

Oracle® Retail Category Management

Installation Guide

Release 13.2.2

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Oracle Retail Category Management Installation Guide, Release 13.2.2

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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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Related Documentation

For more information, see the following documents in the Oracle Retail Category Management Release 13.2.2 documentation set:

- *Oracle Retail Category Management Release Notes*
- Oracle Retail Predictive Application Server documentation set

Customer Support

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When contacting Customer Support, please provide the following:

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

Review Patch Documentation

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

Oracle Retail Documentation on the Oracle Technology Network

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

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

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

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

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<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.

Introduction

This document provides instructions on installing Oracle Retail Category Management.

It provides detailed instructions on how to install a Category Management 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.

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.

Please 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

The following table provides information about the current release.

Table 1–1 Hardware and Software Requirements

Requirement	Details
Supported RPAS Version	13.2.2
Supported OS, Server and Compilers	- Oracle Solaris 10 (SPARC): GCC 4.2.3 (32 bit) - AIX 5.3 (POWER) - TL12 SP1: GCC 4.1.1 (32 bit) - AIX 6.1 (POWER) -TL4: GCC 4.3.3 (32 bit) - HP-UX 11.31 (Itanium): ACC 6.20 (64 bit) - Oracle Linux 5, Update 3 (5.3): GCC 4.1.2 (64 bit) - Red Hat Enterprise Linux 5.3: GCC 4.1.2 (64 bit) Notes: After the 13.2.2 release, the following components will no longer be supported: 32 bit compilation on Solaris 10, AIX 5.3, and AIX 6.1 platforms. All custom extensions must be recompiled in the 64 bit mode on these platforms. Customers must also migrate to 64 bit Java on these platforms. - GCC compiler on Solaris 10. The Oracle Solaris Studio 12.2 compiler is in development as a replacement for the GCC compiler. Customers on Solaris 10 who have custom extensions must recompile their extensions using this compiler.
Supported OS, Client	- Microsoft Windows XP - Microsoft Windows Vista
Required 3rd Party Software	- Oracle Java Runtime Environment (JRE) 1.6 - Oracle Java Runtime Environment (JRE) 1.5 - For AIX, the JRE version must be the 32-bit version of Java 1.5 SR1 or higher. Notes: - After the 13.2.2 release, JRE 1.5 will no longer be supported. Only JRE 1.6 will remain supported. - When installing Java, avoid enabling AutoUpdate because it may update the Java version without prompting.

Supported Oracle Retail Products

Category Management is not integrated with any Oracle Retail products.

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 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 *Oracle Retail Predictive Application Server 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://support.oracle.com>.

Environment Variable Setup Script

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.

Downloading 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 is 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 `category.zip` file, which contains the Category Management solution.
 - The DOCS folder contains the Category Management documentation.

Installing 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. Using FTP in binary mode, transfer the Category Management Media Pack to the [Category Installation] directory on the target server.
2. Extract the package to the [Category Installation] directory.

```
cd [Category Installation]
unzip [Category Management Media Pack]
```

3. Extract the Category Management Installer.

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

4. Change directories to the root of the [Category Installation] directory and 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), a 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.

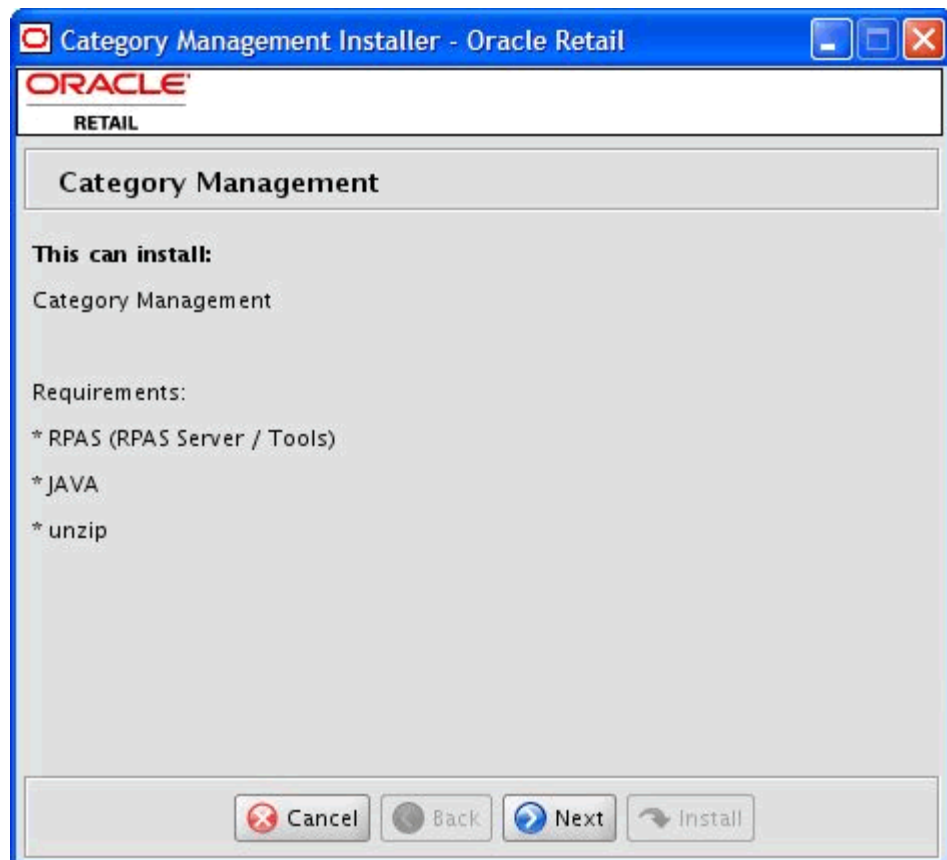
In both cases, the requested information is identical. In the GUI, you may be shown a check box to signal whether you want a component installed; in text mode, you are prompted for a response of **true** or **false**.

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

5. The Category Management Installer screen appears and displays the components that are installed during installation process and the required components.

Click **Next** to continue.

Figure 2-1 Category Management Installer Screen



6. The Base Paths for Solution screen appears.

Enter the relevant information in the following fields.

- **Dir to store configurations:** Enter the directory path where the configurations will be stored.
- **Dir to store created domains:** Enter the directory path where the created domains will be stored.
- **Path and filename to retaillogin.ksh script:** Enter the path and file name to the retaillogin.ksh script created during RPAS installation.

Click **Next** to continue.

Figure 2–2 Base Paths for Solution Screen

The screenshot shows a window titled "Category Management Installer - Oracle Retail". Inside the window, there is a header with the "ORACLE" logo and the word "RETAIL". Below this is a section titled "Base Paths for Solution". This section contains three rows of input fields and buttons:

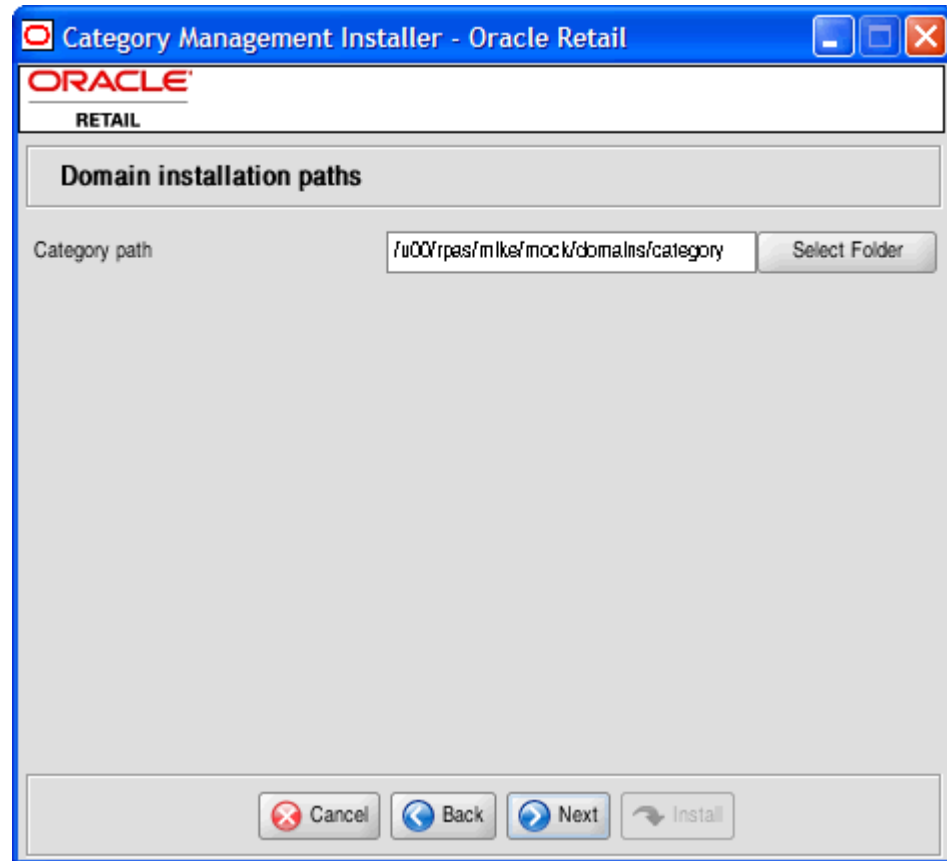
Label	Input Field	Button
Dir to store configurations	/u00/rpas/mlke/mock/configurations/categc	Select Folder
Dir to store created domains	/u00/rpas/mlke/mock/domains	Select Folder
Path and filename to retaillogin.ksh sc...	/u00/rpas/mlke/mock/retallogin.ksh	Select File

At the bottom of the window, there are four buttons: "Cancel", "Back", "Next", and "Install".

7. The Domain Installation Paths screen appears. Enter the path to where you want the Category Management domain to be created.

Click **Next** to continue.

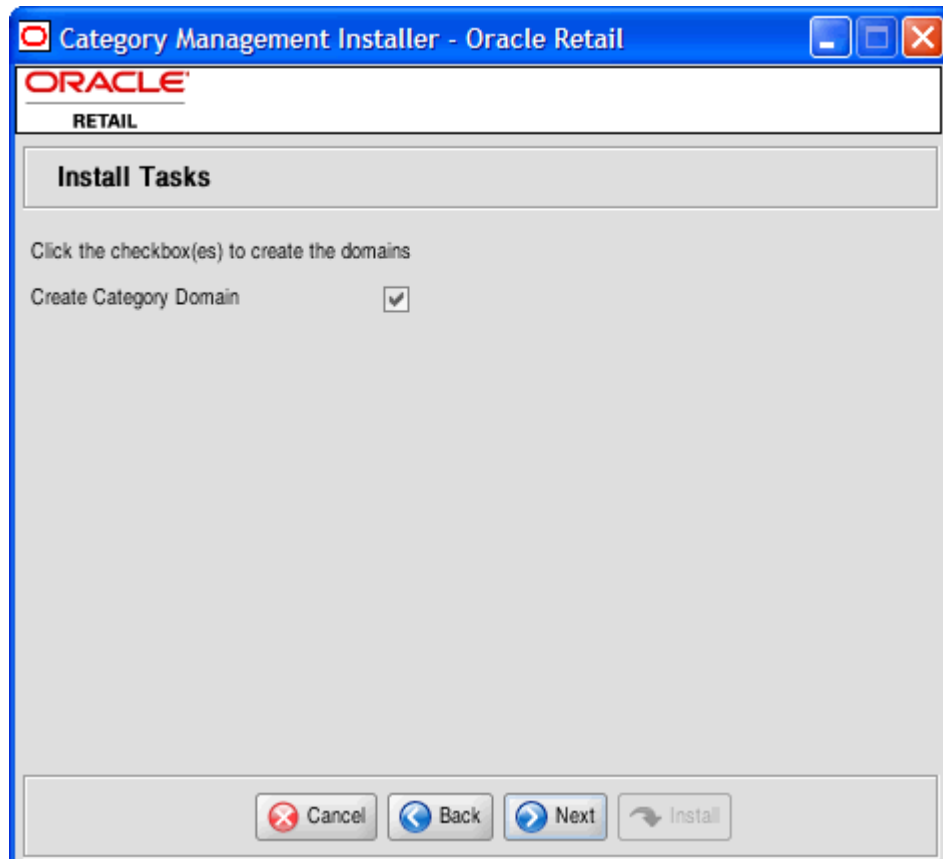
Figure 2–3 Domain Installation Paths Screen



8. The Install Tasks screen appears.
 - If you want to create the Category Management domain, select the **Create Category Domain** option, which is selected by default.
 - If you want to install all required components to support the Category Management domain, but not create the actual Category Management domain, clear the check box.

Click **Next** to continue.

Figure 2–4 *Install Tasks Screen*

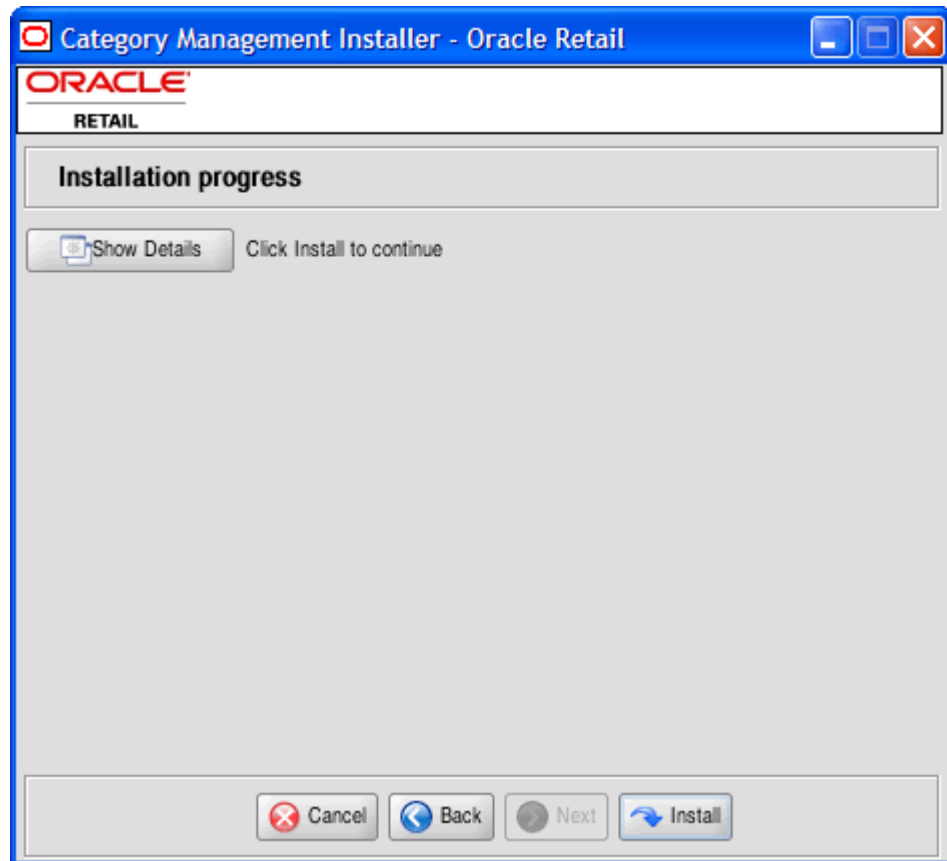


9. The Installation Progress screen appears. Once you are ready to begin installation, click **Install**.

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 changes to show you the progress.

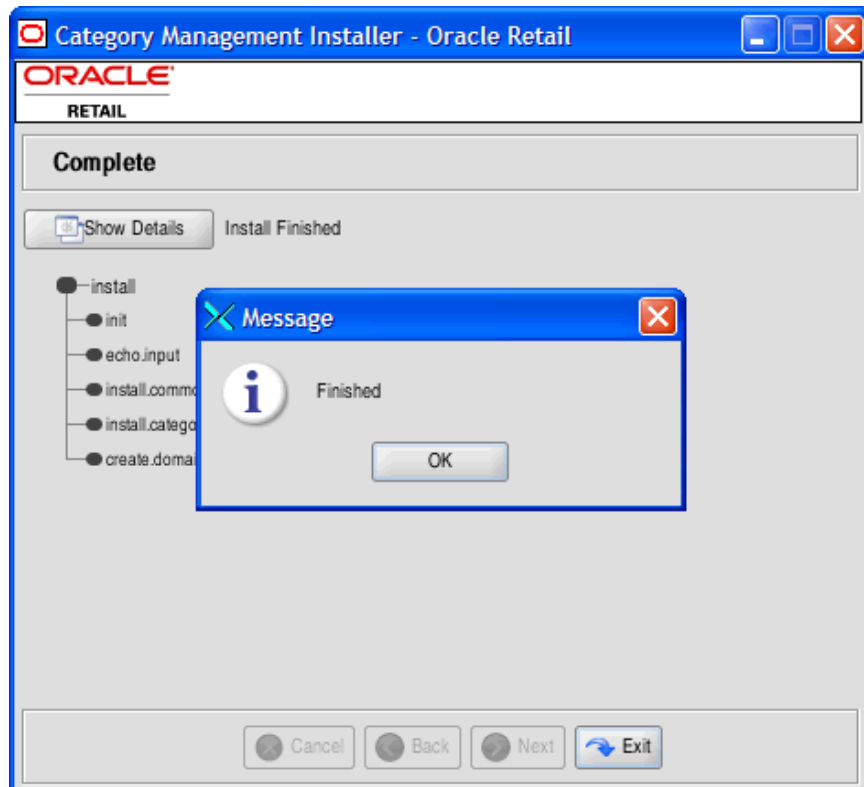
You can toggle between detailed mode at any time during or after the installation.

Figure 2–5 *Installation Progress Screen*



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

Figure 2–6 Complete Screen



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 want to view the log again at a later date, a text copy was saved in the directory [Category Installation]. The log file is 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.

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

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

Patch Installation

This chapter describes how to upgrade Category Management from a previous release to 13.2.2.

Upgrade Prerequisites

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

- Verify that RPAS is currently installed.
- Verify that the UNIX operating system is updated to the currently supported version, which can be found in the [Hardware and Software Requirements](#) section.
- 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:

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

Upgrade Process

The following process outlines how to upgrade Category Management to the new version using the RPAS Configuration Tools.

For the PC

1. Open RPAS Configuration Tools.
2. In RPAS Configuration Tools, load your previous configuration of Category Management:
 - 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 MKS KornShell and transfer the .zip file to the RPAS server. Note where it is saved. You will need this configuration for Step 1 of the [For the Server](#) section.

For the Server

1. Unzip the updated configuration from step 5 of the [For the PC](#) section and note where it is saved.
2. Upgrade your Category Management domain to a 13.2.2 domain. For upgrading instructions, the "Upgrading and Patching Domains" section in the *RPAS Administration Guide for the Classic Client*.

Note: Whether or not you are taking the latest configuration, a configuration patch must be run over the domain to ensure compatibility with the latest RPAS version.

Appendix: Installation Order

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

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

Enterprise Installation Order

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

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

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

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

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

12. Oracle Retail Store Inventory Management (SIM)

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

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