

# **Oracle® Retail Item Planning Configured for COE**

Installation Guide

Release 16.0.2

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Oracle Retail Item Planning Configured for COE Installation Guide, Release 16.0.2.

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- Did you understand the context of the procedures?
- Did you find any errors in the information?
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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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<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 Configured for COE, Release 16.0.2 documentation set:

- *Oracle Retail Item Planning Configured for COE Installation Guide*
- *Oracle Retail Item Planning Configured for COE Release Notes*

The following documentation may also be needed when implementing Item Planning Configured for COE:

- *Oracle Retail Predictive Application Server Batch Script Architecture Implementation Guide*

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

- Oracle Retail Item Planning documentation

- Oracle Retail Clearance Optimization Engine documentation
- Oracle Retail Assortment Planning documentation
- Oracle Retail Merchandise Financial Planning documentation
- Oracle Retail Size Profile Optimization documentation

## 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, 16.0) or a later patch release (for example, 16.0.2). 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.

## Improved Process for Oracle Retail Documentation Corrections

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

This process will prevent delays in making critical corrections available to customers. For the customer, it means that before you begin installation, you must verify that you have the most recent version of the Oracle Retail documentation set. Oracle Retail documentation is available on the Oracle Technology Network at the following URL:

<http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html>

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

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

# Oracle Retail Documentation on the Oracle Technology Network

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

<http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html>

(Data Model documents are not available through Oracle Technology Network. You can obtain them through My Oracle Support.)

## Conventions

The following text conventions are used in this document:

Convention	Meaning
<b>boldface</b>	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.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.



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# Introduction

This document provides detailed instructions on how to install an Item Planning Configured for COE domain using a configuration created through the RPAS Configuration Tools. This document does not describe how to create the actual configuration.

Supplemental installations 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.

Read through this document completely before performing the installation steps.

## About This Document

This document contains information for full and patch installations:

- [Chapter 2, "Full Installation: UNIX Environment"](#). 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.
- [Appendix A, "Appendix: Installation Order."](#) Refer to this section for the installation order of RPAS applications.

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

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**Note:** Oracle Retail assumes that the retailer has applied all required fixes for supported compatible technologies.

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[Table 1–1](#) provides information on the hardware and software requirements.

**Table 1–1 Hardware and Software Requirements**

Requirement	Details
Supported RPAS Version	16.0.2

**Table 1–1 (Cont.) Hardware and Software Requirements**

Requirement	Details
Required Software	<p>Java Development Kit (JDK) 1.8</p> <p><b>Note:</b> 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>.</p> <p><b>Note:</b> When installing Java, avoid enabling AutoUpdate because it may update the Java version without prompting.</p>

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**Note:** RPAS applications, such as Item Planning Configured for COE, 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*.

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## Supported Oracle Retail Products

Item Planning Configured for COE 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)	16.0.2
Oracle Retail Clearance Optimization Engine (COE)	14.0.5
Oracle Retail Merchandise Financial Planning (MFP)	16.0.2

## Requesting Infrastructure Software

If you are unable to find the necessary version of the required Oracle infrastructure software (database server, application server, WebLogic, and so on.) on the Oracle Software Delivery Cloud, you should file a non-technical ‘Contact Us’ Service Request (SR) and request access to the media. For instructions on filing a non-technical SR, see My Oracle Support Note 1071023.1 – *Requesting Physical Shipment or Download URL for Software Media*.

## Road Map for Installing Item Planning

This guide explains how you can install and set up IP COE. In order to install IP COE 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> .
<i>Installation Task</i>	
3.	Access the IP COE installation software and install the application. For more information, see <a href="#">Chapter 2, "Full Installation: UNIX Environment"</a> .

---

**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.

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## Full Installation: UNIX Environment

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 Configured for COE Installer automates the following:

- Installation of the Item Planning Configured for COE configuration
- Installation of the Item Planning Configured for COE 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 Configured for COE 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 Configured for COE 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 and space ". ":

```
. /<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 the environment variables, such as `RPAS_HOME` and `RIDE_HOME`, which are required for RPAS to run properly.

---

**Important:** Ensure that you set up the `RPAS_JAVA_CLASSPATH` environment variable. For more information, see the COE Expression Runtime Environment section in the chapter Item Planning Configured for COE of the *Oracle Retail Item Planning Operations Guide*.

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 IP COE Media Pack

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

1. Create a directory to store the Item Planning Configured for COE media pack and download the media pack to this location. This directory is referred to as **[IPCOE Installation]**.
2. Download and extract the media pack to this location. Once extracted, two directories appear: **CDROM** and **DOCS**.
  - The **CDROM** folder contains the `itemcoe.zip` file, which contains the Item Planning Configured for COE solution.
  - The **DOCS** folder contains the Item Planning Configured for COE documentation.

---

**Note:** Files contained within the installation package are intended to be used by the installer only.

---

## Installing IP COE

Perform the following steps to install Item Planning Configured for COE.

---

**Note:** This product's installer includes Ant. If Ant is already installed on your system and is version 1.6.5 or earlier, then you must run `unset ANT_HOME` on the command line to ensure that the installer uses the included version. The `unset ANT_HOME` command must be run before `./install.sh`.

---

1. Extract the Item Planning Configured for COE Installer from the **[IPCOE Installation]** directory.

```
cd CDROM
unzip itemcoe.zip
```
2. From the **[IPCOE Installation]/CDROM** directory, run the following commands to run the Item Planning Configured for COE Installer:

```
cd itemcoe
```

---

```
./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 appears.

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**.

---

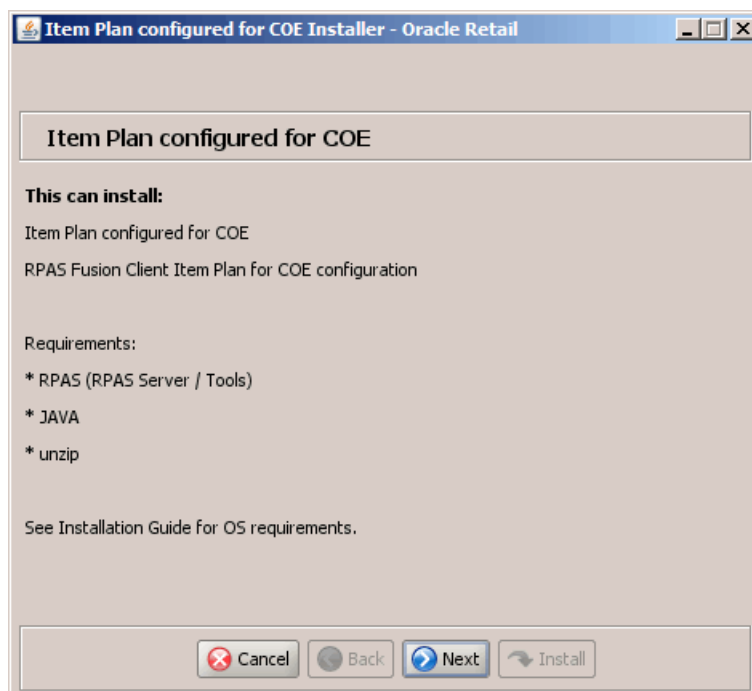
3. The [Item Plan Configured for COE Installer Window](#) opens and displays the components that are installed during installation process and the required components.

Click **Next** to continue.

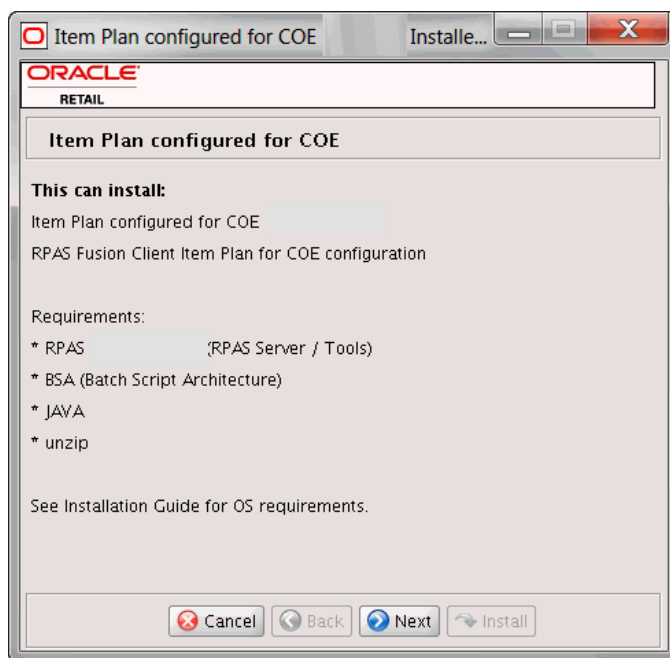
---

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

---

**Figure 2–1 Item Plan Configured for COE 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 Plan for COE Server** — Select this option to install the Item Planning Configured for COE server with the domain.

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

---

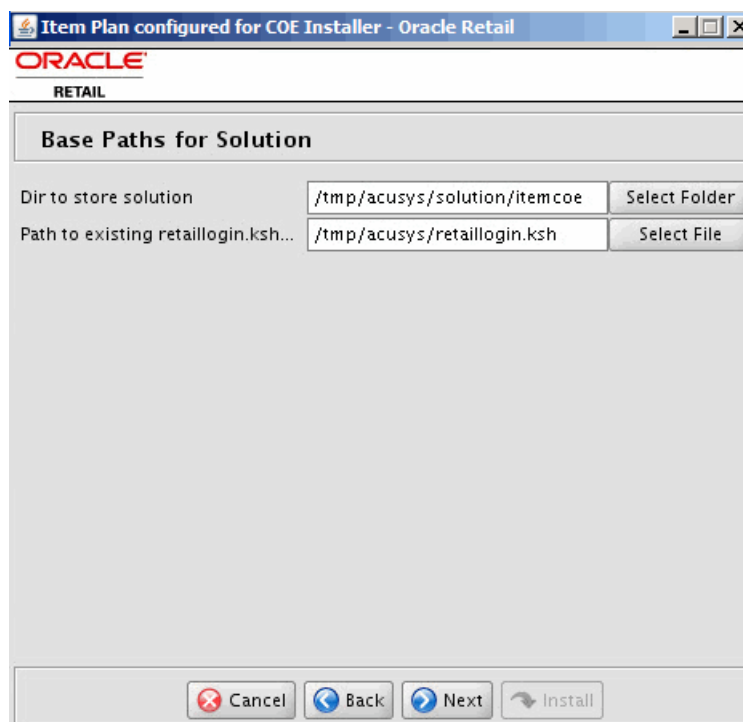
**Note:** If you do not want to install the RPAS Fusion Client configuration, clear this check box and skip steps 7 and 8.

---

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.

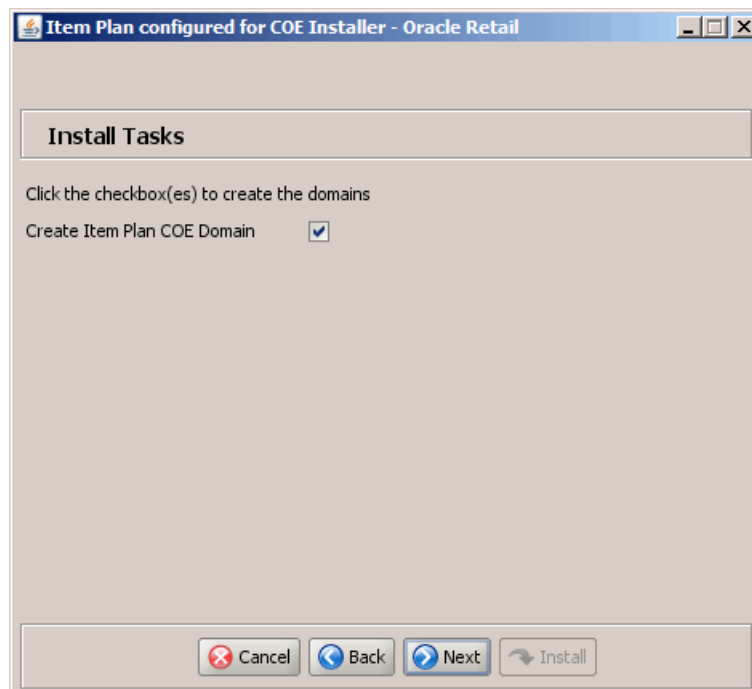
---

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

---

Click **Next** to continue.

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

**Figure 2–4 Install Tasks Window**

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

- To create the IP COE domain, select the **Create Item Plan COE 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 support the IP COE domain, but not create the actual domain, clear this check box.

Click **Next** to continue.

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

---

**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.

---

**Figure 2–5 Fusion Location Information Window**

Item Plan configured for COE 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

Cancel Back Next Install

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 COE 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 COE.

Click **Next** to continue.

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

**Figure 2–6 Fusion Location Information (Details) Window**

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

---

**Note:** The authentication provided needs to be either:

Path to SSH identity file and SSH identity passphrase

or

Login username, Login password, and Login username alias

---

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 <b>config</b> directory available at the location where the RPAS Fusion Client is installed.
Path to SSH identity file	Enter the location of the SSH identity file to be used for authentication to the server where the RPAS Fusion Client is installed.
SSH identity passphrase	If your SSH identity is secured with a passphrase, then enter the passphrase. If not, then leave this field empty.
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.



---

**Note:** Information such as user credentials for the RPAS Fusion Client is encrypted and stored in a secure location in the application installation directory. This location is called the Oracle Wallet.

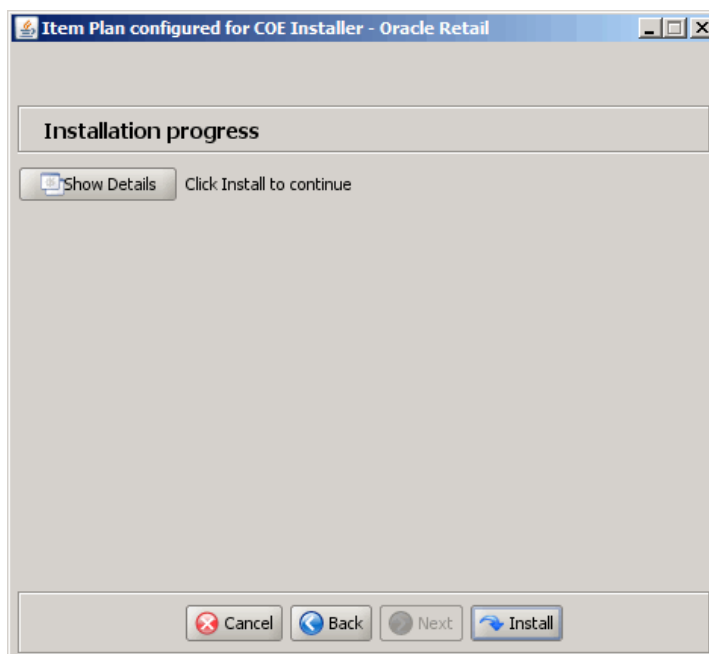
When the installation starts, the administrative user credentials are retrieved from the Oracle Wallet based on the alias name specified in this window.

---

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 appears. 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 **[IPCOE 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:** When reviewing Installer output or logs, you may see the following message: *[scp] Caught an exception, leaving main loop due to Socket closed*. This message is harmless and does not indicate failure.

---



---

**Note:** The domain install process may also include postinstallation data loading scripts specific to the Item Planning Configured for COE configuration. These scripts, if present, may also be modified.

For additional information on installing RPAS domains manually, see to 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.

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

```
export IP_HOME=[Solution Install Dir]
```

### WebLogic Libraries

IP COE requires the following Java libraries from the WebLogic server as listed in the following table:

- Libraries numbered 1-9 are available after unzipping the \$WebLogic\_HOME/server/lib/wseeclient.zip file.
- Libraries numbered 10-12 can be copied from the \$WebLogic\_HOME/server/lib/ directory.
- Library number 13 (wlfullclient.jar) should be built from the \$WebLogic\_HOME/server/lib/ directory using the command, `java -jar wljarbuilder.jar`.

Number	Java Library	Location
1	com.bea.core.descriptor.wl.binding_1.3.0.0.jar	\$WebLogic_HOME/server/lib/wseeclient.zip
2	com.bea.core.descriptor.wl_1.3.0.0.jar	\$WebLogic_HOME/server/lib/wseeclient.zip
3	com.bea.core.xml.beaxmlbeans_1.1.0.0_2-4-1.jar	\$WebLogic_HOME/server/lib/wseeclient.zip
4	com.bea.core.xml.staxb.buildtime_1.4.1.0.jar	\$WebLogic_HOME/server/lib/wseeclient.zip
5	com.bea.core.xml.xmlbeans_1.1.0.0_2-4-1.jar	\$WebLogic_HOME/server/lib/wseeclient.zip
6	com.bea.core.xml.WebLogic.xpath_1.4.0.0.jar	\$WebLogic_HOME/server/lib/wseeclient.zip
7	glassfish.jaxws.rt_1.1.0.0_2-1-4.jar	\$WebLogic_HOME/server/lib/wseeclient.zip
8	javax.xml.bind_2.1.1.jar	\$WebLogic_HOME/server/lib/wseeclient.zip

Number	Java Library	Location
9	javax.xml.ws_2.1.1.jar	\$WebLogic_HOME/server/lib/wseclnt.zip
10	WebLogic.jar	\$WebLogic_HOME/server/lib/ directory
11	webservices.jar	\$WebLogic_HOME/server/lib/ directory
12	xqrl.jar	\$WebLogic_HOME/server/lib/ directory
13	wlfullclient.jar	\$WebLogic_HOME/server/lib/ directory using java -jar wljarbuilder.jar

Assume the WebLogic Java libraries are copied into IP\_HOME/javatools/lib directory.

Then the RPAS\_JAVA\_CLASSPATH environment variable which is used to provide the classpath for the classes used by the Java special expression should be set using Unix syntax as shown in [Example 2-1](#).

#### **Example 2-1 Export RPAS\_JAVA\_CLASSPATH**

```
export RPAS_JAVA_CLASSPATH="$RPAS_HOME/lib/oracleRpasUtils.jar:$IP_
HOME/java/lib/coeexpression_owl.jar:$IP_
HOME/javatools/lib/com.bea.core.descriptor.wl.binding_1.4.0.0.jar:$IP_
HOME/javatools/lib/com.bea.core.descriptor.wl_1.4.0.0.jar:$IP_
HOME/javatools/lib/com.bea.core.xml.beaxmlbeans_2.5.0.0_2-5-1.jar:$IP_
HOME/javatools/lib/com.bea.core.xml.staxb.buildtime_1.6.0.0.jar:$IP_
HOME/javatools/lib/com.bea.core.xml.xmlbeans_2.2.0.0_2-5-1.jar:$IP_
HOME/javatools/lib/glassfish.jaxws.rt_1.3.0.0_2-1-5.jar:$IP_
HOME/javatools/lib/javax.xml.bind_2.1.1.jar:$IP_
HOME/javatools/lib/javax.xml.ws_2.1.1.jar:$JAVA_HOME/lib/tools.jar:$IP_
HOME/javatools/lib/WebLogic.jar:$IP_
HOME/javatools/lib/webservices.jar:$IP_
HOME/javatools/lib/wlfullclient.jar:$IP_HOME/javatools/lib/xqrl.jar:$IP_
HOME/javatools/lib/com.bea.core.xml.WebLogic.xpath_1.5.0.0.jar:$IP_
HOME/retailpublicsecurityapi/lib/retail-public-security-api.jar:$IP_
HOME/java/lib/ant.jar:$RPAS_JAVA_CLASSPATH"
```

## Online Help File

If you are on AIX and you have re-installed IP COE, you must edit a help file to use the IP COE 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 IP COE configuration. If you

chose to install the Fusion Client configuration files using the IP COE 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 Configured for COE solution and domain, the IP COE installation media pack also includes the RPAS Fusion Client configuration and online help files that you must install if you want to use IP COE on the RPAS Fusion Client.

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

**[IPCOE Installation]/itemplancoe/fusion<server-name>{RPASServerName}**  
**</server-name>**

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

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

## Taskflow Files

This section provides information about the files needed for taskflow configuration.

If you selected the option to build a domain, you will find two taskflow files (**taskflow.xml** and the **taskflowBundle.properties** resource file) in the **fusionClient** subdirectory within the domain. For information about how to use these files to configure the Multi-solution Taskflow, refer to the section, “Postinstallation Configuration” in the *Oracle Retail Predictive Application Server Administration Guide for the Fusion Client*

---

## Patch Installation

This chapter describes how to upgrade IP COE from 13.2.1 to 16.0.2.

---

**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 Environment](#) 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 COE, 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 COE 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 or later 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 or later 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 COE 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 COE:
  - 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 IP COE](#) section.
  - b. Complete steps 1-5.
  - c. At step 6, on the [Install Tasks Window](#), clear the **Create Item Plan COE 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 COE domain to a 16.0.2 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*.





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## Appendix: Installation Order

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

---

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

---

### Enterprise Installation Order

1. Oracle Retail Merchandising System (RMS), Oracle Retail Trade Management (RTM)
2. Oracle Retail Sales Audit (ReSA)
3. Oracle Retail Extract, Transform, Load (RETL)
4. Oracle Retail Warehouse Management System (RWMS)
5. Oracle Retail Invoice Matching (ReIM)
6. Oracle Retail Price Management (RPM)
7. Oracle Retail Allocation
8. Oracle Retail Mobile Merchandising (ORMM)
9. Oracle Retail Customer Engagement (ORCE)
10. Oracle Retail Xstore Office
11. Oracle Retail Xstore Point-of-Service, including Xstore Point-of-Service for Grocery, and including Xstore Mobile
12. Oracle Retail Xstore Environment
13. Oracle Retail EFTLink
14. Oracle Retail Store Inventory Management (SIM), including Mobile SIM
15. Oracle Retail Predictive Application Server (RPAS)
16. Oracle Retail Predictive Application Server Batch Script Architecture (RPAS BSA)
17. Oracle Retail Demand Forecasting (RDF)
18. Oracle Retail Category Management Planning and Optimization/Macro Space Optimization (CMPO/MSO)
19. Oracle Retail Replenishment Optimization (RO)

- 20.** Oracle Retail Regular Price Optimization (RPO)
- 21.** Oracle Retail Merchandise Financial Planning (MFP)
- 22.** Oracle Retail Size Profile Optimization (SPO)
- 23.** Oracle Retail Assortment Planning (AP)
- 24.** Oracle Retail Item Planning (IP)
- 25.** Oracle Retail Item Planning Configured for COE (IP COE)
- 26.** Oracle Retail Advanced Inventory Planning (AIP)
- 27.** Oracle Retail Integration Bus (RIB)
- 28.** Oracle Retail Services Backbone (RSB)
- 29.** Oracle Retail Financial Integration (ORFI)
- 30.** Oracle Retail Bulk Data Integration (BDI)
- 31.** Oracle Retail Integration Console (RIC)
- 32.** Oracle Commerce Retail Extension Module (ORXM)
- 33.** Oracle Retail Data Extractor for Merchandising
- 34.** Oracle Retail Clearance Optimization Engine (COE)
- 35.** Oracle Retail Analytic Parameter Calculator for Regular Price Optimization (APC-RPO)
- 36.** Oracle Retail Insights, including Retail Merchandising Insights (previously Retail Merchandising Analytics) and Retail Customer Insights (previously Retail Customer Analytics)
- 37.** Oracle Retail Order Broker