

Oracle® Retail Item Planning

Installation Guide

Release 13.4.2

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Oracle Retail Item Planning Installation Guide, Release 13.4.2.

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document.

Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the Online Documentation available on the Oracle Technology Network Web site. It contains the most current Documentation Library plus all documents revised or released recently.

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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.

Audience

This Installation Guide is written for the following audiences:

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

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For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

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 Documentation

For more information, see the following documents in the Oracle Retail Item Planning Release 13.4.2 documentation set:

- *Oracle Retail Item Planning Release Notes*
- Oracle Retail Predictive Application Server documentation

For more information about the Fashion Planning Bundle applications see the following documentation sets:

- Oracle Retail Item Planning Configured for COE documentation
- Oracle Retail Clearance Optimization Engine documentation
- Oracle Retail Assortment Planning documentation
- Oracle Retail Merchandise Financial Planning documentation

- Oracle Retail Size Profile Optimization documentation

For more information about RPAS and the ODI Enabled Integration, see the following documentation sets:

- Oracle Retail ODI Enabled Integration documentation
- Oracle Data Integrator documentation
- Oracle Retail Predictive Application Server documentation

Supplemental Documentation on My Oracle Support

The following supplemental documentation is also available in the My Oracle Support Knowledge Base.

My Oracle Support Note ID 1132783.1 – Oracle Retail Fashion Planning Bundle Reports Documentation

The Oracle Retail Fashion Planning Bundle Reports package includes role-based Oracle Business Intelligence (BI) Enterprise Edition (EE) reports and dashboards that provide an illustrative overview highlighting the Fashion Planning Bundle solutions. These dashboards can be leveraged out-of-the-box or can be used along with other dashboards and reports that may have already been created to support a specific solution or organizational needs. This package includes dashboards for the Assortment Planning, Item Planning, Item Planning Configured for COE, Merchandise Financial Planning Retail Accounting, and Merchandise Financial Planning Cost Accounting applications.

The Oracle Retail Fashion Planning Bundle Reports documentation set includes the following documents that describe how you can install and use the reports and dashboards:

- *Oracle Retail Fashion Planning Bundle Reports Installation Guide* – This guide describes how you can download and install the Fashion Planning Bundle reports. This guide is intended for system administrators and assumes that you are familiar with the Oracle Retail Predictive Application Server (RPAS) and Oracle BI EE.
- *Oracle Retail Fashion Planning Bundle Reports User Guide* – This guide describes the reports and dashboards included for the Oracle Retail Fashion Planning Bundle solutions.

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, 13.4) or a later patch release (for example, 13.4.2). 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.
<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.

Introduction

This document provides instructions on installing Oracle Retail Item Planning. It provides detailed instructions on how to install an Item Planning domain using a configuration created in the RPAS Configuration Tools. This document does not describe how to create the actual configuration.

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 prior to beginning the installation process. Read these documents in their entirety before beginning the installation.

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.

About This Document

This document contains information for full and patch installations:

- [Chapter 2, "Full Installation: UNIX Environments"](#). Refer to this section if you are performing a full installation.
- [Chapter 3, "Patch Installation"](#). Refer to this section if you are performing a patch installation.

Read this entire guide before beginning the installation process to ensure you understand the installation process and have all the necessary documentation, hardware, and software available.

Hardware and Software Requirements

Table 1–1 provides information about the current release.

Table 1–1 Hardware and Software Requirements

Requirement	Details
Supported RPAS Version	13.4.2
Oracle Retail Batch Script Architecture (BSA)	13.4.2
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 <i>Oracle Retail Predictive Application Server Installation Guide</i> . Note: When installing Java, avoid enabling AutoUpdate because it may update the Java version without prompting.

Note: RPAS applications, such as Item Planning, 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*.

Verify that the UNIX operating system is updated to the currently supported version, which can be found in the “Hardware and Software Requirements” section of the supported RPAS version of the *Oracle Retail Predictive Application Server Installation Guide*.

Supported Oracle Integration Technology

The following Oracle integration technology is supported:

- Oracle Data Integrator (ODI) 11.1.1.6

Supported Oracle Retail Products

Item Planning is part of the Oracle Retail Fashion Planning Bundle. The Fashion Planning Bundle is the integration of Item Planning (IP), Clearance Optimization Engine (COE), Assortment Planning (AP), Merchandise Financial Planning (MFP), and Size Profile Optimization (SPO) as a full-suite planning solution for fashion retailers.

Table 1–2 provides information about the supported Oracle Retail products:

Table 1–2 Supported Oracle Retail Products

Product	Version
Oracle Retail Assortment Planning (AP)	13.4.2
Oracle Retail Merchandise Financial Planning (MFP)	13.4.2

Road Map for Installing Item Planning

This guide explains how you can install and set up the Item Planning application. In order to install Item Planning for production, you must perform the following tasks in a sequence:

Task	Description
<i>Pre-installation Tasks</i>	
1.	Install and set up the RPAS Infrastructure. For more information, refer to the <i>Oracle Retail Predictive Application Server Installation Guide</i> .
2.	Install and set up the RPAS Client. RPAS includes the RPAS Classic Client and RPAS Fusion Client. For more information, refer to the <i>Oracle Retail Predictive Application Server Installation Guide</i> .
3.	Oracle Retail Batch Scripting Architecture (BSA) must be installed prior to installing IP. For information about installing BSA, see the <i>Oracle Retail Batch Script Architecture Implementation Guide</i> .
<i>Installation Task</i>	
4.	Access the Item Planning installation software and install the application. For more information, see Chapter 2, "Full Installation: UNIX Environments" .

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.

Full Installation: 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 Item Planning Installer automates the following:

- Installation of the Item Planning mock install configuration
- Installation of the Item Planning configuration for the RPAS Fusion Client. For more information on installing the RPAS Fusion Client, refer to the *Oracle Retail Predictive Application Server Installation Guide*.
- Creation of a sample Item Planning domain

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

Environment Variable Setup

Before running the solution installer, source the `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
```

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

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.

Note: There are additional Java environment variables that must be set for your particular operation system. These variables are the same for all applications on RPAS. See the “Java Environment” section of the *Oracle Retail Predictive Application Server Installation Guide* for these environment variables.

Downloading and Extracting the Item Planning Media Pack

The following procedure provides information about downloading and extracting the Item Planning media pack and its contents.

1. Create a directory to store the Item Planning media pack on the target server. This directory is referred to as **[IP Installation]**. It is the location where the Item Planning installation routine is run.
2. Download and extract the media pack to this location. Once extracted, two directories appear: **CDROM** and **DOCS**.
 - The **CDROM** folder contains the `itemplan.zip` file, which contains the Item Planning solution.
 - The **DOCS** folder contains the Item Planning documentation.

Installing Item Planning

Perform the following steps to install Item Planning.

1. Extract the Item Planning Installer from the **[IP Installation]** directory.

```
cd CDROM  
unzip itemplan.zip
```
2. From the **[IP Installation]/CDROM** directory, run the following commands to run the Item Planning installer:

```
cd itemplan  
./install.sh
```

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

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

In both cases, the requested information is identical. In the GUI, you may be shown a check box to signal whether you want a component installed; in text mode, you are prompted for a response of **true** or **false**.

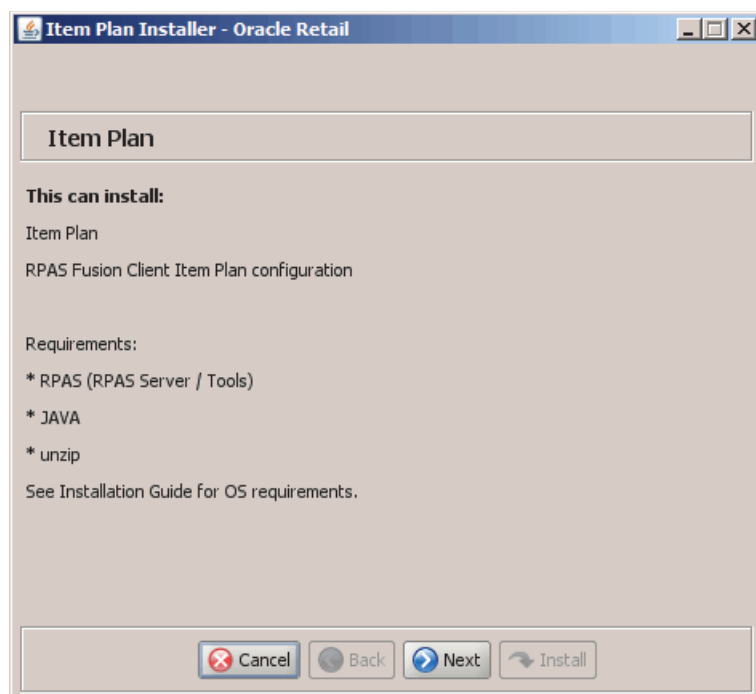
Note: In text mode, the default value appears in square brackets []. To use the default value and continue, press **Enter**. If you want to use a different value, enter the new value. When prompted to create a directory, respond with **yes** and press **Enter**.

3. The [Item Plan Installer Window](#) opens and displays the components that are installed during installation process as well as the required components.

Click **Next** to continue.

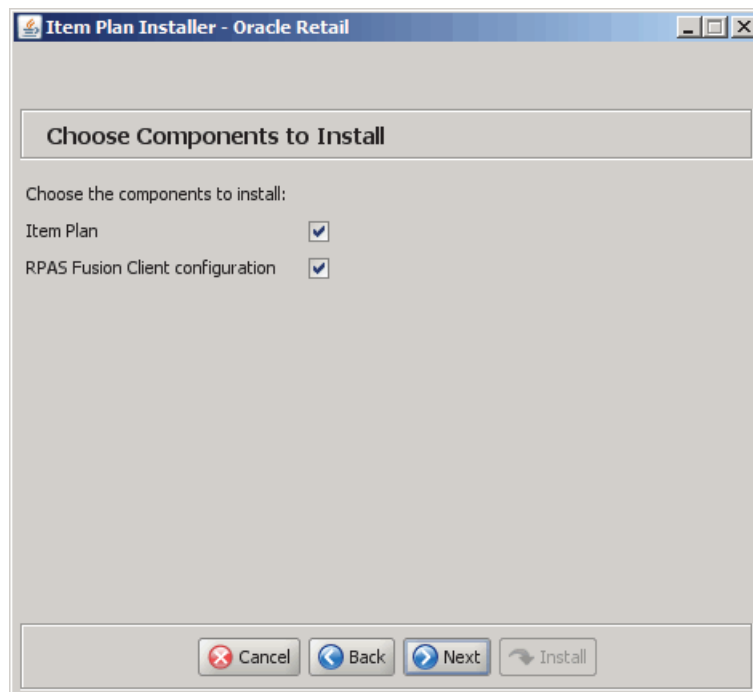
Note: Oracle Retail Batch Scripting Architecture (BSA) must be installed prior to installing IP. For information about installing BSA, see the *Oracle Retail Batch Script Architecture Implementation Guide*.

Figure 2–1 *Item Plan Installer Window*



4. The [Choose Components to Install Window](#) opens.

Figure 2–2 *Choose Components to Install Window*



Select one or both of the following options:

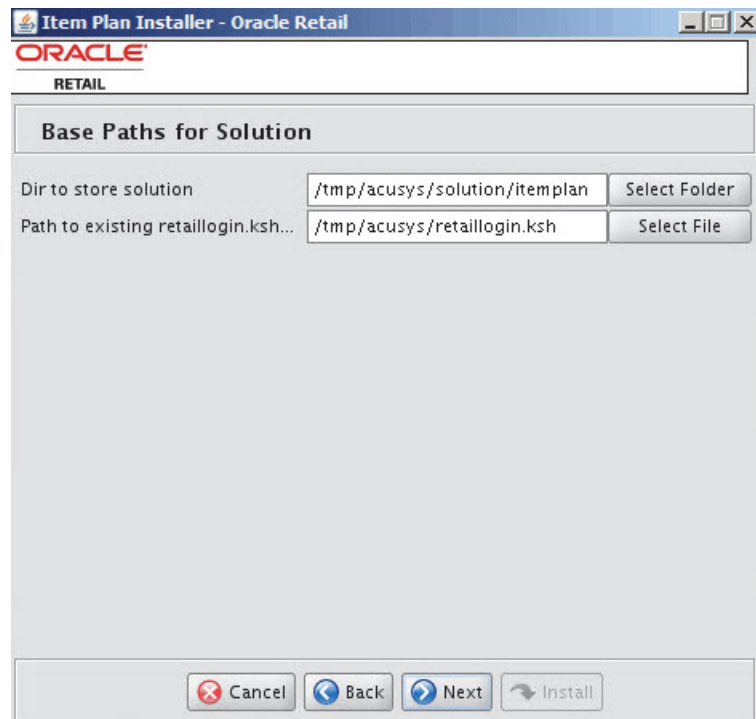
- **Item Planning** — Select this option to install the Item Planning server with the domain.
- **RPAS Fusion Client configuration** — Select this option to install the RPAS Fusion Client configuration for Item Planning. For more information on the configuration files included for the RPAS Fusion Client, see [Configuration Files for the RPAS Fusion Client](#).

Note: If you do not want to install the RPAS Fusion Client configuration, clear this check box, and skip steps 7 and 8.

Click **Next** to continue.

5. The [Base Paths for Solution Window](#) opens.

Figure 2–3 *Base Paths for Solution Window*



Enter the relevant information in the following fields:

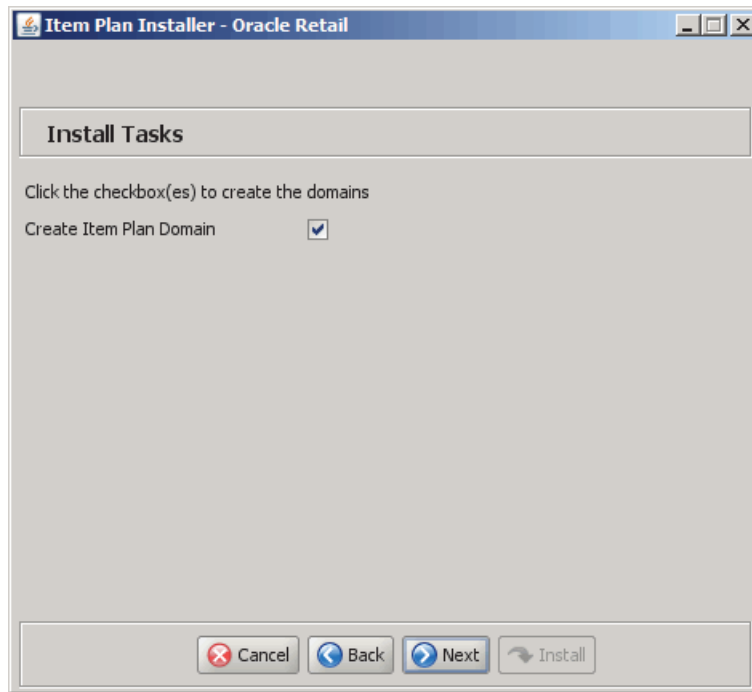
- **Dir to store solution** — Enter the directory path where your solution should be stored.
- **Path to existing retaillogin.ksh script** — Enter the path and file name to the retaillogin.ksh script created during RPAS installation.

Note: Ensure that the installation paths are located outside the installer directory [IP Installation].

Click **Next** to continue.

6. The [Install Tasks Window](#) opens.

Figure 2–4 *Install Tasks Window*



Select or clear the **Create Item Plan Domain** option:

- To create the Item Planning domain, select the **Create Item Plan Domain** option, which is selected by default.

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, see the [Environment Variable Setup](#) section.

- To install all required components to support the Item Planning domain, but not create the actual domain, clear the check box.

Click **Next** to continue.

7. The [Fusion Location Information Window](#) opens.

Figure 2–5 Fusion Location Information Window

Item Plan Installer - Oracle Retail

ORACLE
RETAIL

Fusion Location Information

Enter the number of RPAS Fusion Client servers to install these configurations on:

(1-4)

Enter the RPAS server hostname:

Enter the RPAS server port:

Enter RPAS solution details for the application.

RPAS Solution Path

Enter the relevant information in the following fields:

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 IP 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.
RPAS Solution Path	Enter the location of the RPAS domain for IP.

Note: The Fusion Location Information Windows open 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.

Click **Next** to continue.

8. Based on the number of servers you entered, the [Fusion Location Information \(Details\) Window](#) opens.

Figure 2–6 Fusion Location Information (Details) Window

The screenshot shows the 'Fusion Location Information' window. It has a title bar 'Item Plan Installer - Oracle Retail'. The main area is titled 'Fusion Location Information' and contains the following elements:

- A section titled 'Enter the details for RPAS Fusion Client #1'.
- A 'Hostname or IP' text box containing 'localhost'.
- A 'Configuration Directory' text box.
- A scrollable text area with the text: 'Enter both username and password if you want to save the login credentials to the secure wallet. Otherwise, login credentials will be retrieved from the wallet based on the user alias.'
- A 'Login username' text box.
- A 'Login password' text box.
- A text box for 'Enter an alias for the username.'
- A bottom bar with four buttons: 'Cancel' (with a red X icon), 'Back' (with a left arrow icon), 'Next' (with a right arrow icon), and 'Install' (with a circular arrow icon).

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.

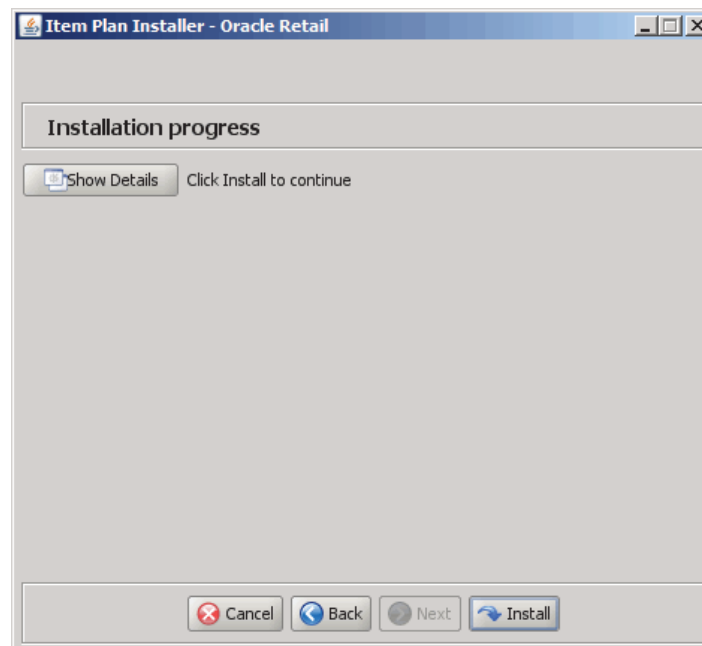
Enter the server details in the following set of fields for each configuration:

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.

Click **Next** to continue.

9. The [Installation Progress Window](#) opens. To start the installation, click **Install**.

Figure 2–7 *Installation Progress Window*



This window also displays the progress of the installation routine. Click **Show Details** to view the log output as the installation is performed. If you do not select to view the details, a graphical representation of the installation steps opens. As each step is completed, the color changes to show you the progress.

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

10. When the installation has finished, the Finished message opens. Click **OK**.
11. To view the installation details, click **Show Details**. The window displays two tabs, the Output tab and the Error tab. It is recommended that you review these tabs for any issues that may have occurred during the installation process.

If you want to view the log again at a later date, a text copy is saved in the directory **[IP Installation]**. The log file is named based on the product and timestamp, followed by the `.log` extension.

Created as part of this process is the `make_domain.itemplan` file located in **[Solution Install Dir]** entered previously. This file contains the required parameters needed to support the 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 may also include postinstallation data loading scripts specific to the Item Planning configuration. These scripts, if present, may also be modified.

For additional information on installing RPAS domains manually, see the *Oracle Retail Predictive Application Server Installation Guide*.

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

Postinstallation Configuration

Before starting the DomainDaemon, you must first set the following environment variables and online help files.

Environment Variables

Set your IP_HOME environment variable and source the solution's environment.ksh script. This loads environment variables required by RPAS to interact with your solution's workbooks.

To do this, either in shell or with additions to your .profile, add:

```
export IP_HOME=[Solution Install Dir]
. [Solution Install Dir]/bin/environment.ksh
```

Online Help File

If you are on AIX and you have re-installed Item Planning, you must edit a help file to use the Item Planning online help in the RPAS Fusion Client.

Manually edit the [fusion client installation dir]/config/Help/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 Item Planning configuration. If you chose to install the Fusion Client configuration files using the Item Planning 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 Item Planning solution and domain, the IP installation media pack also includes the RPAS Fusion Client configuration and online help files that you must install if you want to use Item Planning on the RPAS Fusion Client.

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

[IP Installation]/itemplanning/fusion

<server-name>{RPASServerName}</server-name>

During the Item Planning 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 Item Planning 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 Item Planning installation, you can choose to do one of the following tasks:

- Run the Item Planning installer again, and select to install only the RPAS Fusion Client configuration.
- Run the RPAS Fusion Client installer again, and specify the Item Planning 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 Item Planning manually. For more information, see the “Configuring Additional Domains” section in the *Oracle Retail Predictive Application Server Administration Guide for the Fusion Client*.

Configuring the RPAS Fusion Client for Item Planning

This section describes the manual configuration method of setting up the RPAS Fusion Client with the Item Planning configuration. If you chose to install the Fusion Client configuration files using the Item Planning installer, you can skip this section.

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

To manually set up an additional domain connection, perform the following steps:

1. After you have set up the Item Planning domain, navigate to the following location in the RPAS Fusion Client installation directory:

```
<RPAS_Fusion_Client_Installation>/config/rpas/
```

2. In a text editor, edit the `Foundation.xml` file by appending a connection specification for your domain in the following syntax:

```
<solutions>
  <solution>
    <name>CPEM</name>
    <description>CPEM</description>
    <server-name>mspd200</server-name>
    <daemon-port>38381</daemon-port>
    <domain-path>/vol.nas/rpas_gc/Mock/13.4.0/Linux5.8/rpas_
full/cpem/domain/CPEM</domain-path>
  </solution>
</solutions>
```

Note: In the previous example, placeholders have been used as values for the parameters. Replace the placeholders with the relevant values.

Where,

- `connection-spec name` – Name for the connection specification. This matches the name for the taskflow configuration and resource files. Each must have a unique name.
- `server-name` – The host where the RPAS server is installed and the DomainDaemon process is running.
- `daemon-port` – The port specified when starting the DomainDaemon.
- `domain-name` – The name that displays to the user on the login window.
- `domain-path` – Location where the domain is installed.

Note: Multiple domains on the same server can use the same configuration.

3. Save and close the `Foundation.xml` file.
4. In the `<RPAS_Fusion_Client_Installation>/config` directory, create a new folder and specify the `domainConnectionName` or `connection-spec` name as the folder name.
5. Navigate to the `fusionClient` directory located within the directory where the domain is installed. This folder contains the following files that define the taskflow configuration:
 - `taskflowBundle.properties`
 - `taskflow.xml`

When you created the domain using the `rpasInstall` script, these files were generated based on the taskflow configuration you set up in the RPAS Configuration Tools. For more information on the taskflow configuration, refer to the *Oracle Retail Predictive Application Server Configuration Tools User Guide*.

6. Copy the two files to the domain name folder you created in step 4.
7. Rename the `Taskflow.xml` file to include the domain name. The new file name must read as `Taskflow_<domainConnectionName>.xml`. Where `<domainConnectionName>` is the domain connection name or connection-spec name.
8. Create a resources subfolder within this location and move the `taskflowBundle.properties` file to the resources subfolder.
9. In the resources subfolder, rename the `taskflowBundle.properties` file to include the domain name. The new file name must read as `<domainConnectionName>Bundle.properties`. Where `<domainConnectionName>` is the domain connection name or connection-spec name.
10. For the changes to take effect, restart the RPAS and WebLogic servers.

Patch Installation

This chapter describes how to upgrade Item Planning from 13.2.1 to 13.4.2.

Note: Due to the introduction of new hierarchies in 13.2.1, Item Planning is not upgradeable from previous versions to 13.2.1. If you are upgrading from a version prior to 13.2.1, you must perform a full installation of Item Planning in order to accommodate these changes. See the [Full Installation: UNIX Environments](#) chapter for full installation instructions.

If you are upgrading from version 13.2.1, you can follow the upgrade instructions in this chapter.

For more information about the hierarchy changes, see the *Oracle Retail Item Planning Operations Guide*.

Upgrade Prerequisites

In order to upgrade IP, 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 execute `retaillogin.ksh` to set all environment variables. For example:

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

Notes: After 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 Process

The following process outlines how to upgrade IP to the latest version using the RPAS Configuration Tools.

Upgrade to Key RPAS Versions

Before you upgrade to a post-13.3 release, ensure that you have upgraded and patched to RPAS Release 13.2.3.

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

1. [Upgrade and Patch 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 to RPAS Release 13.2.3

Upgrading your domain to a 13.3 RPAS domain requires that you first upgrade it to a 13.2.3 domain. For 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 IP to the current version using the RPAS Configuration Tools.

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. Open RPAS Configuration Tools.
2. In RPAS Configuration Tools, load your previous configuration of IP:
 - a. From the Configuration Tools File menu, select **Open**.
 - b. From the Open window, locate the configuration file and click **Open**.
3. If your configuration requires updating, dialog boxes will prompt you to upgrade. Follow the instructions given in the dialog boxes.

4. In the RPAS Configuration Tools File menu, click **Save** to save the configuration.
5. Zip the configuration in Cygwin and transfer the .zip file to the RPAS server.

For the Server

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

1. Upgrade the RPAS server and the RPAS Fusion Client configuration by running the installer:
 - a. Begin the installer as described in the [Installing Item Planning](#) section.
 - b. Complete steps 1-5.
 - c. At step 6, the [Install Tasks Window](#), clear the **Create Item Plan Domain** option.
 - d. Finish the remaining steps of the installer.
2. Unzip the updated configuration and note where it is saved.
3. Upgrade your IP domain to a 13.4.2 domain. For upgrading instructions, see the "Upgrading and Patching Domains" section in either the Classic Client or Fusion Client version of the *Oracle Retail Predictive Application Server Administration Guide*.

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 (RCM)
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)