

Oracle® Retail Regular Price Optimization

Installation Guide

Release 13.3

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Oracle Retail Regular Price Optimization Installation Guide, Release 13.3

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Oracle Retail Regular Price Optimization Installation Guide, Release 13.3

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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 Documents

For more information, see the following documents in the Oracle Retail Regular Price Optimization Release 13.3 documentation set:

- *Oracle Retail Regular Price Optimization Release Notes*
- *Oracle Retail Regular Price Optimization Implementation Guide*
- *Oracle Retail Regular Price Optimization User Guide for the RPAS Classic Client*
- *Oracle Retail Regular Price Optimization User Guide for the RPAS Fusion Client*

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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, 13.3) or a later patch release (for example, 13.3.1). 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

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

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

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Introduction

Oracle Retail Regular Price Optimization (RPO) assists retail price managers in pricing hard-line and grocery items. It is suited for long lifecycle items with infrequent price changes. It recommends permanent prices based on initial estimates of an item's total sales volume over a planning period and on price-related sales of items and related items.

RPO includes grouping in its pricing analysis because it considers cross-item elasticities; that is, RPO considers how price changes for one item may affect the sales volume of other items. Users can input objective functions and pricing constraints that define the optimization problem. After these inputs are defined, the pricing optimizer recommends prices. Multiple scenarios can be created and evaluated side by side, and what-if analysis can be performed within the context of a pricing scenario. After analyzing the what-if results and recommended prices, the user can make a final decision to submit the recommended prices for the given set of merchandise items and locations.

About This Document

This document provides detailed instructions on how to install a Regular Price Optimization domain using a configuration created with the RPAS Configuration Tools. This document does not describe how to create the actual configuration.

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.

You will find supplemental installations guides referenced throughout this document; note that the *RPAS Installation Guide* and the *RPAS Configuration Tools User Guide* must be obtained prior to beginning the installation process. Oracle Retail recommends that you read these documents in their entirety before beginning the RPO installation process.

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	13.3
Required Software	<p>Java Development Kit (JDK) 1.6</p> <p>Note: There are specific JDK versions needed for each of the supported operating systems for the Oracle Retail Predictive Application Server (RPAS). For the list of JDK versions, see the <i>Oracle Retail Predictive Application Server Installation Guide</i>.</p> <p>Note: When installing Java, avoid enabling AutoUpdate because it may update the Java version without prompting.</p>

Note: RPAS applications, such as RPO, 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*.

Supported Oracle Integration Technology

The following Oracle integration technology is supported:

Oracle Data Integrator 10.1.3.5

Supported Oracle Retail Products

The following Oracle Retail products are supported:

Table 1–2 Supported Oracle Retail Products

Requirement	Version
Oracle Retail Analytic Parameter Calculator for Regular Price Optimization (APC-RPO)	13.3
Oracle Retail Demand Forecasting (RDF)	13.3

Road Map for Installing RPO

This guide explains how you can install and set up the RPO application. In order to install RPO 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 13.3 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 RPO installation software and install the application. For more information, see Chapter 2, "Full Installation: UNIX Environments" .

Note: The RPO installation software enables you to install the taskflow and online help files for the RPAS Fusion Client. In order to install the taskflow files, the RPAS Fusion Client must already be installed.

Full Installation: UNIX Environments

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

The RPO Installer automates the following:

- Installation of the RPO mock install configuration
- Installation of the RPO 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*.
- Custom configuration of `make_domain.rpo` script for creating domains
- Creation of sample RPO domain

This document assumes that the RPAS Installer process (from the *RPAS Installation Guide*) has been completed prior to using the RPO 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, run the `retaillogin.ksh` script. The script is located in the root of the base directory where RPAS was installed unless the default was overwritten when specifying directory paths.

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

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

Or, include the full path after the period:

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

Notes:

- The preceding period and space (". ") must be included at the beginning of the command when executing the script.
 - Include this path and script in the .profile in your home directory (~/.profile) if you want to have this environment setup script run during login.
-

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

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

Extracting the RPO Media Pack

Perform the following procedure to extract the installation package.

1. Create a directory to store the RPO media pack and download the media pack to this location. This directory is referred to as [RPO Installation].
2. Extract the media pack to this location. After it is extracted, two directories appear: CDROM and DOCS.
 - The CDROM folder contains the rpo.zip file. This zip file contains the RPO solution.
 - The DOCS folder contains the RPO documentation.

Installing RPO

Perform the following procedures to install RPO.

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

```
cd [RPO Installation]
unzip [RPO Media Pack]
```

4. Extract the RPO Installer.

```
cd CDROM
unzip rpo.zip
```

5. Change directories to the root of the [RPO Installation] directory and run the RPO Installer:

```
cd rpo
./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.

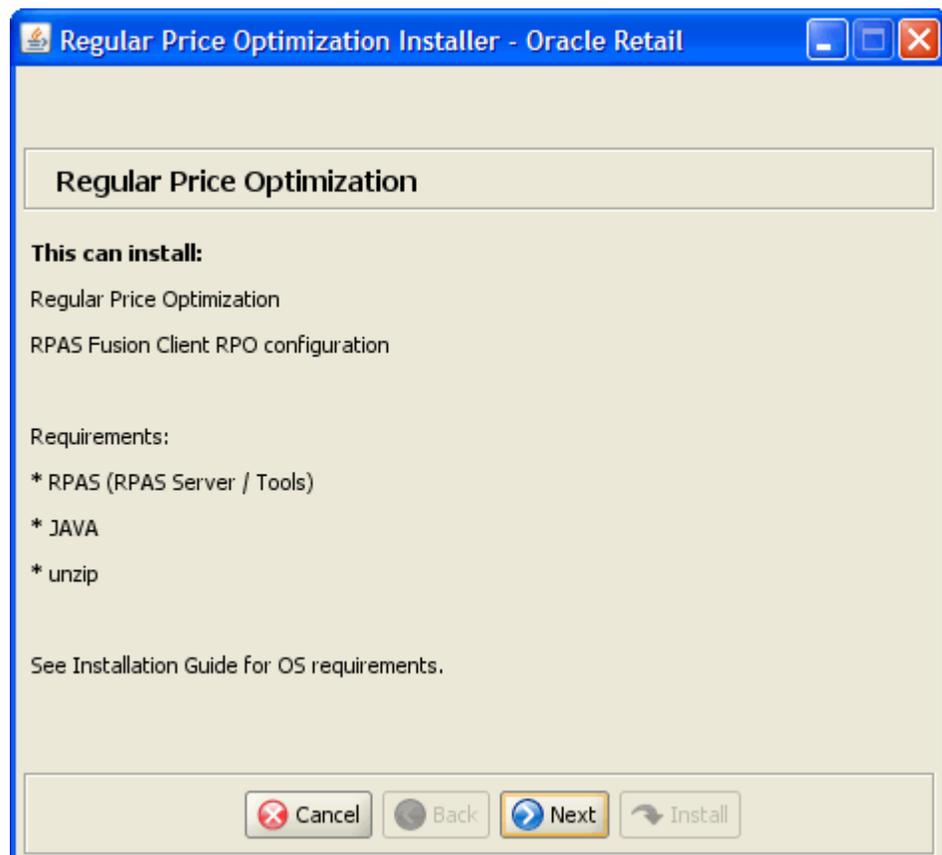
In both cases, the requested information is identical. In the GUI, you may be shown a check box to signal whether you want a component installed; in text mode, you are prompted for a response of **true** or **false**.

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**.

6. The Regular Price Optimization Installer screen appears and displays the components that are installed during the installation process, as well as the required components.

Click **Next** to continue.

Figure 2–1 Regular Price Optimization Installer Screen



7. The Choose Components to Install screen appears.

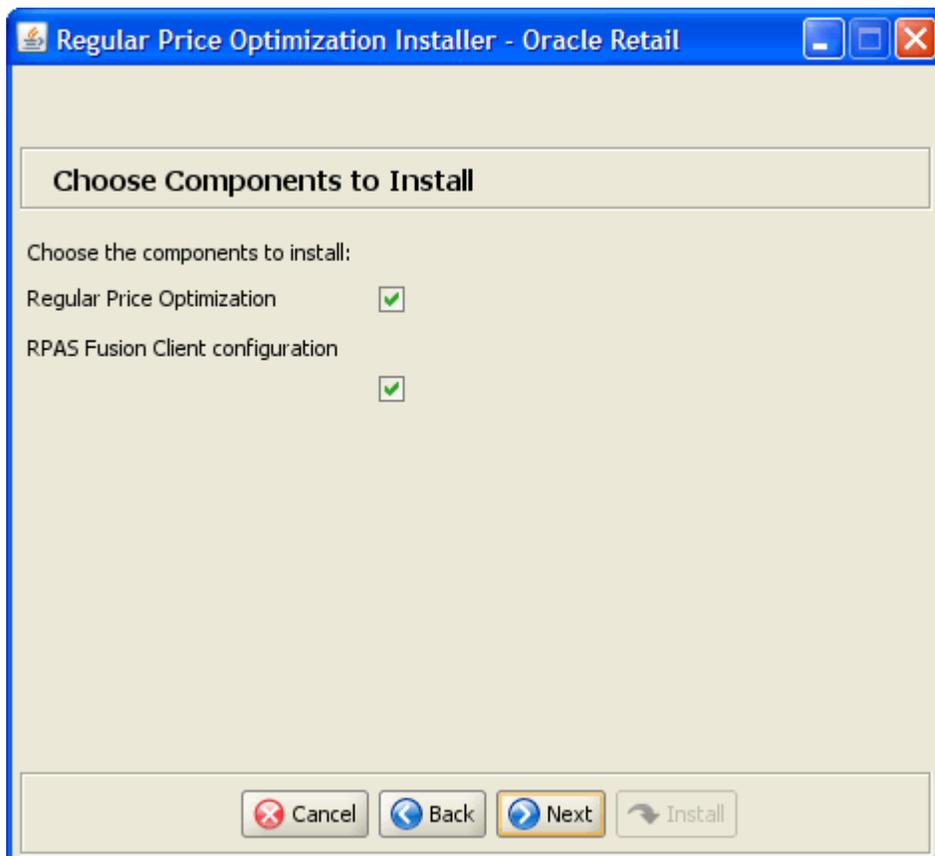
Select the following options:

- **Regular Price Optimization** – Select this option to install the RPO server with the domain.
- **RPAS Fusion Client configuration** – Select this option to install the RPAS Fusion Client configuration for RPO. 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 10 and 11.

Click **Next** to continue.

Figure 2–2 Choose Components to Install Screen



8. The Base Paths for Solution screen appears.

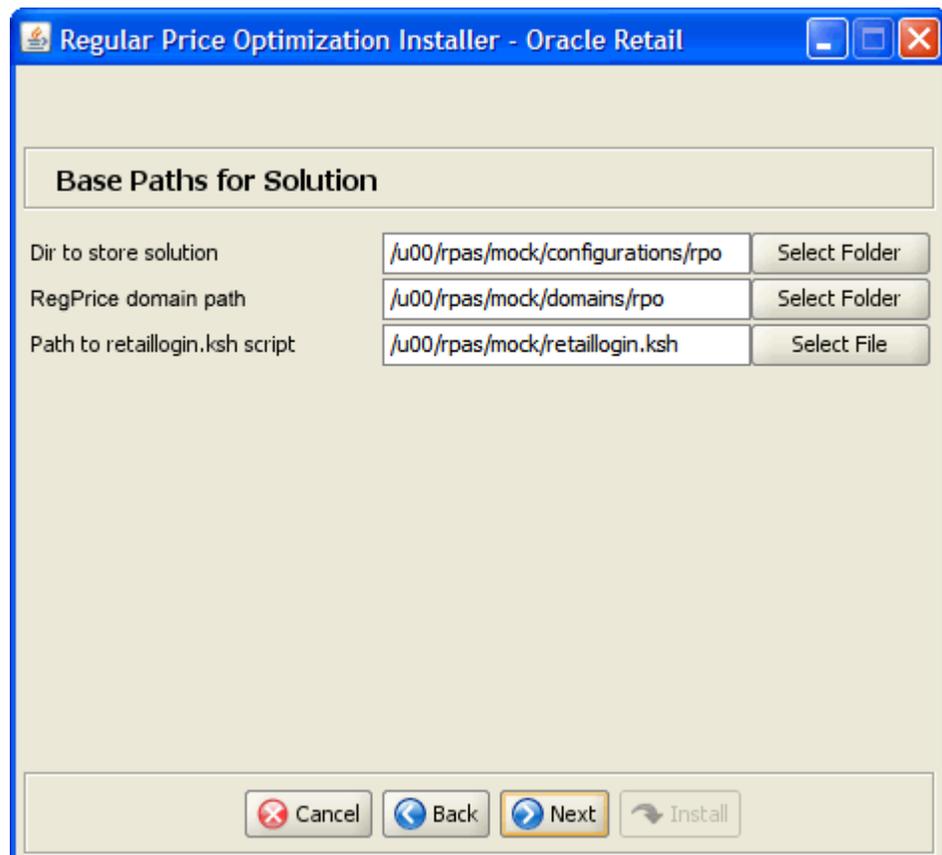
Enter the relevant information in the following fields:

- **Dir to store solution** - Enter the directory path where your solution should be stored.
- **RegPrice domain path** - Enter the directory path where domains for this solution should be stored.
- **Path to 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 [RPO Installation].

Click **Next** to continue.

Figure 2-3 Base Paths for Solution Screen



9. The Install Tasks screen appears.
 - If you want to create the RPO domain, select the **Create RegPrice Domain** option, which is selected by default.

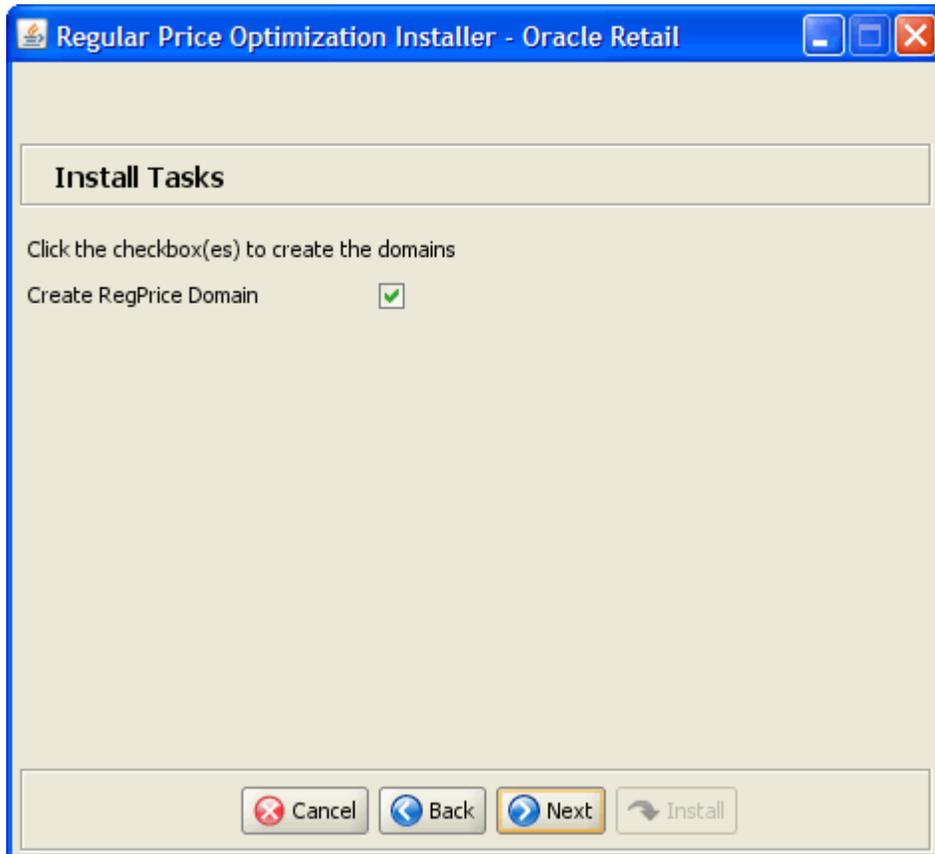
Note: Domain builds use the environment specified in the retaillogin.ksh environment setup script. If you change any environment details, edit the retaillogin.ksh script and any subsequent scripts called by retaillogin.ksh.

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

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

Click **Next** to continue.

Figure 2–4 Install Tasks Screen



10. The Fusion Location Information screen appears.

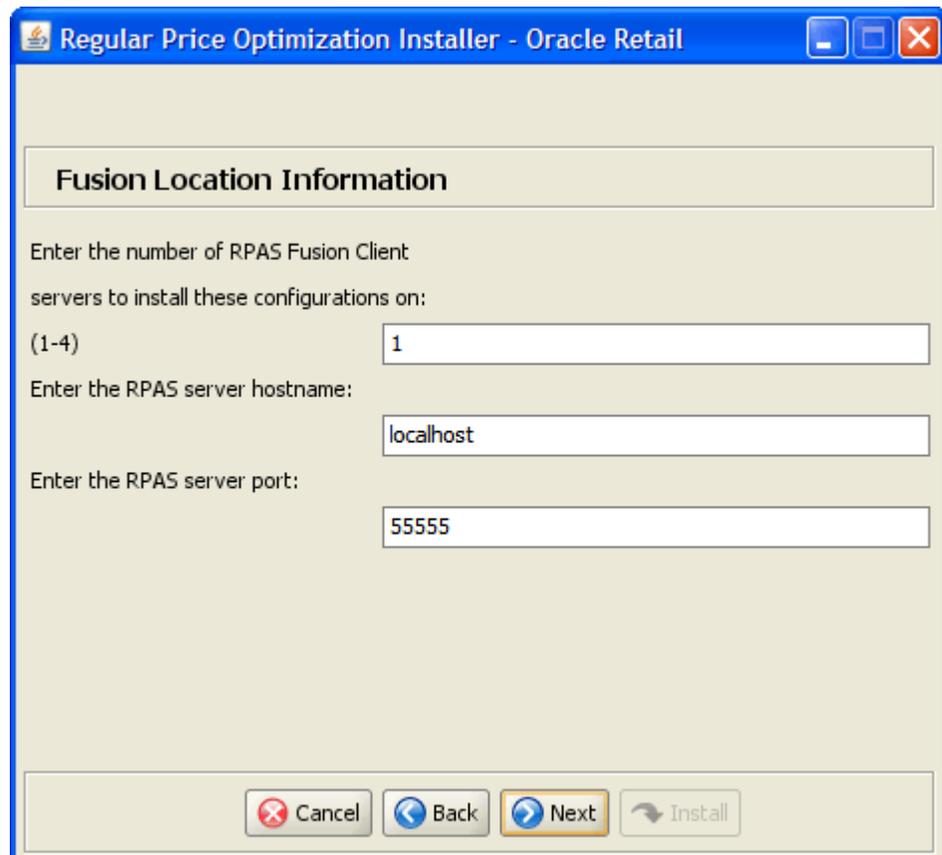
- Enter the number of servers running the RPAS Fusion Client where you want to install the RPO configuration. If the RPAS Fusion Client is running on a single server, enter 1. If you have a clustered installation, you can enter up to four servers.
- Enter the host name and port number of the RPAS server.

Click **Next** to continue.

Note: The Fusion Location Information screens appear when you select the RPAS Fusion Client configuration check box on the [Choose Components to Install Screen](#).

If you are not installing the RPAS Fusion Client configuration, proceed to step 12.

Figure 2-5 Fusion Location Information Screen



The screenshot shows a window titled "Regular Price Optimization Installer - Oracle Retail". The main content area is titled "Fusion Location Information". It contains three input fields with labels:

- "Enter the number of RPAS Fusion Client servers to install these configurations on:" with a sub-label "(1-4)" and a text box containing "1".
- "Enter the RPAS server hostname:" with a text box containing "localhost".
- "Enter the RPAS server port:" with a text box containing "55555".

At the bottom of the window, there are four buttons: "Cancel", "Back", "Next", and "Install". The "Next" button is highlighted with a yellow border.

11. Based on the number of servers you entered, the Fusion Location Information screen appears 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 (Second Screen)

The screenshot shows a window titled "Regular Price Optimization Installer - Oracle Retail". The main content area is titled "Fusion Location Information" and contains the following fields and instructions:

- 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:

At the bottom of the window, there are four buttons: "Cancel", "Back", "Next", and "Install". The "Next" button is highlighted in yellow.

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.

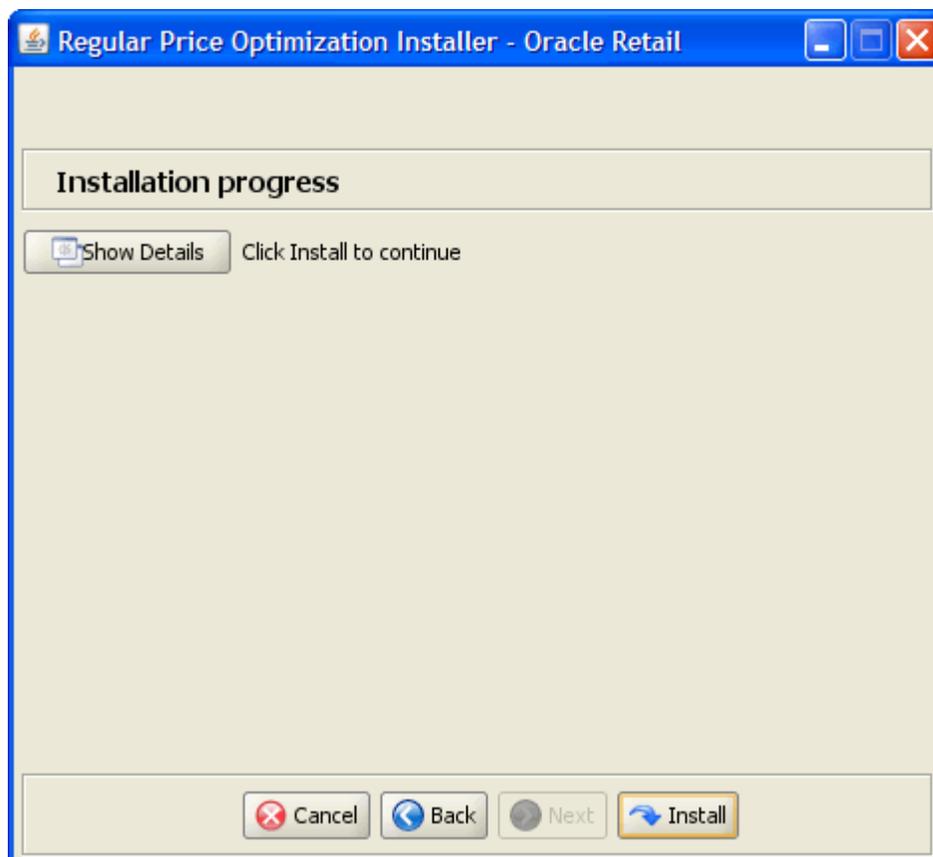
When the installation starts, the administrative user credentials will be retrieved from the Oracle Wallet based on the alias name specified in this screen.

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

This screen 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 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 2-7 Installation Progress Screen



13. When the installation has finished, the Finished screen appears. Click **OK**.
14. 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 where you initiated the installation from [RPO Installation]/CDROM/rpo. The log file is named based on the product and a timestamp, followed by the .log extension.

Created as part of this process is a sample domain creation script, located in the [Dir to store configurations] entered previously. This file is named make_domain.rpo. This file contains all of the required parameters needed to support the domain installation process. If necessary, this file may be modified if the default parameters are not applicable for your particular environment.

Note: The domain install process may also include post-installation data loading scripts specific to the RPO configuration. These scripts, if present, may also be modified.

For additional information on installing RPAS domains manually, see to the *RPAS Installation Guide*.

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

Post Installation Tasks

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

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

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

```
[RPO Installation]/rpo/fusion  
<server-name>{RPAServerName}</server-name>
```

During the RPO 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 RPO installation:

- `ProfileList.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 RPO installation, you can choose to do one of the following tasks:

- Run the RPO installer again, and select to install only the RPAS Fusion Client configuration.
- Run the RPAS Fusion Client installer again, and specify the RPO 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 RPO manually. For more information, see the "Configuring Additional Domains" section in the *RPAS Administration Guide for the Fusion Client*.

Patch Installation

This chapter describes how to upgrade RPO from a previous release to 13.3.

Upgrade Prerequisites

In order to upgrade RPO, 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 of the supported RPAS version 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 outlined above.
-
-

Upgrade Process

The following process outlines how to upgrade RPO 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 RPO:
 - 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. Note where it is saved. You will need this configuration for Step 2 of the [For the Server](#) section.

For the Server

1. Upgrade the RPAS server configuration by running the installer:
 - a. Begin the installer as described in the [Installing RPO](#) section.
 - b. Complete steps 1-9.
 - c. At step 9, the [Install Tasks Screen](#), deselect the **Create RegPrice Domain** option.
 - d. Finish the remaining steps of the installer.
2. Unzip the updated configuration from step 5 of the [For the PC](#) section and note where it is saved.
3. Upgrade your RPO domain to a 13.3 domain. For upgrading instructions, see the "Upgrading and Patching Domains" section in the *RPAS Administration Guide for the Classic Client* or the *RPAS Administration Guide for the Fusion Client*.

Notes:

- Upgrading your domain to a 13.3 domain requires that you first upgrade it to a 13.2.3 domain. See the "Upgrading and Patching Domains" section in the 13.2.3 versions of the *RPAS Administration Guide for the Classic Client* or *RPAS Administration Guide for the Fusion Client* for instructions. Then, you must perform additional upgrade steps. For those instructions, see the "Upgrading and Patching Domains" section in the 13.3 versions of the *RPAS Administration Guide for the Classic Client* or *RPAS Administration Guide for the Fusion Client*.
 - Upgrading to 13.3 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 versions of the *RPAS Administration Guide for the Classic Client* or *RPAS Administration Guide for the Fusion Client*.
 - After the domain has been upgraded to 13.3, 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.
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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), 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
- 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)