

Oracle® Retail Merchandise Financial Planning Cloud Service Starter Kit



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Oracle Retail Merchandise Financial Planning Cloud Service Starter Kit, Release 25.2.301.0

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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 Starter Kit is written for the following audiences:

- Integrators and implementation staff

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- Exact error message received
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<http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html>

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<https://docs.oracle.com/en/industries/retail/index.html>

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

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.

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Oracle Retail Merchandise Financial Planning Cloud Service Starter Kit, Release 25.2.301.0.

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1

Introduction

Welcome to the *Oracle Retail Merchandise Financial Planning Cloud Service Starter Kit*. This chapter outlines the contents of this guide, discusses the updated components with respect to the previous version, lists hardware and software requirements, and defines commonly used notations and terms.

Using this document allows users to:

- Install RPASCE Windows Starter Kit
- Launch ConfigTools and application plug-ins for modifying an existing or developing a new application configuration.
- Validate the configurations using scripts in Cygwin
- Download and launch Virtual Machines

About This Document

This document contains information for installation of the Starter Kit components.

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](#) describes the hardware and software requirements for the Starter Kit.

Note

Java can be acquired for Microsoft Windows at: www.java.com.

Table 1-1 Starter Kit Hardware and Software Requirements

Requirement	Details
Supported Operating Systems for RPASCE Configuration Tools	Microsoft Windows 10
	Note: Oracle Retail assumes that the retailer has ensured its Operating System has been patched with all applicable Windows updates.
	RPASCE Configuration Tools requires 64-bit Java JDK 11u023 or later.
Required Software	• Java JDK 11u023 (required to support the RPASCE Cloud Edition Configuration Tools.) • Microsoft 2015 Runtime Libraries • VirtualBox • Cygwin

Table 1-1 (Cont.) Starter Kit Hardware and Software Requirements

Requirement	Details
Microsoft 2015 Runtime Libraries	Ensure that these Microsoft 2015 Runtime Libraries are installed to enable RPASCE RPAS Cloud Edition Configuration Tools and other RPASCE utilities: - vc_redist.x64.exe - vc_redist.x86.exe Download these libraries from this link: https://www.microsoft.com/en-us/download/details.aspx?id=48145 Note: Use Microsoft Visual C++ 2015 or higher for use with RPAS Cloud Edition Configuration Tools and other RPASCE utilities.
Cygwin	64-bit installation of Cygwin Cygwin provides a Unix-like environment under Windows. You must install Cygwin to emulate UNIX commands (required for running some RPAS Cloud Edition Configuration Tools utilities on Windows).

Cygwin Installation Requirement Notes

The following notes pertain to the RPASCE hardware and software requirements.

Installation Requirements for Cygwin

For some RPAS Cloud Edition Configuration Tools utilities on Windows, you must install Cygwin to emulate UNIX commands. You can find more information about downloading this product at: <http://www.cygwin.com>.

1. Cygwin should be installed under this directory:

C:\cygwin

Note

Only use this folder and do not install under C:\Program files or any other folders with spaces to avoid file path conversion issues.

2. Select **Use System Proxy Settings** for install to display a list of mirror sites.

Warning

In addition to the default packages that are installed, make sure to select the mksh, unzip, and zip packages to be installed.

Starter Kit Components

For information on installing the Starter Kit, refer to [Installing on a Windows Environment](#).

For information on installing the VM related software refer to [RPASCE Virtual Machine](#)

Hardware and Software Requirement Notes

The following notes pertain to the RPASCE hardware and software requirements:

- An application for unzipping (.zip) components must be installed and used for extracting the RPASCE Configuration Tools.
- You must install Cygwin to emulate UNIX commands (required for running some RPASCE Configuration Tools utilities on Windows). You can find more information about downloading this product at: <http://www.cygwin.com>.

[Table 1-2](#) indicates which software components are needed for each task.

Table 1-2 Software Requirements Notes

Item	Details
Task	Use the Configuration Tools to create or modify solutions.
Typical User	Solution/ Product Administrator
Platforms	Windows 10
RPASCE Server	Yes
RPASCE Clients	No
Configuration Tools	Yes
Java	Yes

Terms

The following table lists terms that are used in this guide:

Term	Definition
RPASCE	The Oracle Retail Predictive Application Server Clud Edtion provides the foundation for Oracle Retail solutions such as Oracle Retail Inventory Planning Optimization Cloud Service-Demand Forecasting (IPOCS-Demand Forecasting), Merchandise Financial Planning (MFPCS), and Assortment Planning (APCS). RPASCE does not include any business logic, but it enables the solutions to store, manipulate and retrieve data. It provides the solutions with a standard interface based on wizards, templates, workbooks, and batch processes.
PDS	Planning Data Store. Database containing the data and metadata for RPASCE applications.
RPASCE Configuration Tools	The tools used to configure an RPASCE solution. For more information, refer to the <i>Oracle Retail Predictive Application Server Configuration Tools User Guide</i>

2

Installing on a Windows Environment

This chapter describes how to install the MFP Cloud Service Starter Kit on a Windows environment.

MFP Cloud Service Starter Kit Overview

RPAS Cloud Edition is comprised of many components. In addition, there are solutions that have been developed using the RPAS Cloud Service foundation. Examples of these solutions include Oracle Retail Merchandise Financial Planning (MFPCS) and Oracle Retail Inventory Planning Optimization Cloud Service-Demand Forecasting (IPOCS-Demand Forecasting). Each application supported by the RPAS Cloud Edition Platform has a dedicated Starter Kit.

The components of the Starter Kit software include the following:

- RPASCE Configuration Tools
- RPASCE Server libraries used by the Configuration Tools
- Documentation

Note

The Starter Kit distribution does not contain a full Retail Home instance. As a result, Retail Home and its features are not supported in Starter Kit environments.

Starter Kit Installation on Windows

For the purposes of this section, a slash "/" is used to delineate directories and files in paths. Users in a Windows Command Prompt environment need to either use a backslash "\" as the delineation character or use double quotes around paths.

This section contains the following topics:

- [Starting the Cygwin Shell and Setting up the Environment](#)
- [RPASCE Package Location](#)
- [Installing the Starter Kit](#)

Starting the Cygwin Shell and Setting up the Environment

Perform the following procedures to start the Cygwin shell and set up the environment.

Download and Install Java JDK

This version of ConfigTools support 64 bit Java JDK version. Java needs to be installed under the directory which does not have spaces in it.

C:\Java

Setup JAVA_HOME

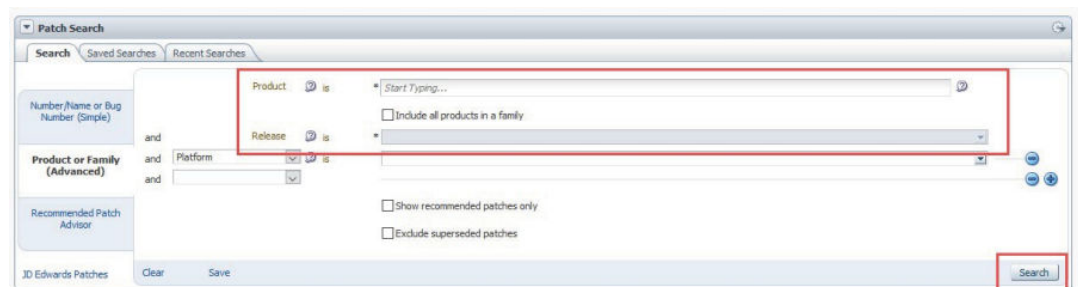
After installing JDK inside Cygwin, setup the JAVA_HOME as described in [Creating the Required Environment Variables](#).

RPASCE Package Location

The RPASCE package can be found on My Oracle Support.

1. Access My Oracle Support using this URL: <https://support.oracle.com>
2. From the My Oracle Support dashboard, click on the **Patches & Updates** tab.
3. From the **Patches & Updates** tab, select the **Product or Family (Advanced Search)** that is located in the **Patch Search** panel.
4. In the **Product** search box, enter *Oracle Retail Merchandise Financial Planning Cloud Service*.
5. Click the arrow on the Release list to view all of the available releases for your product. Select the release that you wish to access and then click **Search**.

Figure 2-1 Patch Search



6. From the Patch Advanced Search Results, click the patch link located in the Patch Name column.
7. Verify that this is your desired patch and then click **Download**.

Note

Some customers may not be able to download the Starter Kit package, due to a limitation in My Oracle Support portal's structure. If you run into a problem trying to download, then log an SR through which Oracle will provide you a link to access the Starter Kit package.

Installing the Starter Kit

The following procedures provide information about creating the necessary folders on your Windows PC and copying the Configuration Tools components to them.

1. Using Windows Explorer, navigate to your C drive, create a folder named **Oracle**.
2. Open the **Oracle** folder.

- Unzip the downloaded file with a name similar to p33174696_19000_MSWIN-x86-64.zip into the newly created Oracle directory on the Windows machine. Once extracted, the following directories appear:

Directory	Description
ConfigTools	This directory contains the components required to run the RPASCE Configuration Tools.

In this example, the path C:\Oracle\MFP_Cloud_Starter_Kit\ConfigTools is both the **RPAS_HOME** and **RIDE_HOME**. Environment variables are defined on your Windows PC to point to this location so that RPASCE will function correctly. Refer to "[Creating the Required Environment Variables](#)" for information on creating the necessary RPASCE variables.

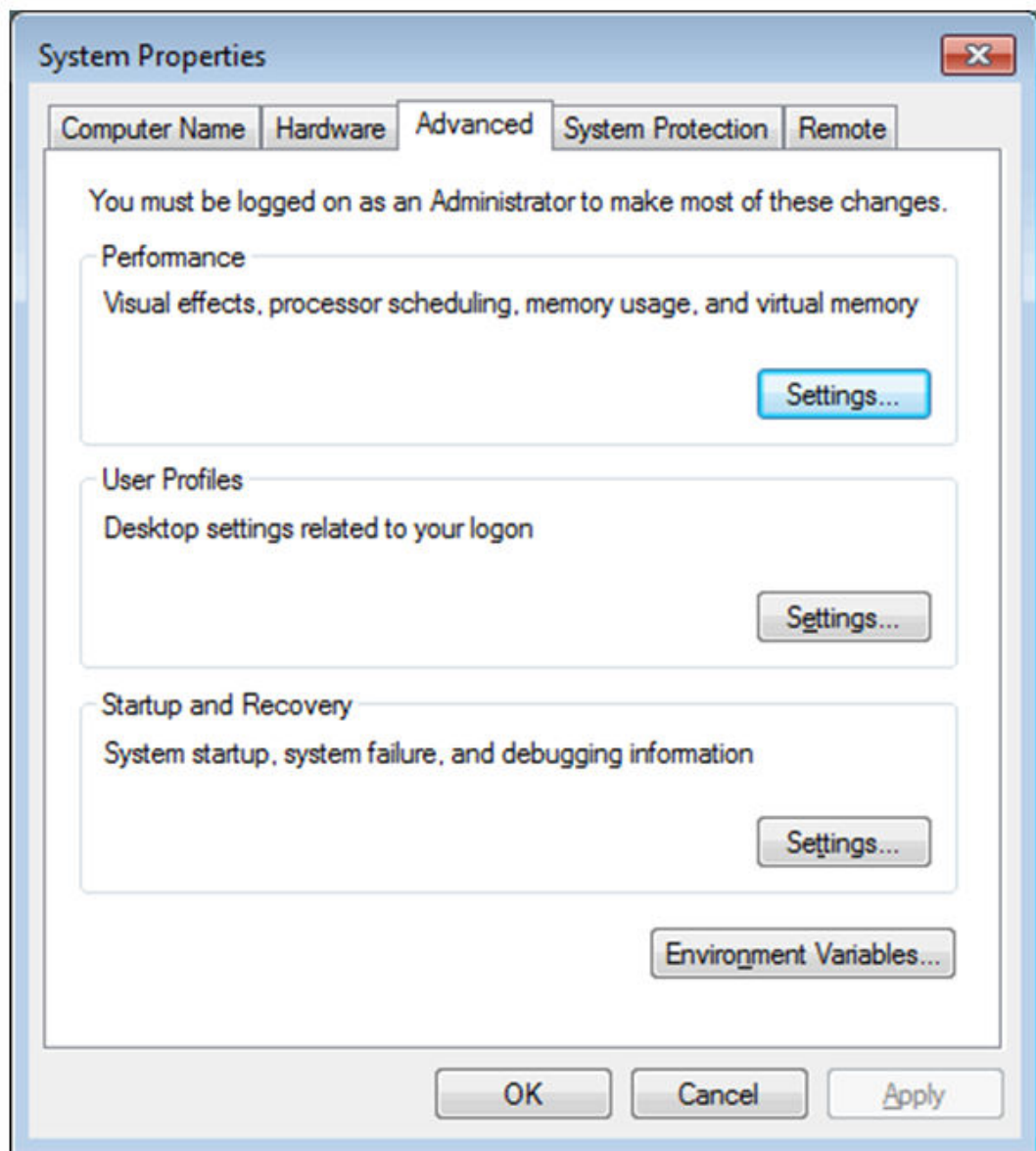
Creating the Required Environment Variables

The following steps outline the process to follow and environment variables required to support the RPASCE installation and application install.

Steps to Access the Environment Variables Window

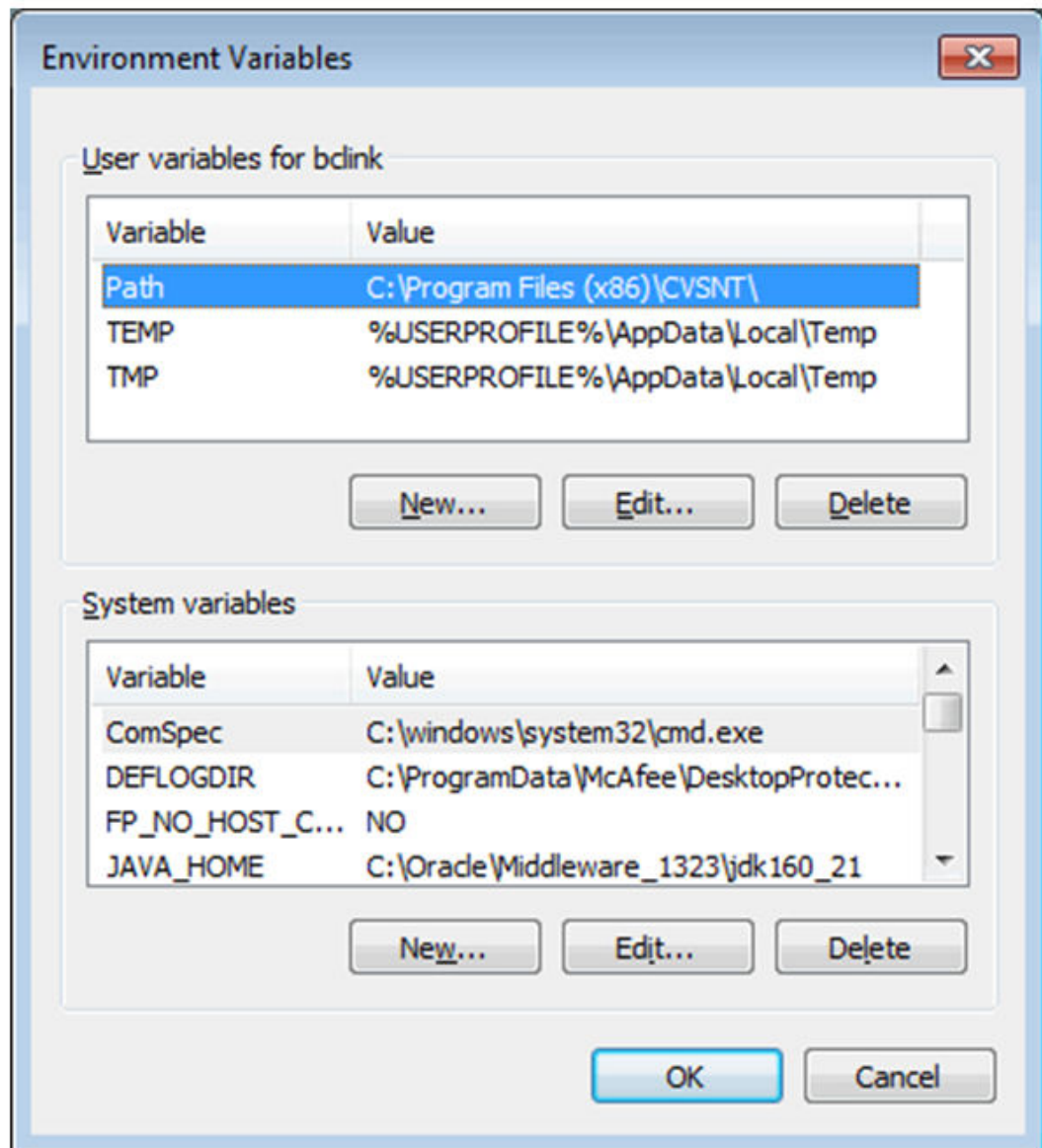
Perform the following steps to access the Environment Variables window.

- Press Windows key and **R**, the Run box opens.
- Type sysdm.cpl and press **Enter**.
- Select the **Advanced** tab.
- At the bottom of the window, click **Environment Variables**.

Figure 2-2 System Properties - Advanced Tab

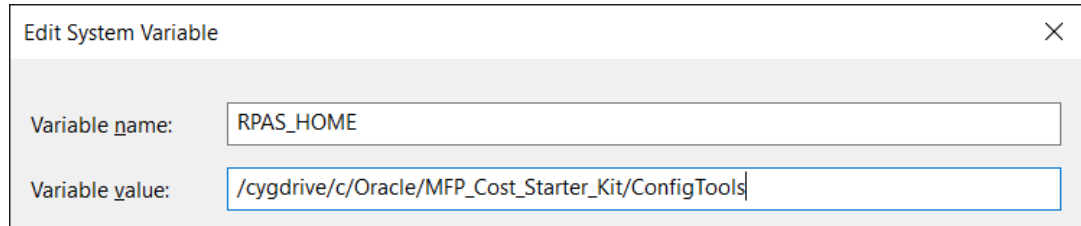
5. The [Figure 2-3](#) window opens.

Figure 2-3 Environment Variables Window



Create the **RPAS_HOME** Environment Variable

1. Under the System variables box, click **New**. The New System Variable dialog box opens.
2. Enter **RPAS_HOME** in the **Variable** name field.
3. Enter the path of the **RPAS Server** folder in the **Variable value** field. In our [Figure 2-4](#) example, this is: `/cygdrive/c/Oracle/MFP_Cloud_Starter_Kit/ConfigTools`

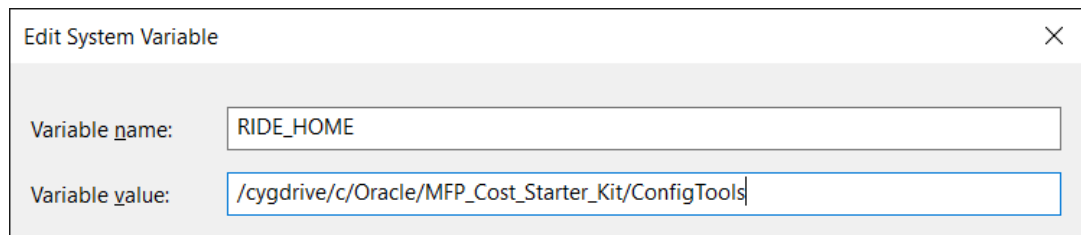
Figure 2-4 Example of RPAS_HOME VariableThe screenshot shows a dialog box titled "Edit System Variable" with a close button (X) in the top right corner. It contains two input fields: "Variable name:" with the text "RPAS_HOME" and "Variable value:" with the text "/cygdrive/c/Oracle/MFP_Cost_Starter_Kit/ConfigTools".

Variable name:	RPAS_HOME
Variable value:	/cygdrive/c/Oracle/MFP_Cost_Starter_Kit/ConfigTools

4. Click **OK**. **RPAS_HOME** now appears in the Variable name box.

Create the RIDE_HOME Environment Variable

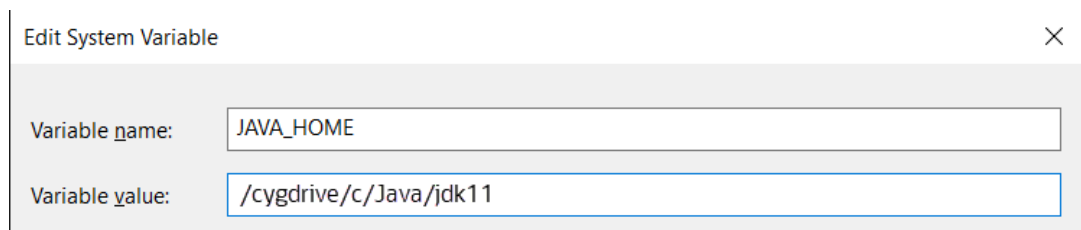
1. Under the System variables box, click **New**. The New System Variable dialog box opens.
2. Enter **RIDE_HOME** in the **Variable name** field.
3. Enter the path of the **ConfigTools** folder in the **Variable value** field. In our [Figure 2-5](#) example, this is: /cygdrive/c/Oracle/MFP_Cloud_Starter_Kit/ConfigTools
4. Click **OK**.

Figure 2-5 Example of RIDE_HOME VariableThe screenshot shows a dialog box titled "Edit System Variable" with a close button (X) in the top right corner. It contains two input fields: "Variable name:" with the text "RIDE_HOME" and "Variable value:" with the text "/cygdrive/c/Oracle/MFP_Cost_Starter_Kit/ConfigTools".

Variable name:	RIDE_HOME
Variable value:	/cygdrive/c/Oracle/MFP_Cost_Starter_Kit/ConfigTools

Update or Create the JAVA_HOME Environment Variable

1. Under the System variables box, select the **JAVA_HOME** environment variable and update it
2. Enter the path of the java folder in the Variable value field. In [Figure 2-6](#), this is:
/cygdrive/c/Java/jdk11

Figure 2-6 JAVA_HOME VariableThe screenshot shows a dialog box titled "Edit System Variable" with a close button (X) in the top right corner. It contains two input fields: "Variable name:" with the text "JAVA_HOME" and "Variable value:" with the text "/cygdrive/c/Java/jdk11".

Variable name:	JAVA_HOME
Variable value:	/cygdrive/c/Java/jdk11

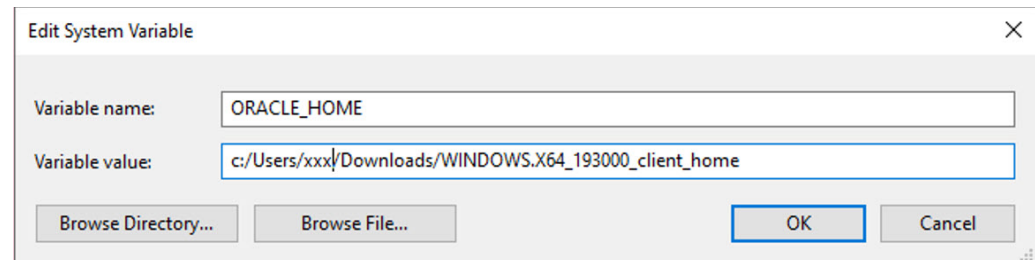
3. Create the **ORACLE_HOME** environment variable.
 - a. Ensure that the Oracle Database 19c Client is installed locally on your Windows machine. If not installed, you can download a copy from: <https://www.oracle.com/database/technologies/oracle19c-windows-downloads.html>

For example, download the `WINDOWS.X64_193000_client_home.zip` file and then unzip it into your Download directory.

- b. Beneath the System variables box, click **New**. The New System Variable dialog box opens.
- c. In the Variable name field, enter `ORACLE_HOME`
- d. In the Variable value field, enter the path of the Oracle database 19c client folder. In [Figure 2-7](#), this is:

`c:/Users/xxx/Downloads/WINDOWS.X64_193000_client_home`

Figure 2-7 Example of ORACLE_HOME Variable



Update the PATH Variable

1. Under the System variables section, select the PATH environment variable and click **Edit**.
2. Insert the complete paths for `RPAS_HOME`, `RIDE_HOME`, and `JAVA_HOME` as shown:
`%RPAS_HOME%\bin;%RPAS_HOME%\applib;%RPAS_HOME%\lib;`
`%JAVA_HOME%\bin;%JAVA_HOME%\lib;`
`%JAVA_HOME%\jre\bin\server;`
`%ORACLE_HOME%\bin;%ORACLE_HOME%\lib;`

Note

Remember to separate all path statements with semicolons (;).

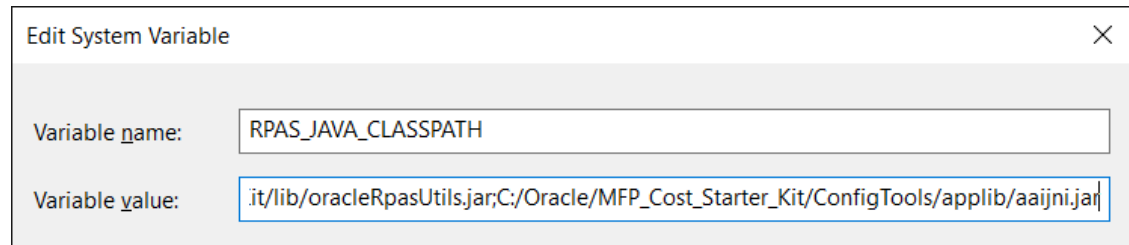
3. Select **OK** to save your changes.

Update the RPAS_JAVA_CLASSPATH Variable

The `RPAS_JAVA_CLASSPATH` is used to enable the MFP solution to execute extensions to RPAS written within the AAI framework. In order for the Configuration Tools to support these extensions, it is necessary to set the `RPAS_JAVA_CLASSPATH` environment variable so that the Configuration Tools can locate the libraries.

The value of the `RPAS_JAVA_CLASSPATH` variable should be the locations of the `aaijni.jar` located in the `applib` subdirectory of the Starter Kit installation and the `oracleRpasUtils.jar` located in the `lib` subdirectory of the Starter Kit installation. Assuming the default location for Starter Kit installation, `RPAS_JAVA_CLASSPATH` should be set to:

`C:/Oracle/ConfigTools/MFP_Cloud_Starter_Kit/lib/oracleRpasUtils.jar;C:/Oracle/ConfigTools/MFP_Cloud_Starter_Kit/applib/aaijni.jar`

Figure 2-8 Example of RPAS_JAVA_CLASSPATH Variable

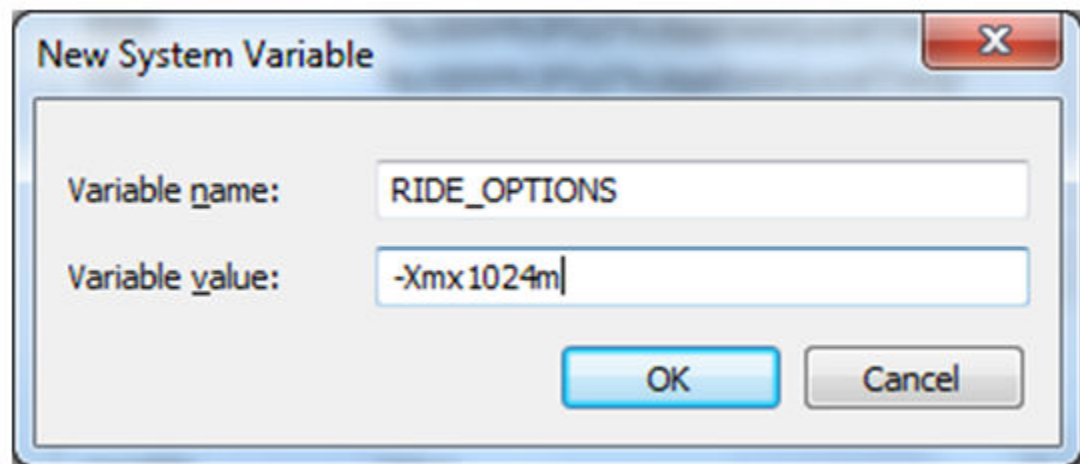
The RIDE_OPTIONS Variable

The RIDE_OPTIONS environmental variable can be used to pass information into the ConfigTools.

By default, the Java Virtual Machine requests on the order of 268 MB of RAM from the OS to allocate for its heap. This is even more of an issue when multiple configurations are open in the Configuration Tools and must be held in memory simultaneously.

By using the -Xmx option, you can instruct the Java Virtual Machine to request more memory from the OS to prevent situations when all allocated memory is exhausted. The syntax of the property is:

-Xmx###m, where ### is the amount, in megabytes, of memory the JVM is to request. Common values for this argument are -Xmx512m or -Xmx1024m.

Figure 2-9 Example of RIDE_OPTIONS Variable

Launching RPAS Cloud Edition Configuration Tools

Perform the following steps to launch RPAS Cloud Edition Configuration Tools.

1. Start Cygwin terminal and run the following commands:

```
>cd $RIDE_HOME/bin
```

then

>ConfigTools

Application Building

This section describes building applications on Oracle cloud using the configuration from the Starter Kit.

Object Store Locations

For the purposes of building the application, following subpaths in the object store are used:

Note

If you are using the VM it still uses the incoming FTP location; which is a folder shared with the host machine instead of the object store.

config

For uploading the application configuration into the cloud environment, create an archive containing the config directory and all of its contents. This archive file must be named as <config_name>_config.zip. This archive file must be uploaded to the in Object Store under planning/incoming/config location.

If using MFPCS template version then customer can use the plug-ins to generate different available configuration plug-in options. Refer to [Appendix: Generating the Configuration for Plug-in Options](#)

json

Dashboards use the file, dashboardSettings.json which is used by the RPASCE client for displaying the dashboard. It is also possible to use an empty file if you do not need to configure the dashboard. This file if present should be uploaded to the Object Store under the planning/incoming/config location.

If the Application Configuration uses any web services in the custom menu, then its parameters can be configured in serviceConfig.json. This file is optional. If present it should be uploaded to the Object store under the planning/incoming/config location.

batch_control

The set of batch process control files must be uploaded to the Object Store under planning/incoming/batch_control location.

integration

The batch process also needs interface.cfg file which is a configuration file to get data from RAP Integration. Refer to the *Oracle Retail Predictive Application Server Cloud Edition Implementation Guide* for more details about configuring the interface.cfg file. This file is needed only if some interfaces are configured to get the data. This file if present should be uploaded to the Object Store under planning/incoming/config location.

input

The hierarchy data files and measure input files must be uploaded to the object store under planning/incoming/input as individual files or as an archive in the .zip format. If uploading data files as an archive, the name of the archive file should be same as the one used in batch control files for the compressed files. Remember not to include any directory structure in the archive file. In addition to the application build and patch processes, batch framework tasks like measload, hierload, unpack, and waittrigger will check for incoming files in this same object store input location.

Updating the Starter Kit Installation

Each release of Cloud Service will have a version-specific Starter Kit. As the product is enhanced in future versions, it will be necessary to update the Starter Kit to incorporate these enhancements. The following steps outline the process of updating the Starter Kit installation:

1. Download the new version of the MFP Cloud Service Starter Kit.
2. Delete the contents of the C:/Oracle/MFP_Starter_Kit directory.

Warning

It is highly recommended to save custom configurations outside of the MFP_Starter_Kit directory so that they are not accidentally deleted when updating the Starter Kit.

3. Follow the installation instructions for the new version of the Starter Kit.
4. Run plug-in automation on the existing configuration to create a version of the configuration for the selection configuration options. Follow the instructions in the *Oracle Retail Merchandise Financial Planning Cloud Service Implementation Guide*.
5. Apply the changes in the newly generated configuration to the MFP Cloud Service application.

Note

For more information on using the RPASCE Configuration Manager, refer to the *Oracle Retail Predictive Application Server Configuration Tools User Guide*.

3

RPASCE Virtual Machine

RPAS Cloud Edition (RPASCE) Virtual Machines (VMs) provide a way for anyone to be up and running using the RPASCE software as quickly as possible without having to deal with all the steps around setting up the RPASCE server, UI and its applications. The VMs are created for Oracle consultants and partners who want to get a quick feel of the application without having to set up the hardware and software resources necessary for trying out RPASCE solutions.

RPASCE VMs are not a replacement or substitution for pre-production Cloud Environments (STAGE, Dev, and so on). Note that the VMs are only provided to give a quick feel of the application and are not intended to be used as full-blown implementation tool.

This chapter lists the steps necessary to deploy an RPAS Cloud Edition VM, launch the UI and connect to the application included in the VM. All the components - RPASCE server, UI, PDS (Planning Data Store) are all local to the VM. Disregard the version numbers shown in the images in this chapter as the steps are the same across different versions.

Contrary to previous versions of the RPASCE VMs where the RPASCE server and UI software were directly installed in the VM they are now deployed using Docker inside the VirtualBox VM. Therefore, the RPASCE server, UI and database processes are running inside their silos known as containers inside the VM. For more information on Docker, refer to the URL:

<https://docs.docker.com/>

Note

The VMs do not include Retail Home, Science, or RI components. It only contains the base planning application. Also, the VMs do not use IDCS or Object Storage. Notifications are currently not supported in the VM.

VirtualBox Software

Download the Oracle VirtualBox software that is available for Windows, Mac, Linux and Solaris from the following link. For Windows, select the download link for Windows Hosts:

<https://www.virtualbox.org/wiki/Downloads>

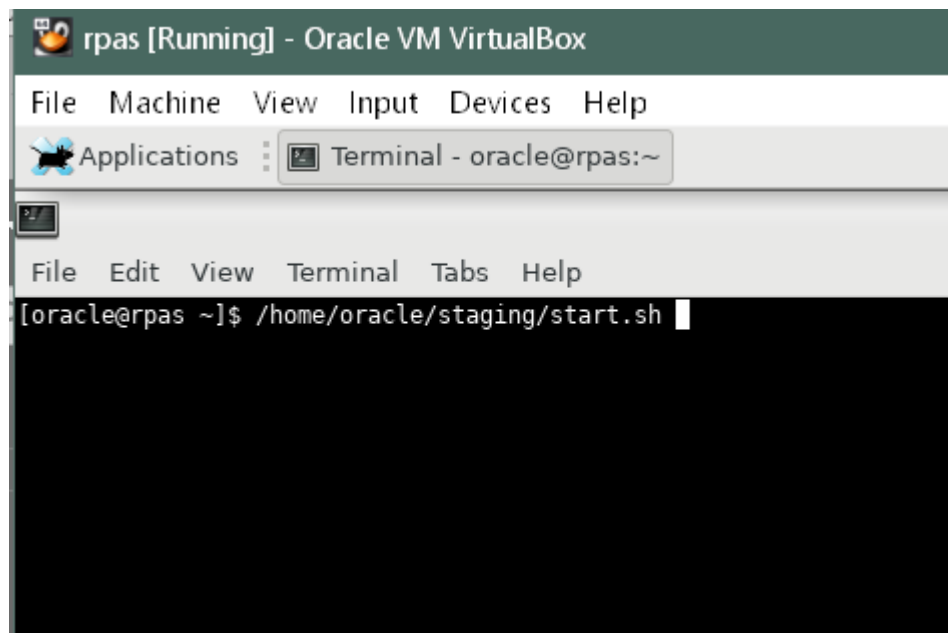
Note

For a straight forward installation, use the VirtualBox version 6.1 from the older downloads section. Version 7 and later versions require Python and certain Python bindings, refer to VirtualBox software documentation for more information.

Note

The previously mentioned Operating System is the OS of the host machine where the VirtualBox software will be installed and not the OS of the VM image itself. For most installers this will be a Windows system as shown in [Figure 3-1](#).

Figure 3-1 VirtualBox Platform Packages



System Requirements

The Oracle VirtualBox software has the following system requirements:

- 16 GB RAM
- Quad-core CPU
- 50 GB free disk space

VM Image

Download the VM the same way as you download the Starter Kit using the **Patches & Updates** tab from the My Oracle Support dashboard. Refer to "[RPAS Package Location](#)" for instructions on My Oracle Support downloads.

Figure 3-2 VM Download

Patch Alias	Description	Release	Platform (Language)	Product	Size
33617549	Oracle Retail Merchandise Financial Planning Enterprise Edition Cloud Service Virtual Machine 19.0.008.12 (Patchset)	19.0.0.0.0	Microsoft Windows x64 (64-bit) (American English)	Oracle Retail Merchandise Financial Planning Enterprise Edition Cloud Service (More...)	9.5 GB
33617522	Oracle Retail Merchandise Financial Planning Enterprise Edition Cloud Service Starter Kit 19.0.008.10 (Patchset)	19.0.0.0.0	Microsoft Windows x64 (64-bit) (American English)	Oracle Retail Merchandise Financial Planning Enterprise Edition Cloud Service (More...)	18.4 MB

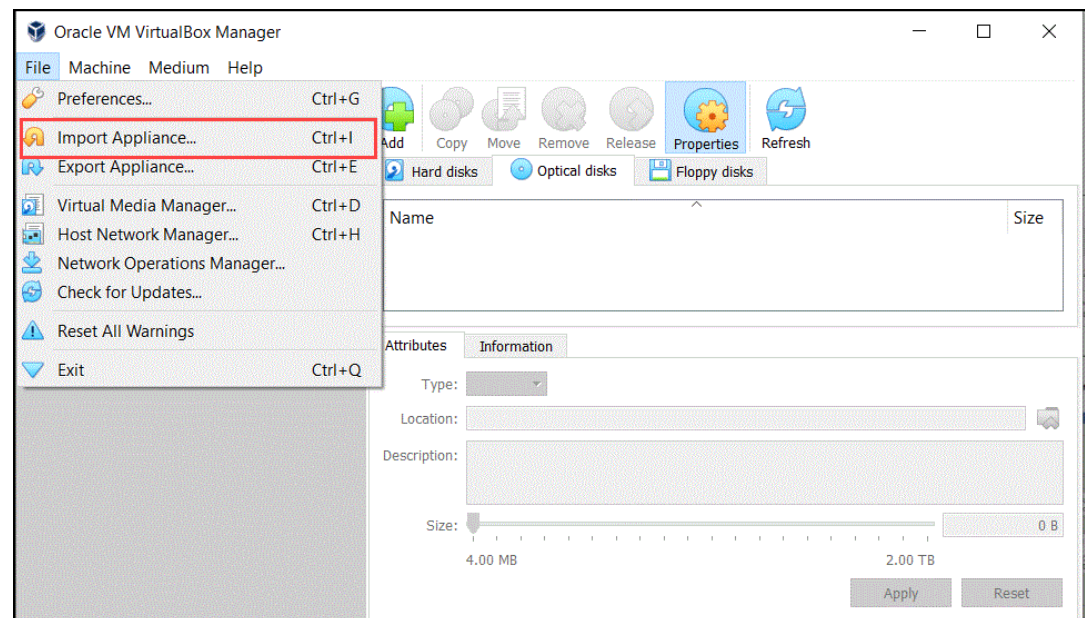
After downloading the VM, unzip the archive to obtain the file with the .ovf extension.

VM Setup

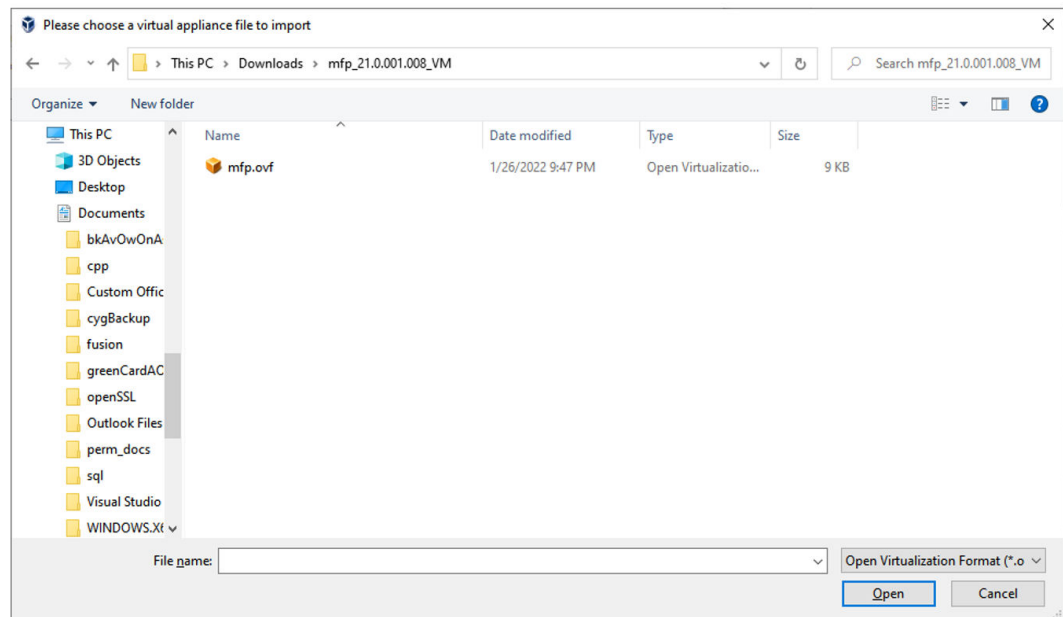
Perform the following steps to import the downloaded RPASCE VM image file using VirtualBox software and then start it.

1. Start the VirtualBox software
2. From the main menu, click **File** and then select **Import Appliance...** as shown in [Figure 3-3](#)

Figure 3-3 Main Menu: Import Appliance...

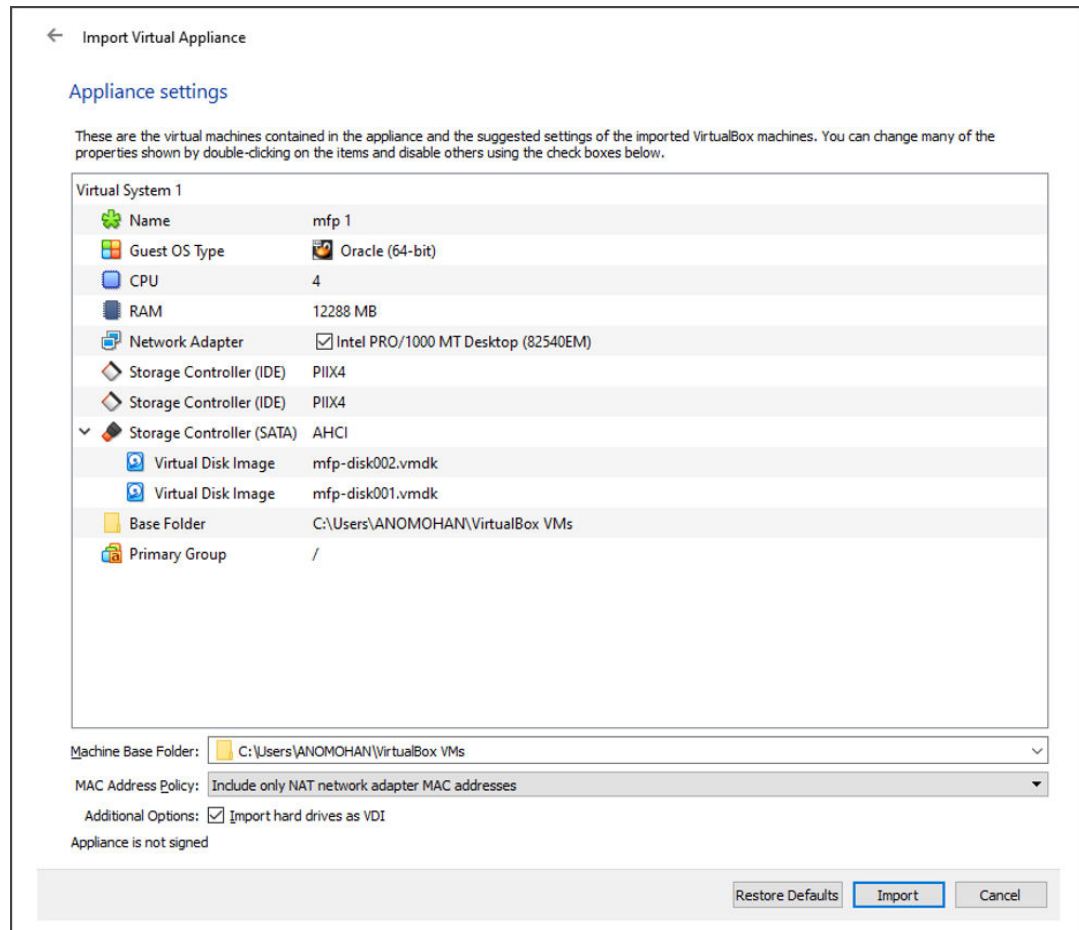


3. Browse to the downloaded VM base image (.ovf file). Select the VM file with the .ovf extension and click **Open**.

Figure 3-4 Downloaded VM Base Image

4. On the screen shown in [Figure 3-5](#), change the name of the VM or increase the RAM used for a smoother VM experience, but choose the RAM setting carefully. The memory given to VM will not be available to your host OS while the VM is running, and this can significantly impact the performance of your host OS if it is already running low on memory due to other applications.

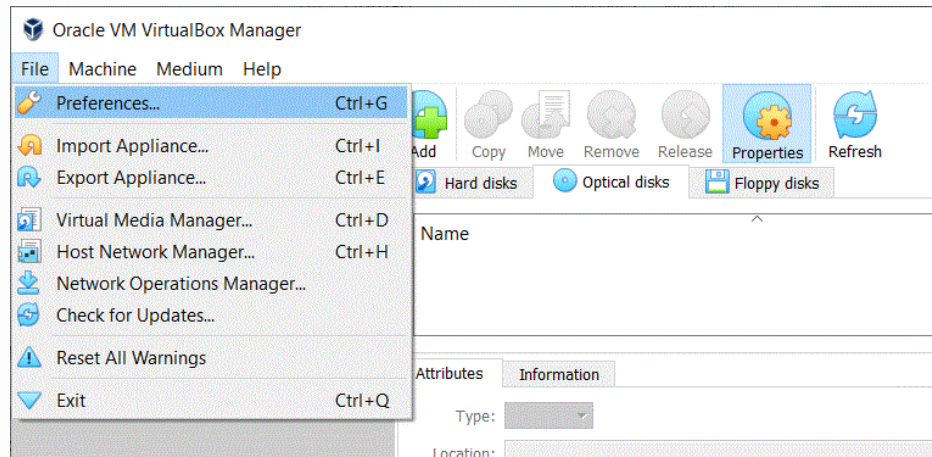
Click **Import**.

Figure 3-5 Change the Name and RAM of the VM file

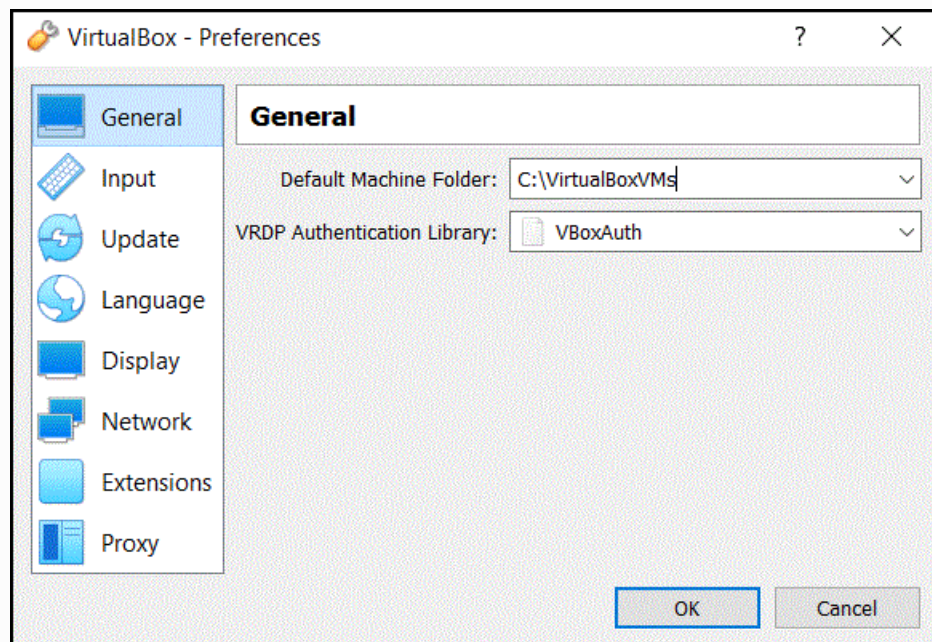
Note

This step creates a large file of around 40 GB on your local disk. The default location of these files is the location where VirtualBox is installed (usually the C drive for Windows). If the default location does not contain at least 50 GB of free space, then change the default location as described here:

- Click **File** and then select **Preferences...**



- Change the location of the Default Machine Folder to a drive that has enough space.

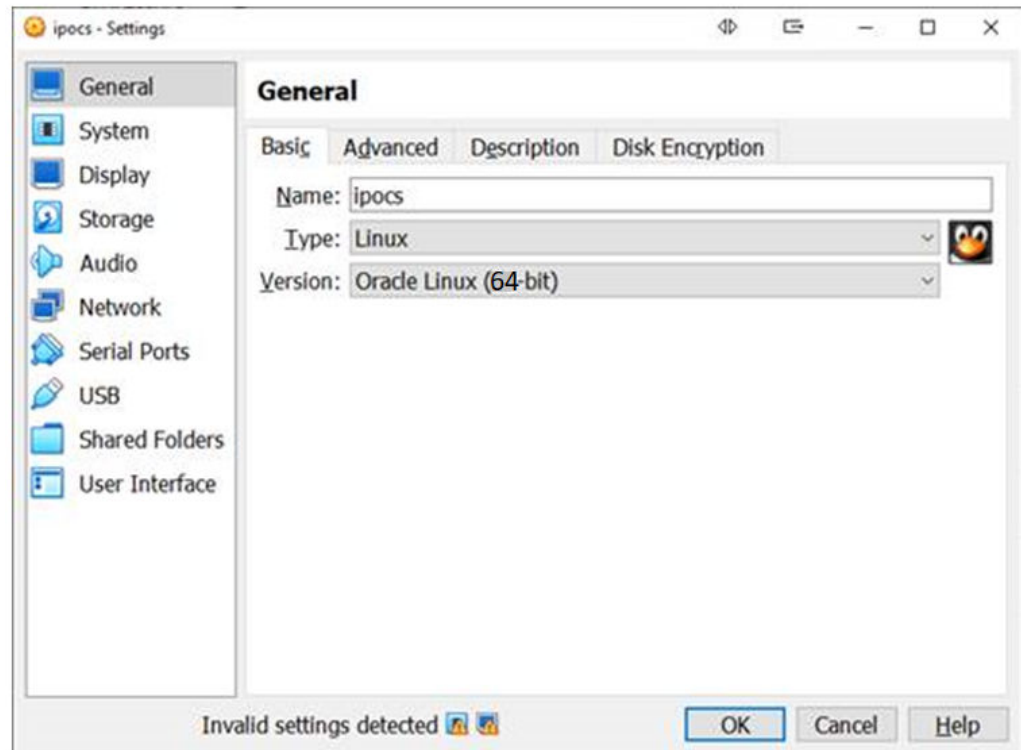


Wait for the image to get imported. It might take a few minutes.

- Prior to deployment, verify that the Basic settings are correct to avoid receiving an error message that indicates that the inappropriate kernel is being used for your CPU.
 - Click the **Settings** icon to verify the settings for the selected VM.

Figure 3-6 Settings Icon

- b. From the left panel, click **General** and then select the **Basic** tab.

Figure 3-7 Basic Tab

- c. Verify that the System Type and Version are appropriate and match your CPU.

Example:

Type: Linux

Version: Oracle Linux (64-bit)

6. If your machine has more than 16 GB of memory, increase the memory used by the VM. Note that the post-build batch for the initial application build will not work without at least 12 GB of memory allocated.

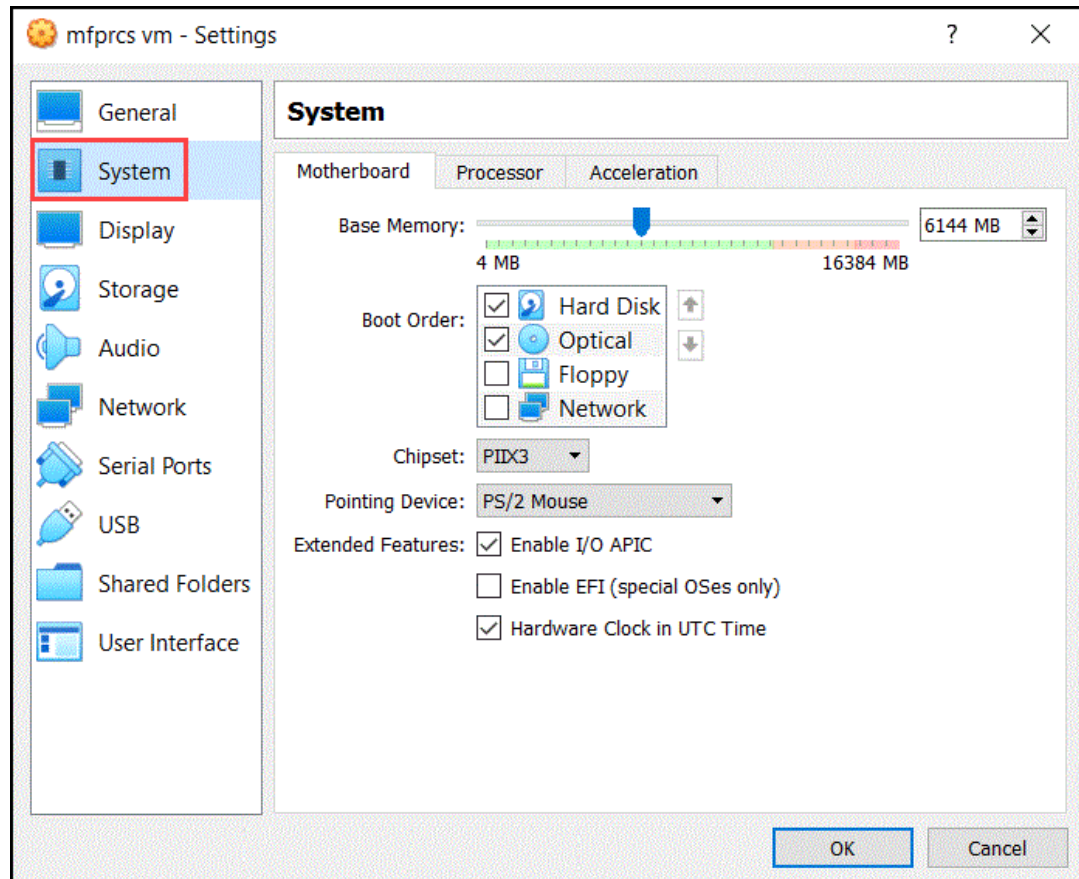
Click the **Settings** icon to change the settings for the selected VM.

7. From the left panel, click **System** and then move the slider to desired memory.

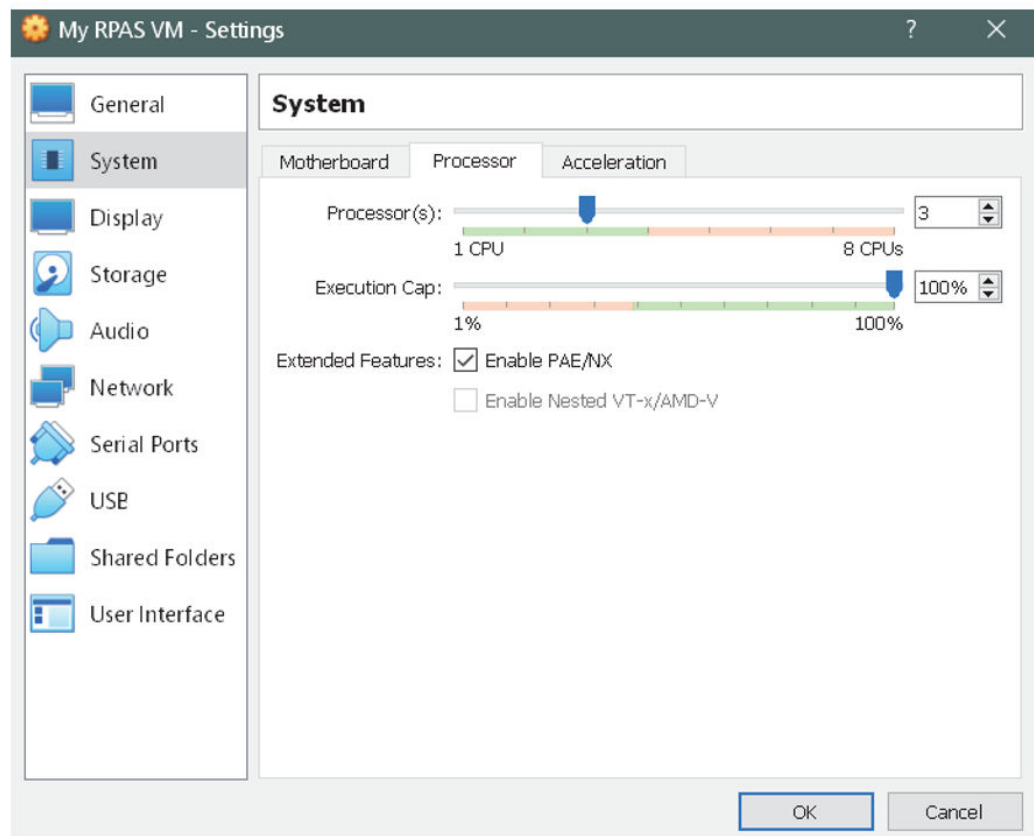
Note

Sometimes the settings screen shows an invalid settings warning. This warning can be ignored.

Figure 3-8 System Memory Slider

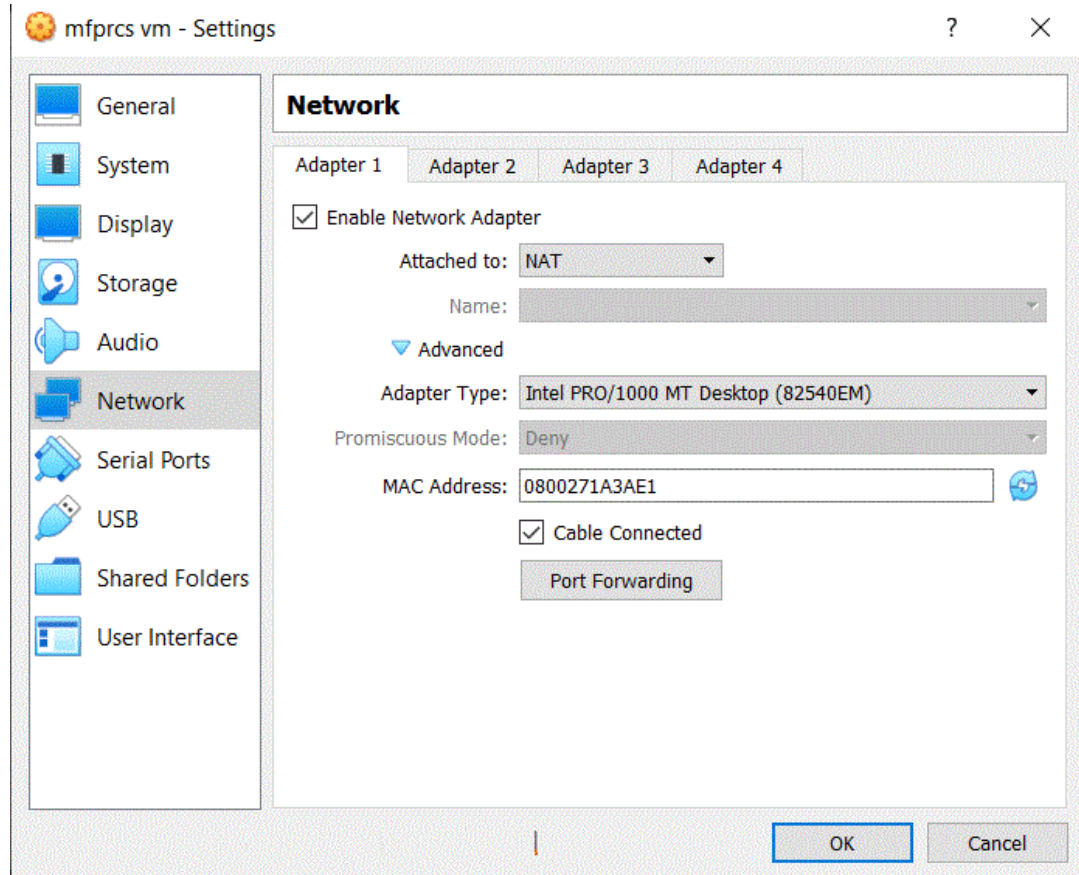


8. Select the **Processor** tab. If you run into any performance issues while using the VM and your host machine has multi-core processors, you may increase the available CPU for the VM by increasing the number of processors in the **Processor** tab ([Figure 3-9](#)).

Figure 3-9 System Processor CPU Change

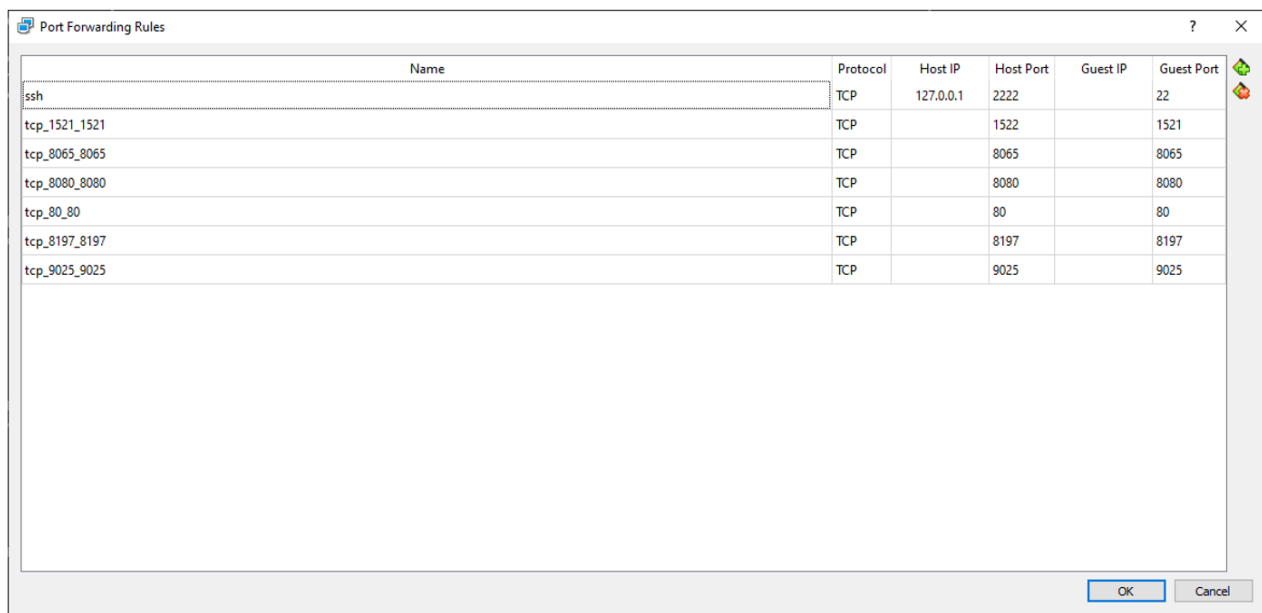
9. Optional step- Only perform this step if someone else will use an RPASCE VM on the same network.

From the left panel, click **Network** and then click the **Circle** icon next to the MAC Address text box. This gives the virtual network card in the VM a new random MAC address. If the MAC Address setting is not visible, then click the **Advanced** icon.

Figure 3-10 New Random MAC Address for the Virtual Network Card**10. Click Port Forwarding.**

You should see the rule that forwards port 8080 inside the VM to port 8080 on the host machine. If you have some other application running on port 8080 of the host machine change the host port to an unused port number.

Figure 3-11 Port Forwarding Rules Window



Click **OK**.

11. Start the imported image.

From the left panel of the VirtualBox, right-click on the VM image you downloaded and select **Start**. Alternately you can select the image and click the **Start** arrow icon from the top menu.

Figure 3-12 Starting the VM Image



12. In the grub boot-loader screen there is no action required. Let the VM automatically boot the default kernel.

Wait for OS to finish loading and it displays similar messages as shown in [Figure 3-13](#).

Figure 3-13 Load Messages

```
[ 83.512215] IPVS: Registered protocols (TCP, UDP, SCTP, AH, ESP)
[ 83.512664] IPVS: Connection hash table configured (size=4096, memory=64Kbytes)
[ 85.145210] IPVS: ipvs loaded.
[ 85.279498] IPVS: [rrr] scheduler registered.
```

13. In a browser on the host machine launch the following URL:

`http://localhost/logs/startup.log`

When the VM is ready to be used, an **Environment is ready for use!** message displays as shown in [Figure 3-14](#).

Figure 3-14 VM is Ready Message

```
=====
start.ksh
=====
[start.ksh] Executing commands as user: oracle
[start.ksh]: Fri Jan 28 13:39:02 -05 2022 -- Waiting for RPAS stack services to come up...
Fri Jan 28 13:39:13 -05 2022 -- Waiting for service RPAS_http to reach 3/3 replicated running tasks...
Fri Jan 28 13:39:13 -05 2022 -- Waiting for service RPAS_rpasserver to reach 1/1 replicated running tasks...
Fri Jan 28 13:39:13 -05 2022 -- Waiting for service RPAS_launcher to reach 3/3 replicated running tasks...
Fri Jan 28 13:39:13 -05 2022 -- Waiting for service RPAS_taskdaemon to reach 1/1 replicated running tasks...
Fri Jan 28 13:39:13 -05 2022 -- Waiting for service RPAS_client to reach 1/1 replicated running tasks...
Fri Jan 28 13:40:30 -05 2022 -- Service RPAS_client has started successfully!
Fri Jan 28 13:41:25 -05 2022 -- Service RPAS_launcher has started successfully!
Fri Jan 28 13:41:25 -05 2022 -- Service RPAS_http has started successfully!
Fri Jan 28 13:41:25 -05 2022 -- Service RPAS_rpasserver has started successfully!
Fri Jan 28 13:41:25 -05 2022 -- Service RPAS_taskdaemon has started successfully!
[start.ksh]: Fri Jan 28 13:41:25 -05 2022 -- Creating RPAS service logs under /var/www/html/logs...
[start.ksh]: Fri Jan 28 13:41:26 -05 2022 -- PDS Property subgroup_max_parallel set to 4...

[start.ksh]: Fri Jan 28 13:41:26 -05 2022 -- Environment is ready for use! You may log into the RPAS Client at
http://localhost:8080/rpasceui
It is safe to close this window.
```

Note

This page may show older logs too, it is critical to check that the date and time matches the current time. The time shown is GMT-5 hours. Also, while waiting for the VM to be ready, refresh the page manually as it does not auto refresh.

Using the VM

All the necessary processes needed for using the RPASCE application in the VM automatically start when the VM boots up. The system just needs a few minutes after the login screen appears to bring up all of the necessary processes. However depending on the resources available to the VM, the time required for startup will differ.

Launching the RPASCE User Interface

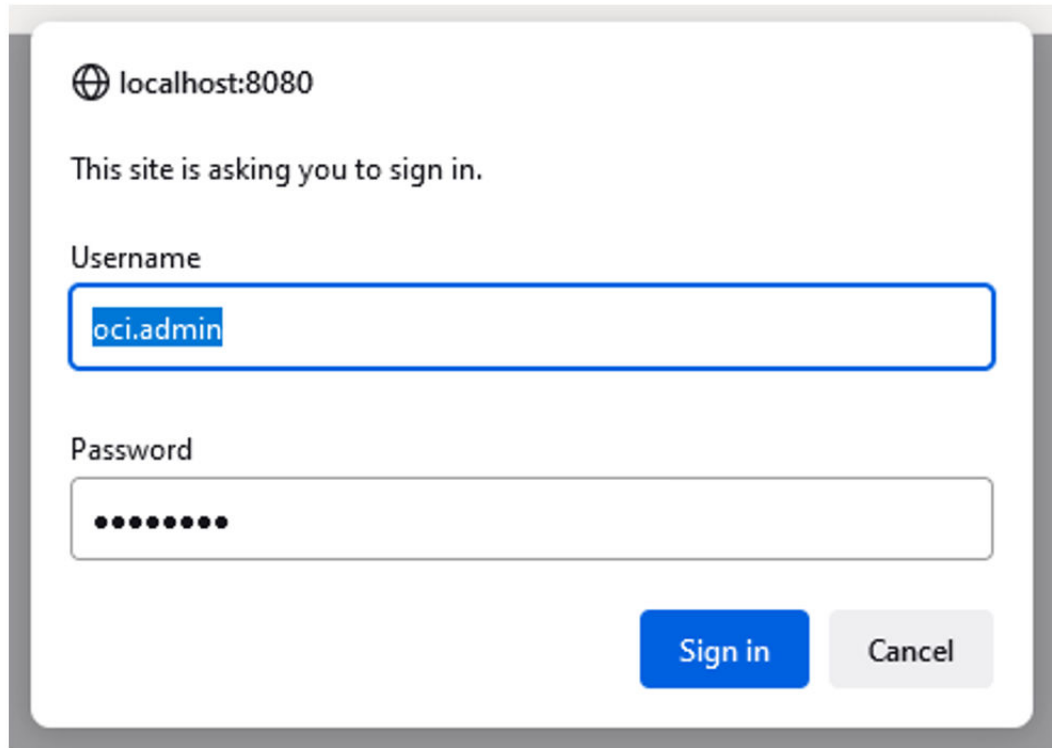
Perform the following steps to launch the RPASCE User Interface (UI).

1. Open a browser on the host machine where you started the VirtualBox software and paste the URL into the address bar and press **Enter**

<http://localhost:8080/rpasceui/>

Figure 3-15 shows the RPASCE UI Sign In, enter the Username: *oci.admin* and the Password: *Orc1234*.

Figure 3-15 RPASCE UI Sign In

A screenshot of a web browser window showing a sign-in dialog box. The dialog box has a title bar with a globe icon and the text 'localhost:8080'. Below the title bar, it says 'This site is asking you to sign in.' There are two input fields: 'Username' and 'Password'. The 'Username' field contains the text 'oci.admin' and is highlighted with a blue border. The 'Password' field contains a series of dots. At the bottom right of the dialog box, there are two buttons: 'Sign in' (blue) and 'Cancel' (gray).

The VM does not come with any applications prebuilt. Therefore on the initial login, a user only has bootstrap access and no task flows. Users can use the Online Admin Tools to build a GA or EE application.

2. To build the GA app using the input files present in the VM select the GA checkboxes as shown in [Figure 3-16](#).

Refer to either the *Oracle Retail Merchandise Financial Planning Cloud Service Administration Guide* or *Oracle Retail Merchandise Financial Planning Enterprise Edition Cloud Service Administration Guide* for more details about building the application.

Figure 3-16 Select Options for GA App Build

Submit a New Admin Task

Specify the arguments for task:

Task Label
Build Application

Partition Dimension
dept

☒ Use GA Configuration with no extensibility?

☒ Use GA data?

☐ Overwrite Existing Application?

Set RPAS_TODAY in application
20230101

Batch Task Group to run after Application Build
postbuild

Cancel < Previous Next > Finish

Note

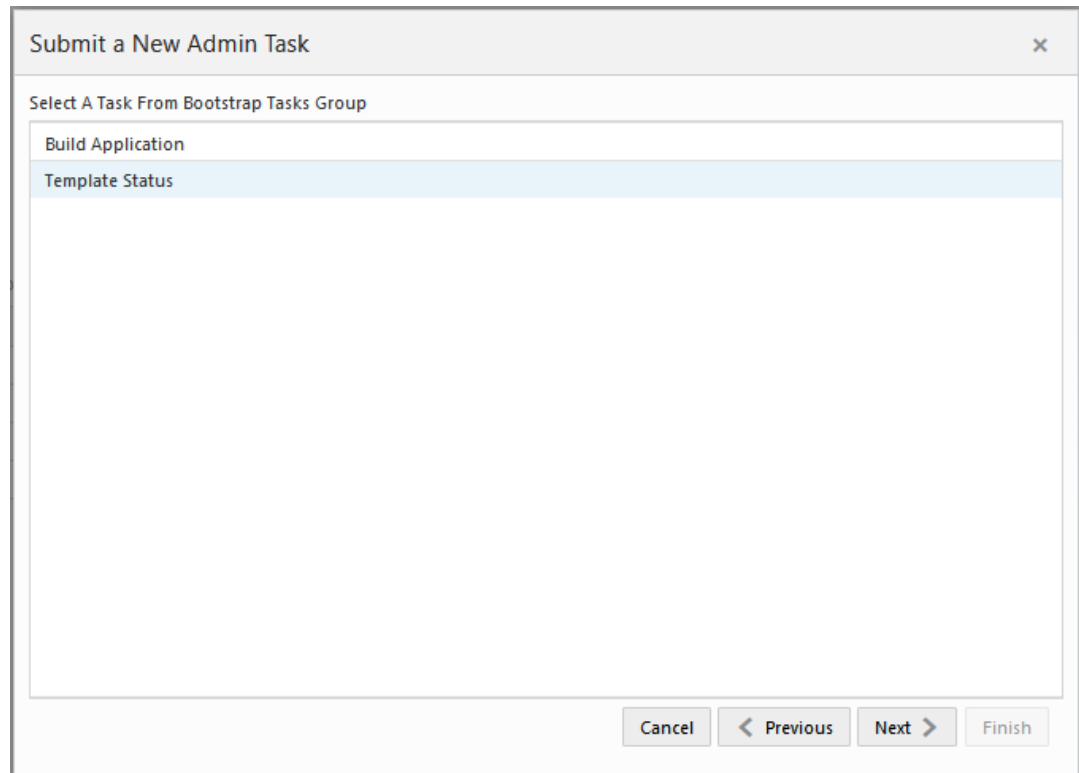
Hierarchy data is now loaded after the application is built as a post-build step. Run the postbuild batch that is available as part of GA.

Alternately the load Dimension Data task is available in the online Admin Tools and can be used to load the hierarchy data.

For providing input files for building the application, refer to the section, [Copying Files between the VM and the Host Desktop](#).

If **Use GA data?** is selected, it is recommended to set RPAS_TODAY in the application to **20230101** (January 1, 2023).

3. If your build is not using GA, run the OAT task Template Status and then deactivate the template status.

Figure 3-17 Select Options for non-GA App Build

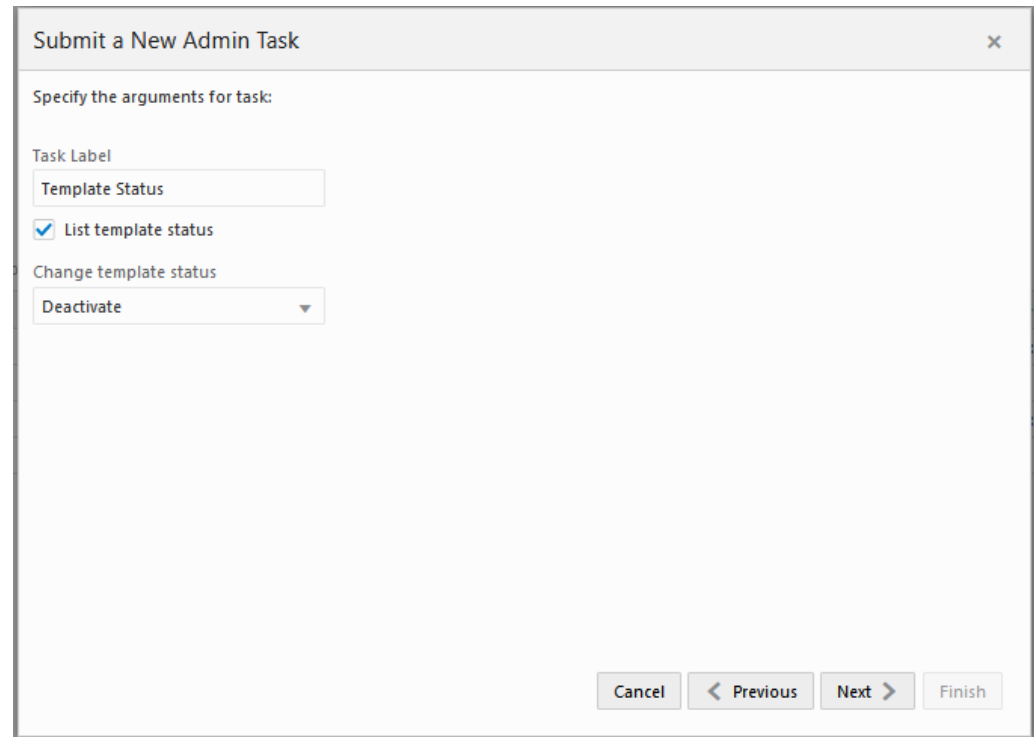
Submit a New Admin Task

Select A Task From Bootstrap Tasks Group

- Build Application
- Template Status

Cancel < Previous Next > Finish

- a. From the Change template status drop-down list, select **Deactivate**. Click **Next** and then click **Finish** to run the task.

Figure 3-18 Change Template Status List

Submit a New Admin Task

Specify the arguments for task:

Task Label
Template Status

☒ List template status

Change template status
Deactivate

Cancel < Previous Next > Finish

Note

Hierarchy data is now loaded after the application is built as a post-build step. If the template status is active, just run the post-build batch that is available as part of GA. If the template is deactivated, then a post-build batch can be setup using the control files uploaded during application build to load the hierarchy data.

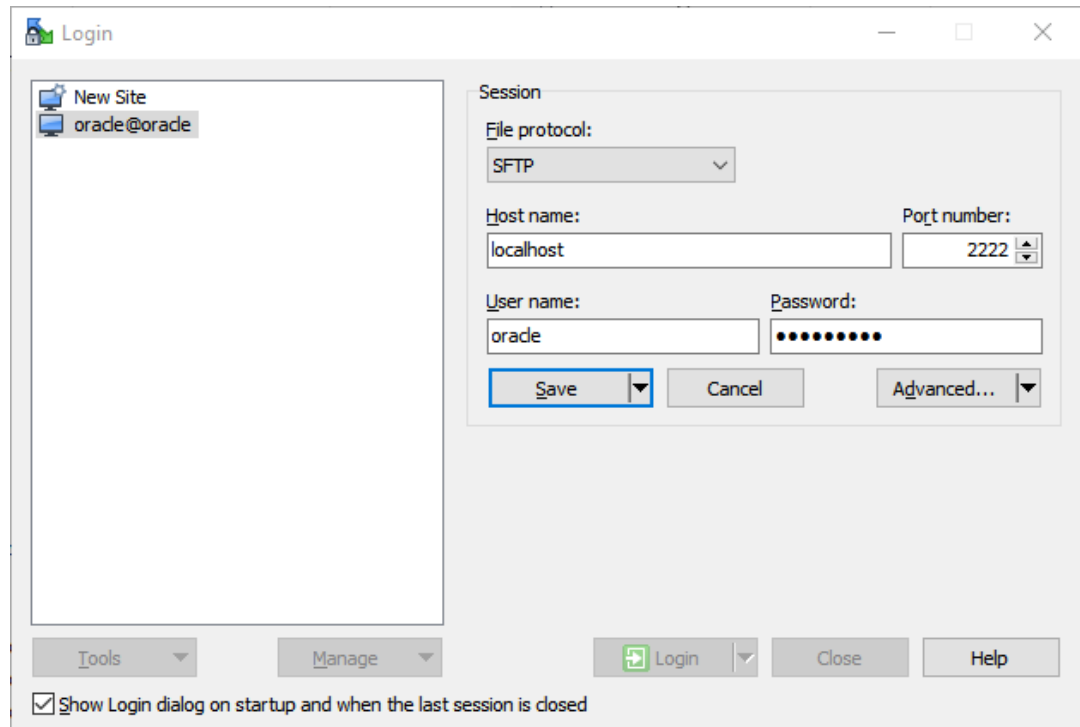
Alternately the load Dimension Data task is available in the online Admin Tools and can be used to load the hierarchy data.

For providing input files for building the application, refer to the section, [Copying Files between the VM and the Host Desktop](#).

Copying Files between the VM and the Host Desktop

Perform the following steps to share files and folders between the desktop and the VM.

1. Use an application like WinSCP to connect to the SSH port of the VM on **2222**.
Enter the Username as: *rpasdckr* and the Password as: *rpasdckrv25*.

Figure 3-19 Sharing Files

2. The incoming FTP location inside the VM is:

/rpsdckr/RPAS/RPAS/ftp/mfpcs/incoming

The outgoing FTP location inside the VM is:

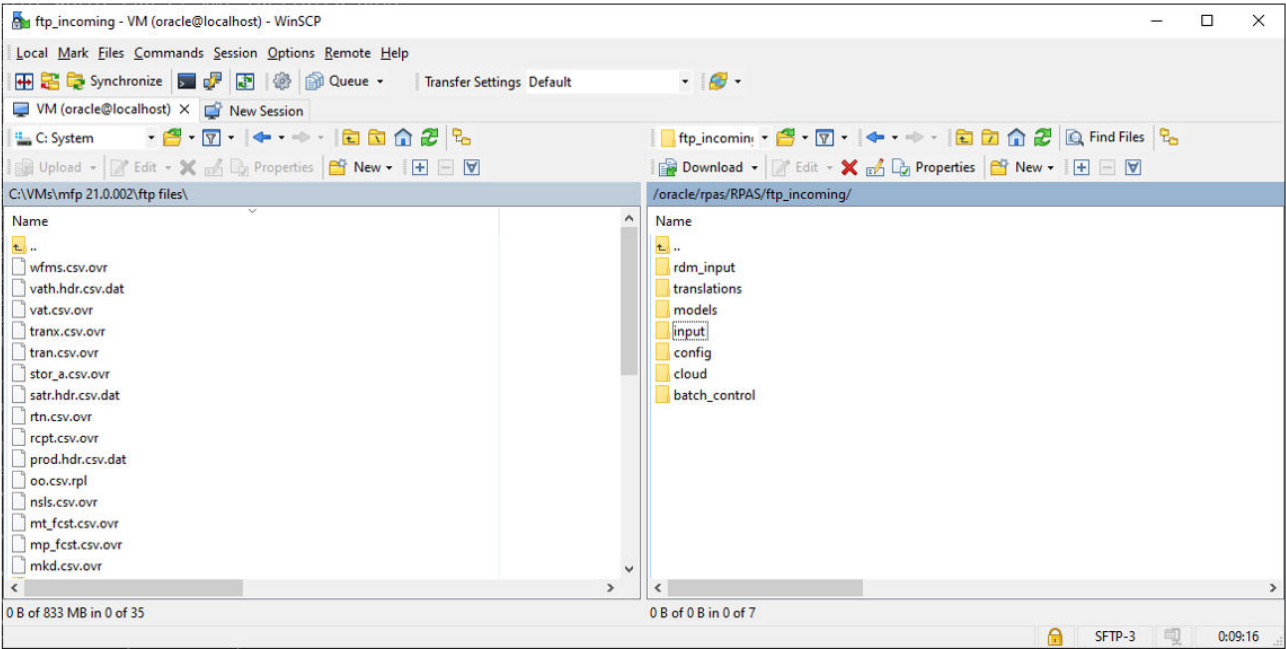
/rpsdckr/RPAS/RPAS/ftp/mfpcs/outgoing

The VM still uses the incoming and outgoing FTP locations although now in the Oracle Cloud RPAS applications use object storage for incoming and outgoing locations.

Note

For more details about placing files in incoming location for application build, batch or other OAT tasks, refer to the *Oracle Retail Merchandise Financial Planning Cloud Service* documentation set.

Figure 3-20 FTP Locations



Users in the VM

The following users are present in the VM.

The password for all users is set to: *Orcl1234*.

Note

It is not possible to add new users to the VM.

User Label	User Name	Administrator
OCI Administrator	oci.admin	Yes
Admin User 2	user2	Yes
Admin User 3	user3	Yes
Admin User 4	user4	Yes
Admin User 5	user5	Yes
Admin User 6	user6	Yes
Admin User 7	user7	Yes
Admin User 8	user8	Yes
Admin User 9	user9	Yes
Admin User 10	user10	Yes
Non-Admin User 1	nonadm1	No
Oracle Internal User	oracleintuser	Yes

User Label	User Name	Administrator
Non-Admin User 2	nonadm2	No
Administrator	adm	Yes
Administrator1	adm1	Yes
Administrator2	adm2	Yes
Administrator4	adm4	Yes
Administrator7	adm7	Yes
Administrator10	adm10	Yes
Admin User 1	user1	Yes

Using SQL Developer

It is possible to connect a SQL developer running on the host machine to the database running in the VM.

Set the password for all the schema users as: **Orcl1234**

Enter the Service name as: **ORCLPDB1**

Figure 3-21 Database Connection

New / Select Database Connection

Connection... Connection Details

785 - RPAS... RPAS_DATA_MART_PD...

785 - RPAS... RPAS_DATA_MART_PD...

785 - RPAS... RPAS_DATA_MART_PD...

localhost R... RPAS_DATA_MART_PD...

localhost R... RPAS_DATA_MART_PD...

localhost r... rpsdba@//127.0.0.1:...

vm ADMIN ADMIN@//127.0.0.1:...

vm RPAS... RPAS_DATA_MART_PD...

vm rps_r... rps_rdonly_pdsvbox...

Name: vm RPAS_DATA_MART_PDSVBOX

Database Type: Oracle

User Info Proxy User

Authentication Type: Default

Username: RPAS_DATA_MART_PDSVBOX

Role: default

Password: *****

Save Password

Connection Type: Basic

Details Advanced

Hostname: 127.0.0.1

Port: 1521

Service name: ORCLPDB1

Status :

Help Save Clear Test Connect Cancel

[Table 3-1](#) lists the schema users

Table 3-1 Schema Users

Schema User	Username
rpas_data_mart	RPAS_DATA_MART_PDSVBOX
rpas_patch_user	RPAS_PATCH_PDSVBOX
rpas_batch_user	RPAS_BATCH_PDSVBOX
rpas_dimload_user	RPAS_DIMLOAD_PDSVBOX
rpas_factload_user	RPAS_FACTLOAD_PDSVBOX
rpas_hiermgr_user	RPAS_HIERMGR_PDSVBOX
rpas_wkbk_user	RPAS_WKBK_PDSVBOX
rpas_etl_user	RPAS_ETL_PDSVBOX
rpas_rdonly_user	RPAS_RDONLY_PDSVBOX
rpas_report_user	RPAS_REPORT_PDSVBOX

Troubleshooting

If you have any of the following issues, follow the steps for troubleshooting:

- [Network Issues](#)
- [VirtualBox Error](#)
- [UI Login Issues](#)
- [SQL Developer Login Issues](#)

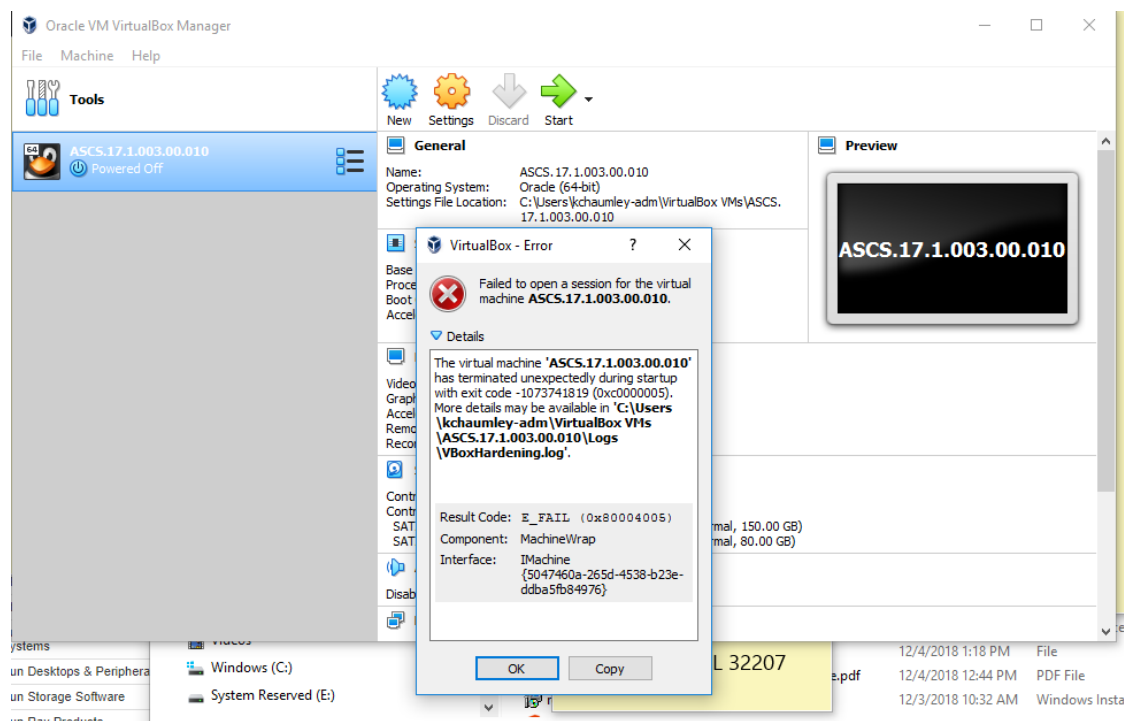
Network Issues

If you have many network interfaces you might have to make changes to Network Settings screen before starting the VM. The VM image has been tested only with Ethernet and Wi-Fi. If you use power line Ethernet or a network dongle or you have multiple network interface cards in your system you might need to make changes in the VM network settings screen.

Depending on your system configuration, you might need to enable additional adapters.

VirtualBox Error

If you receive the following error shown in [Figure 3-22](#) while starting the image, you might have an unsupported version of VirtualBox. Install the latest VirtualBox software.

Figure 3-22 VirtualBox Error

UI Login Issues

If you have trouble logging into the UI, check if port 8080 is being used by some other application on your host machine. Change the port mapping in the VM Network Setup screen and use the new port.

For any application related issues check the logs at this URL:

<http://localhost/logs/>

SQL Developer Login Issues

If you have trouble connecting to the database using SQL developer, check if port 1521 is being used. Change the port mapping in the VM Network Setup screen and use the new port.

A

Appendix: Generating the Configuration for Plug-in Options

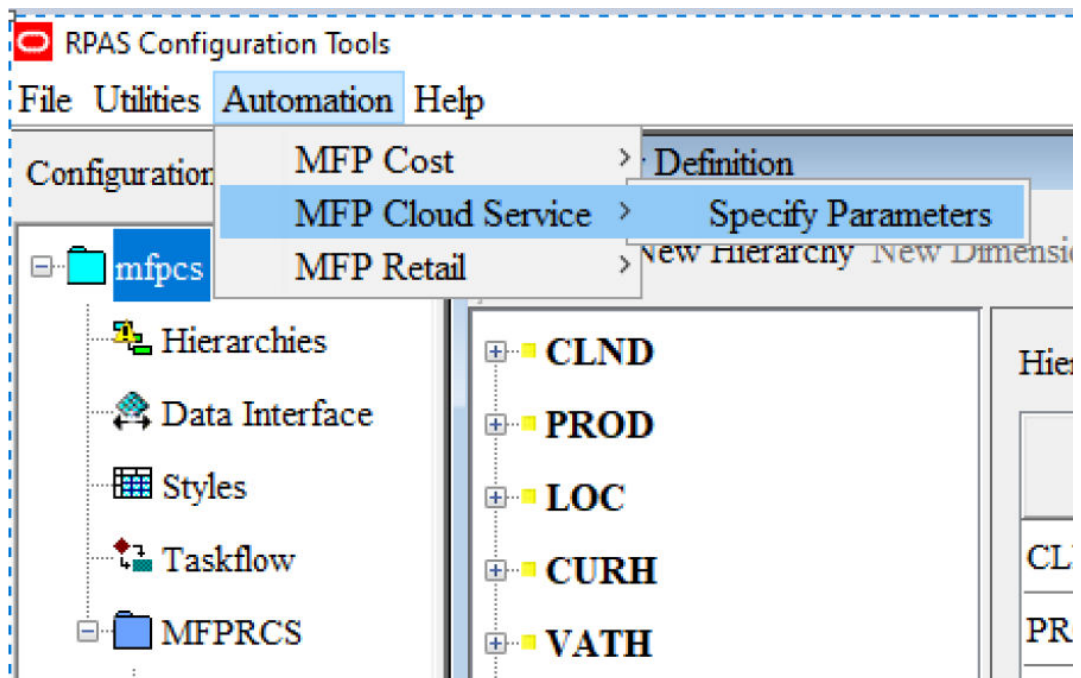
Merchandise Financial Planning Cloud Service supports generating different configurations using plug-in automation for different configuration options.

Steps to Generate MFP Cost Configuration

By default, without any selections if MFP GA is deployed it will only deploy the MFP Retail configuration. In order to deploy MFP Cost configuration, MFP Cost configuration needs to be generated from MFP Starter Kit.

1. Download the MFP_Starter_Kit.zip and unzip the content.
2. Open the RPAS Cloud Edition Configuration Tools from the Starter Kit and open the configuration mfpcs within the starter kit. Notice that configuration is MFP Retail with the solution name used in it is shown as **MFPRCS**.
3. From Automation, select **MFP Cloud Service** and then **Specify Parameters**.

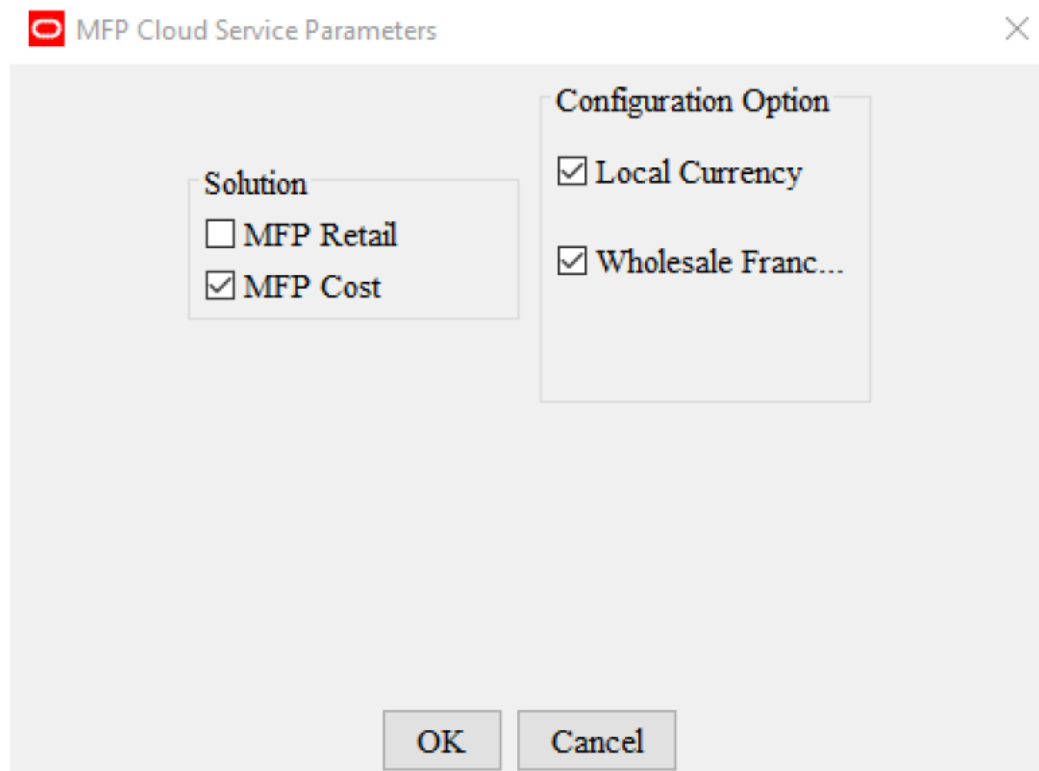
Figure A-1 Specify Parameters



4. From the Service Parameters dialog box, select **MFP Cost** and clear the **MFP Retail Solution**.

Select or clear any Configuration Options.

Click **OK**.

Figure A-2 Service Parameters

5. Save the configuration and exit the RPAS Cloud Edition Configuration Tools.
6. Open the Cygwin from where config tools was launched and then go to the bin directory.
`cd $RIDE_HOME/bin;`

7. Ensure that BSA_LOG_HOME and BSA_TEMP_DIR are set to valid directories. For example:

```
mkdir -p "${ORACLE_HOME}/logs"
mkdir -p "${ORACLE_HOME}/temp"
export BSA_LOG_HOME="${ORACLE_HOME}/logs"
export BSA_TEMP_DIR="${ORACLE_HOME}/temp"
```

8. Run the following plug-in script to generate the MFP Cost configuration. In the following example -c should be followed with full cygwin path where you have unzipped the starter kit.

The example uses the directory: `/cygdrive/c/Oracle/MFP_Starter_Kit`.

9. Run this script:

```
ra_auto_gen_config.ksh -c /cygdrive/c/Oracle/MFP_Starter_Kit -n mfpcs -genAllFiles
```

The script should run and complete with non-zero return code as shown in [Figure A-3](#).

You can run the script with the -clean option to remove any customization from GA solutions.

If you are switching from MFP Cost to MFP Retail or vice versa, you must run the script with the -clean option.

```
ra_auto_gen_config.ksh -c /cygdrive/c/Oracle/MFP_Starter_Kit -n mfpcs -clean -genAllFiles
```

Figure A-3 Run the Script

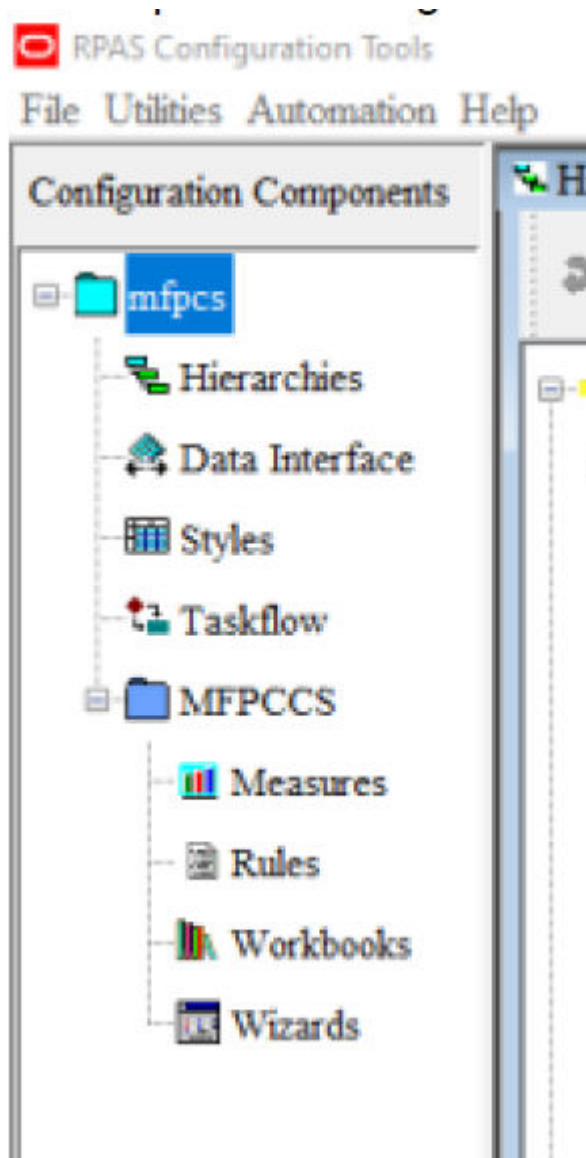
```

s.xml' complete
18:51:23 : INFORMATION : ra_auto_gen_config.ksh[0] - Generate all files selected. Generating internal plugin data files.
18:51:24 : INFORMATION : ra_auto_gen_config.ksh[0] - _call executing command 'rm -rf /cygdrive/c/Oracle/MFP_Starter_Kit/batch_control'
18:51:24 : INFORMATION : ra_auto_gen_config.ksh[0] - _call of command 'rm -rf /cygdrive/c/Oracle/MFP_Starter_Kit/batch_control' complete
18:51:24 : INFORMATION : ra_auto_gen_config.ksh[0] - _call executing command 'mkdir -p /cygdrive/c/Oracle/MFP_Starter_Kit/batch_control'
18:51:25 : INFORMATION : ra_auto_gen_config.ksh[0] - _call of command 'mkdir -p /cygdrive/c/Oracle/MFP_Starter_Kit/batch_control' complete
18:51:25 : INFORMATION : ra_auto_gen_config.ksh[0] - _call executing command 'rm -rf /cygdrive/c/Oracle/MFP_Starter_Kit/json'
18:51:25 : INFORMATION : ra_auto_gen_config.ksh[0] - _call of command 'rm -rf /cygdrive/c/Oracle/MFP_Starter_Kit/json' complete
18:51:26 : INFORMATION : ra_auto_gen_config.ksh[0] - _call executing command 'mkdir -p /cygdrive/c/Oracle/MFP_Starter_Kit/json'
18:51:26 : INFORMATION : ra_auto_gen_config.ksh[0] - _call of command 'mkdir -p /cygdrive/c/Oracle/MFP_Starter_Kit/json' complete
18:51:26 : INFORMATION : ra_auto_gen_config.ksh[0] - _call executing command 'execPluginTask.sh MFPCS:com.oracle.rgbu.mfpcs.plugin.installer.MFPCSDataG
18:51:38 : INFORMATION : ra_auto_gen_config.ksh[0] - _call of command 'execPluginTask.sh MFPCS:com.oracle.rgbu.mfpcs.plugin.installer.MFPCSDataG
18:51:38 : INFORMATION : ra_auto_gen_config.ksh[0] - _call of command 'execPluginTask.sh MFPCS:com.oracle.rgbu.mfpcs.plugin.installer.MFPCSDataG
18:51:38 : INFORMATION : ra_auto_gen_config.ksh[0] - ra_auto_gen_config.ksh completed.
18:51:38 : INFORMATION : ra_auto_gen_config.ksh[0] - Program completed successfully.
18:51:38 : INFORMATION : ra_auto_gen_config.ksh[0] - Exiting script with code: 0
18:51:39 : INFORMATION : ra_auto_gen_config.ksh[0] - Insufficient parameters to export log file package; skipping.

```

- Open the configuration using RPAS Cloud Edition Configuration Tools and verify that solution now shows as **MFPCS**.

Figure A-4 Verify the Solution



- After the solution is generated, zip the **config mfpcs** folder and name it as **mfpcs_config.zip**. It can be used during application build or patching of the configuration.

Note

You can implement on MFP Retail and then generate MFP Cost configuration and then patch it, but that patching option is allowed only if there are no extensibility changes. If you plan to use extensibility to customize template version of configuration, then you should decide on Retail or Cost type solution before making any of those extensibility specific changes.

B

Appendix: Modularity Tool Options for Non-Template Customers

Merchandise Financial Planning Cloud Service supports modularity options which allow non-template MFP customers to create a start-up initial configuration using MFP GA as a base configuration from the MFP Starter Kit. This appendix provides details about modularity options, assumptions, initial setups to use modularity options, available modules, and limitations of the modularity functionality.

MFP Modularity Options

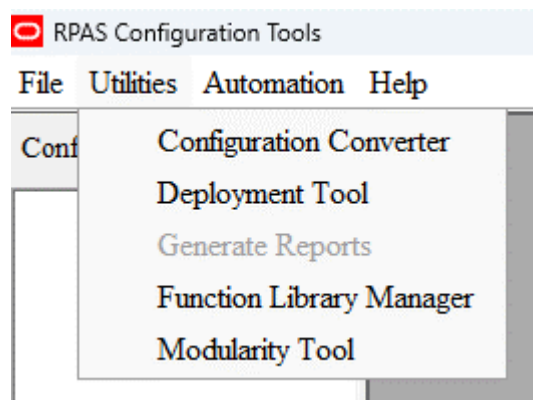
MFP GA has a basic set of roles and functions within each role that we call modules. Each module may comprise using a certain set of measures, rules, or workflows within the configuration. This modularity tool provides options to enable or disable a few modules within each role and allows customer to create a new base configuration that you can further customize to use as your non-template configuration. Following are the current assumptions and limitations about this modularity option available within the MFP Starter Kit.

Assumptions:

- Every time you use this modularity tool, the Configuration created is always against the released MFP GA configuration available in the Starter Kit. Currently it's only against the MFP GA Retail Configuration.
- Any further changes to configuration to generated base configuration or upgrade related changes needs to be manually maintained by customer as regular non-template configuration.
- Currently any modularity tool functionality will not change the hierarchy structure or data interface structure of any GA measures. Meaning that existing GA integrations are not impacted.
- The previous functionality will not change `batch_control` files, `dashboard` jsons and `interface.cfg` mappings. If any modularity functionality has impacts, it needs to be managed by implementors as documented in this appendix.

Modularity Tool Setup and Usage

The modularity tool is available as part of the MFP Starter Kit and it is currently enabled for Config Tools when launched from the MFP Starter Kit under Utilities option.

Figure B-1 Modularity Tool Option

In order to use the modularity tool's available options, perform these additional setup steps.

1. Install node.js on your Windows machine.

The recommended version is node.js of v20.18.1 (LTS) which can be installed from <https://nodejs.org/en/download/prebuilt-installer>. The node.js is usually installed under c:/Program Files.

Note

In the installation wizard, do not select the **Tools for Native Modules** option.

2. Update the Path variable.

Below the System variables section, select the Path environment variable and click **Edit**. Add /cygdrive/c/Program Files/nodejs/node to the Path environment variable.

3. Restart the Cygwin terminal and verify the set up before opening the ConfigTools.

```
$ node -v
v20.18.1
$ which node
/cygdrive/c/Program Files/nodejs/node
```

After installing node.js and you have restarted the Config Tools, then select the modularity tool option to launch the window for you to choose the available modules. Config tools provides a view to choose the available modules grouped in different tabs and for modules grouped for different roles. You can choose the modules you want and then provide the Output Config Path location where you want to save the generated configuration. Click **OK** to run your modules.

MFP Modules

The modularity tool allows you to select various pre-defined planning modules that can applied to the GA MFP Retail configuration. The current MFP GA configuration is vast and is set up at an incredibly detailed level which impacts the time taken by the Implementor to trim it down to get an initial or base configuration before even starting the customization required by customers. Applying these modules to simplify the GA MFP configuration will benefit the

Implementor in reducing the time and effort spent on the config modification using the base GA template.

Note

After the modules are applied to the GA template, the solution is no longer a GA template and becomes a custom configuration.

Each module represents a specific logic removal and modification of measures and rules associated for a given workbook template. This utility only runs against the base GA MFP Retail configuration and can not be applied to custom configuration or any other Oracle GA Retail application. Prior to applying the modules, the Implementor needs to establish the customer's requirements so that the correct modules could be applied to create a base configuration for the implementation. This is so that all necessary modules are applied at once as it does not support running modules on top of a non-GA MFP Retail base configuration.

The following modules are pre-defined for GA MFP Retail solution for each template:

Figure B-2 Merch Target Module

Merch Target	
☐	Remove Template
☐	Remove Fulfillment Plan
☐	Remove Units
☐	Remove Inventory KPI
☐	Remove GM KPI
☐	Remove Wholesale/Franchise KPI
☐	Remove E-Com KPI
☐	Remove Local Currency

Figure B-3 Merch Plan Module

Merch Plan
☐ Remove Template
☐ MP Self Approval
☐ Remove Fulfillment Plan
☐ Remove Units
☐ Remove Inventory KPI
☐ Remove GM KPI
☐ Remove Wholesale/Franchise KPI
☐ Remove E-Com KPI
☐ Remove Local Currency

Figure B-4 Location Target Module

Location Target
☐ Remove Template
☐ Remove Units
☐ Remove Local Currency

Figure B-5 Location Plan Module

Location Plan
☐ Remove Template
☐ Remove Units
☐ Remove Inventory KPI
☐ Remove GM KPI
☐ Remove Wholesale/Franchise KPI
☐ Remove Local Currency

Remove Template Changes

The following changes are expected when applying **Remove Template** to each template.

Remove Template for Merch Target:

- Remove Workbook - Create Merch Target.
- Remove the Rules set associated with Create Merch Target workbook.

Remove Template for Merch Plan:

- Remove Workbook - Create Merch Plan.
- Remove the Rules set associated with Create Merch Plan workbook.

Remove Template for Location Target:

- Remove Workbook - Create Location Target.
- Remove the Rules set associated with Location Target workbook.

Remove Template for Location Plan:

- Remove Workbook - Create Location Plan.
- Remove the Rules set associated with Create Location Plan workbook.

Remove Template for Units:

- Remove unit of measure (UOM) associated to Units (U) from the GA configuration, all measures or rules associated with Units will be removed.

Remove Template for Local Currency:

- Remove unit of measure (UOM) associated to Local Currency (LC_UOM) from the GA configuration, all measures/rules associated with LC_UOM will be removed.

Remove Template for Inventory KPI:

Removes all measures and rules associated with the following list of metrics in the Inventory and Receipt Module.

Table B-1 Inventory and Receipt Module

Metric	Label
AEOPP	Avg EOP per Location
BOP	BOP
BOP1	BOP Reg+Promo
BOP2	BOP Clr
BOS	Beginning of Season Inventory
BOS1	BOS Reg+Promo
BOS2	BOS Clr
CAvInv	Avg Inv
ConsInv	Cons Inv
CTO	Cum Turn
EOP	EOP
EOP1	EOP Reg+Promo
EOP2	EOP Clr
InvAdj	Inv Adj
InvDV	Inv Devaluation

Table B-1 (Cont.) Inventory and Receipt Module

Metric	Label
InvDV1	Inv Devaluation Reg+Promo
InvDV2	Inv Devaluation Clr
LastStk	Last Period EOP
MiscAdj	Misc Adj
MOC	Move to Clr
MOS	MOS
NOO	Net On Order
OO	On Order
OOAdj	On Order Adj
OTB	OTB
PORcpt	PO Receipt
Rcpt	Receipts
Redn	Reductions
RInvA1	RMF Shrink Inventory Adjust
RInvA2	RMF Non-Shrink Inventory Adjust
SellThr	Sell Thru Alert
StkSls	Sales to Stock
TranIn	Transfers In
TranInB	Transfers In Book
TranInI	Transfers In ICT
TranIO	Transfers In/Out
TranOut	Transfers Out
TranOutB	Transfers Out Book
TranOutI	Transfers Out ICT
TSInv	Inventory Change
TTranIn	Total Transfers In
TTranOut	Total Transfers Out
Turn	Forward Cover

Remove Template for **GM KPI**:

Removes all measures and rules associated with the following list of metrics in the Margin Module.

Table B-2 Margin Module

Metric	Label
CMU	CMU
COGS	COGS
GM	GM

Table B-2 (Cont.) Margin Module

Metric	Label
GMROI	GMROI
NGM	Net GM
Royal	Royalties
Shrk	Shrink
VndFnd	Vendor Funds

Remove Template for **Fulfillment KPI**:

Removes all measures and rules associated with the following list of metrics in the Fulfillment Module.

Table B-3 Fulfillment Module

Metric	Label
BISSC	Buy In Store Ship to Customer
BOPIS	Buy Online Pick Up in Store
BORIS	Buy Online, Return in Store
BORO	Buy Online, Return Online
BRtn	BORIS return
BRtn1	BORIS Return Reg + Promo
BRtn2	BORIS Return Clr
FFRef	Fulfillment Refresh
IMS	Pick In Store
IMS1	Pick up in Store (Reg+Promo)
IMS2	Pick up in Store (Clr)
InCngStk	Store to Warehouse Restocking
MTD	Returns Back to Online
MTD1	Returns Back to Online (Reg+Promo)
MTD2	Returns Back to Online (Clr)
OnStk	Warehouse Restocking \$
ORtn	Online Returns
Restk	Restocking Cost
STC	Ship to Customer
STC1	Ship to Customer (Reg+Promo)
STC2	Ship to Customer (Clr)
StrStk	Store Restocking \$

Remove Template for **Wholesale and Franchise Module KPI**:

Removes all measures and rules associated with the following list of metrics in the Wholesale and Franchise Module.

Table B-4 Wholesale and Franchise Module

Metric	Label
MkdWF	Markdown due to W/F
WFGM	W/F Gross Margin
WFMkD	W/F Markdown
WFMkU	W/F Markup
WFNSls	W/F Net Sales
WFPoC	W/F Location
WFRet	W/F Owned by Retailers
WFRtn	W/F Returns
WFSls	W/F Sales

Remove Template for **E-com KPI**:

Removes all measures and rules associated with the following list of metrics in the E-commerce Module.

Table B-5 E-commerce Module

Metric	Label
ConvRate	Conversion Rate
Canc	Cancel
COrdr	Customer Order
FulFill	Fulfilled
AvgTrans	Avg Gross Transaction Size
BkOrd	BackOrder
BOCanc	BackOrder Cancel
BOFulFill	BackOrder Fulfilled
Traffic	Traffic
Demand	Demand

MP Self Approval:

This module updates the Merch Plan approval process to be a self approval process instead of submitting the plans to Merch Target approval. It updates the current Submit Plan rules to approve plan directly to CP/OP and removes Merch Target Approve Plan rules.

Note

This modularity utility only affects the measures and rules by removing or unregistering them. It does not directly update the Workbook and Taskflow automatically. The output base configuration after running the utility requires the Implementor to update the Workbook and Taskflow level modification as part of the customization.

The following details an example use case of running the modularity tool to create a base MFP Retail configuration from the GA configuration.

Table B-6 MP Self Approval Module Use Case

Roles	KPIs	Local Currency	Fulfillment Planning	Units	Wholesale / Franchise	E-com KPIs	Approval
Merch Target	Inventory & Receipts, GM	Yes	No	Yes	No	Yes	Not Applicable
Merch Plan	Inventory & Receipts, GM	Yes	No	Yes	No	Yes	Self Approval
Location Target	Not Applicable	Yes	Not Applicable	Yes	Not Applicable	Not Applicable	Not Applicable
Location Plan	Inventory & Receipts, GM	Yes	Not Applicable	Yes	No	Not Applicable	Not Applicable

Perform the following steps to run the modularity tool to create a base MFP Retail configuration from the GA configuration.

1. Open the configuration tool and select the Utilities tab option and then select **Modularity Tool**.

Note

It is not necessary to open the MFP GA configuration first, as the tool always runs against the MFP GA Retail configuration packaged with the Starter Kit.

2. Select the modules to apply against the GA configuration from the pop-up UI for each template to satisfy the requirements for the new base configuration.

Figure B-6 Merch Target Module

The screenshot shows the 'Modularity Tool' interface with the 'Merch Target' module selected. The 'Merch Target' tab is active, and the 'Remove Wholesale/Franchise KPI' option is checked and highlighted with a dashed box.

Modularity Tool

Merch Target | Merch Plan | Location Target | Location Plan

Merch Target

- ☐ Remove Template
- ☒ Remove Fulfillment Plan
- ☐ Remove Units
- ☐ Remove Inventory KPI
- ☐ Remove GM KPI
- ☒ Remove Wholesale/Franchise KPI
- ☐ Remove E-Com KPI
- ☐ Remove Local Currency

Figure B-7 Merch Plan Module

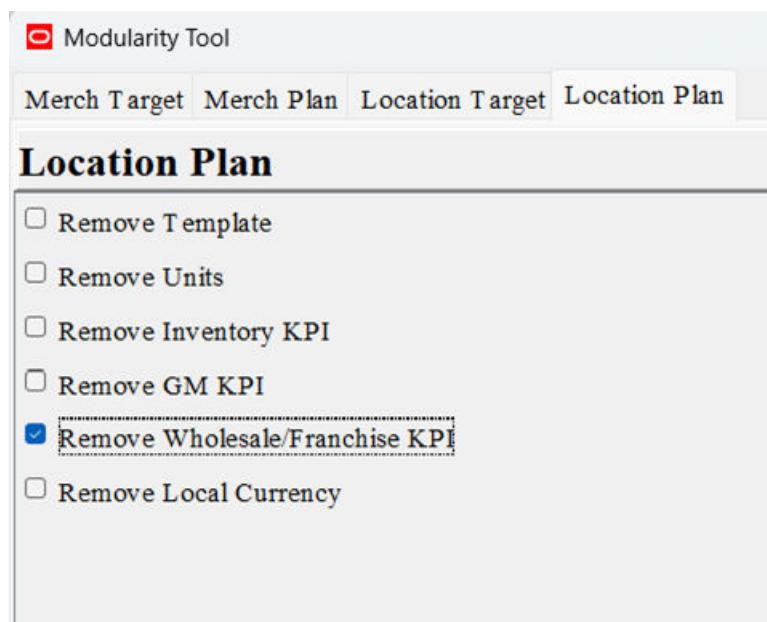
The screenshot shows the 'Modularity Tool' interface with the 'Merch Plan' module selected. The 'Merch Plan' tab is active, and the 'Remove Wholesale/Franchise KPI' option is checked and highlighted with a dashed box.

Modularity Tool

Merch Target | Merch Plan | Location Target | Location Plan

Merch Plan

- ☐ Remove Template
- ☒ MP Self Approval
- ☒ Remove Fulfillment Plan
- ☐ Remove Units
- ☐ Remove Inventory KPI
- ☐ Remove GM KPI
- ☒ Remove Wholesale/Franchise KPI
- ☐ Remove E-Com KPI
- ☐ Remove Local Currency

Figure B-8 Location Plan Module

3. Once the modules are selected, specify the output directory for the new base configuration. Click **OK** after you review the **Apply Selected Modules**.

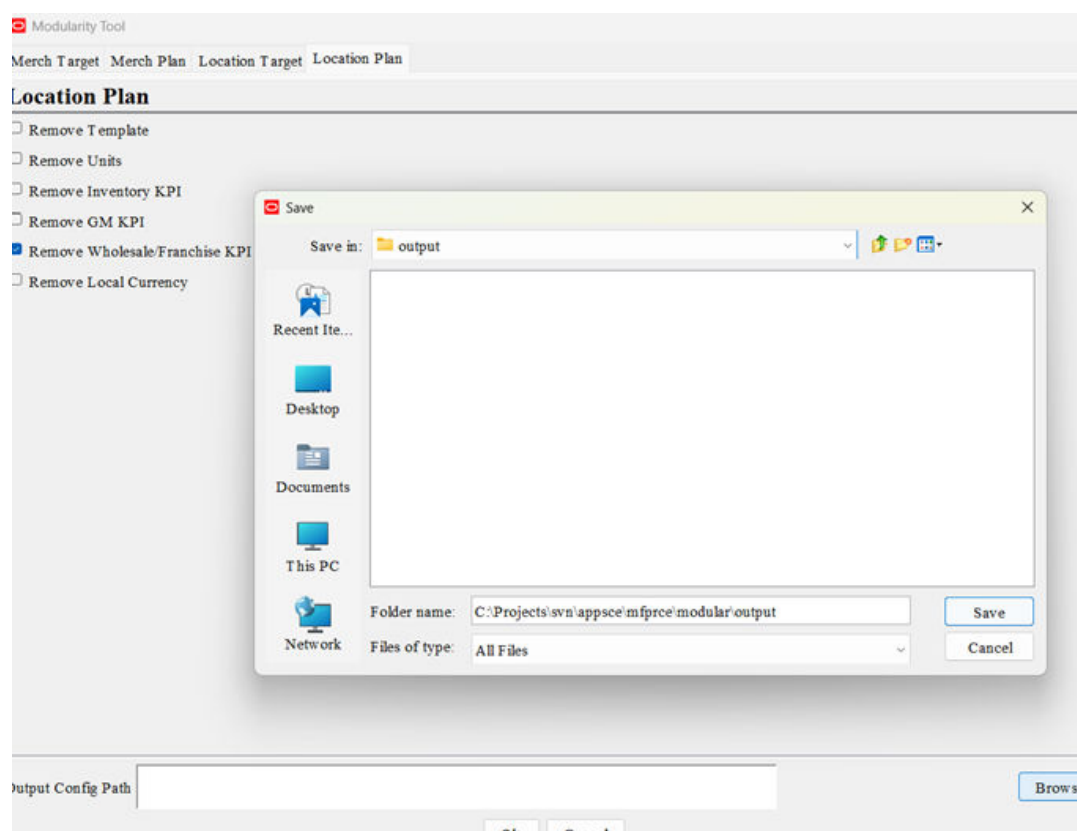
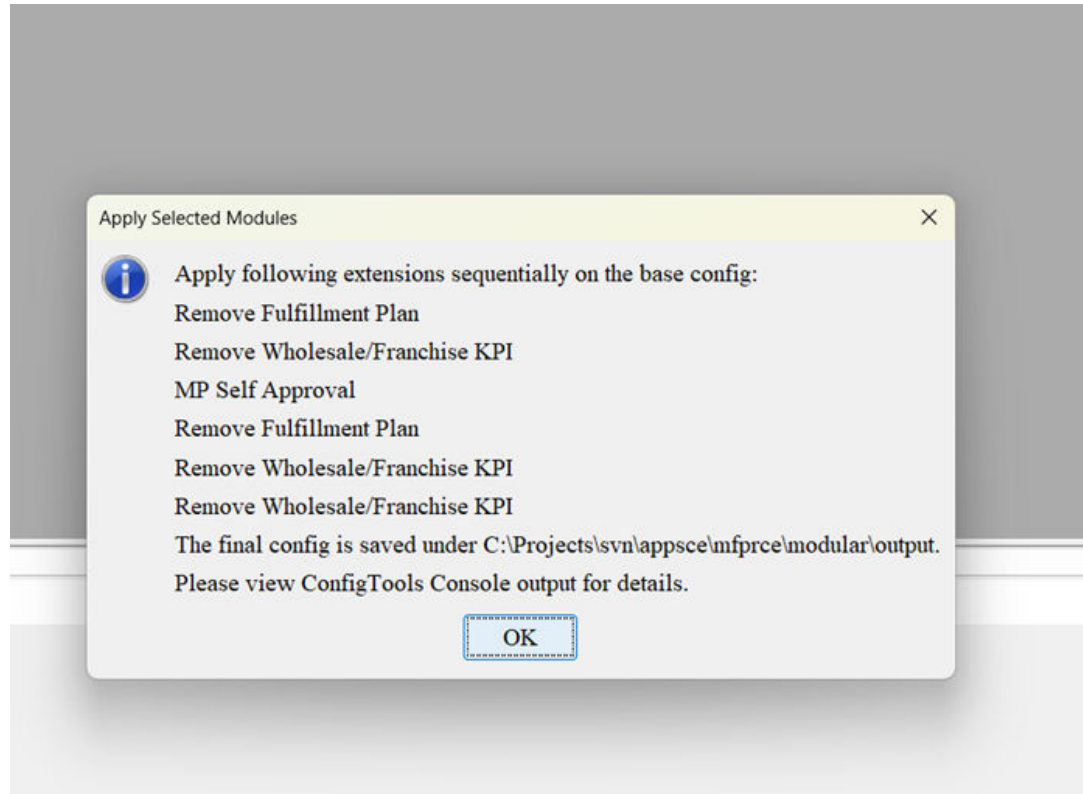
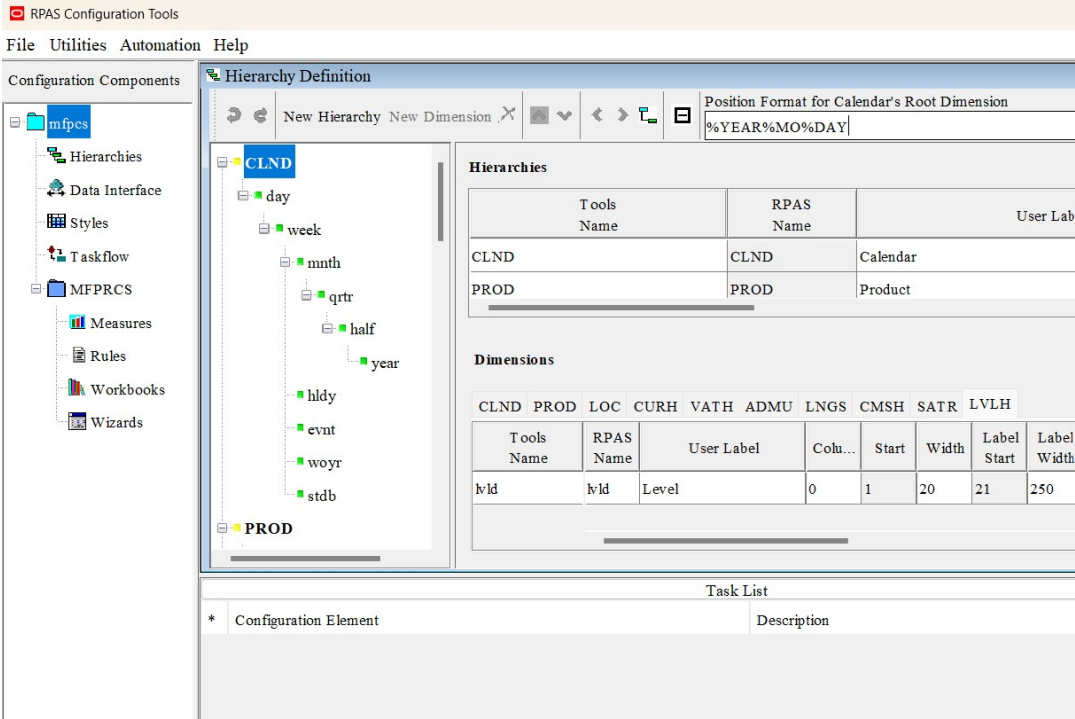
Figure B-9 Specify the Output Directory

Figure B-10 Confirm the Selected Modules

4. Open the new base configuration from the output saved directory and check to see if any errors or warnings exist under the **Task List**. No errors or warnings means that the modularity tool successfully updated the measures and rules associated with the selected modules.

Figure B-11 Check for any Errors in the Task List



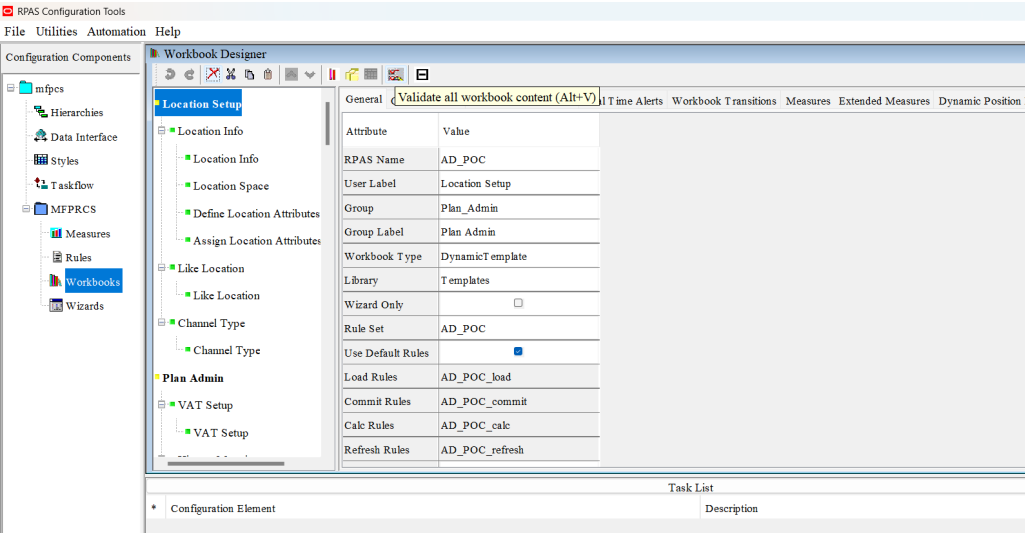
5. The modularity tool currently can only make changes to the measure or rule level. It does not automatically make any changes to the Workbooks or Taskflow. It is up to the Implementor to make additional manual updates to both the Workbooks or Taskflow as a starting point of customization from this new base MFP configuration. Using the example use case scenario, perform the following manual updates.

Note

The following workbook level updates are just a recommendation and it is up to the Implementor and customer to update accordingly with the labels and views required for the customer. This new simplified configuration is now the base configuration for the customer to build their custom logic and functionality on top to meet their business needs.

- a. Under Workbook Designer, click the **Validate all Workbook Content** icon that provides all errors and warnings associated with the workbook templates. This provides descriptions of all template level errors that needs to be resolved; such as a potential error that could be unregistered measures not cleared from the worksheet view that must be manually removed or unregistered measures impacting the workbook properties like real time alerts or extended measures. .

Figure B-12 Check for any Worksheet Errors in the Task List



- b. In the previous use case example, remove worksheets if associated with the module applied, such as Remove of Fulfillment and Wholesale/Franchise. These worksheets should be removed from the template or taskflow.

Figure B-13 Remove Worksheets

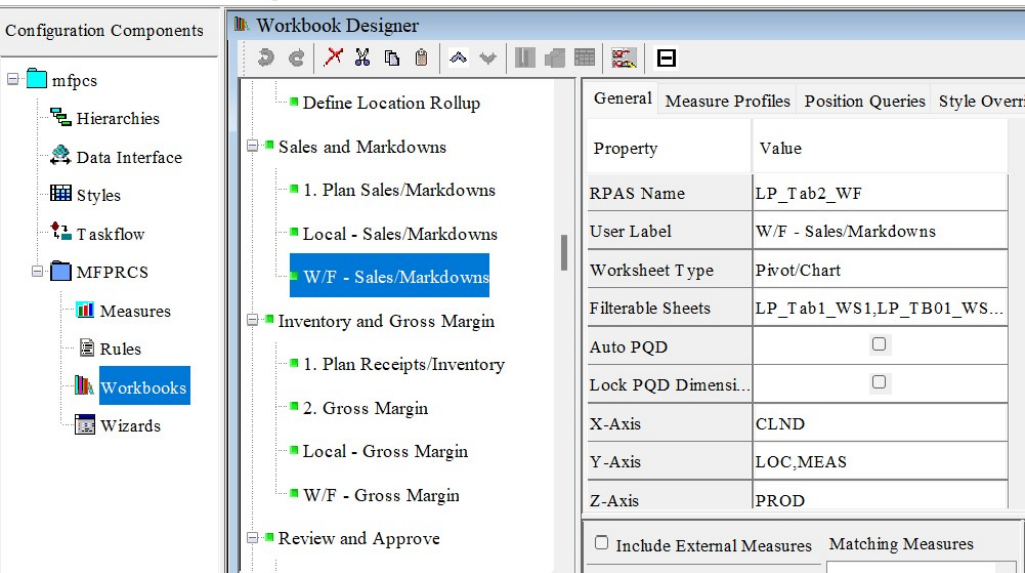
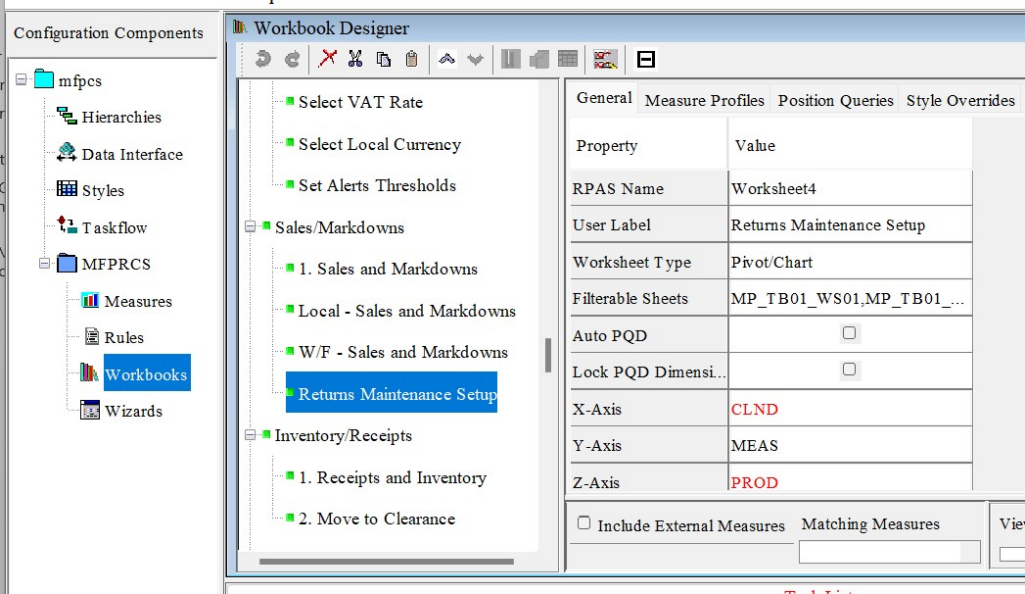
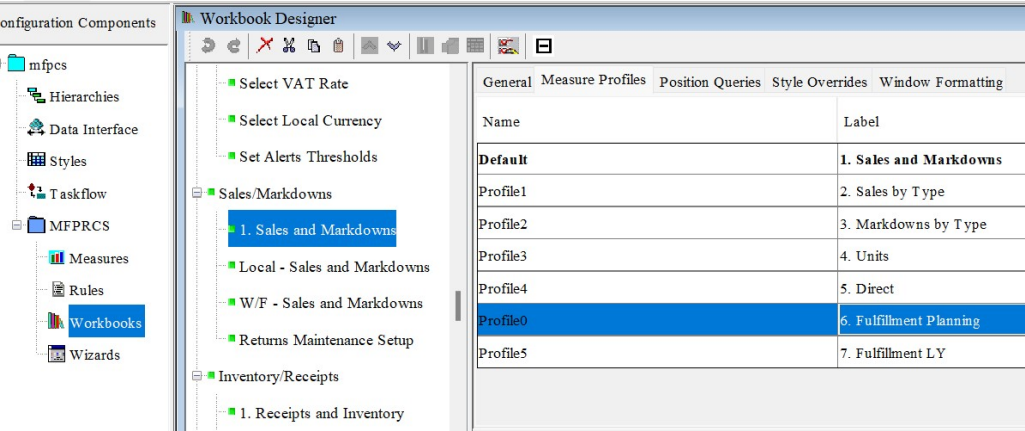


Figure B-14 Remove Worksheets from the Template or Taskflow



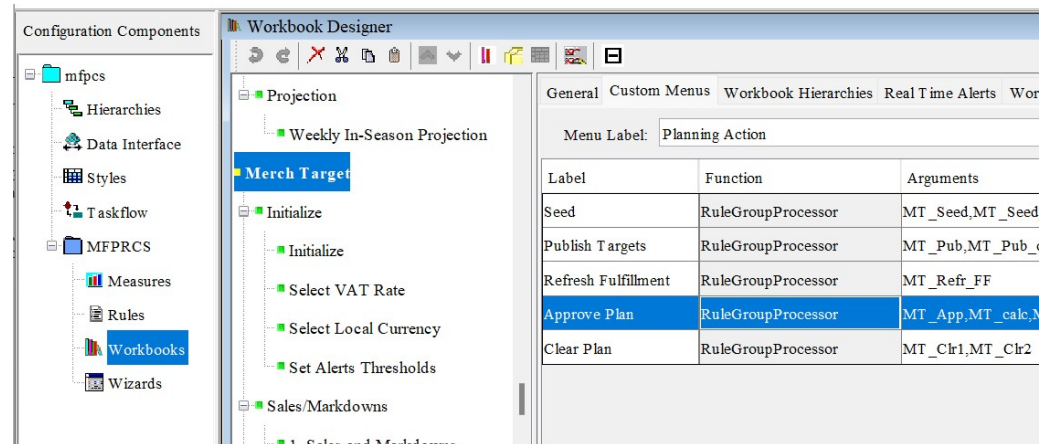
Additionally, check the Worksheet Measure Profile tab to make sure that no specific profile exists. Remove any existing profiles.

Figure B-15 Verify that No Specific Profile Exists



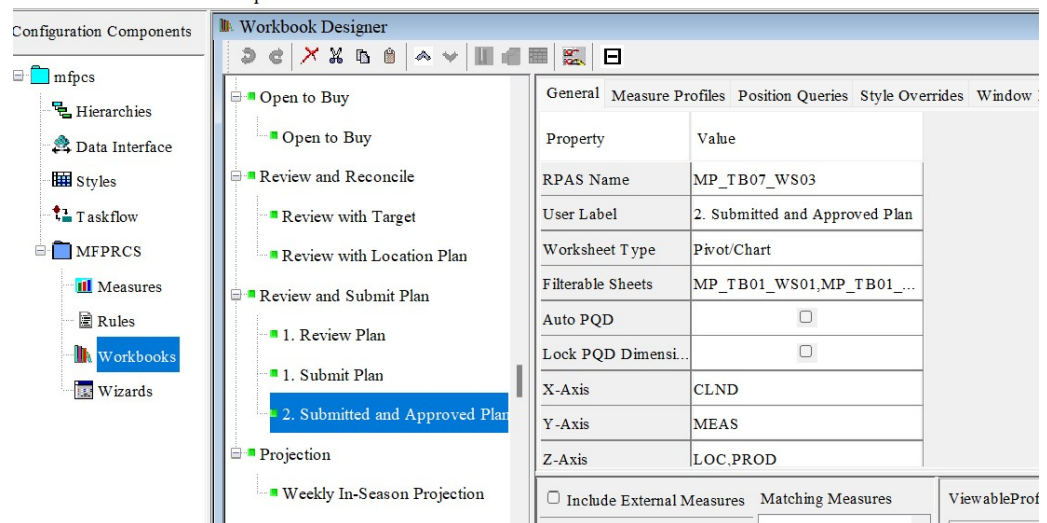
6. The Merch Plan Self Approval module is more complex in that it affects the custom menu rule groups and require more in-depth updates to the Workbooks within Merch Plan and Merch Target templates as follows.
 - a. In the Workbook Designer, navigate to **Merch Target** and then **Custom Menus**. Remove **Approve Plan** since the Merch Plan approval is self-approval.

Figure B-16 Remove Approve Plan



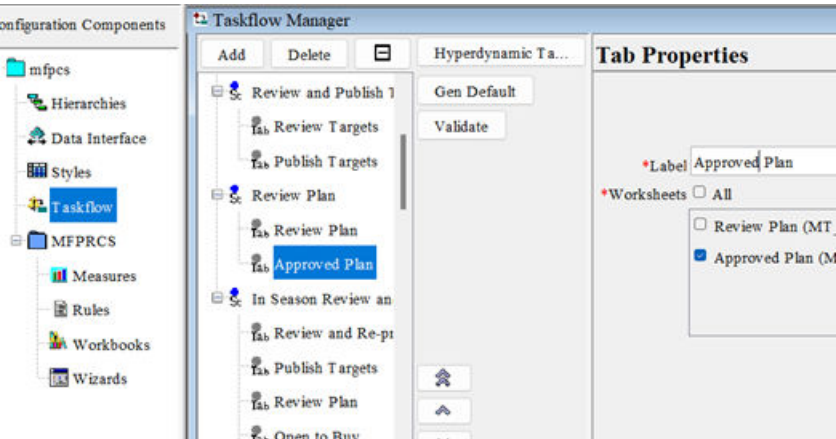
- b. In **Merch Plan**, update the **Review and Submit Plan** tab to the **Review and Approve Plan**. Change **Submit Plan** to **Approve Plan**. Change **Review and Submitted Plan** to **Approved Plan**.

Figure B-17 Change Plan Names



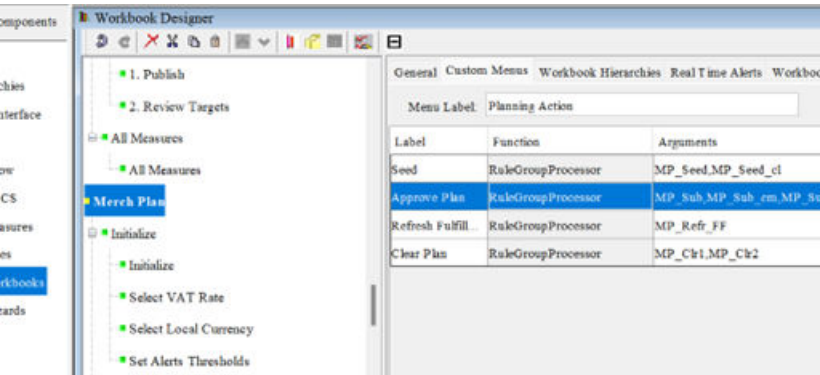
- c. Update the **Merch Target** Taskflow label from **Review and Approve Plan** to **Review Plan**.

Figure B-18 Update the Merch Target Taskflow Label



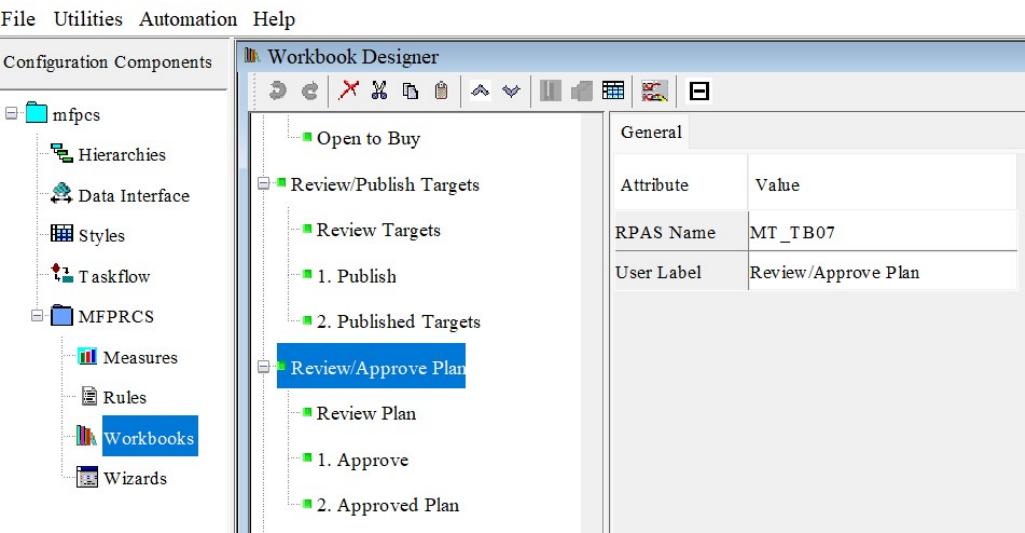
- d. In the Workbook Designer, navigate to **Merch Plan** and then **Custom Menus**. Change **Submit Plan** to **Approve Plan**.

Figure B-19 Update the Merch Target Taskflow Label



- e. In **Merch Plan**, update the **Review and Submit Plan** tab to the **Review and Approve Plan**. Change **Submit Plan** to **Approve Plan**. Change **Review and Submitted Plan** to **Approved Plan**.

Figure B-20 Change Plan Names



Note

Check all template properties for errors, especially for real time alerts, measures, and extended measures properties. Fix those errors manually.