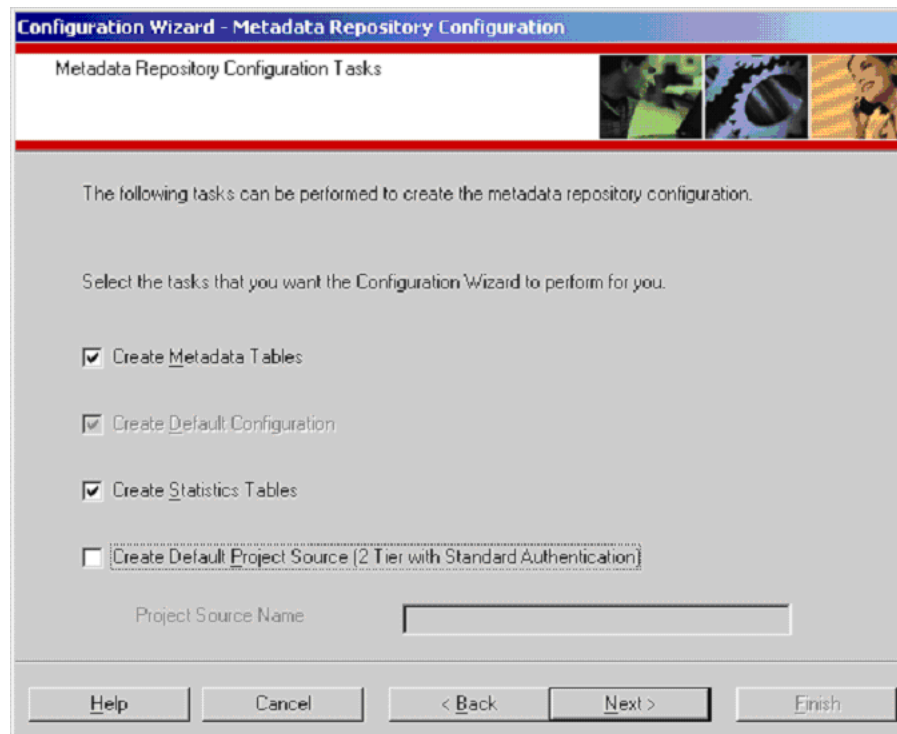
1. Launch the MicroStrategy Configuration Wizard.
The **Welcome** screen displays.

Figure 6–1 Welcome Screen



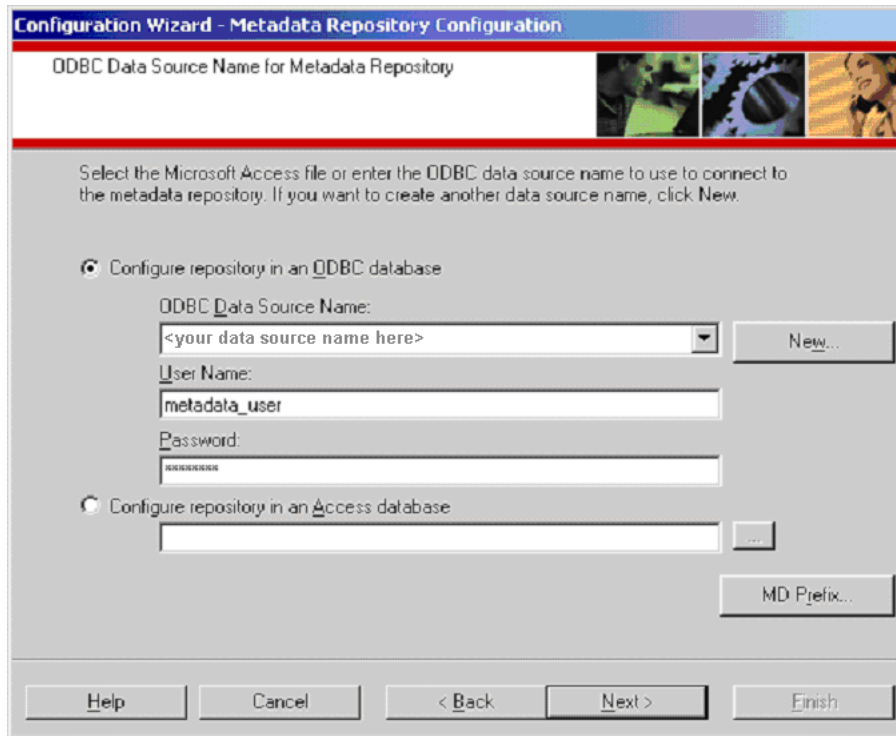
2. Select **Metadata Repository and Statistics Tables** and click **Next**.
The **Configuration Tasks** screen displays.

Figure 6–2 Configuration Tasks Screen



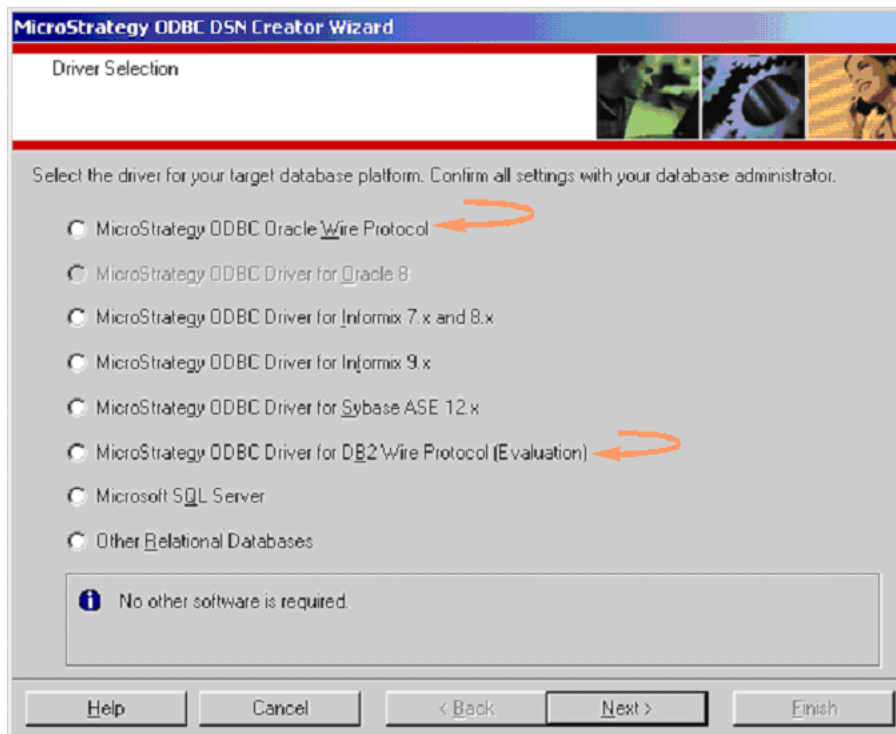
3. Select **Create Metadata Tables** and **Create Statistics Tables**, and click **Next**.
The **ODBC Data Source Name** screen displays.

Figure 6-3 ODBC Data Source Name Screen



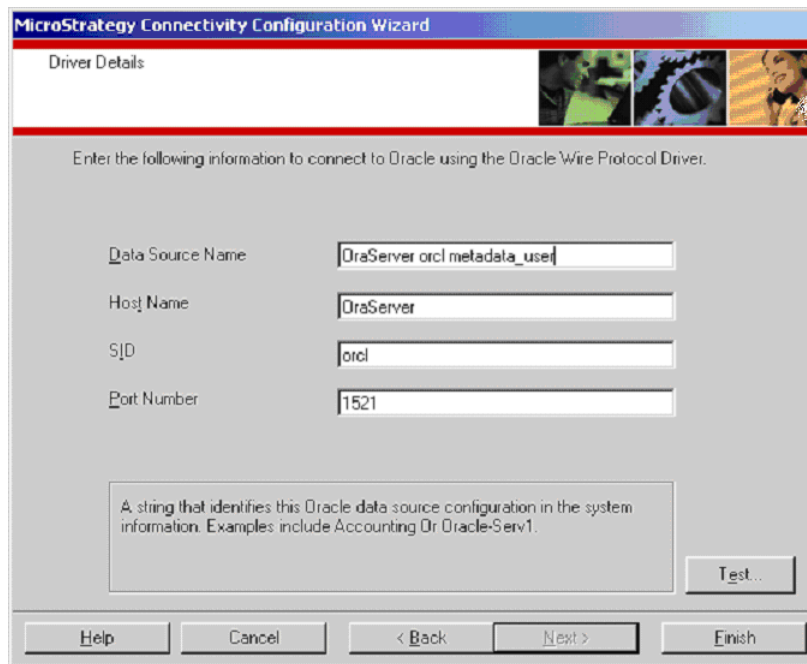
4. Select **Configure repository in an ODBC database**. Enter the **ODBC Data Source Name**, the **User Name** as metadata_user, the **Password**, and click **Next**.
The **Driver Selection** screen displays.

Figure 6-4 Driver Selection Screen



5. Select the **MicroStrategy ODBC Oracle Wire Protocol** driver and click **Next**.
The **Driver Details** screen displays.

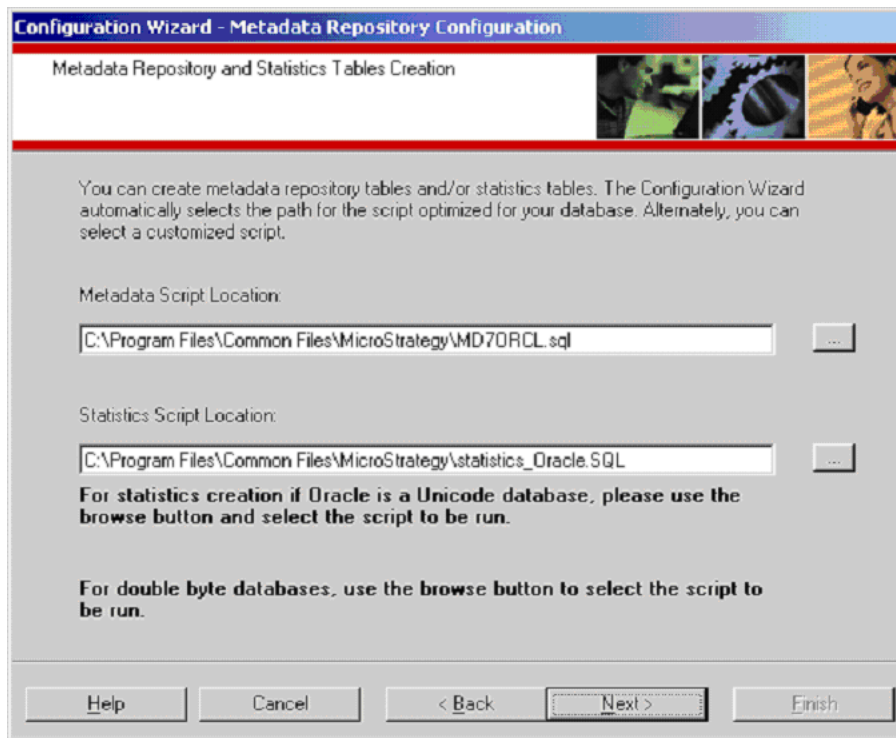
Figure 6–5 Oracle Driver Details Screen



The screenshot shows the 'Driver Details' screen of the 'MicroStrategy Connectivity Configuration Wizard'. The title bar reads 'MicroStrategy Connectivity Configuration Wizard'. Below the title bar, the text 'Driver Details' is displayed. To the right of this text are three small icons: a green landscape, a gear, and a person talking on a phone. Below the icons, the instruction reads: 'Enter the following information to connect to Oracle using the Oracle Wire Protocol Driver.' There are four input fields: 'Data Source Name' with the value 'OraServer orcl metadata_user', 'Host Name' with 'OraServer', 'SID' with 'orcl', and 'Port Number' with '1521'. Below these fields is a text box containing the text: 'A string that identifies this Oracle data source configuration in the system information. Examples include Accounting Or Oracle-Serv1.' To the right of this text box is a 'Test...' button. At the bottom of the window are five buttons: 'Help', 'Cancel', '< Back', 'Next >', and 'Finish'.

6. Enter your **Data Source Name** as `OraServer orcl metadata_user`, **Host Name** as `OraServer`, **SID** as `orcl`, **Port Number** as `1521`, and click **Next**.
7. The **Metadata Repository and Statistics Tables Creation** screen displays.

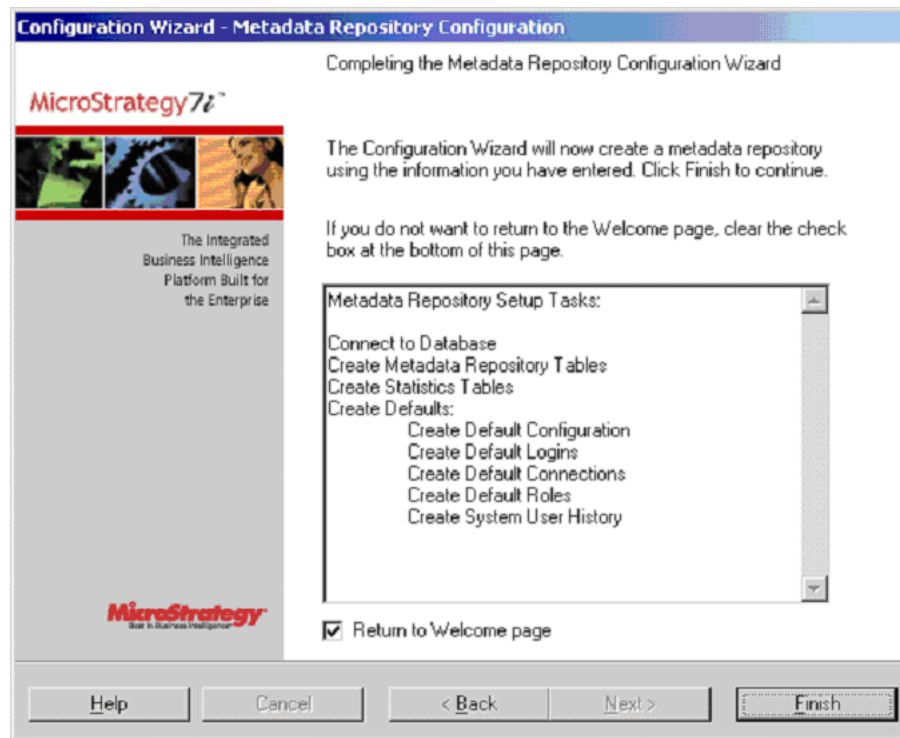
Figure 6–6 Metadata Repository and Statistics Tables Creation Screen



8. Browse to your **Metadata Script Location** and select it, browse to your **Statistics Script Location** and select it, and click **Next**.

Note: For UTF-8 encoded data, select the **Metadata Script Location /MicroStrategy/md7orcutf8.sql**.

The **Completing the Metadata Repository Configuration Wizard** screen displays.

Figure 6–7 Completing the Metadata Repository Configuration Wizard Screen

9. Verify that the setup tasks are correct, select **Return to Welcome page**, and click **Finish**.

The **Welcome** screen displays.

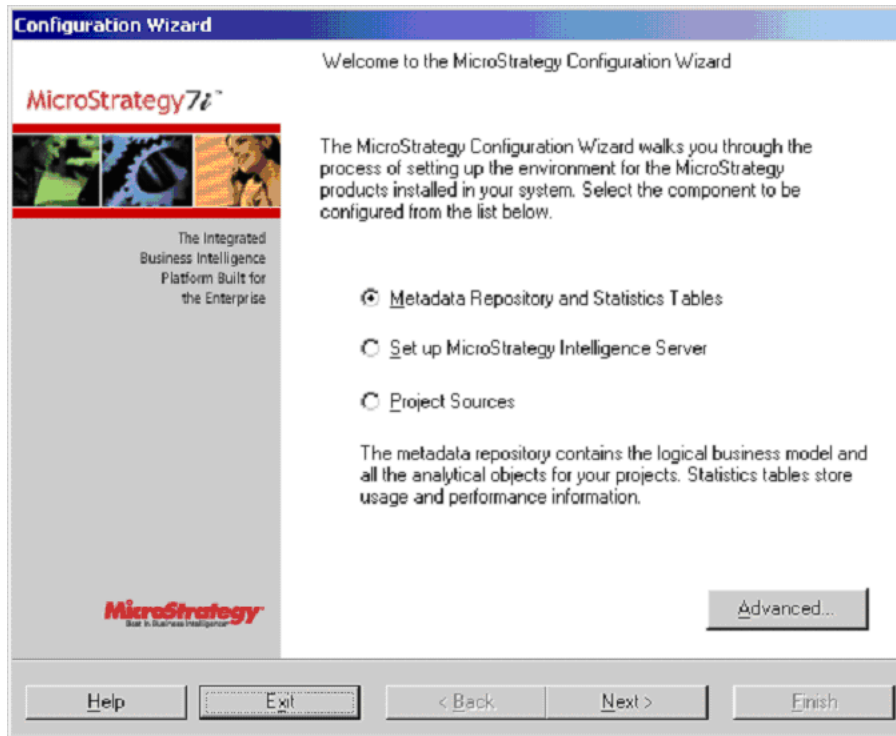
Now you can configure the MicroStrategy Intelligence Server.

Configuring MicroStrategy Intelligence Server

This section describes how to configure your MicroStrategy Intelligence Server.

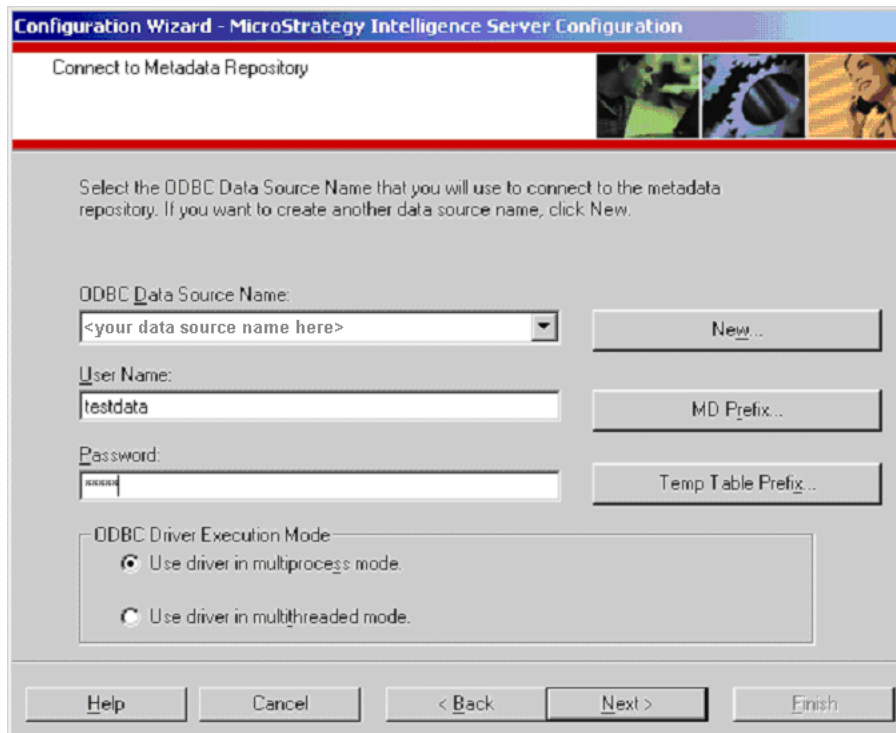
1. Start from the MicroStrategy Configuration Wizard **Welcome** screen.

Figure 6–8 Welcome Screen



2. Select **Set up MicroStrategy Intelligence Server** and click **Next**.
The **Connect to Metadata Repository** screen displays.

Figure 6–9 Connect to Metadata Repository Screen



3. Enter the **ODBC Data Source Name**, **User Name**, and **Password**; select **Use driver in multiprocess mode**; and click **Next**.

The **User Authentication** screen displays.

Figure 6–10 User Authentication Screen

Configuration Wizard - MicroStrategy Intelligence Server Configuration

User Authentication

Enter the MicroStrategy user name and password to use to connect to the metadata repository. The user name you provide must have administrative privileges.

MicroStrategy Administrator User Name:

Password:

If this is the first time you are connecting to the MicroStrategy Intelligence Server, use the user name "Administrator" without a password. It is recommended that you assign a password later for security reasons.

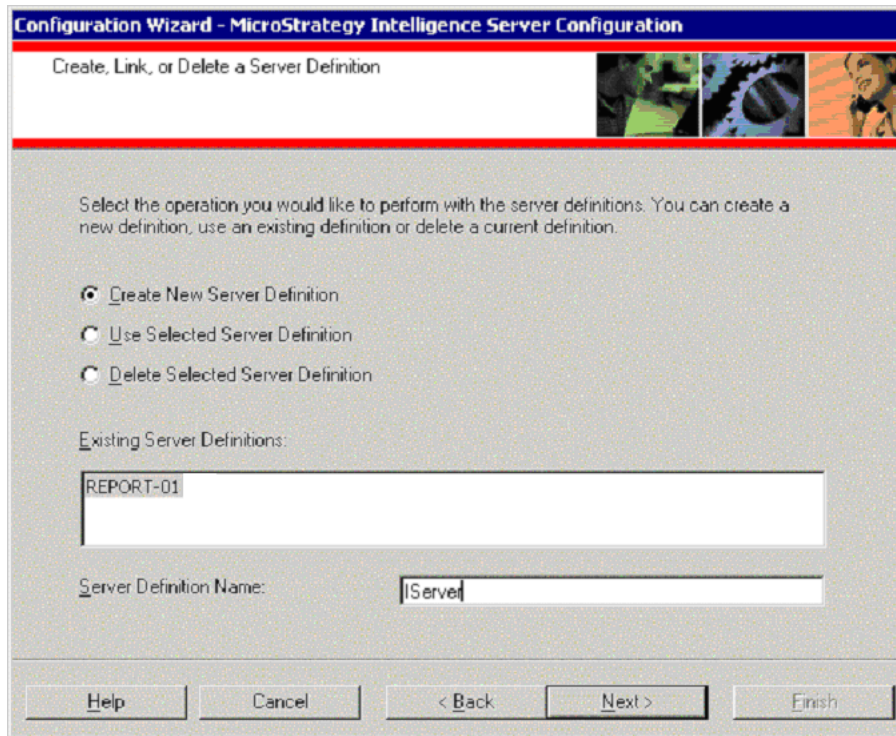
Help Cancel < Back Next > Finish

4. Enter the **MicroStrategy Administrator User Name** and **Password** to use to connect to the metadata repository, and click **Next**.

The **Create, Link, or Delete a Server Definition** screen displays.

Note: The Administrator user name and password combination will also be required later, in the usermanagement.properties file, as described in [Configuring the User Link](#) on page 6-32.

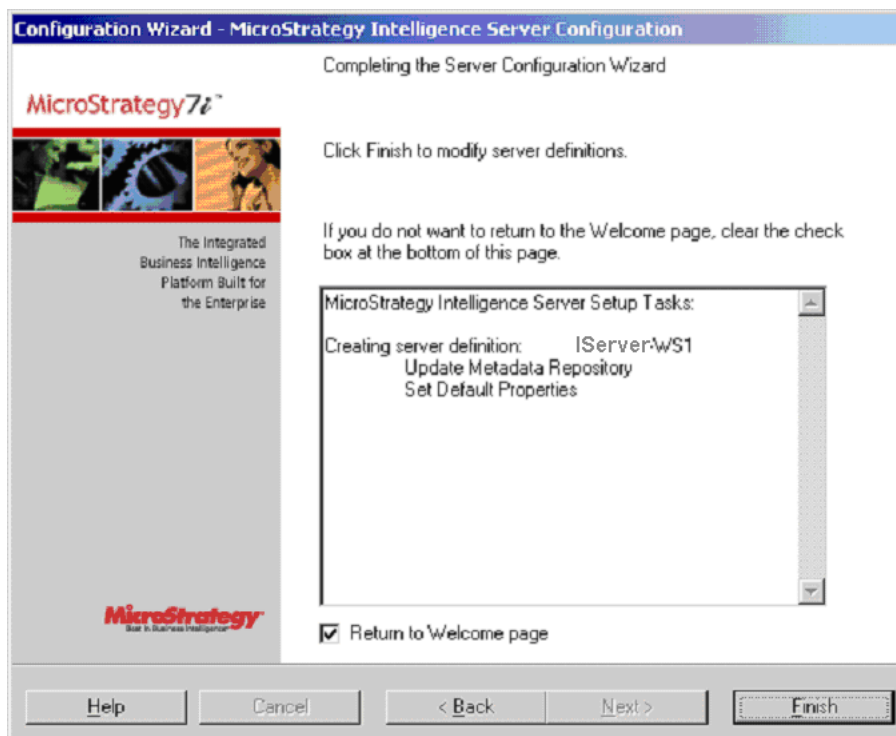
Figure 6–11 Create, Link, or Delete a Server Definition Screen



5. Select **Create New Server Definition**, select your **Existing Server Definitions**, enter **Server Definition Name** as **IServer**, and click **Next**.

The **Completing the Server Configuration Wizard** screen displays.

Figure 6–12 Completing the Server Configuration Wizard Screen



6. Verify that the setup tasks are correct, select **Return to Welcome page**, and click **Finish**.

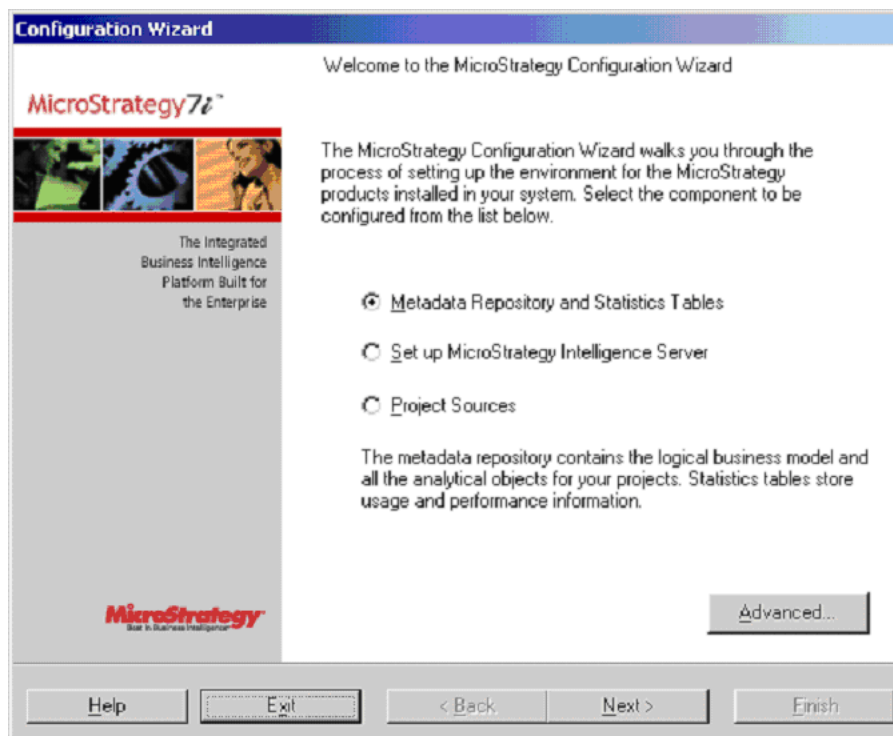
The **Welcome** screen displays.

Now you can configure the Project Sources.

Configuring Project Sources

Start from the MicroStrategy Configuration Wizard **Welcome** screen.

Figure 6–13 Welcome Screen



Select **Project Sources**, click **Next**, and complete the **Project Sources** wizard.

After you finish, migrate your metadata.

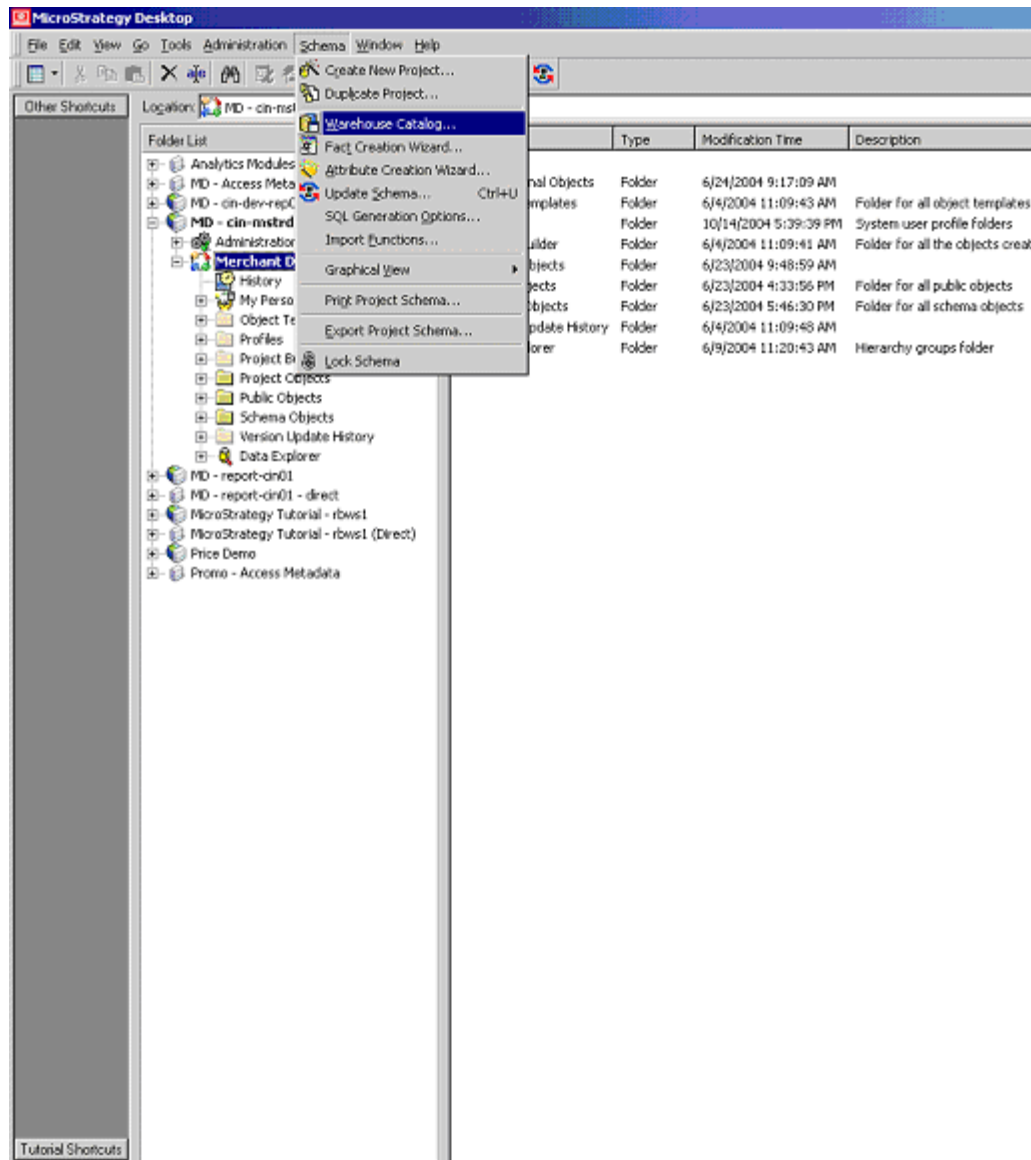
Migrating the Metadata

Use MicroStrategy Desktop to create a project source that points to the correct Intelligence Server as follows:

To create a project source:

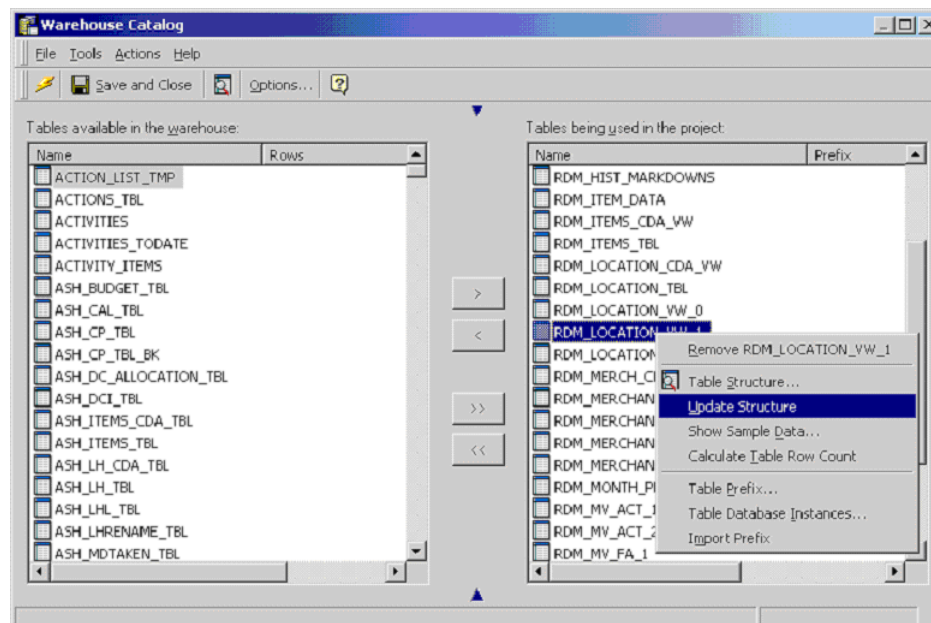
1. Start from the MicroStrategy Desktop user interface and update warehouse catalog schema as follows.

Figure 6–14 Updating Warehouse Catalog Schema



From the **MicroStrategy Desktop** menu, select **Schema > Warehouse Catalog**.
The **Warehouse Catalog** screen displays.

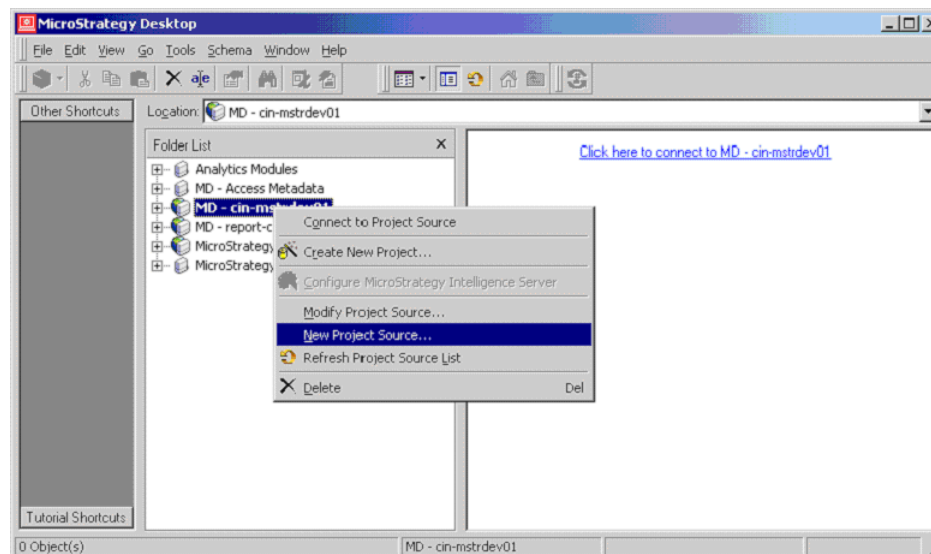
Figure 6–15 Warehouse Catalog Screen



In the **Tables being used in the project** box, right-click each table, and select **Update Structure**.

2. Use the MicroStrategy Desktop to create a project source.

Figure 6–16 Creating a Project Source for the Intelligence Server



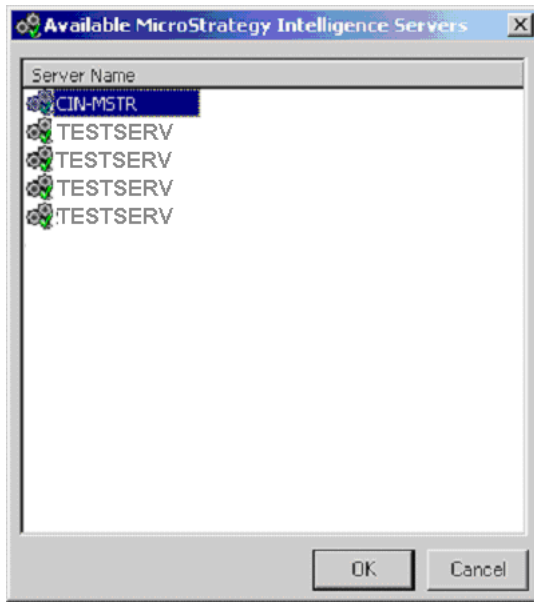
From the **Folder List** pane, right-click **MD - cin** and select **New Project Source**.

The **Project Source Manager** screen displays.

Enter a name for the **Project source** and click **Active Servers**.

The **Available MicroStrategy Intelligence Servers** screen displays.

Figure 6–17 Available MicroStrategy Intelligence Servers



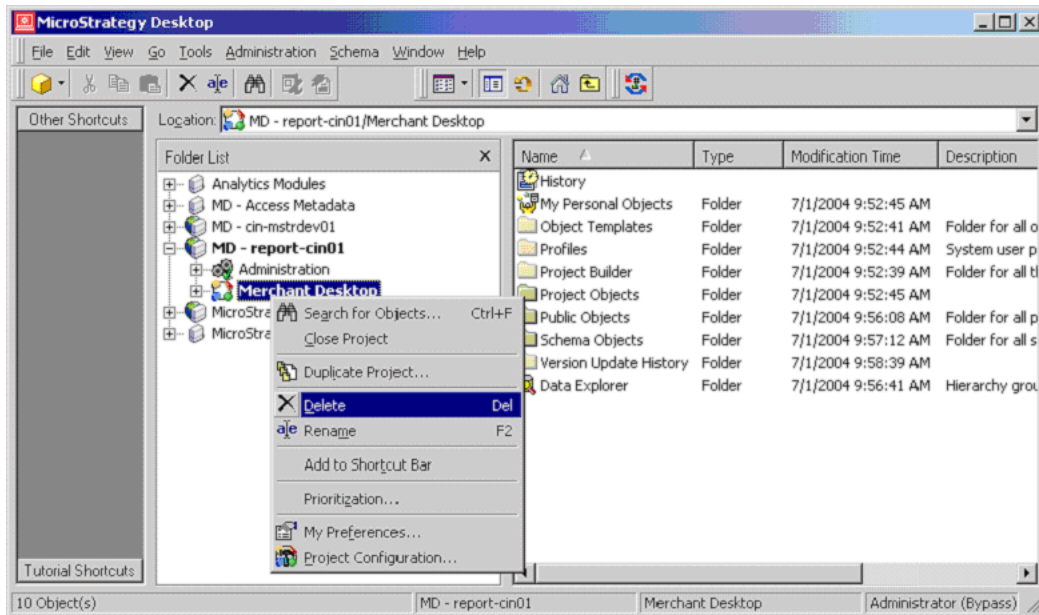
Select your Intelligence Server and click **OK**.

In the **Create Project Source** box, click **OK**.

The **MicroStrategy Desktop** screen displays.

3. If any old Merchant Desktop projects exist, delete them as follows:

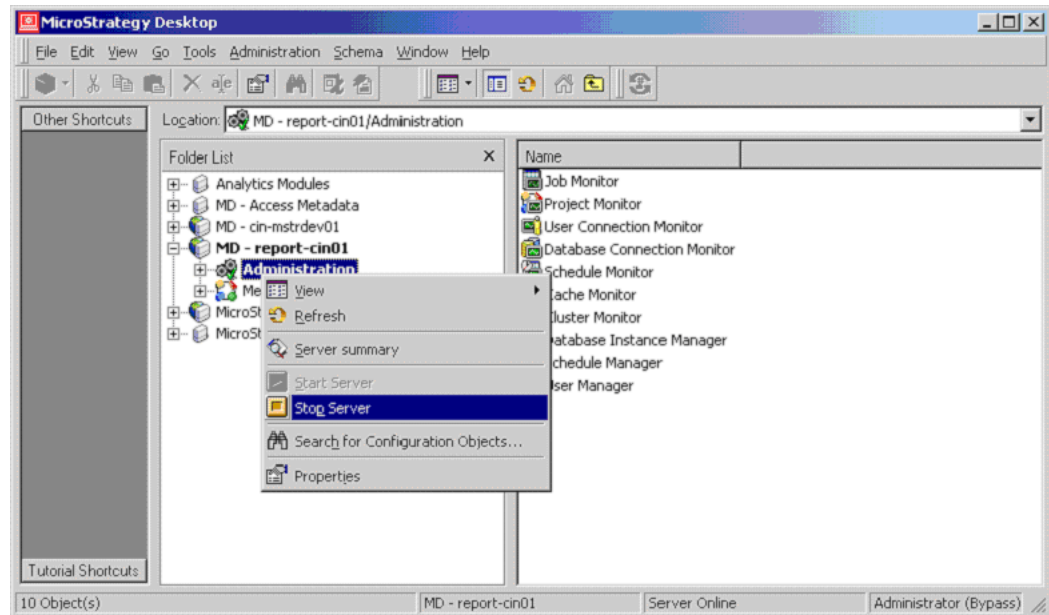
Figure 6–18 Deleting Old Merchant Desktop Projects



From the **Folder List**, right-click **Merchant Desktop** and click **Delete**.

4. Stop and restart the Intelligence Server as follows:

Figure 6–19 Stopping and Restarting the Intelligence Server

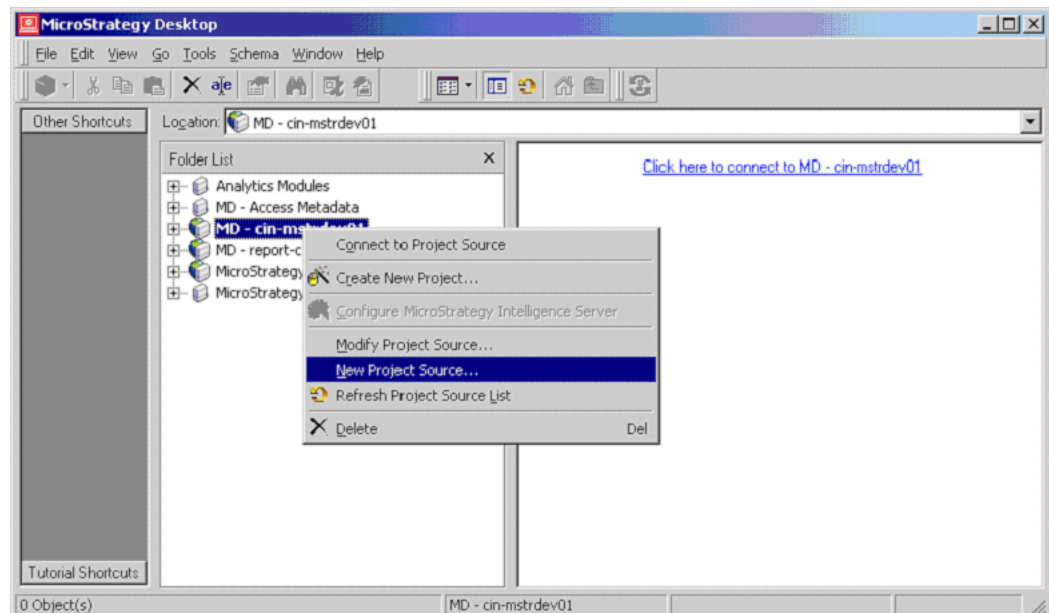


From the **Folder List** pane, right-click **Administration** and select **Stop Server**.

Next, right click **Administration** and select **Start Server**.

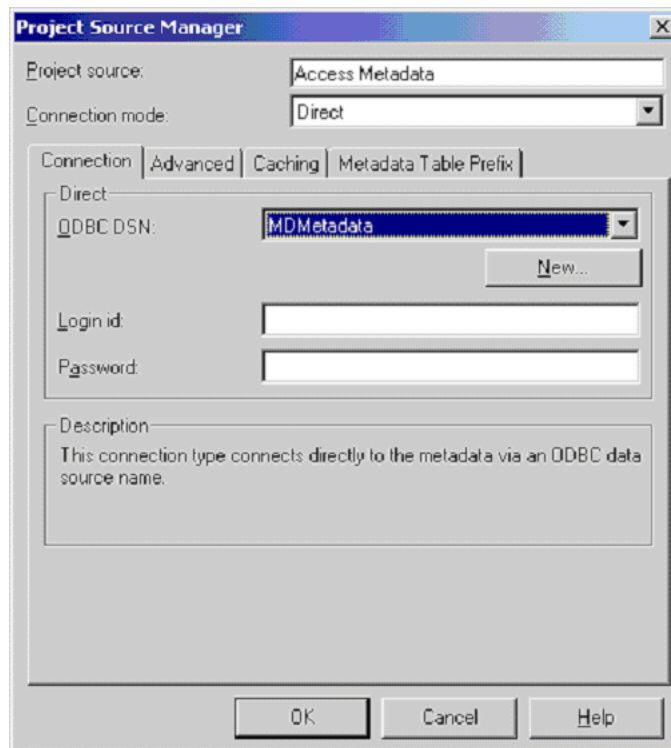
5. Create a new project source as follows:

Figure 6–20 Creating a New Project Source



From the **Folder List** pane, right-click on a project source and select **New Project Source**.

The **Project Source Manager** screen displays.

Figure 6–21 Project Source Manager Screen

- a. In the **Project source** field, enter **Access Metadata**; in the **Connection Mode** dropdown, select **Direct**; on the **Connection** tab, use the **ODBC DSN** drop down to select the **MDMetadata** database; enter your **Login ID** and **Password**; and click **OK**.
- b. From the MicroStrategy Desktop menu, select **Schema > Duplicate Project**. The **Project Duplication - Source Project Location** screen displays.

Figure 6–22 Project Duplication - Source Project Location Screen

- c. From the **Available Project Sources** drop down menu, select **MD - Access Metadata** and click **Next**.

The **Project Duplication - Source Project Selection** screen displays.

Figure 6–23 Project Duplication - Source Project Selection Screen

- d. In the **Available Projects** field, select **Merchant Desktop** and click **Next**.

The **Project Duplication - Duplicate Project Location** screen displays.

Figure 6–24 Project Duplication - Duplicate Project Location Screen

Project Duplication - Duplicate Project Location

Please select a destination project source for the duplicated version 7.X project.

Available Project Sources:

MD - report-01 New...

Authentication:

How should MicroStrategy Desktop verify the authenticity of your login? Please note that you must have administrator privileges in order to proceed.

Use Windows authentication

With the login id and password provided below:

Login id: Administrator

Password:

Help Cancel < Back Next > Finish

- e. In the **Available Project Sources** drop down menu, select **MD - report-01**, and click **Next**.

The **Project Duplication - Duplicate Project Creation** screen displays.

Figure 6–25 Project Duplication - Duplicate Project Creation Screen

Project Duplication - Duplicate Project Creation

Enter the name and description for the duplicated destination project:

Destination project name:
Merchant Desktop

Destination project description (optional):
Merchant Desktop

Help Cancel < Back Next > Finish

- f. Enter the **Destination project name** as Merchant Desktop and click **Next**. The **Project Duplication - Select Objects to Duplicate** screen displays.

Figure 6–26 Project Duplication - Select Objects to Duplicate Screen

Project Duplication - Select objects to duplicate

Please select the objects to duplicate during the process

Objects to duplicate

Select which objects to copy

- Project objects
 - All objects
 - Schema objects only
- Configuration objects
 - All objects
 - Project-related objects only
- Users and user groups
 - All users and user groups
 - Project-related users and groups only
 - Include all groups even if not project related (preserve group...)
 - Selected users and groups...

Select users...

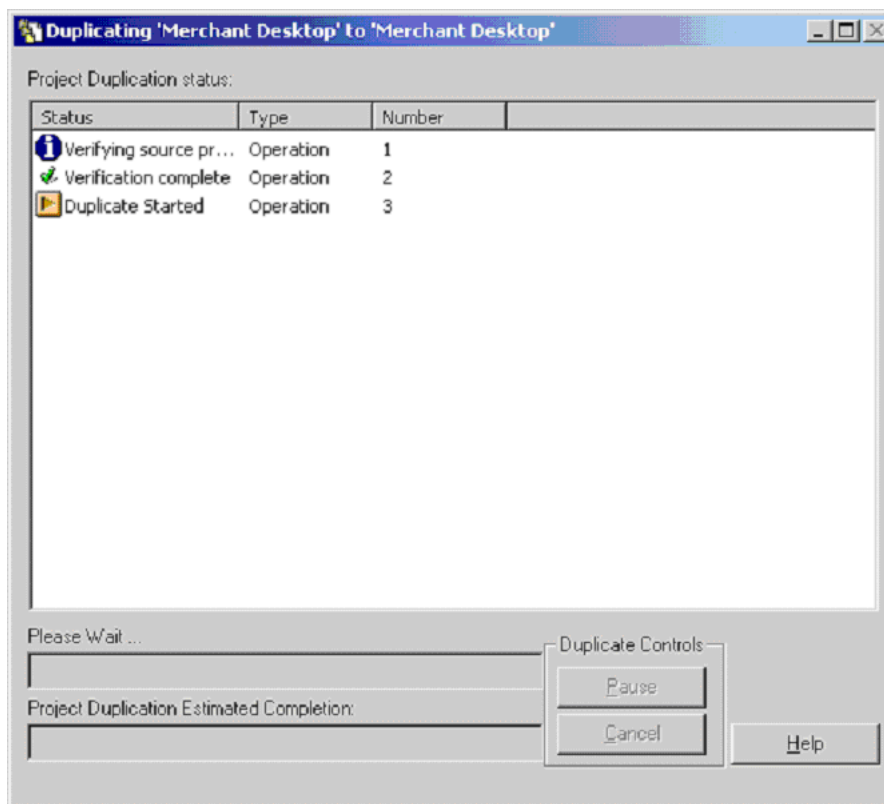
Help Cancel < Back Next > Finish

Select the Project objects you want to duplicate and click **Finish**.

When prompted to overwrite the event log, click **Yes to All**.

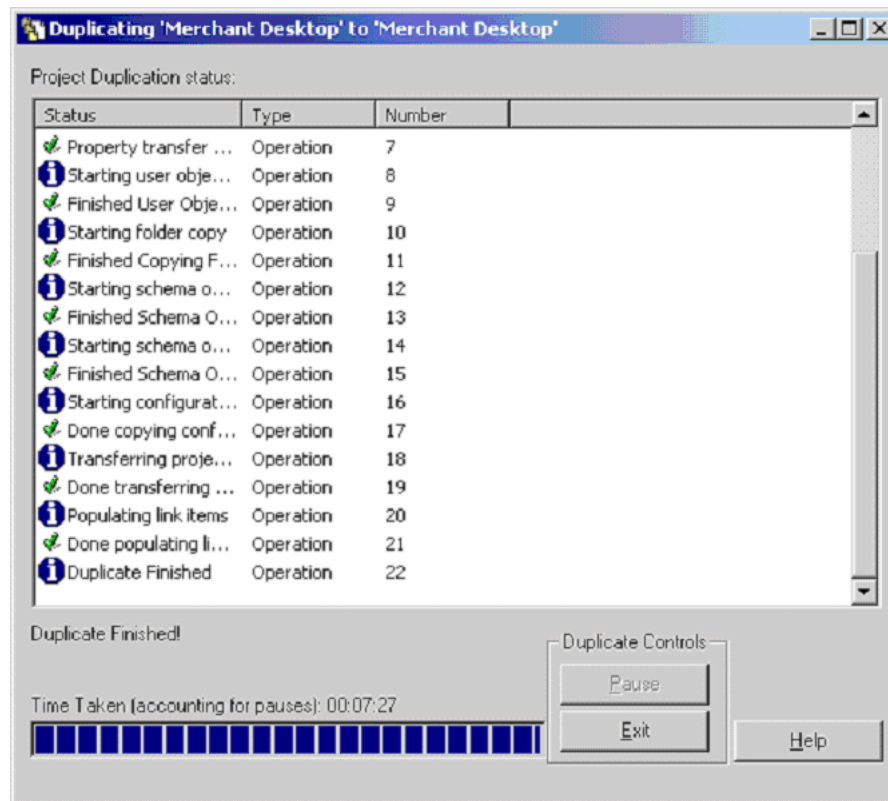
The **Project Duplication Status** screen displays.

Figure 6–27 Project Duplication Status Screen (In Process)



The duplication process takes approximately 15 minutes.

- g.** When the **Duplicating Finished** notification displays, click **OK**.
The **Project Duplication Status** screen now displays an **Exit** button.

Figure 6–28 Project Duplication Status Screen (Completed)

- h. When the process finishes, click **Exit**.

Now the Merchant Desktop metadata has been migrated to the new server.

Now you can configure MicroStrategy to access the RDM database.

Configuring MicroStrategy to Access the RDM Database

This section describes how to configure MicroStrategy to point to the correct RDM database. This section contains the following topics:

- [Creating the Database Connection](#)
- [Mapping MicroStrategy Desktop to the RDM](#)

Creating the Database Connection

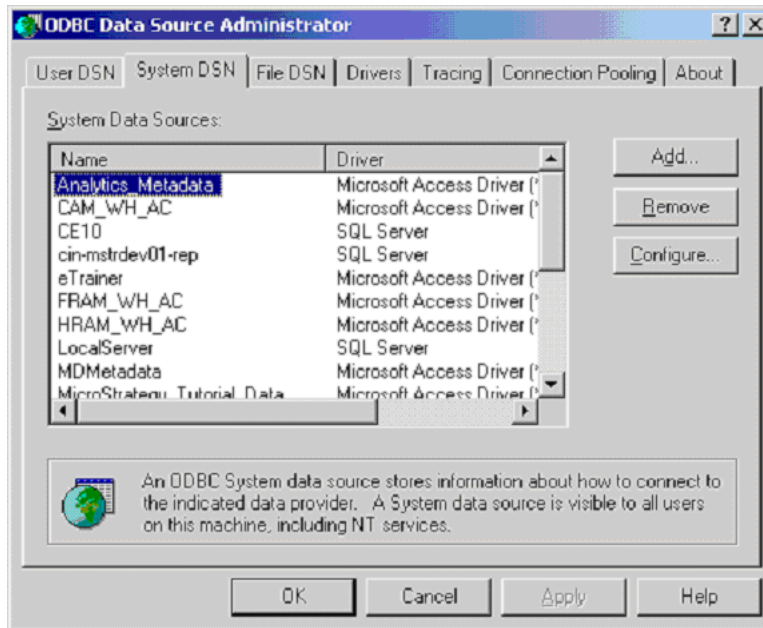
This section explains how to create an ODBC System DSN connection to the RDM database.

To connect the ODBC to the RDM database:

1. From Microsoft Windows, navigate to **Start > Settings > Control Panel > Administrative Tools > Data Sources (ODBC)**.

The **ODBC Data Source Administrator Screen** displays.

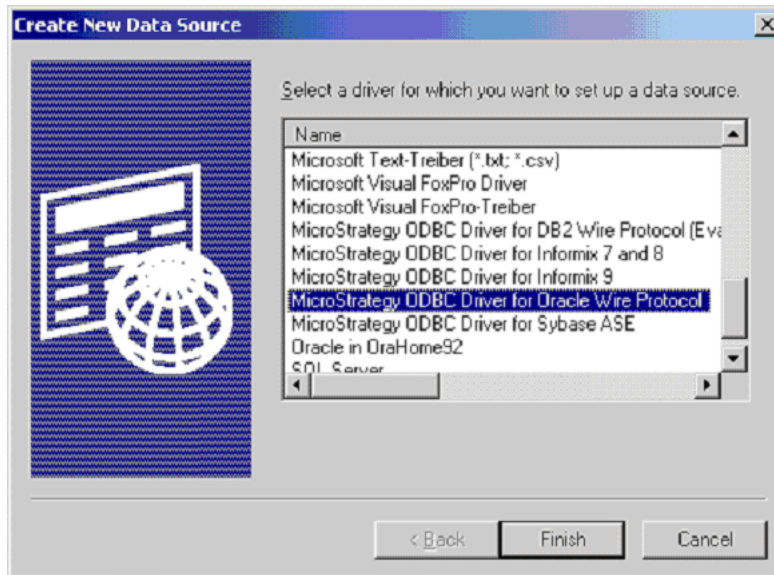
Figure 6–29 ODBC Data Source Administrator Screen



2. Click the **System DSN** tab, in the **System Data Sources** field select **Analytics_Metadata**, and click **Add**.

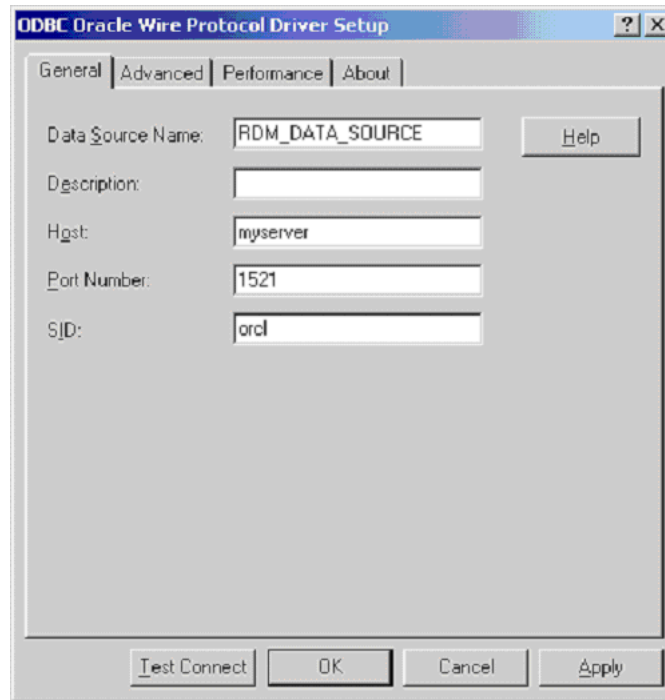
The **Create New Data Source** screen displays.

Figure 6–30 Create New Data Source Screen



Select **MicroStrategy ODBC Driver for Oracle Wire Protocol** and click **Finish**.

The **ODBC Oracle Wire Protocol Driver Setup** screen displays.

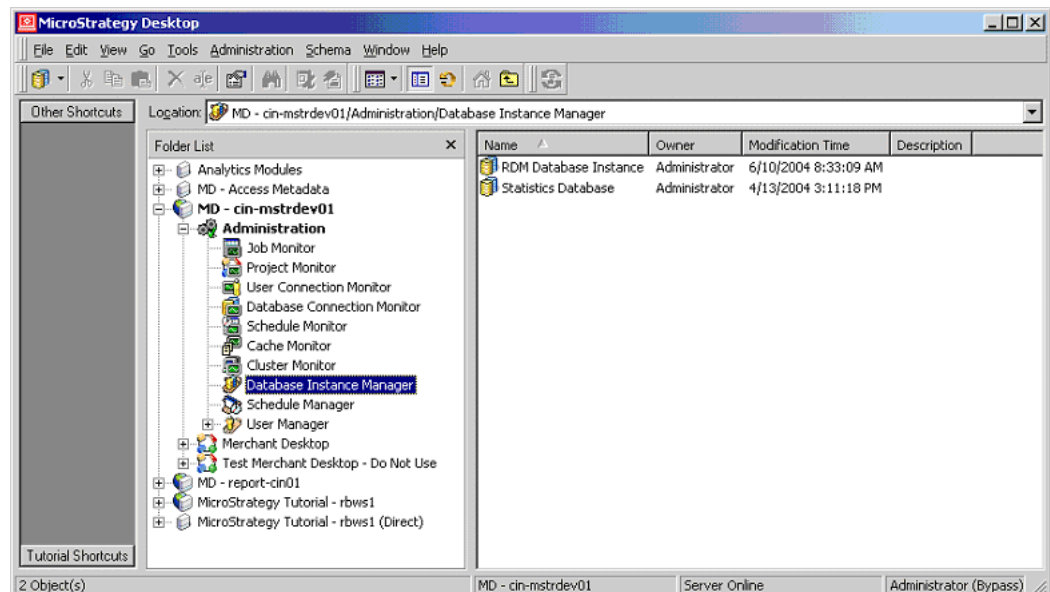
Figure 6–31 ODBC Oracle Wire Protocol Driver Setup Screen

For **Data Source Name** enter RDM_DATA_SOURCE, for **Port Number** enter 1521, for **SID** enter orcl, and click **OK**.

Mapping MicroStrategy Desktop to the RDM

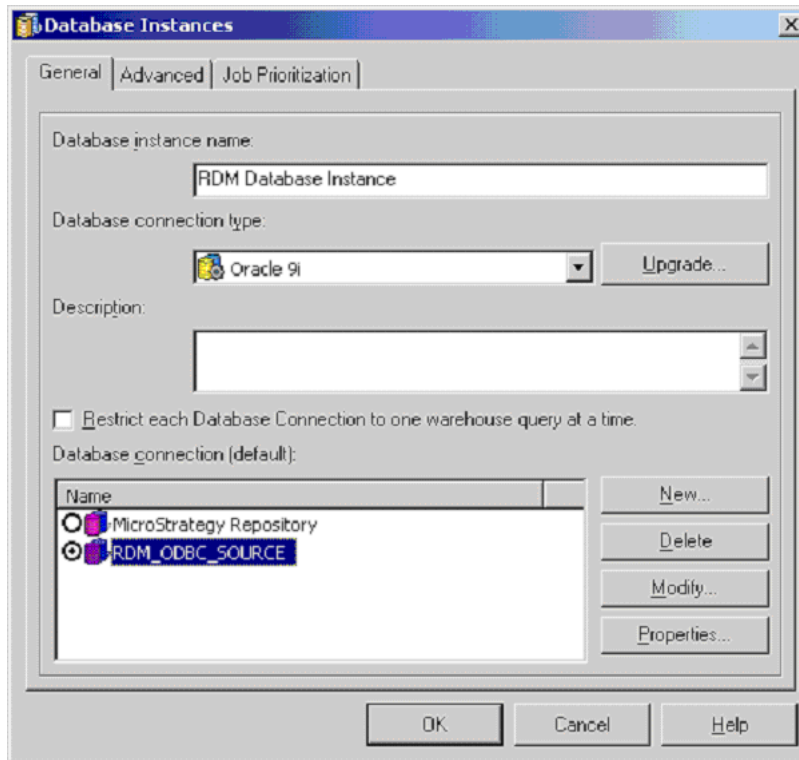
To map MicroStrategy Desktop to the RDM database:

1. Using MicroStrategy Desktop, map the MicroStrategy configuration to the RDM database instance as follows:

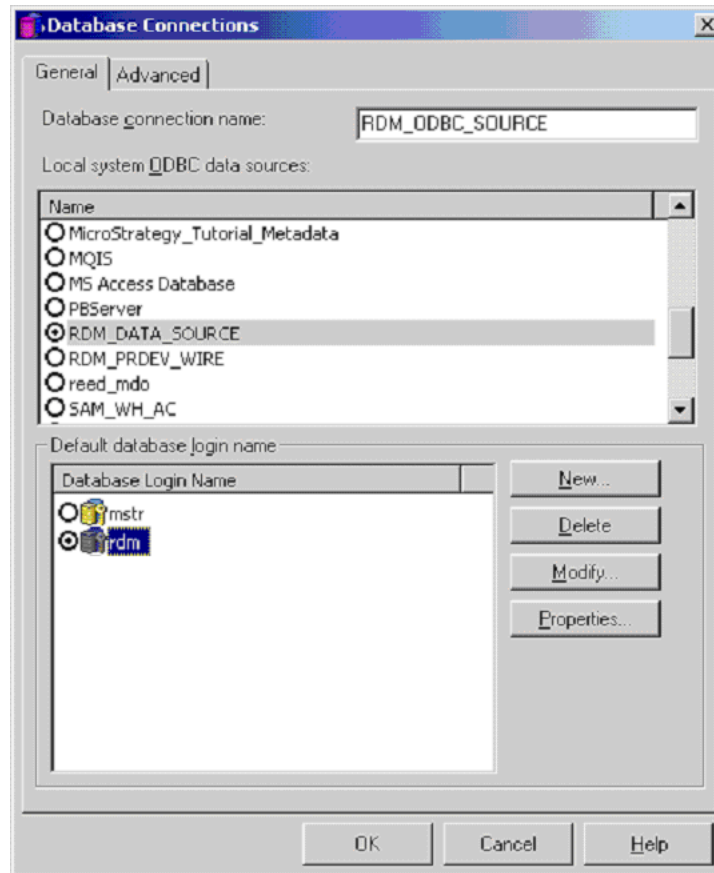
Figure 6–32 Mapping MicroStrategy to RDM Database Instance

- From the **Folder List** panel, select **Project Source > Database Instance Manager**.
The **Database Instances** screen displays.

Figure 6–33 Database Instances Screen



- Enter **Database instance name** as RDM Database Instance, select **RDM_ODBC_SOURCE**, and click **OK**.
The **Database Connections** screen displays.

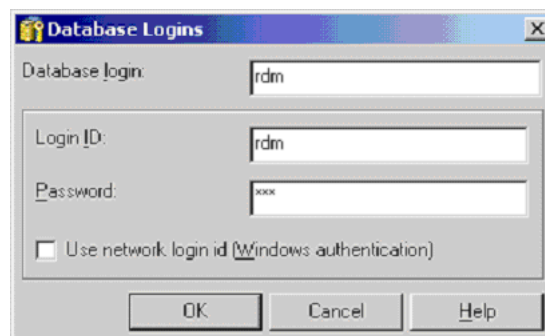
Figure 6–34 Database Connections Screen

From the **Database connection name** drop down menu, select **RDM_DATA_SOURCE**; in the **Local system ODBC data sources** field, select **DRM_DATA_SOURCE**; and in the **Database Login Name**, select **rdm**.

If your login does not already exist, click **New** and create your login ID.

Click **OK**.

4. The **Database Login** screen displays.

Figure 6–35 Database Login Screen

Enter the **Database Login**, **Login ID**, and **Password** for the database where the RDM is installed, and click **OK**.

Your data sources are now mapped to each other.

Mapping RDM and MicroStrategy Summarization Levels

This section contains the following topics:

- [Understanding the Summarization Mapping](#)
- [Using MicroStrategy Desktop to Map Merchant Desktop Attributes](#)

Understanding the Summarization Mapping

For information about summarization level mapping, see the following table.

Table 6–1 Mapping the Summarization Levels

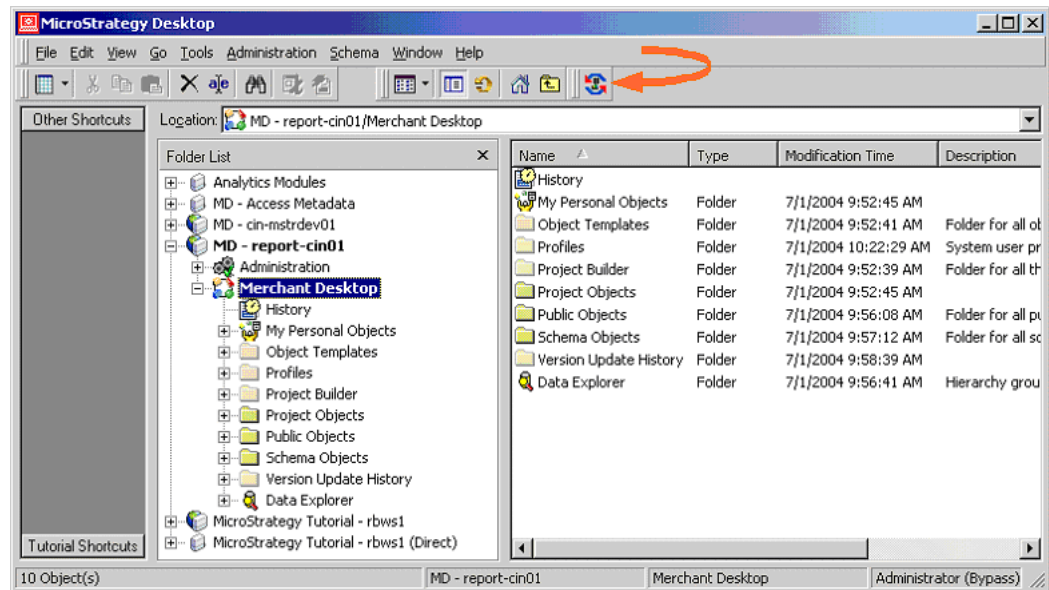
Hierarchy	Summarization Level
<i>Location Hierarchies</i>	
Location Hierarchy 1	At summary levels: 0, 1 and 2 Between summary levels: B Optimization levels: test
Location Hierarchy 2	At summary levels: 0, 1 and 2 Between summary levels: B Optimization levels: test
Location Hierarchy 3	At summary levels: 0, 1 and 2 Between summary levels: B Optimization levels: test
Location Hierarchy 4	At summary levels: 0 and 1 Between summary levels: B Optimization levels: test
<i>Merchandise Hierarchies</i>	
Product Hierarchy 1	At summary levels: 0, 1, and 2 Between summary levels: B Optimization levels: test
Product Hierarchy 2	At summary levels: 0, 1 and 2 Between summary levels: B Optimization levels: test
Product Hierarchy 3	At summary levels: 0, 1 and 2 Between summary levels: B Optimization levels: test
Product Hierarchy 4	At summary levels: 0, 1 and 2 Between summary levels: B Optimization levels: test
Product Hierarchy 5	At summary levels: 0 and 1 Between summary levels: B Optimization levels: test
Product Hierarchy 6	At summary levels: 0 Between summary levels: B Optimization levels: test
Product Hierarchy 7	At summary levels: 0 Between summary levels: B Optimization levels: test
Product Hierarchy 8	At summary levels: 0 Between summary levels: B Optimization levels: test

Using MicroStrategy Desktop to Map Merchant Desktop Attributes

If the new summary levels for either hierarchy are below the appropriate levels, use MicroStrategy Desktop to update the schema as follows. Refer to [Configuring RDM and MicroStrategy Summarization Levels](#) for information.

1. Launch MicroStrategy Desktop and update the Merchant Desktop schema as follows:

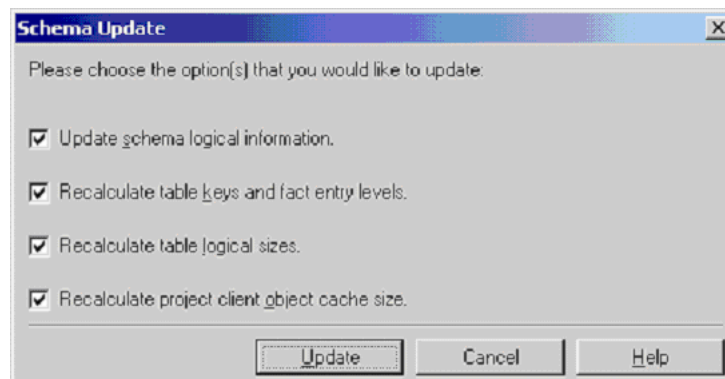
Figure 6–36 Updating the Merchant Desktop Schema



From the MicroStrategy Desktop menu, select **Schema > Update Schema** (or click the Schema Update button).

The **Schema Update** screen displays.

Figure 6–37 Schema Update Screen



2. Ensure that all options are selected and click **Update**.

This updates the schema. The MicroStrategy Desktop displays.

3. Specify attribute mapping as follows:

Modify each **Attribute** screen as shown in [Table 6–2, Price Attribute Screen Summary Table Values](#).

Table 6–2 Price Attribute Screen Summary Table Values

Attribute	Form Expression	Source Tables
<i>Location Attributes</i>		
Location Hierarchy2	HIERARCHY2_LID	RDM_LOCATION_VW_0 RDM_LOCATION_VW_1 RDM_LOCATION_VW_2
Location Hierarchy3	HIERARCHY3_LID	RDM_LOCATION_VW_0 RDM_LOCATION_VW_1 RDM_LOCATION_VW_2 RDM_MV_ACT_2 RDM_MV_FA_2
Location Hierarchy4	LOCATION_ID	RDM_ACTIVITIES RDM_BUDGETS RDM_FORECAST_ACTIVITIES RDM_HIST_MARKDOWNS RDM_ITEM_DATA RDM_ITEMS_TBL
Location Hierarchy4	RDM_LOCATION_VW_0 RDM_LOCATION_VW_1 RDM_MV_ACT_2 RDM_MV_FA_2	HIERARCHY4_LID
<i>Product Attributes</i>		
Product Hierarchy 1	HIERARCHY1_PID	RDM_MERCHANDISE_VW_0
Product Hierarchy5	HIERARCHY5_PID	RDM_MERCHANDISE_VW_1 RDM_MV_ACT_1 RDM_MV_FA_1
Product Hierarchy4	HIERARCHY4_PID	RDM_MERCHANDISE_VW_0 RDM_MERCHANDISE_VW_1 RDM_MERCHANDISE_VW_2 RDM_MV_ACT_2 RDM_MV_FA_2
Product Hierarchy5	HIERARCHY5_PID	RDM_MERCHANDISE_VW_0 RDM_MERCHANDISE_VW_1 RDM_MV_ACT_1 RDM_MV_FA_1
Product Hierarchy6	HIERARCHY_6_PID	RDM_MERCHANDISE_VW_0
Product Hierarchy8 PI_ID	PI_ID	RDM_ACTIVITIES RDM_FORECAST_ACTIVITIES RDM_HIST_MARKDOWNS RDM_ITEM_DATA RDM_ITEMS_TBL
Product Hierarchy8 Hierarchy {N}_PID	HIERARCHY8_PID	RDM_MERCHANDISE_VW_0

Modify each **Attribute** screen as shown in the following tables.

- [Table 6–3, "Location Hierarchy Attributes"](#)
- [Table 6–4, "Product Hierarchy Attributes"](#)

Note: Price Optimization has views but no materialized views.

Location Hierarchy Attributes. For each *location* hierarchy level, the attribute is configured to be available for the hierarchyN_lid for hierarchy, where N is the level of the hierarchy.

Table 6–3 Location Hierarchy Attributes

Attribute	Form Expression	Source Table
Location Hierarchy 1	HIERARCHY1_LID	RDM_LOCATION_2 ~12
	LOCATION_ID	RDM_LOCATION_1 RDM_LOCATION_CDA_1 RDM_PLAN_COMPANY_BUDGETS
Location Hierarchy 2	HIERARCHY2_LID	RDM_LOCATION_3 ~12
	LOCATION_ID	RDM_LOCATION_2 RDM_LOCATION_CDA_2 RDM_ACTUAL_HISTORY_2 RDM_ACTUAL_HISTORY_3 RDM_OPT_HISTORY_2 RDM_OPT_HISTORY_3
Location Hierarchy 3	HIERARCHY3_LID	RDM_LOCATION_4 ~12
	LOCATION_ID	RDM_LOCATION_3 RDM_LOCATION_CDA_3
Location Hierarchy 4	HIERARCHY4_LID	RDM_LOCATION_5 ~12
	LOCATION_ID	RDM_LOCATION_4 RDM_LOCATION_CDA_4
Location Hierarchy 5	HIERARCHY5_LID	RDM_LOCATION_6 ~12
	LOCATION_ID	RDM_LOCATION_5 RDM_LOCATION_CDA_5 RDM_ACTUAL_HISTORY_0 RDM_ACTUAL_HISTORY_1 RDM_OPT_HISTORY_0 RDM_OPT_HISTORY_1 RDM_PLANNED_PACK_OPT RDM_PLAN_COMPANY_BUDGETS RDM_PLAN_SEGMENT_1_DATA_0 RDM_PLAN_SEGMENT_1_DATA_1 RDM_PLAN_SEGMENT_2_DATA_0 RDM_PLAN_SEGMENT_2_DATA_1 RDM_PLAN_STORE_BUDGETS RDM_PLAN_VOLUME_GROUPS

Product Hierarchy Attributes. For each *product* hierarchy level, each attribute is configured to be available for the following form expressions:

- primary key join
- hierarchyN_pi_id, where N is the level of the hierarchy.

Table 6–4 Product Hierarchy Attributes

Attribute	Form Expression	Source Table
Product Hierarchy 1	HIERARCHY1_PI_ID	RDM_MERCHANDISE_2-15
	PI_ID	RDM_MERCHANDISE_1 RDM_MERCH_CDA_1

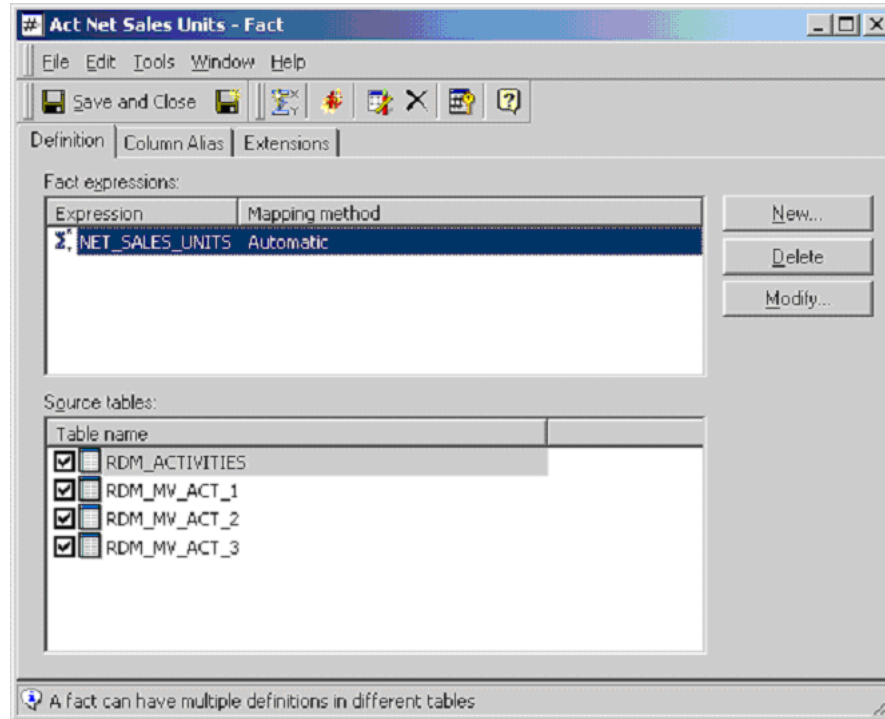
Table 6–4 Product Hierarchy Attributes

Attribute	Form Expression	Source Table
Product Hierarchy 2	HIERARCHY2_PI_ID	RDM_LOCATION_3-15
	PI_ID	RDM_MERCHANDISE_2 RDM_MERCHANDISE_CDA_2
Product Hierarchy 3	HIERARCHY3_PI_ID	RDM_MERCHANDISE_4-15
	PI_ID	RDM_MERCHANDISE_3 RDM_MERCHANDISE_CDA_3
Product Hierarchy 4	HIERARCHY4_PI_ID	RDM_MERCHANDISE_5-15
	PI_ID	RDM_MERCHANDISE_4 RDM_MERCHANDISE_CDA_4 RDM_PLAN_COMPANY_BUDGETS
Product Hierarchy 5	HIERARCHY5_PI_ID	RDM_MERCHANDISE_6-15
	PI_ID	RDM_MERCHANDISE_5 RDM_MERCH_CDA_5 RDM_ACTUAL_HISTORY_3 RDM_OPT_HISTORY_3
Product Hierarchy 6	HIERARCHY6_PI_ID	RDM_MERCHANDISE_7-15
	PI_ID	RDM_MERCHANDISE_6 RDM_MERCH_CDA_6
Product Hierarchy 7	HIERARCHY7_PI_ID	RDM_MERCHANDISE_8-15
	PI_ID	RDM_MERCHANDISE_7 RDM_MERCH_CDA_7
Product Hierarchy 8	HIERARCHY8_PI_ID	RDM_MERCHANDISE_9-15
	PI_ID	RDM_MERCHANDISE_8 RDM_MERCH_CDA_8 RDM_PLANNED_ITEMS_1 RDM_PLAN_SEGMENT_1_DATA_1 RDM_PLAN_SEGMENT_2_DATA_1
Product Hierarchy 9	HIERARCHY9_PI_ID	RDM_MERCHANDISE_10-15
	PI_ID	RDM_MERCHANDISE_9 RDM_MERCH_9 RDM_ACTUAL_HISTORY_1 RDM_ACTUAL_HISTORY_2 RDM_OPT_HISTORY_1 RDM_OPT_HISTORY_2 RDM_PLANNED_ITEMS_0 RDM_PLAN_COMPANY_BUDGETS RDM_PLAN_SEGMENT_1_DATA_0 RDM_PLAN_SEGMENT_2_DATA_0
Product Hierarchy 10	HIERARCHY10_PI_ID	RDM_MERCHANDISE_11-15
	PI_ID	RDM_MERCHANDISE_10 RDM_MERCH_CDA_10 RDM_OPT_HISTORY_0 RDM_ACTUAL_HISTORY_0 RDM_PLANNED_PACK_OPT

4. After you have created, added, or changed any summary levels, use MicroStrategy Desktop to modify the following folders to include the new summary levels:
 - ../schema object/facts/actuals

- ../schema object/facts/forecasts

Figure 6–38 Act Net Sales Units - Fact Screen



5. Change the lookup on all of the forms, not just the ID form.
Now you can map the display of hierarchies to display correctly.

Mapping the Display of Hierarchy Levels

Now you need to enable the correct display of hierarchy level descriptions for the user interface.

To enable the correct display of hierarchy level descriptions:

1. Start MicroStrategy Desktop.
2. From the **Folder List** pane, select **Merchant Desktop > Schema Objects > Attributes**.
3. In the **Attributes** folder, right-click each mapped attribute, select **Rename**, and enter the description listed in [Table 6–5, Mapping the Display of Hierarchy Levels](#).

Table 6–5 Mapping the Display of Hierarchy Levels

MicroStrategy Attributes	Merchant Desktop Descriptions
<i>Location Attributes</i>	
Location Attribute 1	Location Chain
Location Attribute 2	Company
Location Attribute 3	Zone
Location Attribute 4	Price Zone
<i>Merchandise Attributes</i>	

Table 6–5 Mapping the Display of Hierarchy Levels

MicroStrategy Attributes	Merchant Desktop Descriptions
Product Attribute 1	Merchandise Chain
Product Attribute 2	Company Chain
Product Attribute 3	Division
Product Attribute 4	Department
Product Attribute 5	Class
Product Attribute 6	Style
Product Attribute 7	Color
Product Attribute 8	Product Key

Configuring the User Link

Configuring the user link is the last step in integrating with MicroStrategy. This step automatically migrates user configuration data into MicroStrategy, eliminating the need to enter the same user management information into both Merchant Desktop and MicroStrategy.

After you have completed these steps, all MicroStrategy reporting will use the same security settings as specified for Price Optimization/Merchant Desktop users.

1. From the Windows server where MicroStrategy is installed, run the following command:

```
..\MerchantDesktop.tar\MicrostrategyServerSetup\install.cmd
```

The Oracle Installer **Welcome** screen displays.

2. Respond to prompts on the Oracle Installer screens as follows:
 - a. **Welcome** screen - Click **Next**.
 - b. **Application Server** screen - Select **None** and click **Next**.
 - c. **Database** screen - Select a database.

Note: Although this setting is not used by the MicroStrategy User Integration Server and will have no effect on its installation, a current limitation of the Oracle Installer does not allow the **None** selection.

- d. **Select Components** screen - Select **RMI/Jacob Server**, and make sure the destination directories point to the appropriate directory. Click **Next**.
- e. **Summary** screen - Click **Install**.

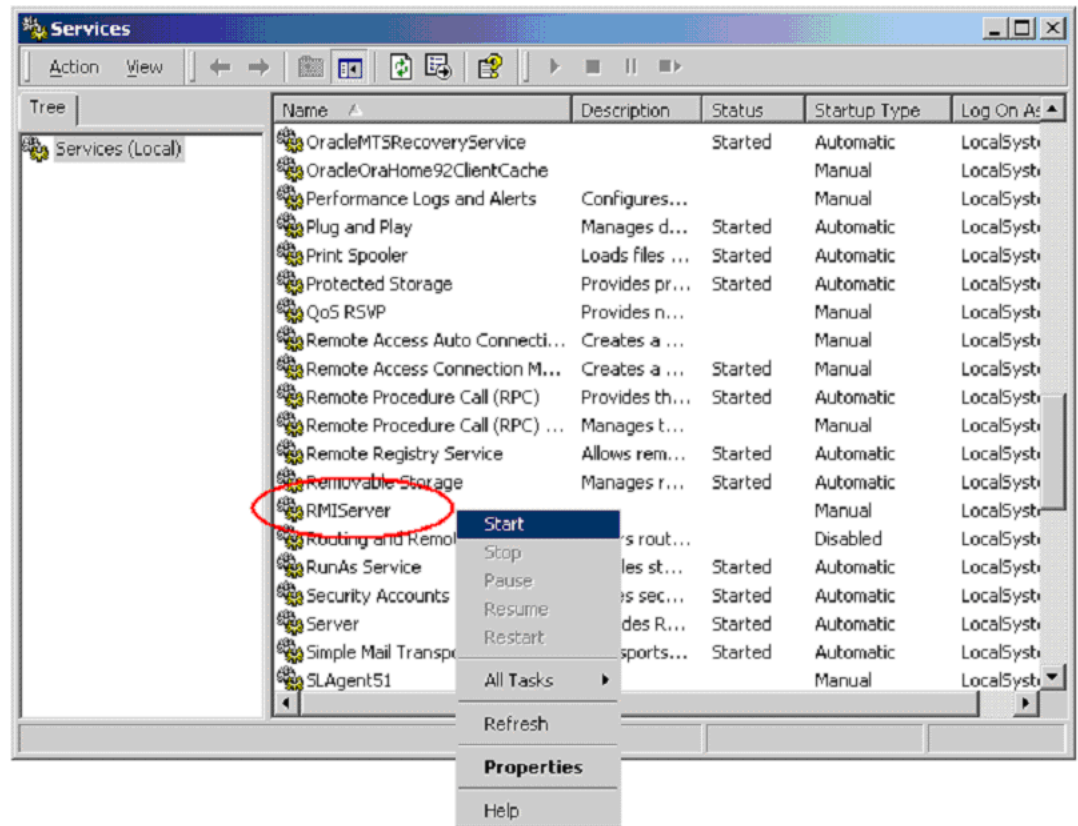
Now, the MicroStrategy User Integration Server is installed.

Next, start this service manually, as follows.

3. From Microsoft Windows, navigate to **Start > Settings > Control Panel > Administrative Tools > Services**.

The **Services** dialog box displays.

Figure 6–39 Services Dialog Box



4. Right click **RMIServer** and select **Start**.

A progress bar displays, and the status changes to **Started**.

Note: You can set the **RMIServer** service to run automatically by selecting **Properties** and on the **RMIServer Properties** dialog box, select **Automatic** for **Startup Type**.

5. Edit the <PRICE_HOME>/config/usermanagement.properties file as follows:

```
# Replace the value with your RMI host.
rmiHost=report-01.<host name>.com

# Specify your rmiHost and reportServer. In most cases they are the same.
rmiPort=44499
reportServer=report-01.<host name>.com

# Specify the administrator username and password for MicroStrategy.
administratorName=administrator
administratorPassword=password

## Specify the number of MicroStrategy licenses you have purchased.
microstrategy.users.max=0
```

Now you can test the user mapping.

6. Shut down your application server and restart it.
7. Enter the URL for Price Optimization, login as root, and create some Merchant Desktop/Price Optimization users.

8. When you have successfully created a user account with a Merchant Desktop and Price Optimization role, enter the URL for Merchant Desktop and log on as an administrator.

Troubleshooting

This section enables you to troubleshoot and resolve user management errors.

Error: Unable to update the MicroStrategy Users table: Licenses exceeded.

Edit the `usermanagement.properties` file as described in Step 5 and specify the correct number of MicroStrategy licenses. Then shut down and restart your application server.

Error: MicroStrategy Integration: General failure connecting to the remote registry.

Start the RMI service as described in Step 4.

Error when trying to add a role.

The role you are trying to create already exists in the MicroStrategy users database. Remove the user instance from the MicroStrategy users database, and then try to add the Merchant Desktop role again.

What's Next?

Now that you have set up Price Optimization, Merchant Desktop, and MicroStrategy, you can load data and configure the user interface as described in the *Price Optimization Configuration Guide*.

For information about using Price Optimization and the Merchant Desktop, see the *Price Optimization User Guide*.