

**Oracle[®] Retail Item Planning
Installation Guide
Release 12.0
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Customer Support

- <https://metalink.oracle.com>

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

About Item Planning Installation Process

This document provides instructions on installing Item Planning v10.5.1 on the RPAS 11.0.4 platform.

Intended Audience

This document is intended for anyone that needs to install a Item Planning domain. This document explains the process to create a domain with an existing KPGA and SLGA configuration.

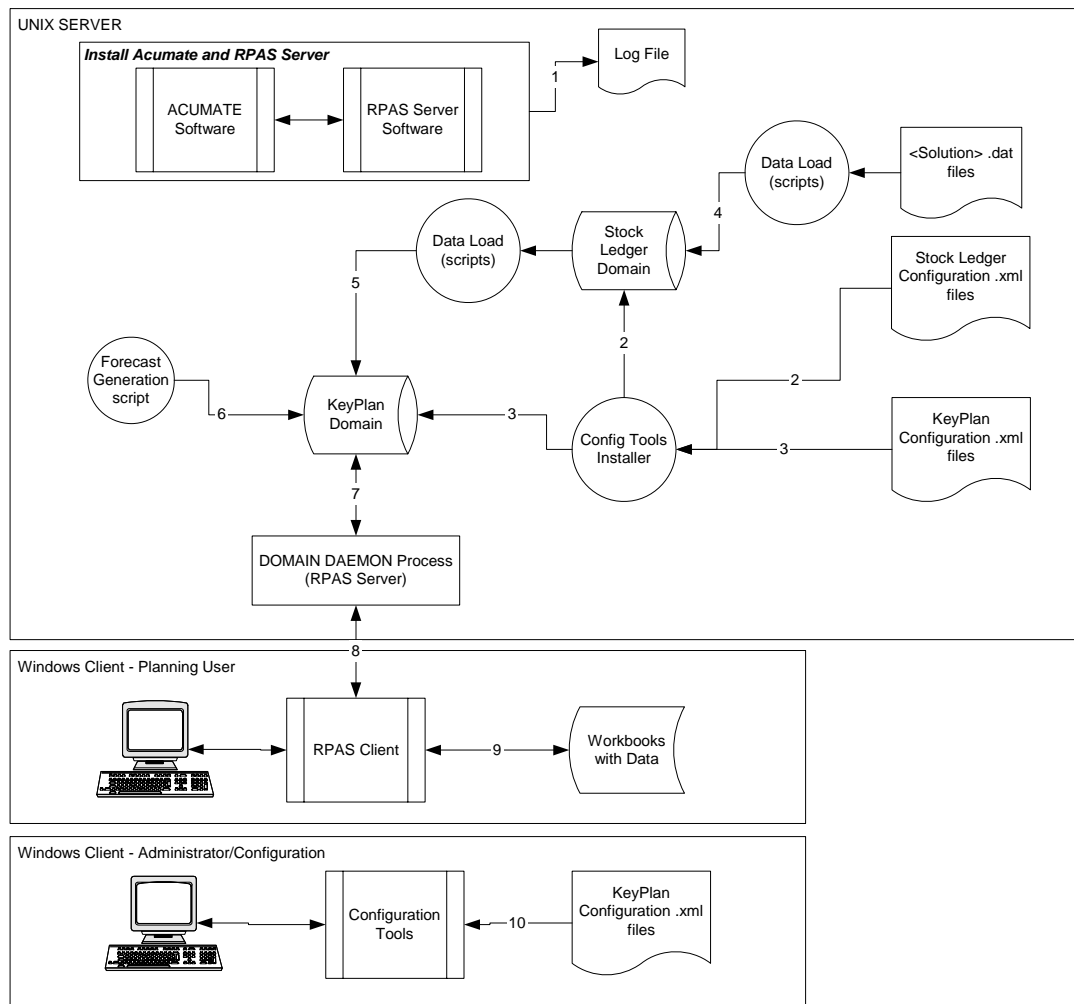
About this Document

This document provides detailed instructions for how to install an Item Planning and Stock Ledger configuration on a RPAS 11.0.4 domain using an existing configuration created using the Configuration Tools (KPGA configuration and SLGA configuration). This document does not describe how to build the actual Item Planning configuration. Read through this document completely before executing the installation steps.

Item Planning Installation Instructions

Overview of Process Steps

This diagram shows an overview of the steps involved in the installation of all the software components required for a typical Item Planning product installation. This section will review and document each of the steps in this diagram, referring to each step by the number indicated on the flow chart.



Step 0: Extract Files for Installation

The RPAS Client and Server software are provided to you in a .zip format. Prior to beginning this process you must have downloaded the following .zip files from <http://fulfillment.OracleRetail.com>. You must have also obtained a proper license key from Oracle Retail for the use of this software. The following .zip files are required for this installation process:

1. ARPOplatform-<version>.<platform>.zip – where <version> is the current RPAS version and <platform> is your operating system platform (AIX, SUN, HP, NT)

For example,

ARPOplatform-11.0.4.aix.zip

2. ARPOplatform-<version>.docs.zip

For example,

ARPOplatform-11.0.4.docs.zip

3. ItemPlanning<version>.zip

For example,

ItemPlanning10.5.1.zip

4. ItemPlanning<version>.docs.zip

For example,

ItemPlanning10.5.1.docs.zip

Step 0.1

Unzip the ARPOplatform-<version>.<platform>.zip file to a location on the server where the software is to be installed. For this guide, assume that location is called /root/arpo_temp.

The following subfolders will be created in /root/arpo_temp:

- /Acumate – contains the setup files for the Acumate installation
- /Client – contains the setup files for the RPAS client installation
- /RpasServer – contains the setup files for the RPAS Server installation
- /Tools – contains the .zip file for the configuration tools installation

Step 0.2

Unzip the ARPOplatform-<version>.docs.zip file to a location on the server. The following documentation guides will be extracted:

- RPAS 11.0.4 Administration Guide rpa-1104-ag.pdf
- RPAS 11.0.4 Installation Guide rpa-1104-ig.doc
- RPAS 11.0.4 Calculation Engine User Guide rpa-1104-ceug.pdf
- RPAS 11.0.4 Configuration Guide rpa-1104-cg.pdf
- RPAS 11.0.4 Configuration Tools Release Notes rpa-1103-ctrn.pdf
- RPAS 11.0.4 Release Notes rpa-1104-rn.pdf
- RPAS 11.0.4 User Guide rpa-1104-ug.pdf

Step 0.3

Unzip the ItemPlanning<version>.zip file to a location on the server. For this guide, assume that location is called /root/ip_temp and the version is 10.5.1.

The following subfolders will be created in /root/fp_temp:

/ItemPlanning10.5.1

 /ItemPlanning10.5.1/scripts – Data load and transfer scripts

 /ItemPlanning10.5.1/data – hierarchy and sample data

 /ItemPlanning10.5.1/configurations – Configuration files for use in building the domains

 /ItemPlanning10.5.1/configurations/stock/SLGA

 /ItemPlanning10.5.1/configurations/keyplan/KPGA

Step 0.4

Unzip the ItemPlanning<version>.docs.zip file to a location on the server.

This file contains the following documents:

- Item Planning 10.5.1 Administration Guide itemplan-1051-ag.pdf
- Item Planning 10.5.1 Release Notes itemplan-1051-rn.pdf
- Item Planning 10.5.1 Installation Guide itemplan-1051-ig.doc
- Item Planning 10.5.1 User Guide itemplan-1051-ug.pdf

Step 1: Install Server-Side Software

This step will install the database-access software, Acumate, and the RPAS Server-side software. Also required is the installation of the configuration tools domain installer. All steps are required for a successful Item Planning installation.

Step 1.1

Refer to the RPAS 11.0.4 Installation Guide for instructions on how to install Acumate and the RPAS server software. Note the location of the installation files that were unzipped in Step 0.1.

Step 1.2

Refer to the RPAS 11.0.4 Installation Guide, Chapter 6 – Configuration Tools Installation for instructions on how to install the configuration tools. Note the location of the zip file that was unzipped in Step 0.1.

Note: The configuration tools installation will install all tools components as part of the installation process. However, only the tools domain installer program is utilized on the server. A system administrator on a Windows client machine uses the remaining components.

Step 2: Build the Stock Ledger Domain

Note: You may skip this step if the Stock Ledger Domain has been built as a result of another product installation such as TopPlan.

The Item Planning Stock Ledger is an RPAS domain that is used as a staging area for data that is to be loaded from an external file. Data in the Stock Ledger domain is later transferred to the Item Planning GA domain.

Refer to the RPAS 11.0.4 Configuration Guide, Chapter 12 – Building an RPAS domain for instructions on how to build a domain from an existing configuration.

In this document we will assume a Stock Ledger Domain was created in /root/domains/stock/SL

The configuration to use to build the Stock Ledger Domain is named SLGA. Using the file location from Step 0.3, the location of the Stock Ledger configuration would be:

/ItemPlanning10.5.1/configurations/stock/SLGA

You will need this information as a reference when referring to the RPAS 11.0.4 configuration guide domain building process.

Note: If the following message is encountered during the Domain Build Process, please disregard as the regFcstFunctions.sh script will resolve this issue.

“Warning: unable to parse new expression (Unknown special expression: Forecast)”

Step 3: Build the Item Planning Domain

Refer to the RPAS 11.0.4 Configuration Guide, Chapter 12 – Building an RPAS domain for instructions on how to build a domain from an existing configuration.

Note: The KPGA configuration for Item Planning will need to be built specifying the attribute measure KWpItmDescTx. Currently the rpasInstall command uses the parameter “-am” to specify an attribute measure. For example, the complete syntax for the switch is “-am KwpltmDescTx”

The domain build process requires the following files to be available for use in building the domain: Ensure these files are located in the /ItemPlanning10.5.1/data directory. You will need to refer to these files and their location as part of the domain build process:

- prod.dat
- loc.dat
- clnd.dat
- hdwr.dat
- keyi.dat

Note: For the purposes of later examples used in this document we will assume a Item Planning Domain was created in the following location
/root/domains/keyplan/PLAN.

The configuration to use to build the Item Planning domain is named KPGA. Using the file location from Step 0.3, the location of the Item Planning configuration would be:

`/ItemPlanning10.5.1/configurations/keyplan/KPGA`

You will need this information as a reference when referring to the RPAS 11.0.4 configuration guide domain building process.

Note: If the following message is encountered during the Domain Build Process, please disregard as the `regFcstFunction.sh` script will resolve this issue.

“Warning: unable to parse new expression (Unknown special expression: Forecast)”

Step 3.1: Copy Scripts to the Domain Scripts Directory

Once the Item Planning domain is created, copy the following scripts from the solution directory `/ItemPlanning10.5.1/scripts` to the domain scripts folder `/root/domains/keyplan/PLAN/scripts`.

- `loadKitm.sh`
- `loadIdesc.sh`
- `loadmeas.sh` (used in Stock Ledger dataload)
- `set_slpath.sh`
- `xferSLdata.sh`
- `regFcstFunction.sh`
- `runFcstKp.sh`

Step 4: Load Data into the Stock Ledger Domain

The Item Planning GA solution has been delivered with sample data. This data may be loaded into the Stock Ledger domain for later transfer to the planning domains. You may substitute your company’s data for the sample data if you wish; however, the data files must conform in format to those being provided.

Data is loaded into the Stock Ledger Domain at the sku/str/day level and transferred and aggregated to Item Planning.

Note: If this process has been run once before on this same stock ledger domain (for example, as a result of building the TopPlan domain) you may skip step 4 in its entirety.

Step 4.1

Copy the files measdata.ovr and onorder.ovr from /root/fp_temp/ItemPlanning10.5.1/data to the input directory of the Stock Ledger domain, /root/domains/stock/SL/input

Step 4.2

Navigate to the directory /root/domains/keyplan/PLAN/scripts and run the script loadmeas.sh using following syntax:

```
loadmeas.sh <<Absolute_Path_To_Stock_Ledger_Domain>> > Sldataload.log
```

For example, if the Stock Ledger domain is located at /root/domains/stock/SL, the loadmeas command would be:

```
loadmeas.sh /root/domains/stock/SL > Sldataload.log
```

Step 5: Transfer Data to Item Planning Domain

Step 5.1: Load KeyItem Data in Item Planning Domain

1. Copy the files kitm.ovr, kitmdesc.ovr, and keyidesc.ovr from the solution directory /root/fp_temp/ItemPlanning10.5.1/data to the input directory of KeyPlan domain /root/domains/keyplan/PLAN/input.
2. Run loadKitm.sh from the directory /root/domains/keyplan/PLAN/scripts using following syntax:

```
loadKitm.sh <<Absolute_Path_To_KeyPlan_Domain>> > loadKitm.log
```

For example, if the KeyPlan domain is located at /root/domains/keyplan/PLAN, the loadKitm command would be:

```
loadKitm.sh /root/domains/keyplan/PLAN > loadKitm.log
```

Step 5.2: Load Item Description data in Item Planning Domain

1. Copy the file itemdesc.ovr from the solution directory /root/fp_temp/ItemPlanning10.5.1/data to input directory of KeyPlan domain /root/domains/keyplan/PLAN/input.
2. Run loadIdesc.sh from the directory /root/domains/keyplan/PLAN/scripts using following syntax:

```
loadIdesc.sh <<Absolute_Path_To_KeyPlan_Domain>> > loadIdesc.log
```

For example, if the KeyPlan domain is located at /root/domains/keyplan/PLAN, the loadIdesc command would be the following:

```
loadIdesc.sh /root/domains/keyplan/PLAN > loadIdesc.log
```

Step 5.3: Transfer Data from Stock Ledger to Item Planning Domain

1. Run `/root/domains/keyplan/PLAN/scripts/set_slpath.sh` using the following 2 parameters:

```
set_slpath.sh <<Absolute_Path_To_KeyPlan_Domain>>
<<Relative_Path_To_StockLedger_Domain>>
```

For example, if the Stock Ledger domain is located at `/root/domains/stock/SL` and the KeyPlan domain is located at `/root/domains/keyplan/PLAN`, `set_slpath.sh` would be run in the following manner:

```
set_slpath.sh /root/domains/keyplan/PLAN ../../stock/SL
```

2. Run `/root/domains/keyplan/PLAN/scripts/xferSLdata.sh` using the following parameter:

```
xferSLdata.sh <<Absolute_Path_To_KeyPlan_Domain>> > xferSLdata.log
```

For example,

```
xferSLdata.sh /root/domains/keyplan/PLAN > xferSLdata.log
```

Step 6: Run a Forecast for Item Planning

Item Planning is delivered with the ability to create a forecast. The forecast is a program that will calculate the projected demand using a statistical model. The instructions for registering the forecast function and generating the demand values are included below.

Step 6.1

This script will register the forecast library into the domain. Run `/root/domains/keyplan/PLAN/scripts/regFcstFunction.sh` using the following parameter.

```
regFcstFunction.sh <<Absolute_Path_To_KeyPlan_Domain>>
```

For example,

```
regFcstFunction.sh /root/domains/keyplan/PLAN
```

A “Registration Completed.” should be returned upon the script’s completion.

Step 6.2

This script will run the forecast and populate the demand forecast measure within the domain. Run `/root/domains/keyplan/PLAN/scripts/runFcstKp.sh` using the following parameter.

Run `runFcstKp.sh` (located in the KeyPlan Scripts Folder) using the following parameters:

```
runFcstKp.sh <<Absolute_Path_To_KeyPlan_Domain>> > fcst.log
```

For example,

```
runFcstKp.sh /root/domains/keyplan/PLAN > fcst.log
```

Verify there are no errors in the `fcst.log`. There will be a report of successful forecasts generated in the `fcst.log`.

Locate the `KfpDemandU` measure. It should appear in a format like this message:

```
1 =/ ../other.KFPDEMANDU%1
```

The log should show a number in the “Called” and the “Succeeded” column for the “Average” method for the measure “KFpDemandU.”

For example:

```
-----
Handled:      111 forecasts out of      111 in 0 seconds
-----
Method                Called      Succeeded
-----
AutoES                  0          0
Simple                  0          0
Holt                    0          0
Winters                  0          0
Causal                   0          0
Average                 111         111
Croston                  0          0
M. Winters               0          0
A. Winters               0          0
Simple Croston           0          0
Bayesian                 0          0
Profile                  0          0
-----
Model                Chosen
-----
Average                111
Forecast finished
autoes destructor called
Successful.
```

Next, locate the KFiDemandU measure. It should appear like this message:

```
1 =/ ../other.PFIDEMANDR%1
```

The log should show a number in the “Called” and the “Succeeded” column for the “Bayesian” method for the measure “KFiDemandU”. For example:

```
-----
Handled:      111 forecasts out of      111 in 0 seconds
-----
Method                Called      Succeeded
-----
AutoES                  0          0
Simple                  0          0
Holt                    0          0
Winters                  0          0
Causal                   0          0
Average                 0          0
Croston                  0          0
M. Winters               0          0
A. Winters               0          0
Simple Croston           0          0
Bayesian                111         111
Profile                  0          0
-----
Model                Chosen
-----
Forecast finished
autoes destructor called
Successful.
```


Step 7: Start the RPAS DomainDaemon

The RPAS DomainDaemon process runs on the server. It allows you to access any domain on the server using the RPAS client installed on their local machine.

Refer to the RPAS 11.0.4 Administrator's Guide, Chapter 2 – Domain Administration for instructions on how to start the DomainDaemon.

Note: You will need to record the port number that is used to start the process. It will be needed to install and configure each RPAS client that is installed.

Step 8: Install the RPAS Client

The RPAS client must be installed on any (Windows) machine that will be used to access the planning domains.

Refer to the RPAS Installation Guide, Chapter 5 - RPAS Client Installation for instructions on how to install and use the RPAS Client.

The client files are found in the Client directory, which was created in Step 0.1 when the ARPOPlatform zip file was extracted.

Step 9: Configure the RPAS Client to use the Domains

The RPAS client must be configured to point to the newly created domains.

Refer to the RPAS Configuration Guide, Chapter 11 – Configuring the RPAS client, for instructions on how to configure the RPAS Client.

This step must be performed in order to use the domains

Step 10: Install the Configuration Tools (optional)

The configuration tools must be installed on a Windows client so that the system administrator can make changes to the domain configuration.

This is an optional step and is only required to be done on the administrator's machine, or the person who has been identified to support your GA solution RPAS Installation Guide, Chapter 6 – Configuration Tools Installation, for instructions on how to use the configuration tools.

Appendix: KeyItem Definition and Item Description

The data files that are required for the setup of the KeyItem Definition and Item Description functionality are included with this GA release. If the need arises to load a new product file that does not include KeyItem information, or if more Key Items need to be added to the existing product file, follow the steps below.

Step A.1: Copy KeyItem and Item Description Scripts

Copy the following files from the solution directory
 /root/fp_temp/ItemPlanning10.5.1/scripts to the domain scripts folder
 /root/domains/keyplan/PLAN/scripts

- appendProd.sh
- addKeyi.sh
- createKeyi.sh
- createKIload.sh
- createIdescload.sh
- all .awk files

Step A.2: Create KeyItem Hierarchy information

1. Run /root/domains/keyplan/PLAN/scripts/appendProd.sh using the following parameters:

```
pendProd.sh prod.dat > appendProd.log
```
2. The script will create an updated prod.dat file. Copy the prod.dat file to the domains input directory /root/domains/keyplan/PLAN/input.
3. Run /root/domains/keyplan/PLAN/scripts/addKeyi.sh using the following parameters:

```
dKeyi.sh <<Absolute_Path_To_KeyPlan_Domain>> prod.dat keyi.dat <number of my key items> > addKeyi.log
```

For example,

```
dKeyi.sh /root/domains/keyplan/PLAN prod.dat keyi.dat 100 > addKeyi.log
```

where 100 is equal to or greater than the number of key items already existing in the ITEM1 domain.

Ensure that there are no errors in the addKeyi.log file. The script will create a keyi.dat file with a specified number of dummy key items. This number should be equal to or greater than the number of key items the domain had when created. The script also ensures that the new keyi.dat file holds all previous key item names already defined in the domain.

4. Copy the keyi.dat to the domain's input folder /root/domains/keyplan/PLAN/input.
5. Copy the keyi.dat to keyidesc.ovr in the domain's input folder /root/domains/keyplan/PLAN/input. This file will be used to load the KWpKeyIDescTx measure.

Step A.3: Create KeyItem Measure Information

1. Run /root/domains/keyplan/PLAN/scripts/CreateKIload.sh to create the files kitm.ovr and kitmdesc.ovr:

```
eateKIload.sh <<Absolute_Path_To_KeyPlan_Domain>> prod.dat kitm.ovr  
kitmdesc.ovr
```

For example,

```
createKIload.sh /root/domains/keyplan/PLAN prod.dat kitm.ovr kitmdesc.ovr
```

2. Copy the files kitm.ovr and kitmdesc.ovr to the domain's input directory /root/domains/keyplan/PLAN/input
3. Run /root/domains/keyplan/PLAN/scripts/CreateIdescload.sh to create itemdesc.ovr using the following parameters:

```
createIdescLoad.sh <<Absolute_Path_To_KeyPlan_Domain>> prod.dat  
itemdesc.ovr
```

For example,

```
createIdescLoad.sh /root/domains/keyplan/PLAN prod.dat itemdesc.ovr
```

4. Copy the resulting itemdesc.ovr file to the domain's input directory /root/domains/keyplan/PLAN/input

Step A.4: Load KeyItem Measure Information

Ensure following files are in the domain's input folder /root/domains/keyplan/PLAN/input

- prod.dat
- keyi.dat
- keyidesc.ovr
- kitm.ovr
- kitmdesc.ovr
- itemdesc.ovr

1. Run /root/domains/keyplan/PLAN/scripts/loadKITm.sh with the following parameters:

```
loadKitm.sh <<Absolute_Path_To_KeyPlan_Domain>> > loadKitm.log
```

For example,

```
loadKitm.sh /root/domains/keyplan/PLAN > loadKitm.log
```

2. Run /root/domains/keyplan/PLAN/scripts/loadIdesc.sh with the following parameters:

```
loadIdesc.sh <<Absolute_Path_To_KeyPlan_Domain>> > loadIdesc.log
```

For example,

```
loadIdesc.sh /root/domains/keyplan/PLAN > loadIdesc.log
```

Appendix: Placeholder Definition

The product file included with this release contains 20 keyitem placeholders for each subclass. If the need arises to add additional placeholders to an existing domain, follow the steps below.

Step 1: Copy Placeholder Scripts

Copy the following files from the solution directory
/root/fp_temp/ItemPlanning10.5.1/scripts to the domain scripts folder
/root/domains/keyplan/PLAN/scripts

- keyplan_pplaceholder.sh
- placeholder_format.sh

Step 2: Create Placeholder Hierarchy Positions

1. Run /root/domains/keyplan/PLAN/scripts/keyplan_placeholder.sh without any parameters.
2. Run /root/domains/keyplan/PLAN/scripts/placeholder_format.sh without any parameters.
3. A resulting file dummyitem.dat will be created in the domain's input folder /root/domains/keyplan/PLAN/input. Rename the dummyitem.dat to prod.dat and complete steps in Appendix A of this document to ensure keyitem positions are created appropriately for the placeholder positions.