

# **Oracle® Retail Category Management**

Installation Guide

Release 13.4

**E36399-01**

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Oracle Retail Category Management Installation Guide, Release 13.4

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- Did you understand the context of the procedures?
- Did you find any errors in the information?
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- 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).

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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 for the following audiences:

- Database administrators
- System analysts and designers
- Integrators and implementation staff

## Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible to all users, including users that are disabled. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Accessibility standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For more information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

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## Related Documentation

For more information, see the following documents in the Oracle Retail Category Management Release 13.4 documentation set:

- *Oracle Retail Category Management Implementation Guide*
- *Oracle Retail Category Management Release Notes*
- *Oracle Retail Category Management User Guide for the RPAS Fusion Client*
- *Oracle Retail Batch Script Architecture Implementation Guide*
- Oracle Retail Predictive Application Server documentation

## 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, 13.4) or a later patch release (for example, 13.4.1). 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](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:

<b>Convention</b>	<b>Meaning</b>
<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.
monospace	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 instructions on installing Oracle Retail Category Management. It provides detailed instructions on how to install a Category Management domain using a configuration created with 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](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 on 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 an upgrade to your configuration.
- [Appendix A, "Appendix: Installation Order"](#). Refer to this section for the installation order of RPAS applications.

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**Note:** This version of Category Management is not upgradeable from a previous version.

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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
Oracle Retail Batch Script Architecture (BSA)	13.4
Required Software	<p>Java Development Kit (JDK) 1.6</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 Category Management, 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

Category Management is not integrated with any Oracle Retail products.

## Road Map for Installing Category Management

This guide explains how you can install and set up the Category Management application. In order to install Category Management 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 Release 13.4 includes the 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 Category Management. For information about installing BSA, see the <i>Oracle Retail Batch Script Architecture Implementation Guide</i> .
<i>Installation Task</i>	
4.	Access the Category Management Installation software and install the application. For more information, see <a href="#">Chapter 2, "Full Installation on UNIX Environments"</a> .

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**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 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.
- Installation of the Category Management 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 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.

### Additional Environment Variables

In addition to the execution of `retaillogin.ksh`, export the following environment variables prior to starting the installer.

```
export RPAS_JAVA_CLASSPATH=$RPAS_HOME/lib/oracleRpasUtils.jar:$RPAS_
HOME/lib/rpasjni.jar:$RPAS_HOME/applib/catManUtility.jar:$RPAS_JAVA_CLASSPATH
```

---

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**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.

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## Downloading and Extracting the Category Management Media Pack

The following procedure provides information about downloading and extracting the Category Management media pack and its contents.

1. Create a directory to store the Category Management media pack on the target server. This directory is referred to as [Category Management Installation]. It is the location where the Category Management 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 `category.zip` file. This file contains the Category Management solution.
  - The DOCS folder contains the Category Management documentation.

## Installing Category Management

The following procedure provides information about installing Category Management.

1. Extract the Category Management installer from the [Category Management Installation] directory.

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

2. From the [Category Management Installation]/CDROM directory, 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 opens. 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 displays 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**.

---

- The [Category Management Installer Window](#) opens and displays the components that are installed during installation process and the required components. Click **Next** to continue.

**Figure 2–1** *Category Management Installer Window*



- The [Choose Components to Install Window](#) opens. Select one or both of the following options:
  - Category Management** – Select this option to install the Category Management server with the domain.
  - RPAS Fusion Client configuration** – Select this option to install the RPAS Fusion Client configuration for Category Management. For more information on the configuration files included for the RPAS Fusion Client, see [Configuration Files for the RPAS Fusion Client](#).

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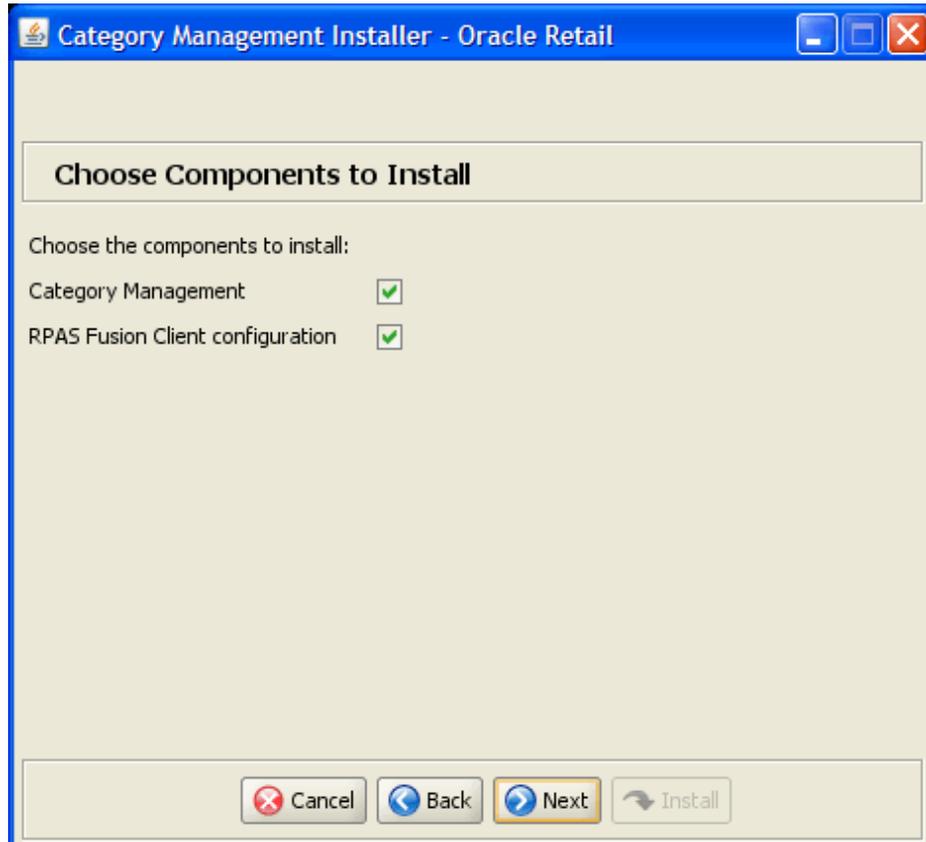
**Note:** If you do not want to install the RPAS Fusion Client configuration, clear this check box and skip steps 7 and 8.

---

---

Click **Next** to continue.

**Figure 2–2 Choose Components to Install Window**



5. The **Base Paths for Solution Window** opens.

Enter the relevant information in the following fields:

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

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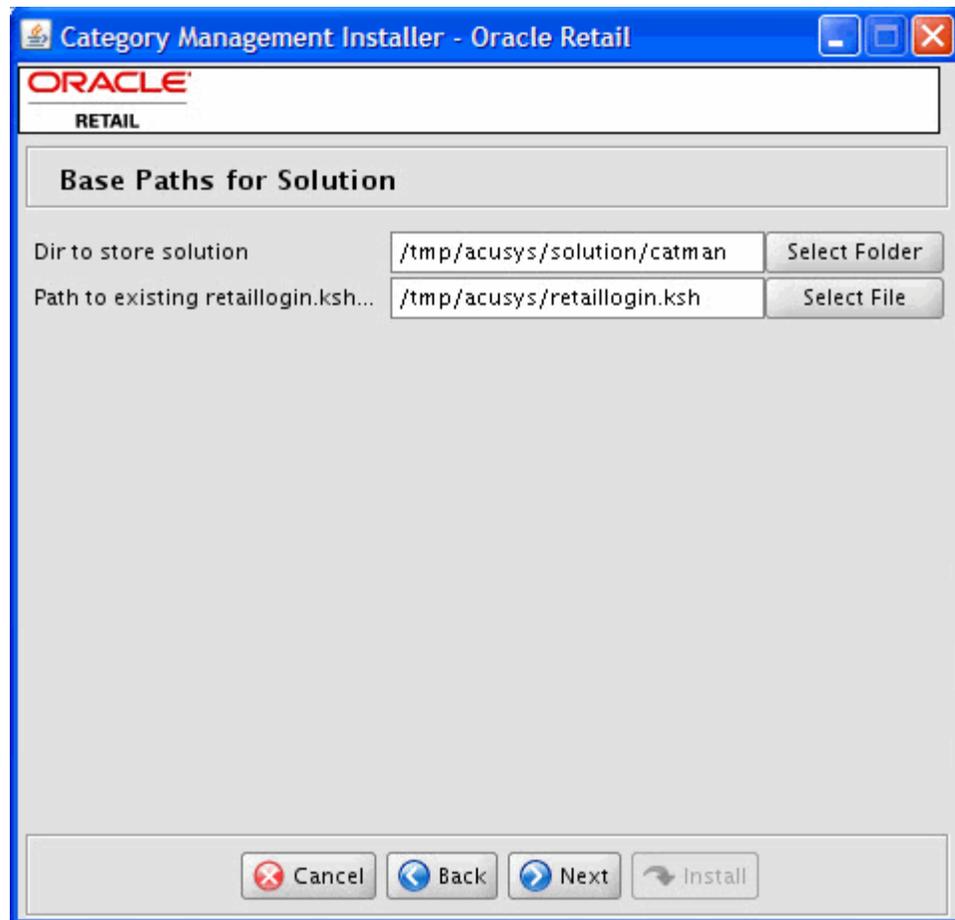
**Note:** Ensure that the installation paths are located outside the installer directory [Category Management Installation].

---

---

Click **Next** to continue.

Figure 2-3 Base Paths for Solution Window



6. The [Install Tasks Window](#) opens.
  - If you want to create the Category Management domain, select the **Create Category Management Domain** option, which is selected by default.

---

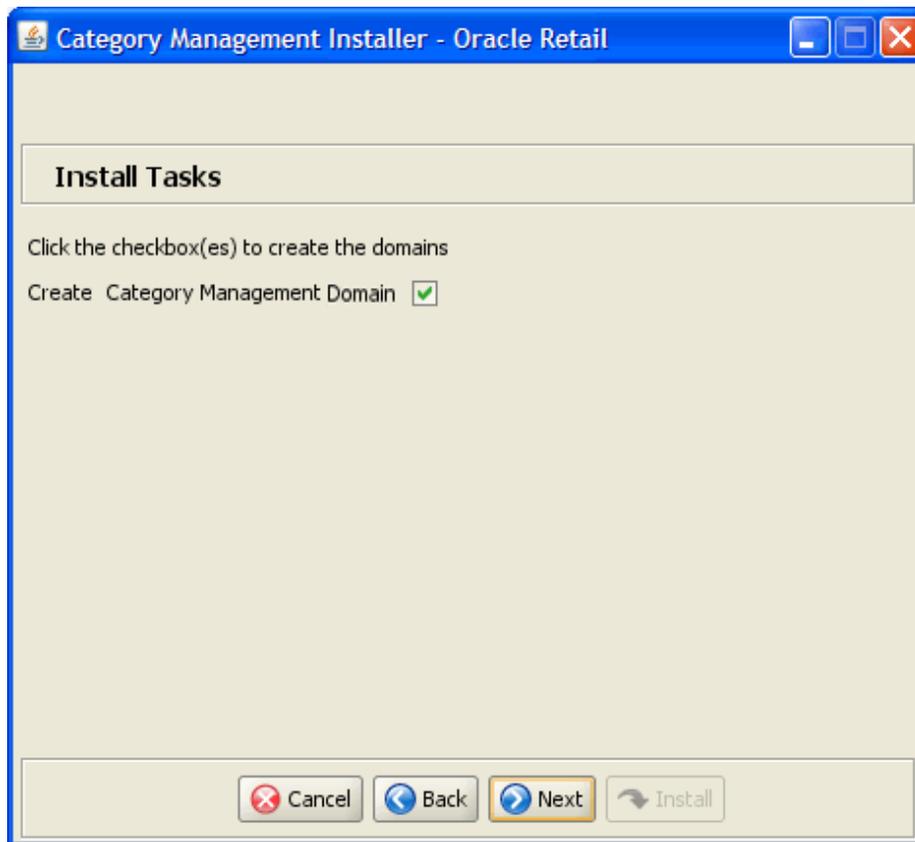
**Note:** Domain builds use the environment specified in the retaillogin.ksh environment setup script. If you change any environment details, edit the retaillogin.ksh script and any subsequent scripts called by retaillogin.ksh.

For more information about the retaillogin.ksh script, see the [Environment Variable Setup Script](#) section.

---

- If you want to install all required components to support the Category Management domain, but not create the actual domain, clear the check box.

Click **Next** to continue.

**Figure 2–4 Install Tasks Window**

7. The [Fusion Location Information Window](#) opens.
  - Enter the number of servers running the RPAS Fusion Client where you want to install the Category Management configuration. If 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 host name and port number of the RPAS server.Click **Next** to continue.

---

**Note:** The Fusion Location Information windows ([Figure 2–5](#) and [Figure 2–6](#)) 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

Category Management 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

8. Based on the number of servers you entered, the Fusion Location Information window opens with the following set of fields for each server configuration:
- **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.

**Figure 2–6 Fusion Location Information Window**

**Category Management Installer - Oracle Retail**

**Fusion Location Information**

Enter the details for RPAS Fusion Client #1

Hostname or IP

Configuration Directory

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.

Login username

Login password

Enter an alias for the username.

Cancel Back Next Install

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**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.

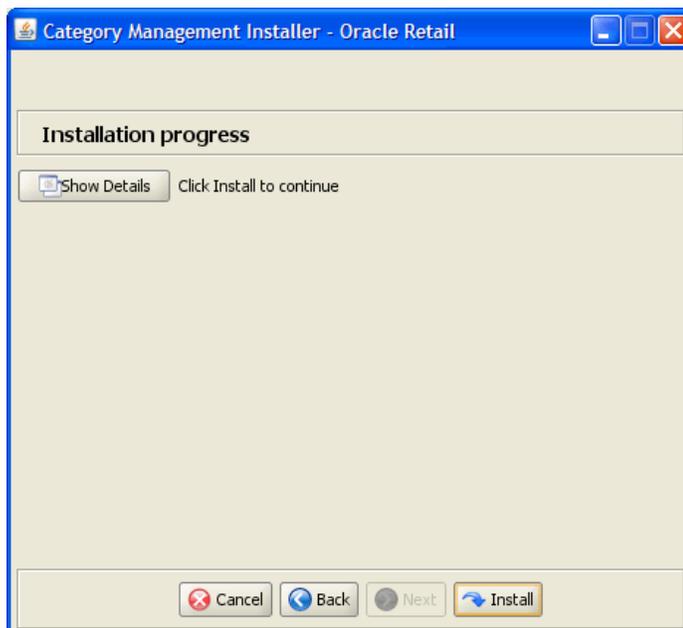
When the installation starts, the administrative user credentials will be retrieved from the Oracle Wallet based on the alias name specified in this window.

---

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

This window also 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 displays. 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 2–7 Installation Progress Window**

10. When the installation has finished, the Finished message displays. Click **OK**.
11. To view the installation details, select **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 [Category Management 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.category` 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 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*.

---

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 `CM_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 CM_HOME=[Solution Install Dir]
. [Solution Install Dir]/bin/environment.ksh
```

## 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 Category Management configuration. If you chose to install the Fusion Client configuration files using the Category Management installer, you can skip this section.

---

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

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During the Category Management 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 Category Management 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.

If you do not install the Fusion Client configuration files during the Category Management installation, you can choose to do one of the following tasks:

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

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## Patch Installation

This chapter describes how to upgrade Category Management to 13.4.

### Upgrade Prerequisites

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

- 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 Category Management to the latest version using the RPAS Configuration Tools.

### Upgrade and Patch to RPAS Release 13.4 or Later

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

#### 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 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 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 Category Management](#) section.
  - b. Complete steps 1-5.
  - c. At step 6, on the [Install Tasks Window](#), clear the **Category Domain** option.
  - d. Finish the remaining steps of the installer.
2. Unzip the updated configuration and note where it is saved.
3. Upgrade your Category Management domain to a 13.4 domain. Run one of the following commands:

To Upgrade:	Run:
With no change to styles	patch_cm_keepformats.ksh
And remove and rebuild the saved styles in the domain. (This calls the rpaInstall with the -updatestyles option.)	patch_cm_deleteformats.ksh

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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.

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

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### 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)

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

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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)

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**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.

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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)

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**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.

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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 Analytics
33. Oracle Retail Workspace (ORW)