

Oracle® Retail Category Management

Installation Guide

Release 13.1.1

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- (ii) the **MicroStrategy** Components developed and licensed by MicroStrategy Services Corporation (MicroStrategy) of McLean, Virginia to Oracle and imbedded in the MicroStrategy for Oracle Retail Data Warehouse and MicroStrategy for Oracle Retail Planning & Optimization applications.
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- (vii) the software component known as **Adobe Flex**TM licensed by Adobe Systems Incorporated of San Jose, California, and imbedded in Oracle Retail Promotion Planning & Optimization application.
- (viii) the software component known as **Style Report**TM developed and licensed by InetSoft Technology Corp. of Piscataway, New Jersey, to Oracle and imbedded in the Oracle Retail Value Chain Collaboration application.
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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 document is intended for an MIS administrator that needs to install the RPAS software and create Category Management domains.

This Installation Guide is written for the following audiences:

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

Related Documents

For more information, see the following documents in the Oracle Retail Category Management Release 13.1.1 documentation set:

- *Oracle Retail Category Management Release Notes*
- *Oracle Retail Category Management Configuration Guide*
- *Oracle Retail Category Management User Guide*
- Oracle Retail Predictive Application Server documentation

Customer Support

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

<https://metalink.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

If you are installing the application for the first time, you install either a base release (for example, 13.0) or a later patch release (for example, 13.0.2). If you are installing a software version other than the base release, be sure to read the documentation for each patch release (since the base release) before you begin installation. Patch documentation can contain critical information related to the base release and code changes that have been made since the base release.

Oracle Retail Documentation on the Oracle Technology Network

In addition to being packaged with each product release (on the base or patch level), all Oracle Retail documentation is available on the following Web site (with the exception of the Data Model which is only available with the release packaged code):

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

Documentation should be available on this Web site within a month after a product release. Note that documentation is always available with the packaged code on the release date.

Conventions

Navigate: This is a navigate statement. It tells you how to get to the start of the procedure and ends with a screen shot of the starting point and the statement “the Window Name window opens.”

Note: This is a note. It is used to call out information that is important, but not necessarily part of the procedure.

This is a code sample
It is used to display examples of code

A hyperlink appears like this.

Instructions

Before You Begin

This document provides instructions on installing Oracle Retail Category Management.

This document provides detailed instructions on how to install a Category Management domain using a configuration created via the RPAS Configuration Tools. This document does not describe how to create the actual configuration.

Supplemental installations guides are referenced in this document. The *RPAS Installation Guide* and *RPAS 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.

Note: If you are upgrading to Category Management 13.1.1 from a previous version rather than performing a full installation, refer to the following document for upgrade instructions:

Oracle Retail Upgrade Guide (Doc ID 837368.1)

This document is available through My Oracle Support (formerly MetaLink). Access My Oracle Support at the following URL:

<https://metalink.oracle.com>

Hardware and Software Requirements

The following table provides information about the current release.

Release Information	Details
Supported RPAS version	13.1.1
Supported OS, Server and Compilers	Sun Solaris 10: GCC 4.2.3 (32 bit) AIX 5.3 (TL5 or greater): GCC 4.1.1 (32 bit) AIX 6.1 (TL2, SP3): GCC 4.3.3 (32 bit) HP-UX 11.31 (Itanium): ACC 6.20 (64 bit) Oracle Enterprise Linux 5, Update 2 (OEL 5.2): GCC 4.1.1 (64 bit)
Supported OS, Client	Windows XP and Vista
Required 3rd Party Software	Java Runtime Environment (JRE) 1.5 or higher Note: JRE 1.6 is also certified, but it is not necessary to upgrade to JRE 1.6.

Supported Oracle Retail Products

Category Management is not integrated with any Oracle Retail products.

Installing Category Management on UNIX Environments

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

The Category Management Installer automates the following:

- Installation of the Category Management mock install configuration
- Creation of a sample Category Management domain

This document assumes that the RPAS Installer process (from the *RPAS Installation Guide*) has been completed prior to using the Category Management 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://metalink.oracle.com>.

Environment Variable Setup Script

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

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

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

OR

Include the full path after the period ".":

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

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

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

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

Downloading and Extracting the Category Management Media Pack

The following procedure provides information about extracting the Category Management Media Pack and its contents.

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

The CDROM folder contains the following ZIP files:

- category.zip – This file contains the Category Management solution.

The DOCS folder contains the Category Management documentation. Within the DOCS you will find the following structure:

- Release Notes – This folder contains the *Category Management Release Notes*.
- Installation Guide – This folder contains the *Category Management Installation Guide*.
- Configuration Guide – This folder contains the *Category Management Configuration Guide*.
- User Guide – This folder contains the *Category Management User Guide*.

Installation Category Management

The following procedure provides information about extracting the Category Management Media Pack and installing Category Management.

Note: When Category Management is installed using the Category Management Installer, the ASOExpressions function library is automatically registered.

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

```
cd [Category Installation]
unzip CategoryManagement.zip
```

4. Extract the Category Management Installer.

```
cd CDROM
unzip category.zip
```

5. Change directories to the root of the [Category Installation] directory and run the following commands to run the Category Management Installer:

```
cd category
./install.sh
```

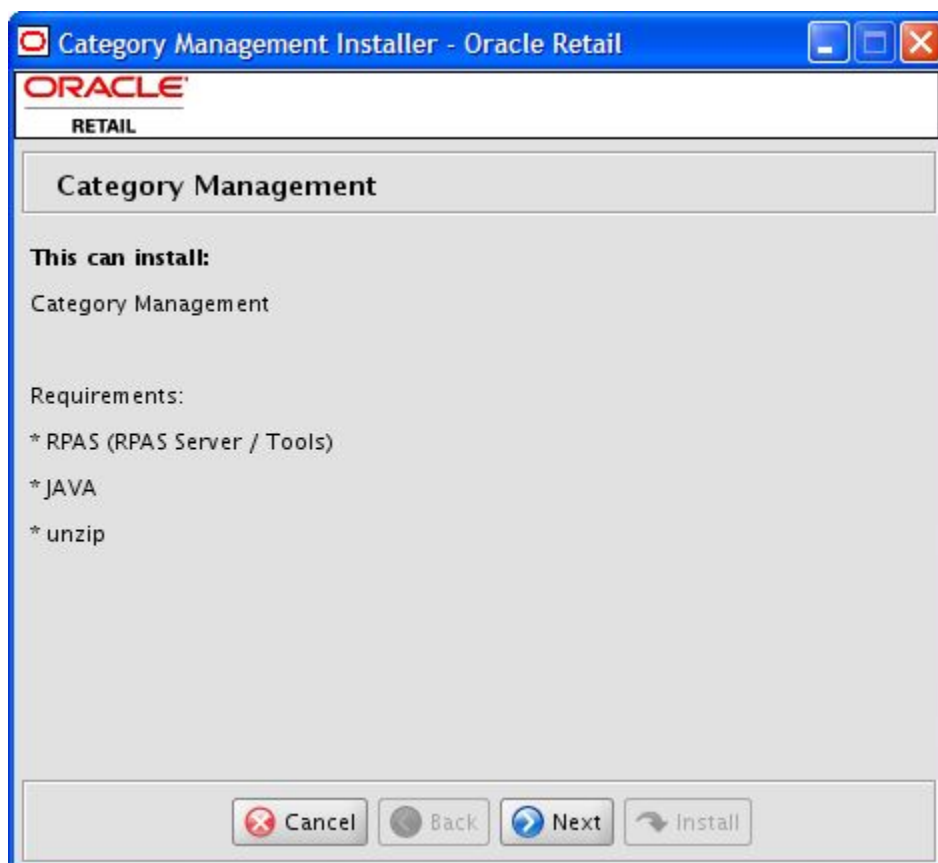
Note: The command must be executed with the preceding period and forward slash (. /).

If this process is being run on an X-Windows emulator (such as Exceed), 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 checkbox to signal whether you want a component installed; in text mode, you will be prompted for a response of **true** or **false**.

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

6. The Category Management Installer screen appears and displays the components that will be installed during installation process and the required components. Click **Next** to continue.



Category Management Installer Screen

7. The Base Paths for Solution screen appears. Enter the following and click **Next** to continue.
 - **Dir to store configurations** – Enter the directory path where your configurations will be stored.
 - **Dir to store created domains** – Enter the directory path where your created domains will be stored.
 - **Directory for Retail login script** – Enter the path and file name to the retaillogin.ksh script created during RPAS installation.

Category Management Installer - Oracle Retail

ORACLE
RETAIL

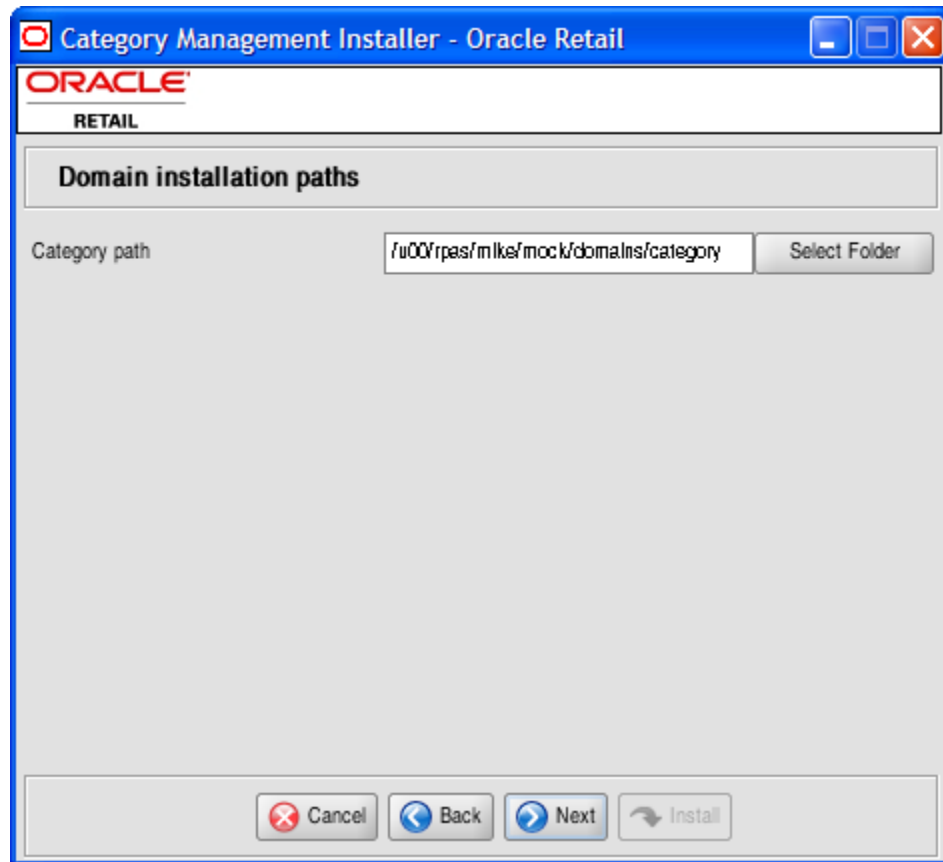
Base Paths for Solution

Dir to store configurations	/u00/rpas/mlke/mock/configurations/categc	Select Folder
Dir to store created domains	/u00/rpas/mlke/mock/domains	Select Folder
Path and filename to retaillogin.ksh sc...	/u00/rpas/mlke/mock/retaillogin.ksh	Select File

Cancel Back Next Install

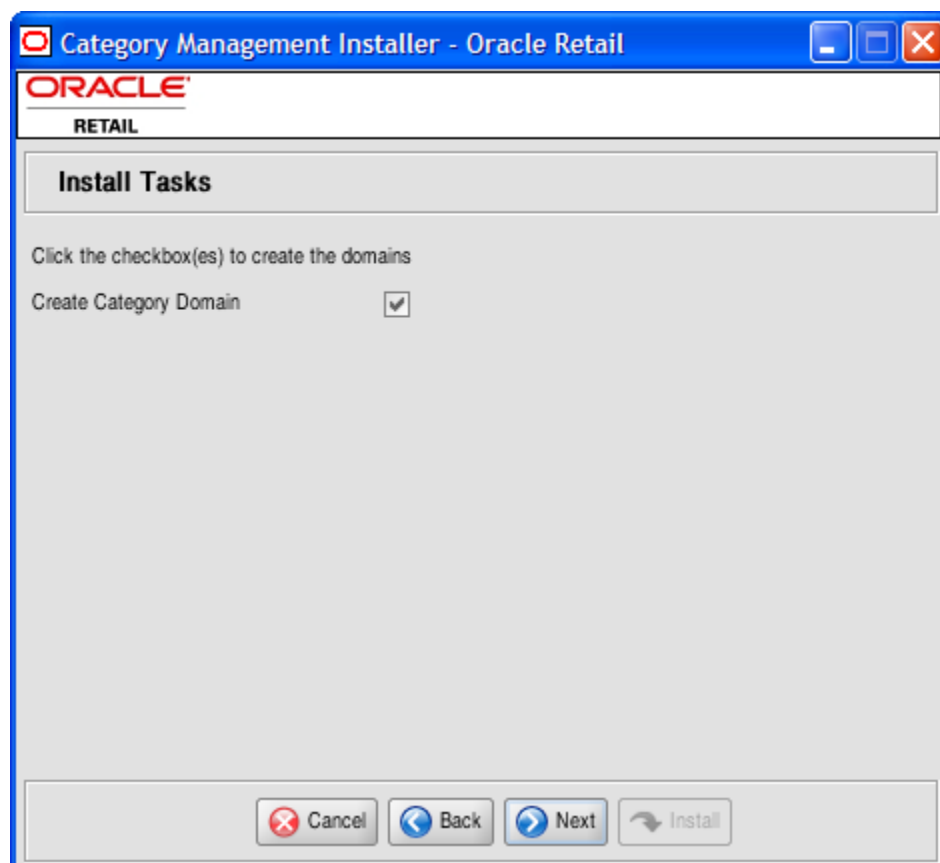
Base Paths for Solution Screen

8. The Domain Installation Paths screen appears. Enter the following and click **Next** to continue:
 - **Category path** – Enter the path where you wish to build your Category Management domain.



Domain Installation Paths Screen

9. The Install Tasks screen appears. Select the **Create Category Domain** option, which is selected by default, to create the Category Management domain. Deselect this option to have all required components to support a Category Management domain installed without creating the domain. Click **Next** to continue.

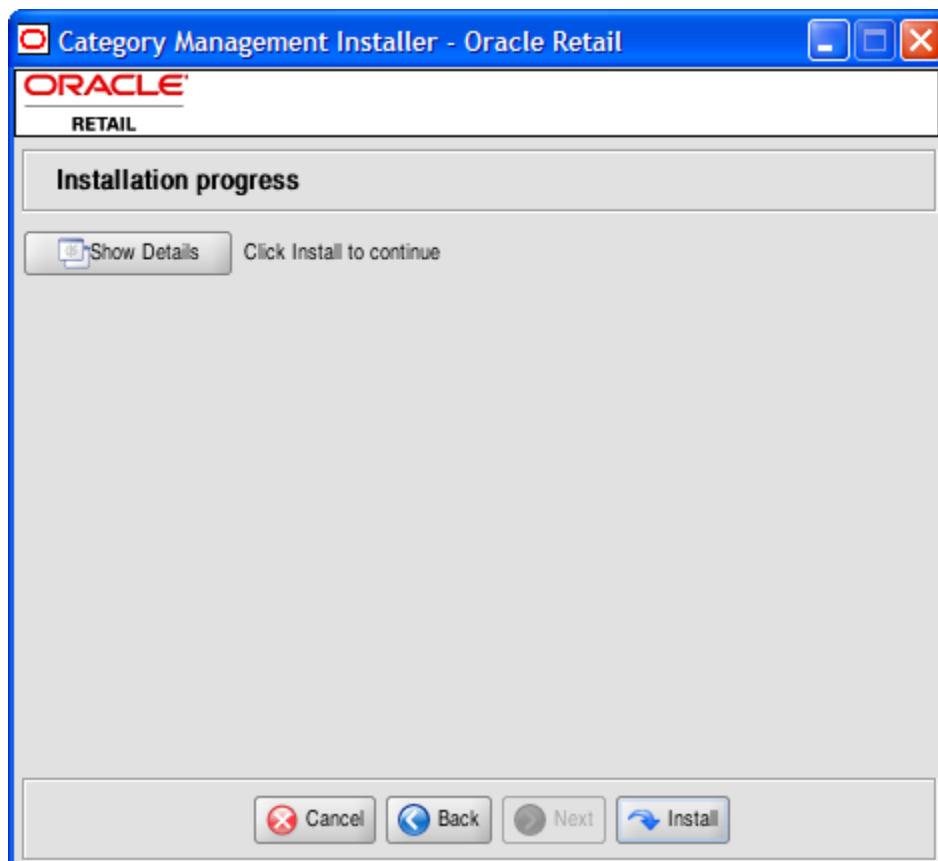


Install Tasks Screen

10. The Installation Progress screen appears. Once you are ready to begin the installation, click the **Install** button.

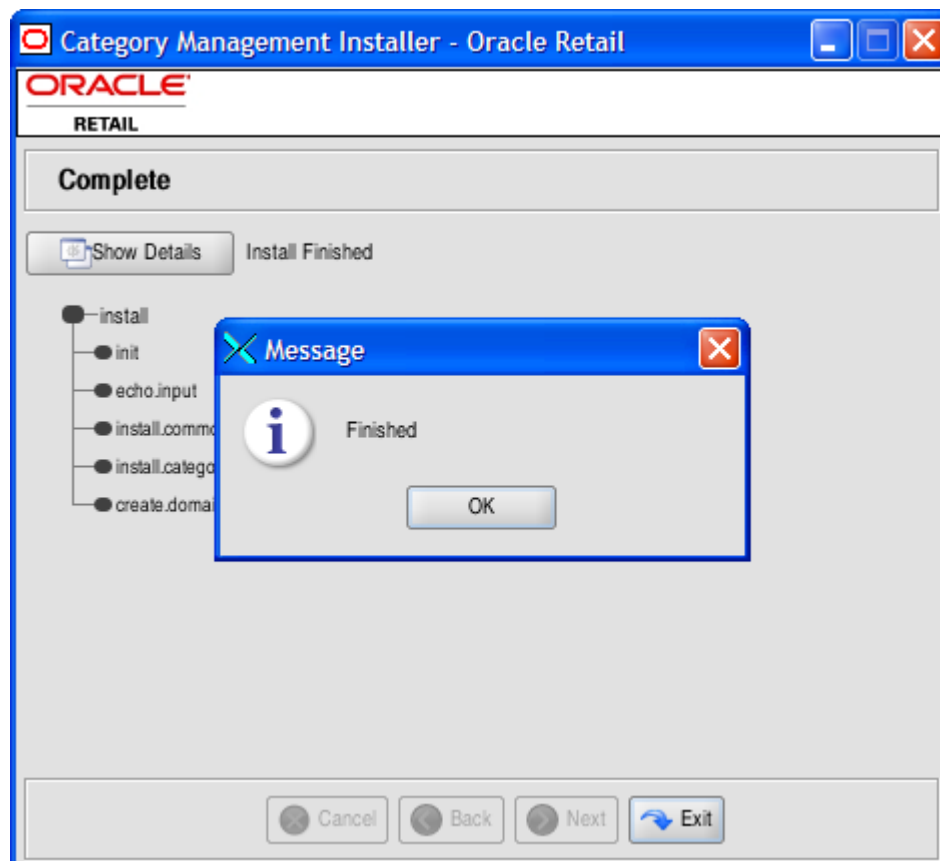
This screen displays the progress of the installation routine. Select **Show Details** to view the log output as the installation is performed. If you do not select to view the details, a graphical representation of the installation steps appears. As each step is completed, the color will change to show you the progress.

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



Installation Progress Screen

11. When the installation has finished, the Complete screen appears. Click **OK** to close the dialog box.



Complete Screen

12. To view the installation details, select the **Show Details** button. The screen 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 wish to view the log again at a later date, a text copy was saved in the directory [Category Installation]. The log file will be named based on the product and a timestamp, followed by the .log extension.

Created as part of this process is the make_domain.category file located in [Configurations Install Dir] entered previously. This file contains all of 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 post-installation data loading scripts specific to the Category Management configuration. These scripts, if present, may also be modified.

Note: For additional information on installing RPAS domains manually, please refer to the *RPAS Installation Guide*.

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

Appendix: Installation Order

This section provides a guideline as to the order in which the Oracle Retail applications should be installed. If a retailer has chosen to use some, but not all, 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)
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 `jndi_provider.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 AIP provider URL. Since AIP is installed after SIM, make a note of the URL you enter. If you need to change the AIP provider URL after you install AIP, you can do so by editing the `jndi_providers_ribclient.xml` file.

13. Oracle Retail Predictive Application Server (RPAS)
14. Oracle Retail Demand Forecasting (RDF)
15. Oracle Retail Category Management (CM)
16. Oracle Retail Replenishment Optimization (RO)
17. Oracle Retail Analytic Parameter Calculator Replenishment Optimization (APC RO)
18. Oracle Retail Regular Price Optimization (RPO)
19. Oracle Retail Merchandise Financial Planning (MFP)
20. Oracle Retail Size Profile Optimization (SPO)

- 21.** Oracle Retail Assortment Planning (AP)
- 22.** Oracle Retail Item Planning (IP)
- 23.** Oracle Retail Item Planning configured for COE (IPCOE)
- 24.** Oracle Retail Advanced Inventory Planning (AIP)
- 25.** Oracle Retail Integration Bus (RIB)
- 26.** Oracle Retail Point-of-Service (ORPOS)
- 27.** Oracle Retail Analytics Applications
- 28.** Oracle Retail Data Warehouse (RDW)
- 29.** Oracle Retail Workspace (ORW)