

Oracle® Retail Plan Pre-Season 2.5
Installation Guide

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Preface

This guide enables you to install the server-side components required for using the Plan application.

Audience

This guide is intended for system administrators and assumes that you are familiar with the following:

- Installing and configuring application server software
- Installing and configuring relational database management systems
- Installing and configuring distributed client/server applications on a UNIX-based local area network

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Related Documents

For additional information about using Plan, see the following:

- *Plan Configuration Guide*
- *Plan Operations Guide*
- *Plan User Guide*

Conventions

The following text conventions are used in this document:

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

This chapter contains the following sections:

- [Overview of Plan](#)
- [Overview of the Plan Architecture](#)
- [Roadmap for Implementing Plan](#)

Overview of Plan

Oracle Plan enables retail planners to meet customer demand throughout the course of a season. Plan enables you to meet store-level demand as follows:

- Order the correct *mix* of products that appeal to your customers
- Order the correct *quantity* to meet customer demand
- Plan the correct *flow* of products

Overview of the Plan Architecture

[Plan Enterprise Components](#) describes the optional and required software. For information about specific versions required, see [Chapter 2, Planning Your Environment](#).

Plan Enterprise Components

Plan is a distributed application, using an application server as the platform for the services, a database, and several software components.

Client System Tier

- Microsoft Windows, Office, and Internet Explorer.
- ActiveX control (installs automatically when Plan is run). JRE for Merchant Desktop (optional).

Application Server Tier

- Application server software.
- Plan - resides on your application server machine. You can install and run multiple Plan instances on multiple application server machines.
- Calculation Engine - which installs on the application server machine by default. To boost performance, you can run install and run multiple Engines, and move them to any other production server within your environment as needed.

- Optional. Merchant Desktop application.

Database Server Tier

- Relational database management system.
- Plan Database - contains historical sales and other business information that originates from systems external to Plan. The database also contains the Retail Data Mart (RDM), a set of data generated and used internally by Plan.

Optional Components

- Optional. Merchant Desktop (an optional component) requires a Windows server for MicroStrategy.
- Optional. Additional computational servers for implementing the Calculation Engine in a large-scale environment.
- Optional. Additional application server machines to implement Plan for a large number of users.

Roadmap for Implementing Plan

This guide explains how to install and set up the required and optional software and the Plan applications.

The instructions in this guide assume knowledge of application servers, databases, and application installation, and are intended for system administrators and experienced IT personnel. Before carrying out any of these activities, ensure that you understand UNIX commands (including shell configuration and scripting), directory operations, and symlinks.

To get Plan ready for production, you perform these tasks in the following sequence:

1. Planning your environment as described in [Chapter 2, "Planning Your Environment."](#)
2. Installing your database as described in [Chapter 3, "Installing Your Database"](#).
3. Installing your application server as described in [Chapter 4, "Installing Your Application Server"](#).
4. Installing Plan as described in [Chapter 5, "Installing Plan."](#)
5. Configuring your application server for Plan as described in [Chapter 4, "Installing Your Application Server"](#).
6. Configure your business rules as described in the *Plan Configuration Guide*.
7. Optional. Modifying the Plan user interface to accommodate your business needs, as described in the *Plan Configuration Guide*. Concurrent with this activity, complete the remaining steps in this roadmap. You can continue refining the user interface iteratively, as needed.
8. Optional. If you are using Merchant Desktop and MicroStrategy, follow Installing Merchant Desktop, Installing MicroStrategy, and Integrating Merchant Desktop with MicroStrategy of this guide.
9. Verifying the application is correctly installed.
10. Loading data and evaluating the results, as described in the *Plan Configuration Guide*.
11. Optional. Testing and tuning, as described in the *Plan Operations Guide*.

12. Setting up user login accounts and introducing end users to Plan.
13. Maintaining data as described in the *Plan Configuration Guide*.

What's Next?

Next, you need to plan your hardware and software environment as described in [Planning Your Environment](#).

Planning Your Environment

This chapter helps you plan your implementation. This chapter contains the following sections:

- [Planning Your Implementation](#)
- [Supported Configurations](#)
- [What's Next?](#)

Planning Your Implementation

This section contains the following topics:

- [Planning Your Network Infrastructure](#)
- [Planning for Optimal Plan Performance](#)
- [Planning for Optimal Merchant Desktop Performance](#)

Planning Your Network Infrastructure

Complete the following steps to plan and prepare the product environment.

1. Plan the infrastructure. Design the hardware and software infrastructure, including system requirements, consider the following:
 - Hardware and associated software requirements
 - Prerequisite software (and licensing)
 - Load balancing and clusters
 - Capacity data gathered
 - Data security
 - Backup and recovery strategies
2. Determine the size of the implementation.
3. Identify source systems. Identify the systems that will trade data with Plan.

Planning for Optimal Plan Performance

Complete the following steps to plan and prepare the product environment.

1. Determine the Plan metrics relevant to your business needs.
2. Determine your relevant business policies. The business policy is a statement of what rules govern the application processes. You need to develop a business

policy based on your business rules. For more information about business rules, see the *Plan Configuration Guide*.

3. Plan periodic batch loading of business and historical databases. Plan business and historical databases, including the data feeds needed from the external systems for nightly, weekly, and periodic batch updates and recycling.

Planning for Optimal Merchant Desktop Performance

The RDM database abstracts forecasting and historic data from Plan for use with either the Merchant Desktop or the MicroStrategy user interface. This can involve quite a bit of data. For optimum performance, keep the RDM schema separate from the Plan schema. For more information, see "[Improving the Performance of Report Generation](#)" on page 3-6.

Supported Configurations

This section describes the Plan network architecture and outlines the supported options.

Choose from the following:

- [Linux-Based Environment](#)
- Next, if you are using Merchant Desktop with MicroStrategy, see "[Merchant Desktop Environment](#)," on page 2-3.
- Then, choose any number of the client machine solutions as described in "[Client System Environment](#)," on page 2-3.

Network Requirements

This section describes basic requirements for your network infrastructure:

- For connections between servers use the following:
 - Minimum: 100 MBps switched ethernet
 - Recommended: 1000 MBps
- For connections to the desktop, 100 MB is sufficient.

Clusters and Multi-Server Requirements

Plan supports the following cluster configuration:

- Application Cluster - two or more server nodes enable instances of Plan and its related applications to remain highly available
- Calculation Engine Cluster - two server nodes that enable instance of the Calculation Engine to remain highly available

You can implement both an Application and a Calculation cluster in your environment, or implement whichever type of cluster, or both, as needed.

Mixed cluster are not supported.

For clustered and multi-server implementations, a hardware load balancer may be required. Cisco CSS series is supported.

Linux-Based Environment

The supported Linux configuration is shown in [Table 2–1, "Linux-Based Environment."](#)

Table 2–1 Linux-Based Environment

Software	Requirement
<i>Database Tier Requirements</i>	
Operating System	Solaris 8
Database	Oracle 10g 10.2.0.1
<i>Application Server Tier Requirements</i>	
Operating System	Red Hat Enterprise Linux 2.1 Kernel 2.4.9 with glibc-2.2.4-31.7 Red Hat Enterprise Linux 3.0 with patch p3006854_9204_LINUX.zip from Oracle (must be installed before Oracle client)
Application Server	WebLogic 8.1 SP 5
JVM	Jrockit 8.1 1.4.2_08

Merchant Desktop Environment

Merchant Desktop is optional. If you are using Merchant Desktop, see the configuration requirements shown in [Table 2–2, "Merchant Desktop Environment."](#)

Optionally, if you are using Merchant Desktop with MicroStrategy, Merchant Desktop requires MicroStrategy to be installed on your application server node.

Table 2–2 Merchant Desktop Server Requirements

Software	Requirements
Operating System	Windows Server 2003
Business Intelligence Tool	MicroStrategy 7.5.3
Java	Sun JDK 1.4.2_05 (32 bit)

Client System Environment

The required client options are shown in [Table 2–3, "Client System Environment."](#)

Table 2–3 Client System Environment

Software	Requirements
Windows XP Pro SP2 (with Office 2002)	<ul style="list-style-type: none"> ■ MS Office XP (Office 2002) ■ Internet Explorer 6.0 ■ Sun JRE 1.4.1_05 (32-bit) for Merchant Desktop
Windows XP Pro SP2 (with Office 2000)	<ul style="list-style-type: none"> ■ MS Office 2000 ■ Internet Explorer 6.0 ■ Sun JRE 1.4.1_05 (32-bit) for Merchant Desktop

What's Next?

Now you can install your database software as described in [Chapter 3, "Installing Your Database."](#)

Installing Your Database

This chapter describes how to install and configure your relational database management system for Plan. This chapter contains the following sections:

- [Before You Begin](#)
- [Creating the Business Database](#)
- [Creating the History Data Database](#)

Before You Begin

Read this section before setting up your Plan database.

Overview of the Plan Database Installation

Plan requires the following database instances:

- Business database
- History database
- RDM database
- Optimized data database

Installing Prerequisite Software

Install your database before you install your application server and Plan. For database prerequisites and other requirements, see [Chapter 2, "Planning Your Environment"](#). Then install your database as follows.

Install the following software, using the documentation specific to your database for guidance:

- Oracle application software
- Oracle J Accelerator
- Install the JVM into Oracle

Creating the Business Database

Creating the Business database involves the following steps:

1. [Setting the Business Database Initialization Parameters](#)
2. [Creating the Business Database](#)

3. Creating the Business Data User Account

Setting the Business Database Initialization Parameters

Create an `init.ora` file in the `<ORACLE_HOME>/dbs` directory, specifying the following parameters:

```
db_block_size = 8192
sga_target = 1000m
db_cache_size = 100M
shared_pool_size = 100M
java_pool_size = 50M
open_cursors = 1000
processes = 250
log_buffer = 1048576
log_checkpoint_interval = 1000000
log_checkpoint_timeout = 0
global_names = FALSE
cursor_sharing = SIMILAR
job_queue_processes = 10
compatible = 10.1.0.4.0
pga_aggregate_target = 500M
db_file_multiblock_read_count = 32
query_rewrite_enabled = TRUE
query_rewrite_integrity = TRUSTED
recyclebin = OFF
_trace_files_public = TRUE
log_checkpoints_to_alert = TRUE
undo_management = AUTO
```

Creating the Business Database

Note: Sizes of tablespaces depends on the amount of data being stored. For any sizing recommendations, see [Table 3–1, Business Database Tablespaces](#).

The Business database requires the following tablespaces:

Table 3–1 Business Database Tablespaces

Tablespace	Description
DATA_01	Required. Application tablespace for Plan. Recommended size: 5 GB.
INDEX_01	Required. Application tablespace for indexes of Plan, STG, and ASH. Recommended size: 5 GB.
SYSTEM	System tablespace used for metadata.
SUSAUX	System tablespace used for system monitoring.
TEMP	System tablespace used for temporary system swap space.
RBS	System tablespace for automatically resolving data write clashes.

To create the Business database and tablespaces:

1. Create the Business database.
2. Log in as the sys user and run the following scripts:

```
<ORACLE_HOME>/rdbms/admin/catalog.sql
<ORACLE_HOME>/rdbms/admin/catproc.sql
```

3. Log in as the system user and run the following scripts:

```
<ORACLE_HOME>/sqlplus/admin/pupbld.sql
<ORACLE_HOME>/rdbms/admin/initjvm.sql
<ORACLE_HOME>/rdbms/admin/catjava.sql
```

4. Create the tablespaces as specified in [Table 3–1, Business Database Tablespaces](#).

Creating the Business Data User Account

The Business data requires an AE_USER user account with the following permissions:

```
CREATE USER AE_USER IDENTIFIED BY passwd
  DEFAULT TABLESPACE DATA_01
  TEMPORARY TABLESPACE TEMP
  PROFILE DEFAULT
  ACCOUNT UNLOCK
GRANT "CONNECT" TO AE_USER
GRANT SELECT_CATALOG_ROLE TO AE_USER
GRANT "RESOURCE" TO AE_USER
ALTER USER AE_USER DEFAULT ROLE "CONNECT",
                                SELECT_CATALOG_ROLE,
                                "RESOURCE"

GRANT ANALYZE ANY TO AE_USER
GRANT CREATE DATABASE LINK TO AE_USER
GRANT CREATE MATERIALIZED VIEW TO AE_USER
GRANT CREATE PUBLIC SYNONYM TO AE_USER
GRANT CREATE SYNONYM TO AE_USER
GRANT CREATE TABLE TO AE_USER
GRANT CREATE VIEW TO AE_USER
GRANT DROP PUBLIC SYNONYM TO AE_USER
GRANT QUERY REWRITE TO AE_USER
GRANT SELECT ANY TABLE TO AE_USER
GRANT UNLIMITED TABLESPACE TO AE_USER
Exec dbms_java.grant_permission('AE_
USER','SYS:java.lang.RuntimePermission','getClassLoader', ' ');
call dbms_java.grant_permission('AE_USER',
'oracle.aurora.security.JServerPermission','Verifier','');
```

Creating the History Data Database

Creating the History database involves the following steps:

1. [Setting the History Database Initialization Parameters](#)
2. [Creating the History Data Database](#)
3. [Creating the Business Data User Account](#)
4. [Creating the OPT_USER Account](#)
5. [Creating the RDM_USER Account](#)

Setting the History Database Initialization Parameters

Create an init.ora file in the <ORACLE_HOME>/dbs directory, specifying the following parameters:

```
db_block_size = 8192
```

```

sga_target = 2000m
db_cache_size = 500M
shared_pool_size = 300M
java_pool_size = 50M
open_cursors = 1000
processes = 300
log_buffer = 1048576
log_checkpoint_interval = 1000000
log_checkpoint_timeout = 0
global_names = FALSE
cursor_sharing = SIMILAR
job_queue_processes = 10
compatible = 10.1.0.4.0
pga_aggregate_target = 500M
db_file_multiblock_read_count = 32
query_rewrite_enabled = TRUE
query_rewrite_integrity = TRUSTED
recyclebin = OFF
_trace_files_public = TRUE
log_checkpoints_to_alert = TRUE
undo_management = AUTO
_kgl_large_heap_warning_threshold = 8388608

```

Creating the History Data Database

Note: Sizes of tablespaces depends on the amount of data being stored. For any size recommendations, see [Table 3–2, History Database Tablespaces](#).

The History database requires the following tablespaces:

Table 3–2 History Database Tablespaces

Tablespace	Description
DATA_01	Required. Application tablespace for historical data.
INDEX_01	Required. Application tablespace for indexes of historical data.
OPT_DATA_01	Required. Application tablespace for optimized historical data.
OPT_INDEX_01	Required. Application tablespace for indexes of optimized historical data.
SYSTEM	System tablespace for metadata.
SUS_AUX	System tablespace for system monitoring.
TEMP	System tablespace for temporary system swap space.
RBS	System tablespace for resolving data write clashes.

To create the History database and tablespaces:

1. Create the History database.
2. Log in as the sys user and run the following scripts:

```

<ORACLE_HOME>/rdbms/admin/catalog.sql
<ORACLE_HOME>/rdbms/admin/catproc.sql

```

3. Log in as the system user and run the following scripts:

```
<ORACLE_HOME>/sqlplus/admin/pupbld.sql
<ORACLE_HOME>/rdbms/admin/initjvm.sql
<ORACLE_HOME>/rdbms/admin/catjava.sql
```

4. Create the tablespaces as specified in [Table 3-2, History Database Tablespaces](#).

Now you can create user accounts.

The History database requires creating user accounts as follows:

- [Creating the HIST_USER Account](#)
- [Creating the OPT_USER Account](#)
- [Creating the RDM_USER Account](#)

Creating the HIST_USER Account

The History database requires an HIST_USER user account with the following permissions:

```
CREATE USER HIST_USER IDENTIFIED BY passwd
  DEFAULT TABLESPACE DATA_01
  TEMPORARY TABLESPACE TEMP
  PROFILE DEFAULT
  ACCOUNT UNLOCK

GRANT SELECT_CATALOG_ROLE TO HIST_USER
GRANT "CONNECT" TO HIST_USER
GRANT "RESOURCE" TO HIST_USER
ALTER USER HIST_USER DEFAULT ROLE SELECT_CATALOG_ROLE,
  "CONNECT",
  "RESOURCE"

GRANT ALTER SESSION TO HIST_USER
GRANT ANALYZE ANY TO HIST_USER
GRANT CREATE DATABASE LINK TO HIST_USER
GRANT CREATE MATERIALIZED VIEW TO HIST_USER
GRANT CREATE PUBLIC SYNONYM TO HIST_USER
GRANT CREATE SYNONYM TO HIST_USER
GRANT CREATE TABLE TO HIST_USER
GRANT CREATE VIEW TO HIST_USER
GRANT DROP PUBLIC SYNONYM TO HIST_USER
GRANT QUERY REWRITE TO HIST_USER
GRANT SELECT ANY TABLE TO HIST_USER
GRANT UNLIMITED TABLESPACE TO HIST_USER
Exec dbms_java.grant_permission('HIST_
USER','SYS:java.lang.RuntimePermission','getClassLoader',' ');
call dbms_java.grant_permission('HIST_USER',
'oracle.aurora.security.JServerPermission','Verifier','');
```

Creating the OPT_USER Account

The History database requires an OPT_USER user account with the following permissions:

```
CREATE USER OPT_USER IDENTIFIED BY passwd
  DEFAULT TABLESPACE OPT_DATA_01
  TEMPORARY TABLESPACE TEMP
  PROFILE DEFAULT
  ACCOUNT UNLOCK
GRANT "CONNECT" TO OPT_USER
```

```
GRANT SELECT_CATALOG_ROLE TO OPT_USER
GRANT "RESOURCE" TO OPT_USER
ALTER USER OPT_USER DEFAULT ROLE "CONNECT",
                                SELECT_CATALOG_ROLE,
                                "RESOURCE"

GRANT ANALYZE ANY TO OPT_USER
GRANT CREATE DATABASE LINK TO OPT_USER
GRANT CREATE MATERIALIZED VIEW TO OPT_USER
GRANT CREATE PUBLIC SYNONYM TO OPT_USER
GRANT CREATE SYNONYM TO OPT_USER
GRANT CREATE TABLE TO OPT_USER
GRANT CREATE VIEW TO OPT_USER
GRANT DROP PUBLIC SYNONYM TO OPT_USER
GRANT QUERY REWRITE TO OPT_USER
GRANT SELECT ANY TABLE TO OPT_USER
GRANT UNLIMITED TABLESPACE TO OPT_USER
Exec dbms_java.grant_permission('OPT_
USER','SYS:java.lang.RuntimePermission','getClassLoader', '' );
call dbms_java.grant_permission('OPT_USER',
'oracle.aurora.security.JServerPermission', 'Verifier', '');
```

Creating the RDM_USER Account

The History database requires an RDM_USER user account with the following permissions:

```
CREATE USER RDM_USER IDENTIFIED BY password
    DEFAULT TABLESPACE OPT_DATA_01
    TEMPORARY TABLESPACE TEMP
    PROFILE DEFAULT
    ACCOUNT UNLOCK
GRANT "CONNECT" TO RDM_USER
GRANT SELECT_CATALOG_ROLE TO RDM_USER
GRANT "RESOURCE" TO RDM_USER
ALTER USER RDM_USER DEFAULT ROLE "CONNECT",
                                SELECT_CATALOG_ROLE,
                                "RESOURCE"

GRANT ANALYZE ANY TO RDM_USER
GRANT CREATE DATABASE LINK TO RDM_USER
GRANT CREATE MATERIALIZED VIEW TO RDM_USER
GRANT CREATE PUBLIC SYNONYM TO RDM_USER
GRANT CREATE SYNONYM TO RDM_USER
GRANT CREATE TABLE TO RDM_USER
GRANT CREATE VIEW TO RDM_USER
GRANT DROP PUBLIC SYNONYM TO RDM_USER
GRANT QUERY REWRITE TO RDM_USER
GRANT SELECT ANY TABLE TO RDM_USER
GRANT UNLIMITED TABLESPACE TO RDM_USER
call dbms_java.grant_permission('RDM_USER',
'oracle.aurora.security.JServerPermission', 'Verifier', '');
```

Improving the Performance of Report Generation

To improve the performance of the report generation process you can add indexes relevant to the user interface you are using as follows.

Merchant Desktop Reports

The speed of data drilling during report generation depends on the number of product hierarchies used by your implementation.

To speed up data drilling performance, you can index specific hierarchy columns within the MERCHANDISE_TBL and RDM_MV_ACT_BASE2_1 tables as required by your implementation. For example, if the maximum optimization level is 8, you can improve performance by creating an index on the HIERARCHY8_PID column in the MERCHANDISE_TBL and RDM_MV_ACT_BASE2_1 tables.

MicroStrategy Reports

If you are using MicroStrategy, you can improve performance when you drill through reports by adding indexes to the RDM tables for the summary levels that are described in [Chapter 6, "Integrating with MicroStrategy."](#)

What's Next?

Install your application server as described in [Chapter 4, "Installing Your Application Server."](#)

Installing Your Application Server

This chapter contains the following sections:

- [Before You Begin](#)
- [Installing and Configuring WebLogic](#)
- [What's Next?](#)

Before You Begin

This chapter describes how to install your application server.

For information about the support version and other requirements, see [Chapter 2, "Planning Your Environment."](#)

If you are using clusters, they need to be created before the installation otherwise the managed servers must be added manually. For information about managing clusters, see the documentation for your application server.

Installing and Configuring WebLogic

To install and configure WebLogic, use these sections in the following sequence:

1. [Installing WebLogic](#)
2. [Creating a WebLogic Domain](#)
3. [Editing the WebLogic Startup Script](#)

Installing WebLogic

Install WebLogic referring the WebLogic documentation for guidance. In this guide, the WebLogic installation directory is referred to as the <WL_HOME> directory.

Next, you can create and configure a domain, using the WebLogic Configuration Wizard.

Creating a WebLogic Domain

Plan uses a WebLogic domain consisting of one administration server, a cluster of one or more managed servers, and other logically related resources and services. The WebLogic Configuration Wizard prompts you to specify all of the settings required by the application domain.

To create a WebLogic domain:

From <WL_HOME>/common/bin/config.sh, start the WebLogic Configuration Wizard create a new domain and server, using the values specified in [Table 4-1, Settings for the WebLogic Configuration Wizard](#).

Table 4-1 Settings for the WebLogic Configuration Wizard

Setting	Description
<i>Define Logical Grouping</i>	
Domain Type	Select WLS Domain .
Server Type	Select Admin Server with Clustered Managed Server(s) .
Domain Name	Enter the domain name to use for Plan. Recommended value: Prepend the domain name with a three-character acronym that represents your company name. For example, ABC Company would enter abcProdPlan.
<i>Define the Administration Server</i>	
Administration Server Name	Name of the server that controls the cluster. Recommended value: admin0
Administration Server Listener Port	Important: Select a unique port number that is not in use by other applications. Recommended value: 8000 Tip: You can ensure that 8000 is an unused port number by entering the following UNIX command: netstat -ae grep 8000
Administration Server SSL Listener Port	Number of the server listener port, incremented by 1. Recommended value: 8001
<i>Configure Managed Servers</i>	
First Server Name	Recommended value: plan0
First Server Listen Address	Recommended value: 0.0
First Server Listen Port	Recommended value: 8040
First Server SSL Port	Number of the managed server port, incremented by 1. Recommended value: 8041
Second Server Name	Name of the first managed server, incremented by 1. Recommended value: plan1
Second Server Listen Address	Recommended value: 0.0
Second Server Port	Recommended value: 8044
Second SSL Port	Port number of the first managed server, incremented by 1. Recommended value: 8046
<i>Join the Nodes in the Cluster Together</i>	
Cluster Name	Recommended value: plan-cluster
Cluster Multicast Port	Recommended value: 7777
Cluster Port	
Cluster Listen Address	Same as host number.

Editing the WebLogic Startup Script

Edit the startWebLogic.sh script, and add the following:

```
CONFIG_ROOT="<INSTALL_BASE>/plan/config"
JAVA_OPTION="-Dcom.profitlogic.configroot=${CONFIG_ROOT}"
JAVA_OPTION="-Dweblogic.management.username=${WLS_USER}"
JAVA_OPTION="-Dweblogic.management.password=${WLS_PW}"
MEM_ARGS="-Xmx256m -Xms256m"
WLS_USER= Set so the script can run in the background without prompting the user.
WLS_PW= Set so the script can run in the background without prompting the user.
```

What's Next?

Now you are ready to install Plan as described in [Chapter 5, "Installing Plan."](#)

Installing Plan

After you have set up your database management system and application server, you can install Plan as described in this chapter. This chapter contains the following sections:

- [Overview of the Plan Installation Process](#)
- [Installing Plan](#)
- [Troubleshooting Plan Installation Issues](#)
- [Registering Merchant Desktop Alerts](#)
- [What's Next?](#)

Overview of the Plan Installation Process

Note: The IBM AIX, DB2, and WebSphere options are not supported in this release. In addition, Oracle Application Server is not supported in this release.

When you install Plan, your first task is to obtain the installation media.

Then you should choose which installation mode you prefer. Whichever mode you use, you first need to set up the Plan properties file. The two modes are as follows:

- Graphical mode - During a graphical mode, the Oracle Installer displays a graphical user interface and prompts you to enter or modify the value of properties specified in the properties file.
- Silent mode - During a silent mode, the installer processes the properties file with no manual intervention required.

To begin the installation process, see [Installing Plan](#).

Installing Plan

Installing Plan consists of the following tasks:

- [Accessing the Installation Software](#)
- [Setting Up Your Plan Properties File](#)
- [Installing Plan in Silent Mode](#)
- [Installing Plan Using the Graphical Oracle Installer](#)

Accessing the Installation Software

In order to install Plan, you first need to obtain the software media, which is available on DVD or from a ZIP file. This section explains how to download the Plan software ZIP file from the Oracle E-Delivery site.

To download the Plan software:

1. From the application server where you will be installing Plan, open a browser and navigate to the following URL:

<http://edelivery.oracle.com/>

The **Oracle E-Delivery** download page displays.

2. Select a language and click **Continue**.

The **Export Validation** screen displays.

3. Respond to the following and click **Continue**.

- **Full Name** - Enter your full name.
- **Company Name** - Enter your company name.
- **E-mail Address** - Enter your e-mail address.
- **Country** - Select your country.
- **License Agreement** - Click the checkbox.
- **Export Restrictions** - Click the checkbox.

The **Media Pack Search** screen displays.

4. Respond to the following and click **Go**.

- **License List** - Review the list to determine which Product Packs you need to download.
- **Product Pack** - Select **Oracle Retail Applications**.
- **Platform** - Select the desired operating system. Optional.

The **Oracle Retail Plan Media Pack** screen displays.

5. In the **Select** column, click **Download**.

Oracle E-Delivery writes a ZIP file to the default location you have selected for downloads.

6. Unpack the ZIP file to a temporary directory. In this guide, the directory that contains the installation media is referred to as the <PLAN_CD_IMAGE> directory.

Now you can set up your Plan properties file.

Setting Up Your Plan Properties File

In order to install Plan, you first need to specify the properties to use during the installation process. These properties are specified in the install.properties file.

To set up your install.properties file:

1. Ensure that your <PLAN_CD_IMAGE> directory exists and is populated as described in [Accessing the Installation Software](#), on page 5-2.

2. Navigate to the <PLAN_CD_IMAGE> directory and copy the reference.plan.install.properties file to the same directory, naming it plan.install.properties.
3. Edit the plan.install.properties file, specifying values as described within the file, and save it.

Now you can install Plan, using either of the following modes:

- [Installing Plan in Silent Mode](#)
- [Installing Plan Using the Graphical Oracle Installer](#)

Installing Plan in Silent Mode

This section describes how to install Plan in silent mode. Silent mode is non-interactive.

To install Plan in silent mode:

1. Ensure that you have completed ["Setting Up Your Plan Properties File"](#) on page 5-2.
2. Make sure that your application server is running.
3. From your application server machine, enter the following command. **Note:** For more information about this command, see the [install.sh](#) command on page 5-3.

```
bash install.sh
```

install.sh

The install.sh command enables you to install Plan.

Syntax

```
install.sh [-s] [-p <path-to-install.properties>]
```

Arguments

Use any arguments listed below as needed.

Argument	Description
-s	Optional. Silent mode. If you omit this option, the Oracle Installer user interface displays.
-p <path-to- install.properties>	Optional. Specifies an alternate path to the install.properties file. Defaults to ./install.properties.
-l, --log-config	Optional. Specifies an alternate log4j configuration file (to change the verbosity level or the log file output location). Defaults to ./Install/conf/log4j.properties. The log4j log file is used for troubleshooting.
-y -n	Optional. Specifies whether or not to overwrite existing files. Defaults to -y (overwrite).
-d <XML path>	Optional. Specifies an alternate path to the XML install scripts. Defaults to ./InstallScripts.
-x <filename.xml>	Optional. Specifies an alternate XML install script file within the ./InstallScripts directory.
-i, --websphere -b, --weblogic	Optional. For specifying your application server.
-h	Optional. Prints a help message.

Return Value

When run in silent mode (`install.sh -s`), the script displays a trace message to stdout (the console). When run in Oracle Installer mode (the default), the script displays a graphical user interface.

Output

The Plan installation creates the Plan directory structure, populates it with appropriate files, and when the installation finishes, it generates a log file and two properties files.

When the installation successfully completes, see [What's Next?](#) on page 5-18.

If the installation resulted in issues, see [Troubleshooting Plan Installation Issues](#).

Installing Plan Using the Graphical Oracle Installer

If you prefer to use a guided user interface, you can use the graphical Oracle Installer.

To install Plan using the Oracle Installer:

1. Ensure that you have completed ["Setting Up Your Plan Properties File"](#) on page 5-2.
2. Make sure that your application server software is running.
3. If you are viewing the installer from a Windows client:
 - On the Windows client, start an Xserver program that enables you to emulate the X terminal.
 - On the application server, set the display for the Windows client where you want the Oracle Installer to display as follows:
4. From your application server machine, enter the following command. Note: for more information about this command, see [Installing Plan in Silent Mode](#).

```
export DISPLAY=<IP address>:0.0
```

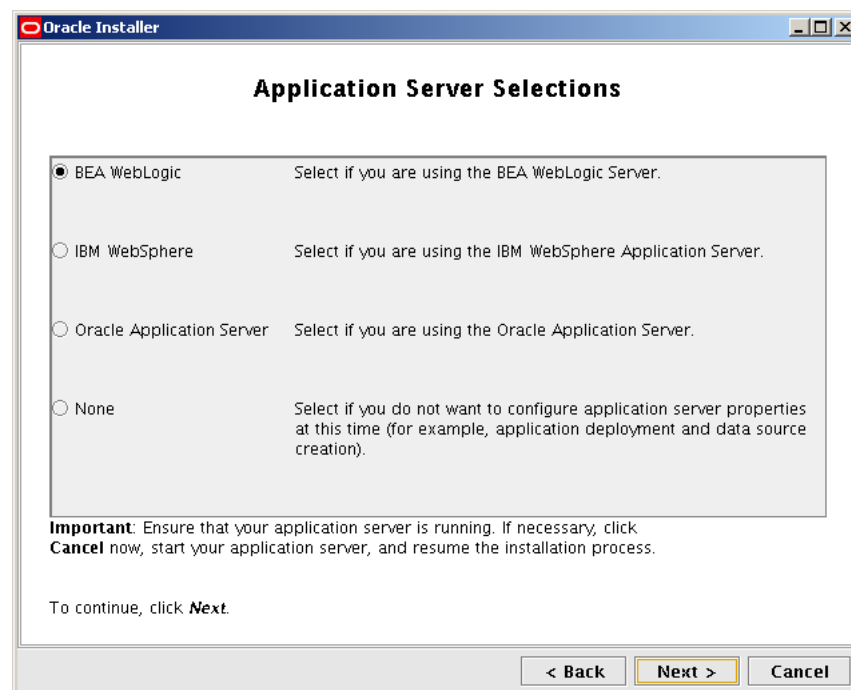
```
bash install.sh
```

The **Welcome** screen displays.

Figure 5–1 Welcome Screen

5. Click Next.

The **Application Server Selections** screen displays.

Figure 5–2 Application Server Selections Screen

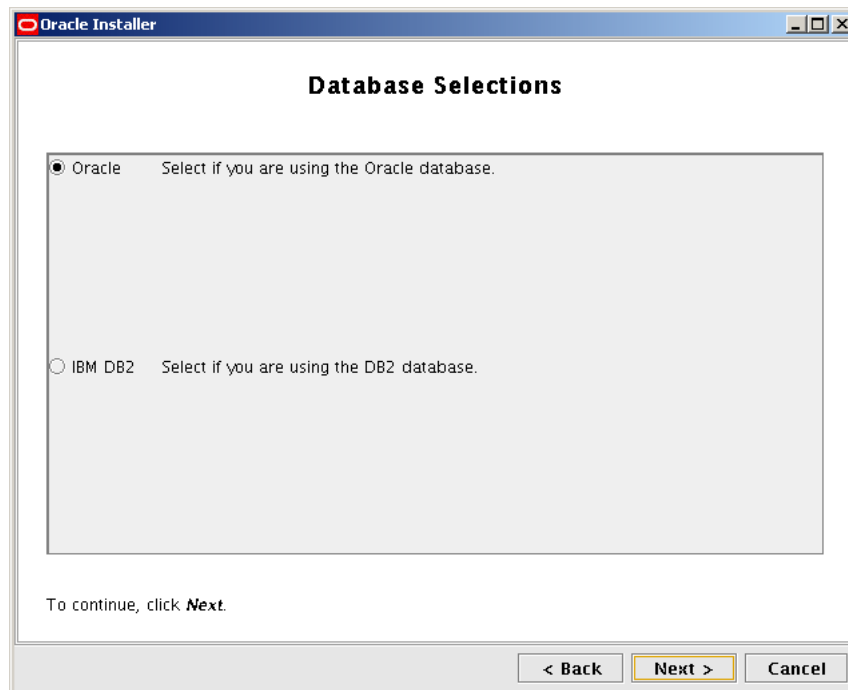
6. Specify application server options as follows:

- **BEA WebLogic** - Select this to configure WebLogic properties.

- **IBM WebSphere** - Select this to configure WebSphere properties.
- **Oracle Application Server** - Select this to configure Oracle Application Server properties.
- **None** - Select this if you are not configuring an application server (for example, if you are only configuring your database).

Click **Next** and the **Database Selections** screen displays.

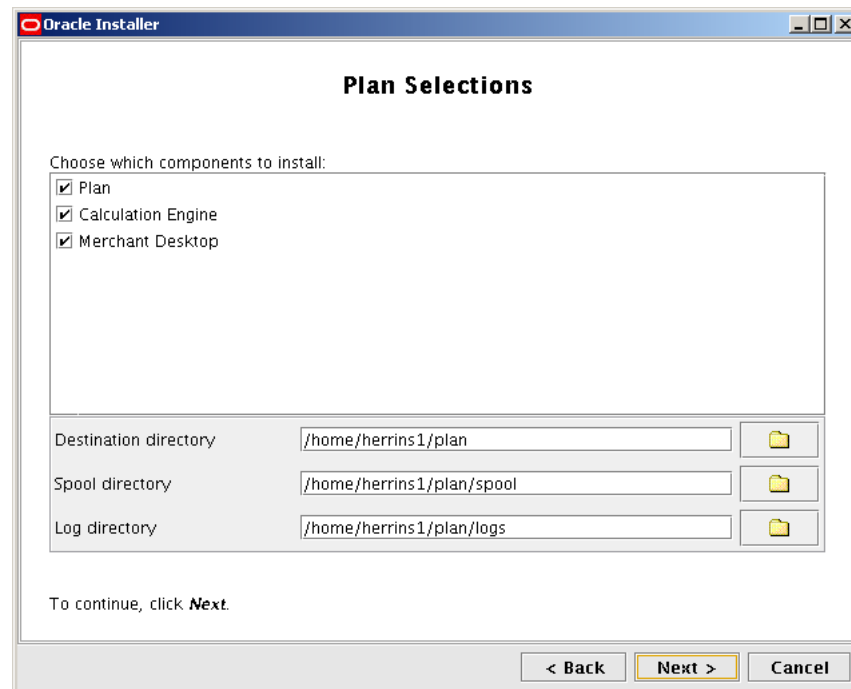
Figure 5–3 Database Selections Screen



7. Specify database options as follows:

- **Oracle** - Select this to configure Oracle.
- **IBM DB2** - Select this to configure DB2.

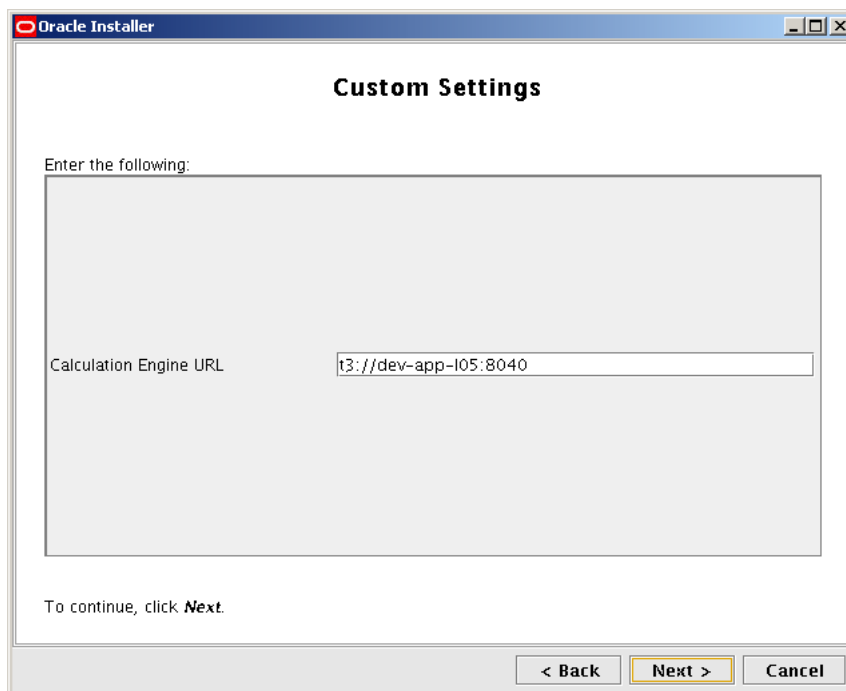
Click **Next** and the **Plan Selections** screen displays.

Figure 5–4 Plan Selections Screen

8. Specify options as follows:

- **Plan** - Select this to install the Plan business application.
- **Calculation Engine** - Select this to install the Plan calculation engine.
- **Merchant Desktop** - Select this to install the Merchant Desktop. *Optional.*
- **Destination Directory** - Specify the location the Plan target directory.
- **Spool Directory** - Specify the path to the Plan spool.
- **Log Directory** - Specify the path to the Plan installation log files.

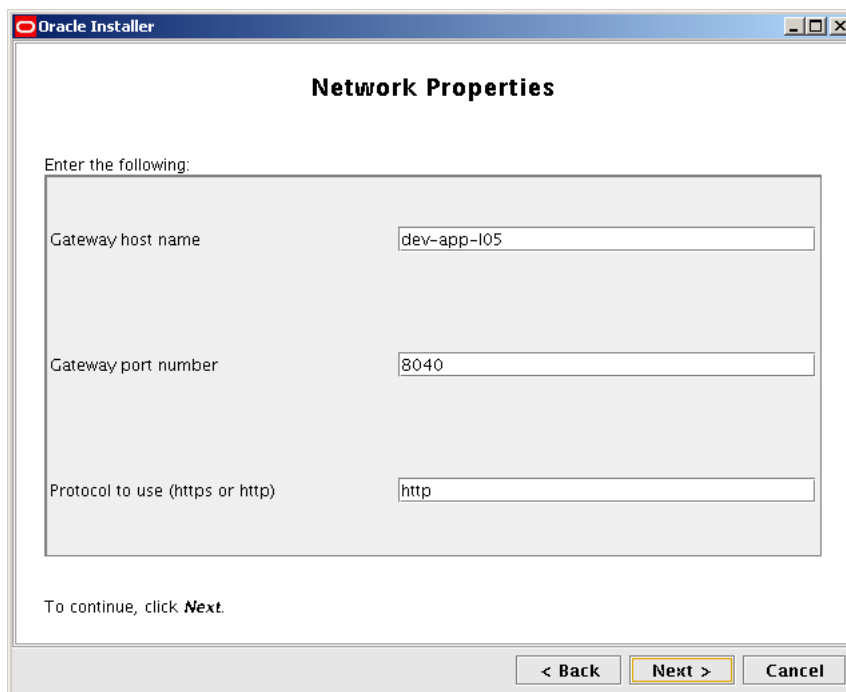
Click **Next** and the **Custom Settings** screen displays.

Figure 5–5 Custom Settings Screen

The screenshot shows the 'Custom Settings' window of the Oracle Installer. The window has a title bar with the Oracle logo and the text 'Oracle Installer'. The main title is 'Custom Settings'. Below the title, it says 'Enter the following:'. There is a large text input field with the label 'Calculation Engine URL' and the value 't3://dev-app-l05:8040'. At the bottom, it says 'To continue, click **Next**.' and there are three buttons: '< Back', 'Next >' (highlighted), and 'Cancel'.

9. Specify options as follows:

- **Calculation Engine URL** - Enter the name or IP address, including port number, of the server where you want to install the Calculation Engine.
- Click **Next** and the **Network Properties** screen displays.

Figure 5–6 Network Properties Screen

The screenshot shows the 'Network Properties' window of the Oracle Installer. The window has a title bar with the Oracle logo and the text 'Oracle Installer'. The main title is 'Network Properties'. Below the title, it says 'Enter the following:'. There are three text input fields: 'Gateway host name' with the value 'dev-app-l05', 'Gateway port number' with the value '8040', and 'Protocol to use (https or http)' with the value 'http'. At the bottom, it says 'To continue, click **Next**.' and there are three buttons: '< Back', 'Next >' (highlighted), and 'Cancel'.

10. Specify network options as follows:

- **Gateway host name** - Enter the hostname or IP address of the server or load balancer hosting the user management, business rules, and Plan components.
- **Gateway port number** - Enter the port number of the gateway host.
- **Protocol to use (https or http)** - Specify using lower-case characters.

Click **Next** and the **Retail Data Mart** screen displays.

Figure 5–7 Retail Data Mart Screen

Oracle Installer

Retail Data Mart

Enter the following:

Username associated with the Application schema

Name of the database link to the Application instance

To continue, click **Next**.

< Back **Next >** Cancel

11. Specify Retail Data Mart options as follows:

- **Username associated with the Application schema** - Enter the username associated with the Application database schema.
- **Name of the database link to the Application instance** - Enter the name of the database link.

Click **Next** and the **Retail Data Mart - Actual and Optimized History** screen displays.

Figure 5–8 Retail Data Mart - Actual and Optimized History Screen

Oracle Installer

Retail Data Mart – Actual and Optimized History

Enter the following:

Username associated with the Actual History schema

Username associated with the Optimized History schema

To continue, click **Next**.

< Back **Next >** Cancel

Specify additional Retail Data Mart options as follows:

- **Username associated with the Actual History schema** - Enter the username associated with the actual history schema.
- **Name of the database link to the Optimized History schema** - Enter the username associated with the actual history schema.

Click **Next** and the **Database Properties Optimized History Database** screen displays.

Figure 5–9 Database Properties Optimized History Database Screen
12. Specify options as follows:

- **Database driver** - Select the appropriate driver from the drop-down list.
- **Database server address** - Enter the name or IP address of the destination server for the database.
- **Database server port** - Enter the server port number associated with your database.
- **Database name** - Enter the name used to identify your database.
- **Database alias** - Enter the database alias, which is typically the same name as the database.
- **User ID** - Enter the user name associated with the database.
- **Password** - Enter the password associated with the database.
- **Leave database "as is"** - Select this if you have an existing database schema that you do not want to modify. This enables you to configure datasources, EAR files, and so forth, without affecting the database.
- **Create tables** - Select this if you are installing a new database schema for Plan. The Oracle Installer drops all schemas and creates new ones.
- **Upgrade tables** - Select this if you have an existing database schema that you want to update. Any existing data remains intact and modified on a row-by-row, column-by-column basis, depending on the actions specified in the database patches.

Click **Next** and the **Database Properties Application Database** screen displays.

Figure 5–10 Database Properties Application Database Screen
13. Specify options as follows:

- **Database driver** - Select the appropriate driver from the drop-down list.
- **Database server address** - Enter the name or IP address of the destination server for the database.
- **Database server port** - Enter the server port number associated with your database.
- **Database name** - Enter the name used to identify your database.
- **Database alias** - Enter the database alias, which is typically the same name as the database.
- **User ID** - Enter the user name associated with the database.
- **Password** - Enter the password associated with the database.
- **Leave database "as is"** - Select this if you have an existing database schema that you do not want to modify. This enables you to configure datasources, EAR files, and so forth, without affecting the database.
- **Create tables** - Select this if you are installing a new database schema for Plan. The Oracle Installer drops all schemas and creates new ones.
- **Upgrade tables** - Select this if you have an existing database schema that you want to update. Any existing data remains intact and modified on a row-by-row, column-by-column basis, depending on the actions specified in the database patches.

Click **Next** and the **Database Properties Actual History Database** screen displays.

Figure 5–11 Database Properties Actual History Database Screen

14. Specify options as follows:

- **Database driver** - Select the database driver from the drop-down list.
- **Database server address** - Enter the address of the database server.
- **Database server port** - Enter the server port number associated with your database.
- **Database name** - Enter the name used to identify your database.
- **Database alias** - Enter the database alias, which is typically the same name as the database.
- **User ID** - Enter the user name associated with the database.
- **Password** - Enter the password associated with the database.
- **Leave database "as is"** - Select this if you have an existing database schema that you do not want to modify. This enables you to configure datasources, EAR files, and so forth, without affecting the database.
- **Create tables** - Select this if you are installing a new database schema for Plan. The Oracle Installer drops all schemas and creates new ones.
- **Upgrade tables** - Select this if you have an existing database schema that you want to update. Any existing data remains intact and modified on a row-by-row, column-by-column basis, depending on the actions specified in the database patches.

Click **Next** and the **Selection Verification** screen displays.

Figure 5–12 Database Properties Retail Data Mart

Oracle Installer

**Database Properties
Retail Data Mart**

Enter the following:

Database driver	oracle.jdbc.driver.OracleDriver
Database server address	dev-db-s01
Database server port	1521
Database name	ppdev
Database alias	ppdev
User ID	herrins
Password	*****
Leave database "as is"	<input checked="" type="radio"/>
Create tables	<input type="radio"/>
Upgrade tables	<input type="radio"/>

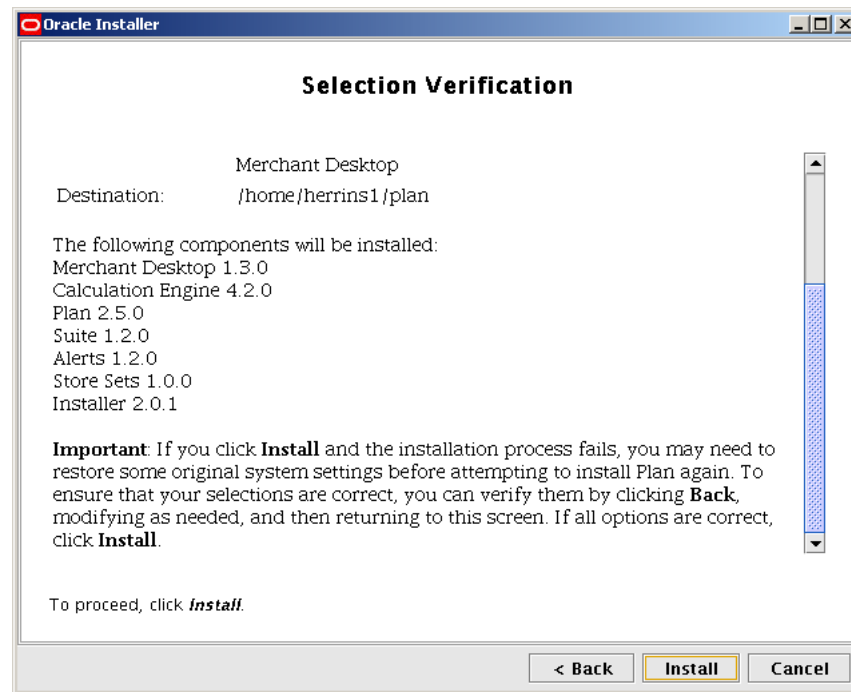
To continue, click **Next**.

< Back **Next >** Cancel

15. Specify options as follows:

- **Database driver** - Select the appropriate driver from the drop-down list.
- **Database server address** - Enter the name or IP address of the destination server for the database.
- **Database server port** - Enter the server port number associated with your database.
- **Database name** - Enter the name used to identify your database.
- **Database alias** - Enter the database alias, which is typically the same name as the database.
- **User ID** - Enter the user name associated with the database.
- **Password** - Enter the password associated with the database.
- **Leave database "as is"** - Select this if you have an existing database schema that you do not want to modify. This enables you to configure datasources, EAR files, and so forth, without affecting the database.
- **Create tables** - Select this if you are installing a new database schema for Plan. The Oracle Installer drops all schemas and creates new ones.
- **Upgrade tables** - Select this if you have an existing database schema that you want to update. Any existing data remains intact and modified on a row-by-row, column-by-column basis, depending on the actions specified in the database patches.

Click **Next** and the **Selection Verification** screen displays.

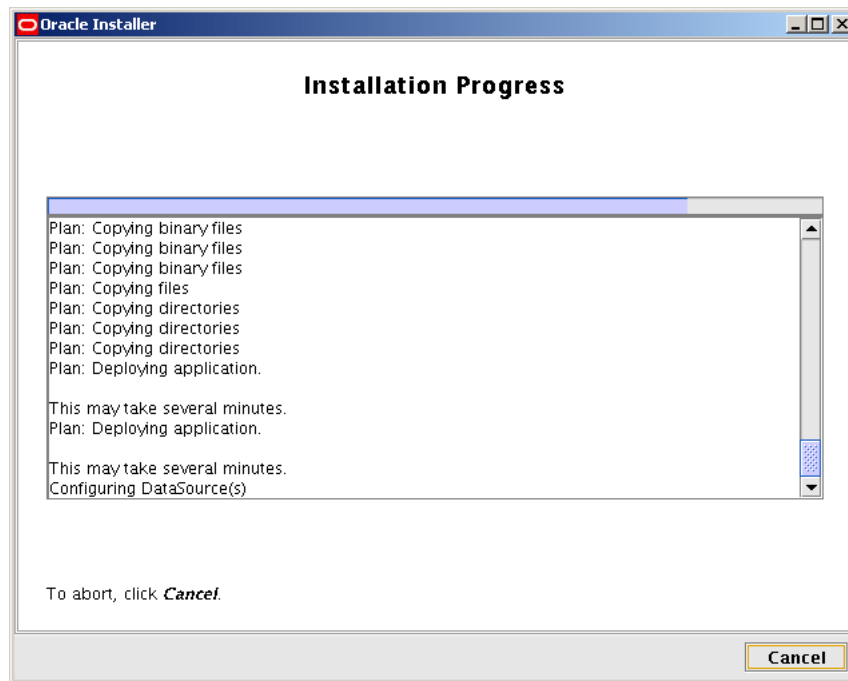
Figure 5–13 Selection Verification Screen

- 16.** The **Selection Verification** screen is the last screen before the Oracle Installer commits these selections to disk.

Verify your selections and click any of the following as needed:

- **Back** - to modify any of the selections you have made.
- **Cancel** - to terminate the installation process. The **Installation Status** screen appears, displaying a message that the installation was cancelled by the user. Choosing **Cancel** stops the installation process before anything has been written to disk.
- **Install** - if all selections are correct and you are ready to start the installation process.

The **Installation Progress** screen displays.

Figure 5–14 Installation Progress Screen

17. The **Installation Progress** screen summarizes the activities while they are being performed. For detailed information about activities being performed, see the trace messages that are output to the application server console window.

If you need to stop the installation process, click **Cancel**. The **Installation Status** screen appears, displaying a message that the installation was cancelled by the user.

Note: Choosing **Cancel** on this screen merely stops the installation process; it does not uninstall the application. Canceling the installation may leave your system in an indeterminate state, which may require you to manually uninstall or reinstall certain components before beginning the installation process again.

The **Plan Installation Status** screen displays.

Figure 5–15 Plan Installation Status Screen

18. Select options as follows:

- **Show Log** - Select this if you want to review the actions taken.
- **Finish** - Select this to exit the Oracle Installer.

When you click **Finish**, the Oracle Installer creates the Plan directory structure and populates it with appropriate files, and generates a log file and two properties files. For more information, see "[install.sh](#)" on page 5-3

If the installation resulted in issues, see [Troubleshooting Plan Installation Issues](#) on page 5-17.

If the installation successfully completes, see the [What's Next?](#) section.

Troubleshooting Plan Installation Issues

The Oracle Installer simplifies the process of integrating and configuring multiple applications (for example, your database software, your application server software, and Plan).

Because of this complexity and the state of your own environment, there may be some situations that you need to troubleshoot and resolve. This section enables you to understand and resolve Plan installation issues.

Ensure that you thoroughly understand the messages being output by the Oracle Installer.

Understanding Trace Output Messages

Note that the Oracle Installer displays messages that originate from multiple sources. Some messages are Plan-specific, such as the directories being created. Other messages are redirected stderr output from third-party applications; as a result, the message content depends on what the software vendor wants to display.

As a result, refer to the documentation associated with the relevant application when troubleshooting, which will help you determine if the error message is even valid and how to correct any existing problems.

For example, during database installation, if a error messages indicate class deployments issues, see the documentation associated with your database management software. The documentation will explain whether the message is spurious (and to be ignored) or valid. If the error is actually valid, the documentation will explain how to correct the problem.

Installation Does Not Complete

If the installation process fails before the application has been completely installed, an onscreen message prompts you to review the log files to determine the cause of the errors. However, since the installation had not completed, no log file was generated.

Instead, review the onscreen trace messages to determine the origin of the error.

install-20050628-154213.log

install-2005 06 28- 15 42 13.log

install-2005 06 28- 1 54 213.log

install-<YYYYMMDD>-154213.log

Installation Completes with Errors

If the installation completes but has errors, an onscreen message prompts you to review the log. Also, you may want to review the generated properties files.

Registering Merchant Desktop Alerts

If you are using Merchant Desktop, you need to register alerts.

Note: If you have previously registered alerts, run the following script using `unregister` instead of `register`.

To register alerts:

Run the following script:

```
cd ../ProfitLogic/modules/tools/admin
bash ./registerAlerts.sh wls <applicationserver>:<7001> register|unregister
```

What's Next?

Now that you have installed the Plan, restart your application server software and proceed with any option as follows:

- If you are using MicroStrategy with Merchant Desktop, configure it as described in [Chapter 6, "Integrating with MicroStrategy."](#)
- If you are ready to start working with your business data, load your data as described in the *Plan Configuration Guide*.
- If you want to maximize system performance, you can tune your Calculation Engine utilization.

Integrating with MicroStrategy

If you are using MicroStrategy, you must configure it to map to the RDM database and the Merchant Desktop user interface. This chapter explains how to configure mapping between the two applications. This chapter contains the following sections:

- [Getting Started](#)
- [Using the MicroStrategy Configuration Wizard](#)
- [Migrating the Metadata](#)
- [Configuring MicroStrategy to Access the RDM Database](#)
- [Mapping RDM and MicroStrategy Summarization Levels](#)
- [Mapping the Display of Hierarchy Levels](#)
- [Configuring the User Link](#)
- [What's Next?](#)

Getting Started

Tip: Before you begin, ensure that users *have not* been added to the RDM user management tables—it will save you time later.

This section explains what you need to install in order to get started integrating Plan with MicroStrategy.

- [Installing Your MicroStrategy Applications](#)
- [Creating Your Merchant Desktop Data Source](#)

Installing Your MicroStrategy Applications

Install the following components, using MicroStrategy documentation for assistance as needed:

- MicroStrategy Intelligence Server
- MicroStrategy OLAP Services
- MicroStrategy Desktop

Next, create the Merchant Desktop Data Source.

Creating Your Merchant Desktop Data Source

Set up the project source for Access Metadata.

To copy the project data source:

1. Copy the MDMetadata.zip file from the Plan CD. Save it to the computer where MicroStrategy Desktop is installed. Unzip the file, naming it **MDMetadata.mdb**.
2. From Microsoft Windows, navigate to **Start > Settings > Control Panel > Administrative Tools > Data Sources (ODBC)**.

Select the **System DSN** tab, and click **Add**.

3. Select **Microsoft Access Driver (*.mdb)** and click **Finish**.
4. In the database section, click **Select** and navigate to your ODBC datasource (for example, C:\temp\MDMetadata.mdb) and click **OK**.

The data source is now available.

5. Exit the ODBC Manager.

Now you can use the MicroStrategy Configuration Wizard to begin setting up MicroStrategy.

Using the MicroStrategy Configuration Wizard

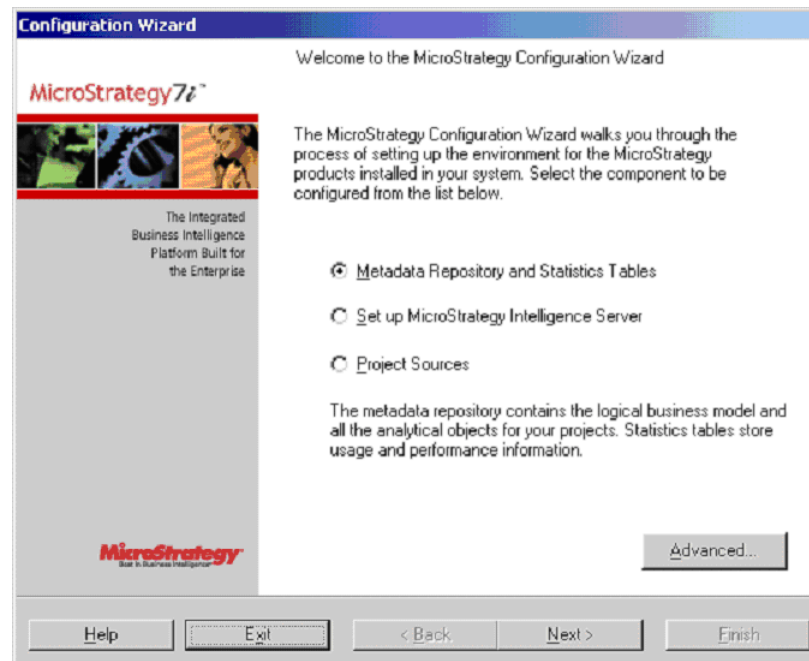
Use the MicroStrategy Configuration Wizard as described in the following sections:

- [Creating the Metadata Repository and Statistics Tables](#)
- [Configuring MicroStrategy Intelligence Server](#)
- [Configuring Project Sources](#)

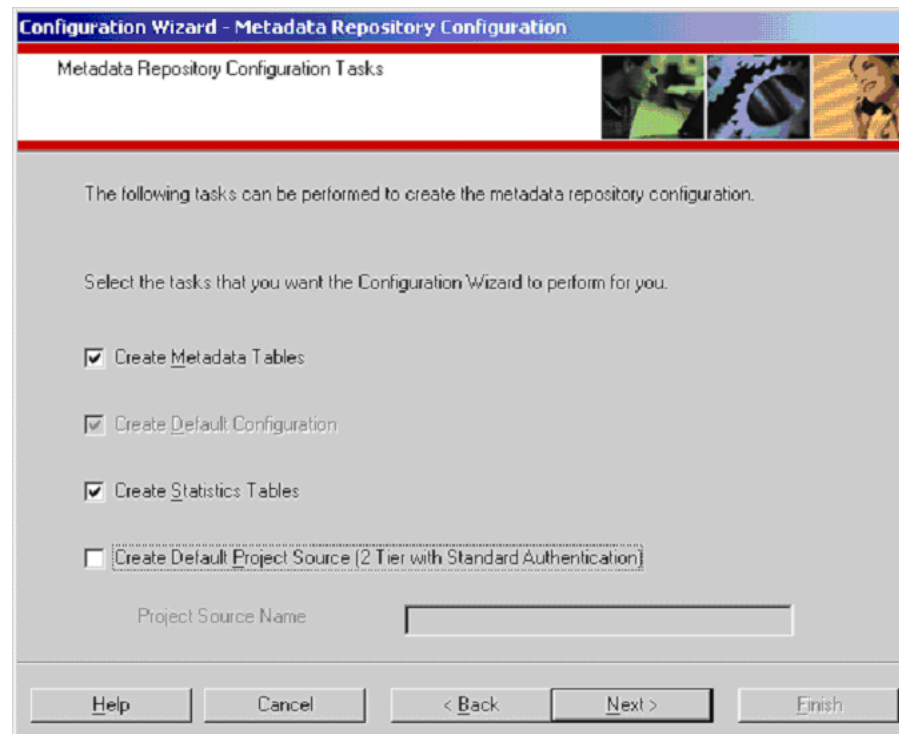
Creating the Metadata Repository and Statistics Tables

To create the metadata repository and statistics tables:

1. Launch the MicroStrategy Configuration Wizard.
The **Welcome** screen displays.

Figure 6–1 Welcome Screen

2. Select **Metadata Repository and Statistics Tables** and click **Next**.
The **Configuration Tasks** screen displays.

Figure 6–2 Configuration Tasks Screen

3. Select **Create Metadata Tables** and **Create Statistics Tables**, and click **Next**.
The **ODBC Data Source Name** screen displays.

Figure 6–3 ODBC Data Source Name Screen

4. Select **Configure repository in an ODBC database**. Enter the **ODBC Data Source Name**, the **User Name** as metadata_user, the **Password**, and click **Next**.
The **Driver Selection** screen displays.

Figure 6–4 Driver Selection Screen

5. Select the **MicroStrategy ODBC Oracle Wire Protocol** driver and click **Next**.
The **Driver Details** screen displays.

Figure 6–5 Oracle Driver Details Screen

MicroStrategy Connectivity Configuration Wizard

Driver Details

Enter the following information to connect to Oracle using the Oracle Wire Protocol Driver.

Data Source Name: OraServer orcl metadata_user

Host Name: OraServer

SID: orcl

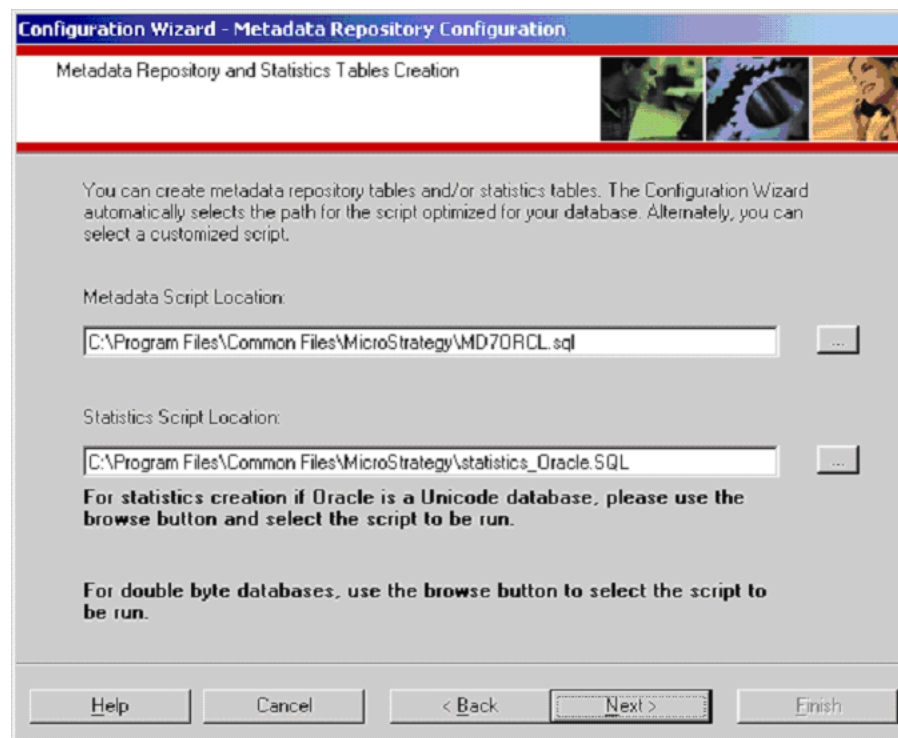
Port Number: 1521

A string that identifies this Oracle data source configuration in the system information. Examples include Accounting Or Oracle-Serv1.

Test...

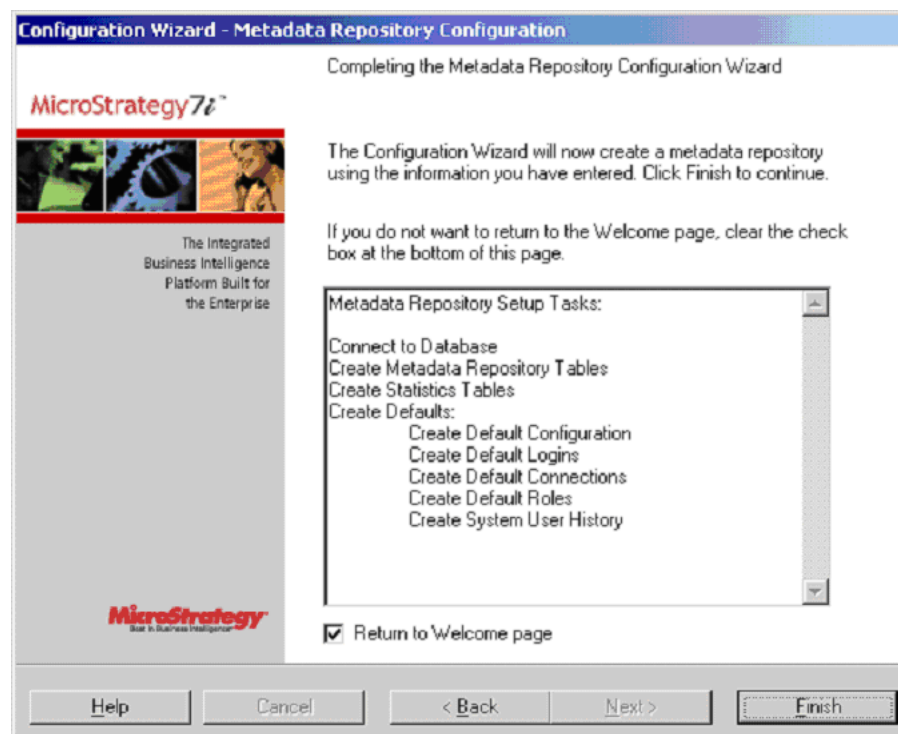
Help Cancel < Back Next > Finish

6. Enter your **Data Source Name** as OraServer orcl metadata_user, **Host Name** as OraServer, **SID** as orcl, **Port Number** as 1521, and click **Next**.
7. The **Metadata Repository and Statistics Tables Creation** screen displays.

Figure 6–6 Metadata Repository and Statistics Tables Creation Screen

8. Browse to your **Metadata Script Location** and select it, browse to your **Statistics Script Location** and select it, and click **Next**.

The **Completing the Metadata Repository Configuration Wizard** screen displays.

Figure 6–7 Completing the Metadata Repository Configuration Wizard Screen

9. Verify that the setup tasks are correct, select **Return to Welcome page**, and click **Finish**.

The **Welcome** screen displays.

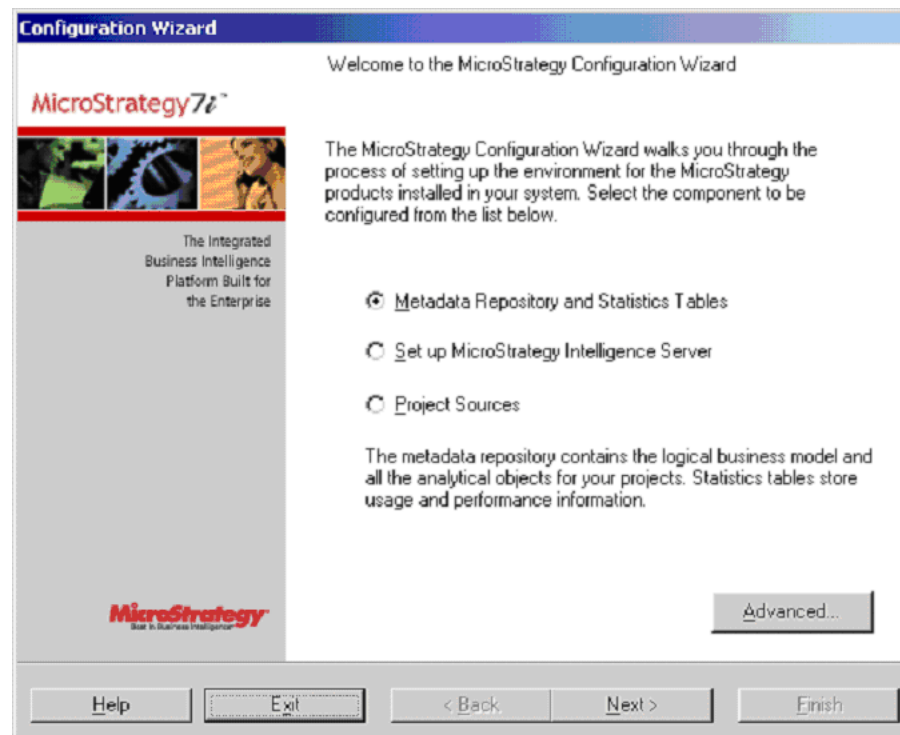
Now you can configure the MicroStrategy Intelligence Server.

Configuring MicroStrategy Intelligence Server

This section describes how to configure your MicroStrategy Intelligence Server.

1. Start from the MicroStrategy Configuration Wizard **Welcome** screen.

Figure 6–8 Welcome Screen



2. Select **Set up MicroStrategy Intelligence Server** and click **Next**.

The **Connect to Metadata Repository** screen displays.

Figure 6–9 Connect to Metadata Repository Screen

3. Enter the **ODBC Data Source Name**, **User Name**, and **Password**; select **Use driver in multiprocess mode**; and click **Next**.

The **User Authentication** screen displays.

Figure 6–10 User Authentication Screen

4. Enter the **MicroStrategy Administrator User Name** and **Password** to use to connect to the metadata repository, and click **Next**.

The **Create, Link, or Delete a Server Definition** screen displays.

Note: The Administrator user name and password combination will also be required later, in the `usermanagement.properties` file, as described in [Configuring the User Link](#).

Figure 6–11 Create, Link, or Delete a Server Definition Screen

Configuration Wizard - MicroStrategy Intelligence Server Configuration

Create, Link, or Delete a Server Definition

Select the operation you would like to perform with the server definitions. You can create a new definition, use an existing definition or delete a current definition.

☒ Create New Server Definition

☐ Use Selected Server Definition

☐ Delete Selected Server Definition

Existing Server Definitions:

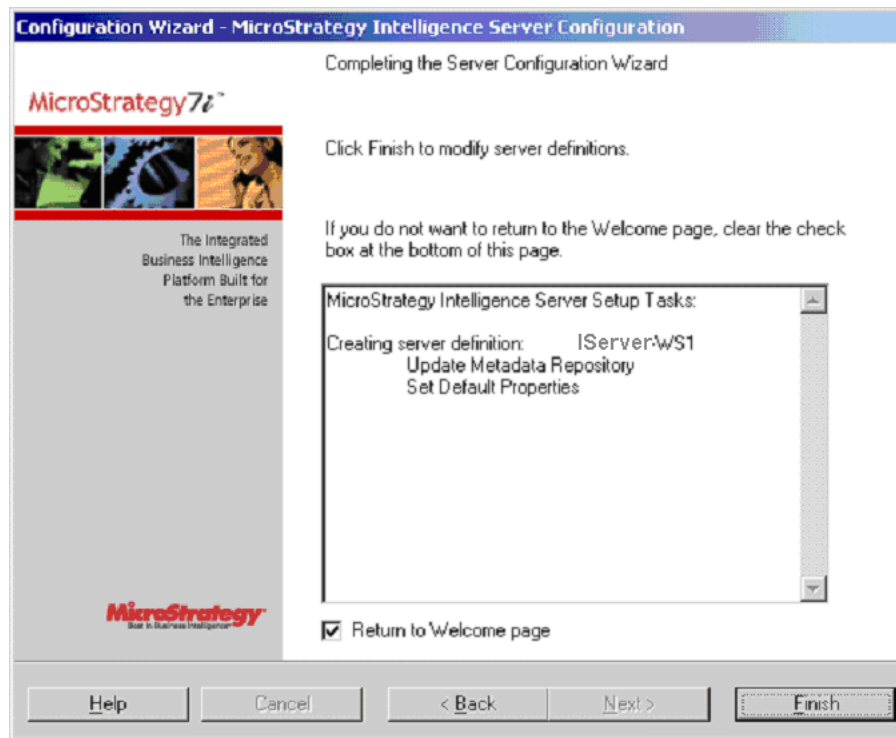
REPORT-01

Server Definition Name: IServer

Help Cancel < Back Next > Finish

5. Select **Create New Server Definition**, select your **Existing Server Definitions**, enter **Server Definition Name** as **IServer**, and click **Next**.

The **Completing the Server Configuration Wizard** screen displays.

Figure 6–12 *Completing the Server Configuration Wizard Screen*

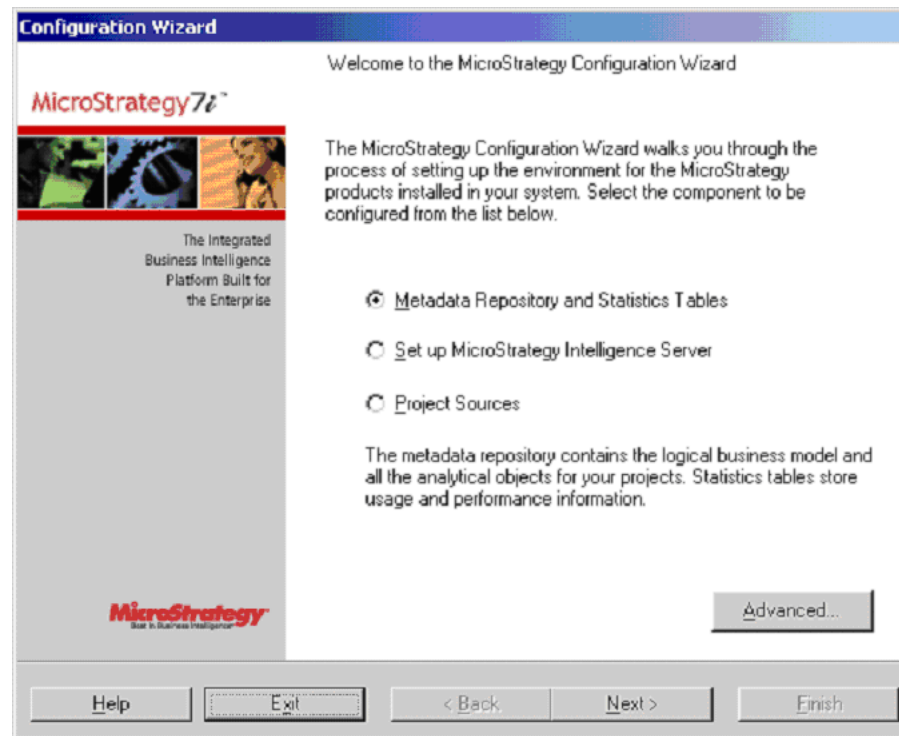
6. Verify that the setup tasks are correct, select **Return to Welcome page**, and click **Finish**.

The **Welcome** screen displays.

Now you can configure the Project Sources.

Configuring Project Sources

Start from the MicroStrategy Configuration Wizard **Welcome** screen.

Figure 6–13 Welcome Screen

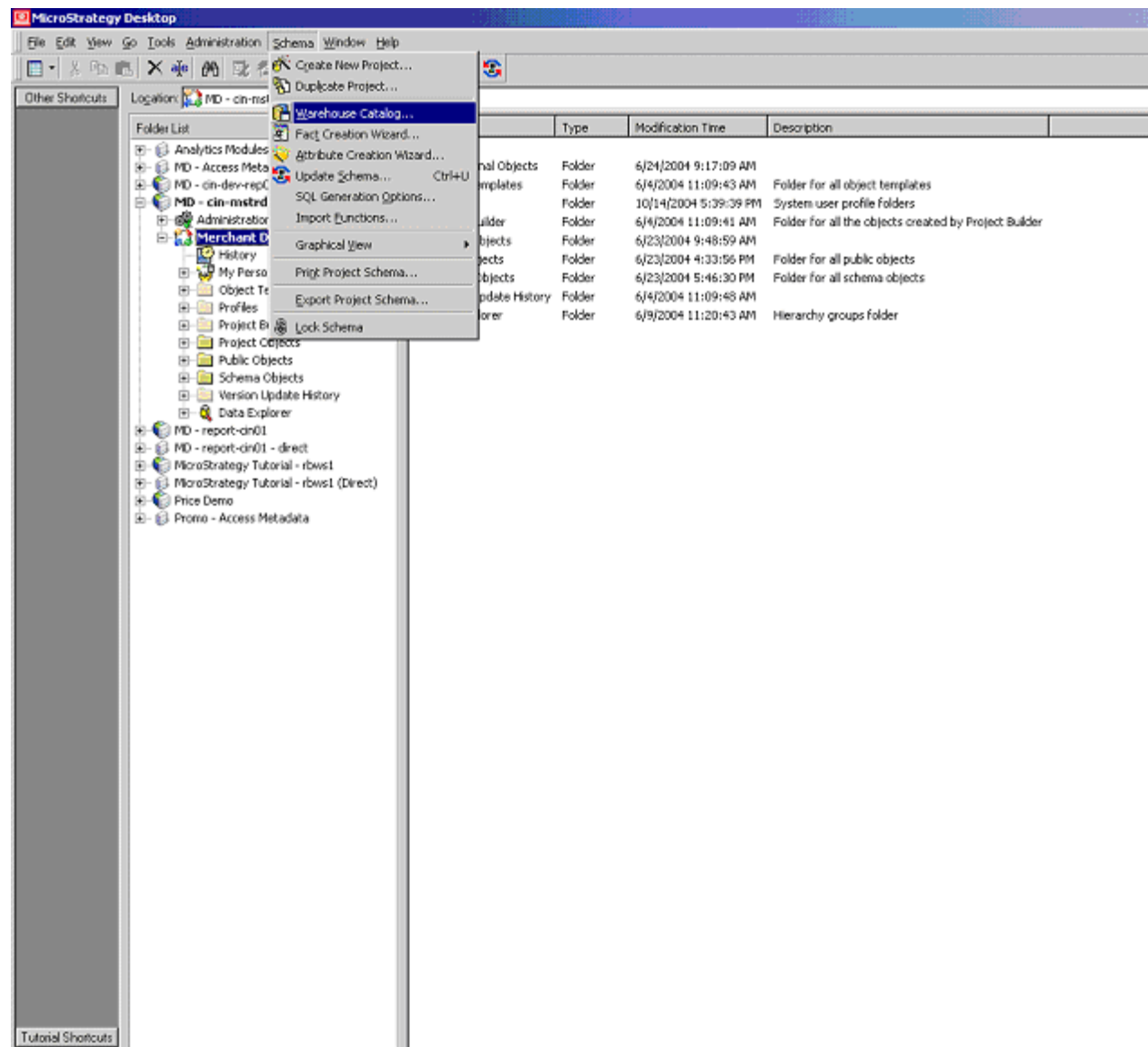
Select **Project Sources**, click **Next**, and complete the **Project Sources** wizard. After you finish, migrate your metadata.

Migrating the Metadata

Use MicroStrategy Desktop to create a project source that points to the correct Intelligence Server as follows:

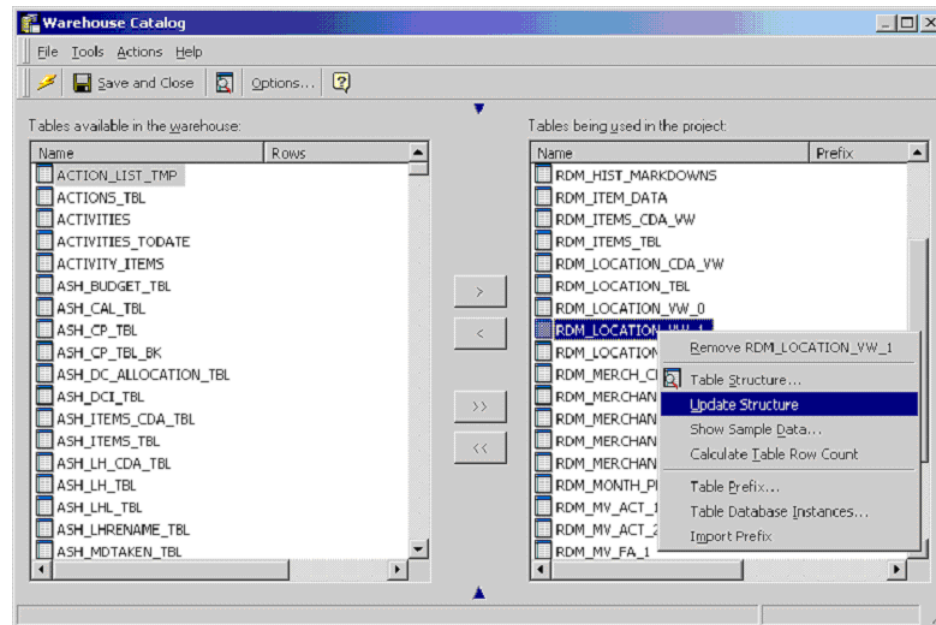
To create a project source:

1. Start from the MicroStrategy Desktop user interface and update warehouse catalog schema as follows.

Figure 6–14 Updating Warehouse Catalog Schema

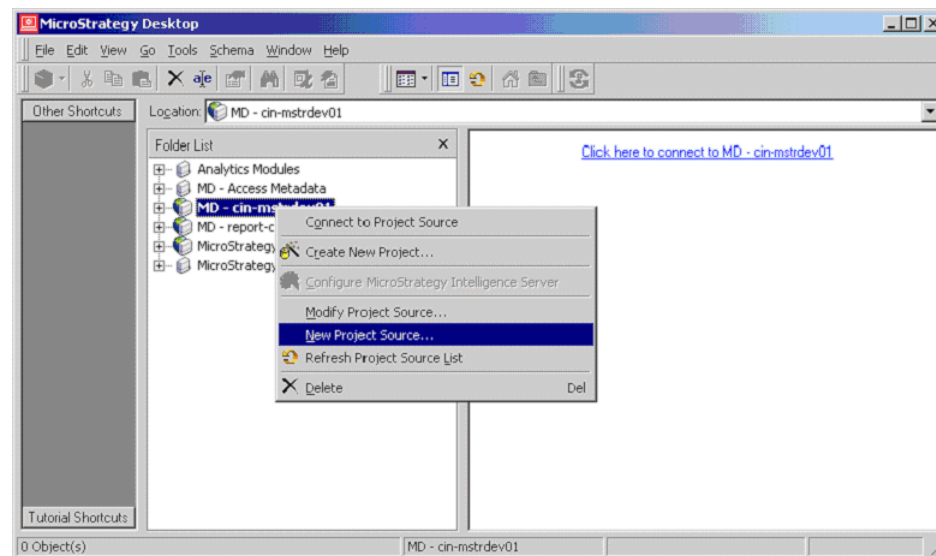
From the **MicroStrategy Desktop** menu, select **Schema > Warehouse Catalog**.

The **Warehouse Catalog** screen displays.

Figure 6–15 Warehouse Catalog Screen

In the **Tables being used in the project** box, right-click each table, and select **Update Structure**.

2. Use the MicroStrategy Desktop to create a project source.

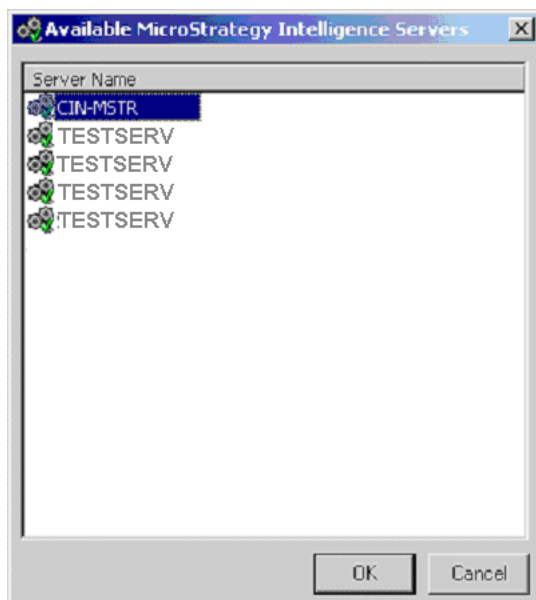
Figure 6–16 Creating a Project Source for the Intelligence Server

From the **Folder List** pane, right-click **MD - cin** and select **New Project Source**.

The **Project Source Manager** screen displays.

Enter a name for the **Project source** and click **Active Servers**.

The **Available MicroStrategy Intelligence Servers** screen displays.

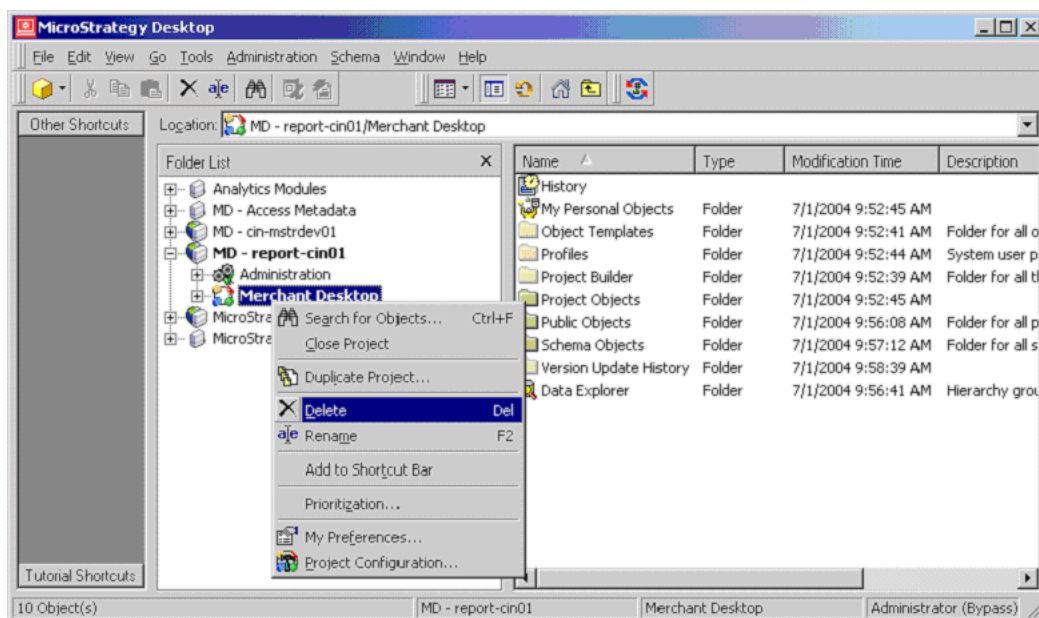
Figure 6–17 Available MicroStrategy Intelligence Servers

Select your Intelligence Server and click **OK**.

In the **Create Project Source** box, click **OK**.

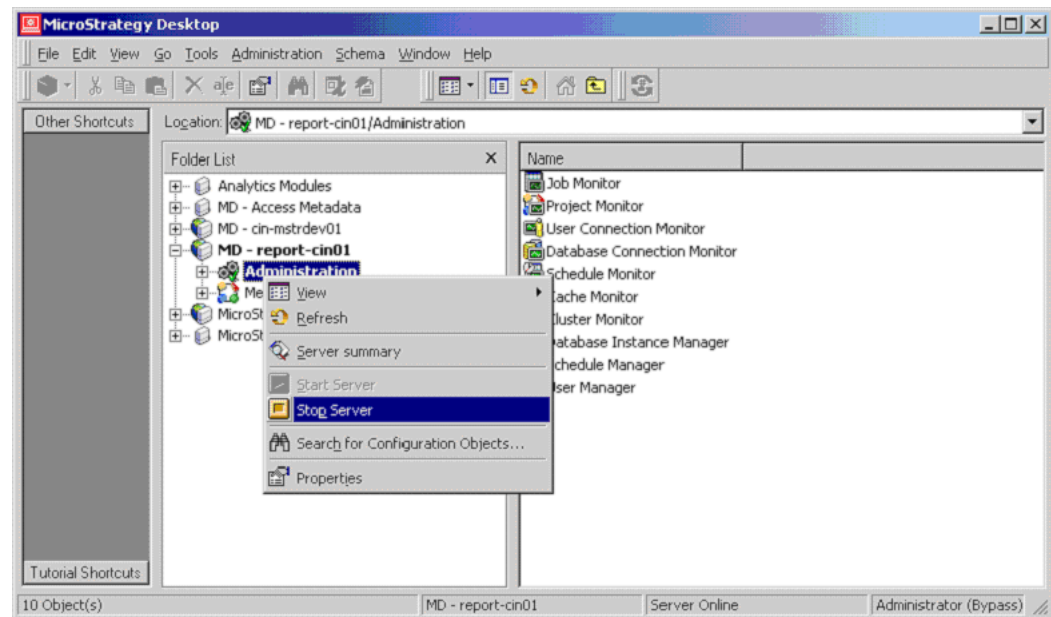
The **MicroStrategy Desktop** screen displays.

3. If any old Merchant Desktop projects exist, delete them as follows:

Figure 6–18 Deleting Old Merchant Desktop Projects

From the **Folder List**, right-click **Merchant Desktop** and click **Delete**.

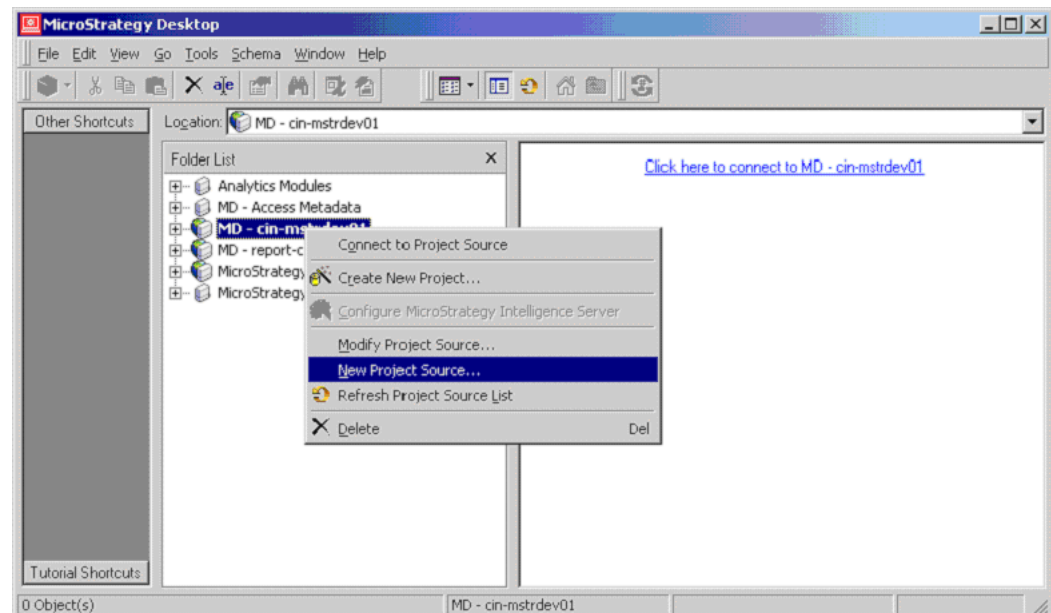
4. Stop and restart the Intelligence Server as follows:

Figure 6–19 Stopping and Restarting the Intelligence Server

From the **Folder List** pane, right-click **Administration** and select **Stop Server**.

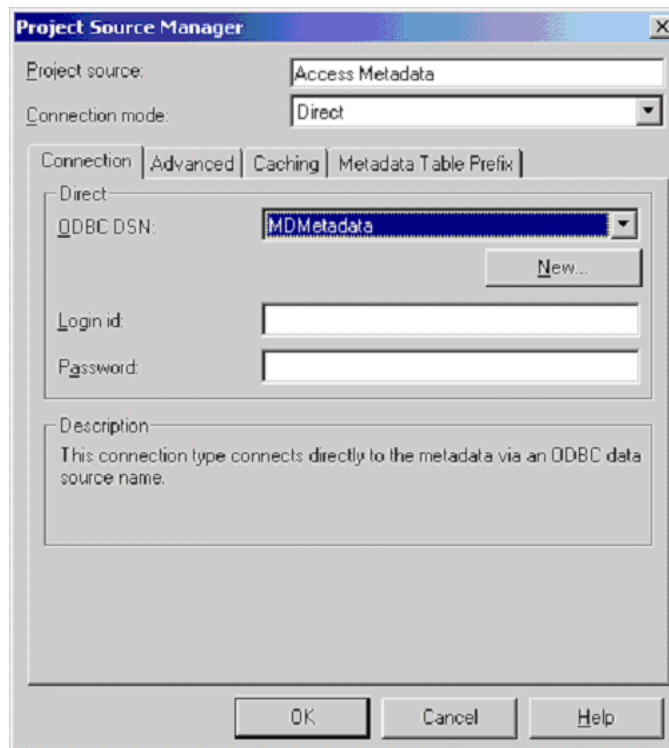
Next, right click **Administration** and select **Start Server**.

5. Create a new project source as follows:

Figure 6–20 Creating a New Project Source

From the **Folder List** pane, right-click on a project source and select **New Project Source**.

The **Project Source Manager** screen displays.

Figure 6–21 Project Source Manager Screen

- a. In the **Project source** field, enter Access Metadata; in the **Connection Mode** dropdown, select **Direct**; on the **Connection** tab, use the **ODBC DSN** drop down to select the **MDMetadata** database; enter your **Login ID** and **Password**; and click **OK**.
- b. From the MicroStrategy Desktop menu, select **Schema > Duplicate Project**. The **Project Duplication - Source Project Location** screen displays.

Figure 6–22 Project Duplication - Source Project Location Screen

Project Duplication - Source Project Location

Please provide a version 7.x project location

Available Project Sources:

MD - Access Metadata [New...]

Authentication:

How should MicroStrategy Desktop verify the authenticity of your login? Please note that you must have administrator privileges in order to proceed.

☐ Use Windows authentication

☒ With the login id and password provided below:

Login id: administrator

Password:

Help Cancel < Back Next > Finish

- c. From the **Available Project Sources** drop down menu, select **MD - Access Metadata** and click **Next**.

The **Project Duplication - Source Project Selection** screen displays.

Figure 6–23 Project Duplication - Source Project Selection Screen

Project Duplication - Source Project Selection

Please select the project you would like to duplicate from the list below:

Available projects:

Name
Merchant Desktop

Selected project:

Merchant Desktop

Project Description:

Merchant Desktop

Help Cancel < Back Next > Finish

- d. In the **Available Projects** field, select **Merchant Desktop** and click **Next**.

The **Project Duplication - Duplicate Project Location** screen displays.

Figure 6–24 Project Duplication - Duplicate Project Location Screen

Project Duplication - Duplicate Project Location

Please select a destination project source for the duplicated version 7.X project.

Available Project Sources

MD - report-01 New...

Authentication

How should MicroStrategy Desktop verify the authenticity of your login? Please note that you must have administrator privileges in order to proceed.

☐ Use Windows authentication

☒ With the login id and password provided below:

Login id: Administrator

Password:

Help Cancel < Back Next > Finish

- e. In the **Available Project Sources** drop down menu, select **MD - report-01**, and click **Next**.

The **Project Duplication - Duplicate Project Creation** screen displays.

Figure 6–25 Project Duplication - Duplicate Project Creation Screen

Project Duplication - Duplicate Project Creation

Enter the name and description for the duplicated destination project:

Destination project name:

Destination project description (optional):

Help Cancel < Back Next > Finish

- f. Enter the **Destination project name** as **Merchant Desktop** and click **Next**.
 The **Project Duplication - Select Objects to Duplicate** screen displays.

Figure 6–26 Project Duplication - Select Objects to Duplicate Screen

Project Duplication - Select objects to duplicate

Please select the objects to duplicate during the process

Objects to duplicate

Select which objects to copy

- ☒ Project objects
 - ☒ All objects
 - ☐ Schema objects only
- ☒ Configuration objects
 - ☐ All objects
 - ☐ Project-related objects only
- ☒ Users and user groups
 - ☐ All users and user groups
 - ☒ Project-related users and groups only
 - ☒ Include all groups even if not project related (preserve group...)
 - ☐ Selected users and groups...

Select users...

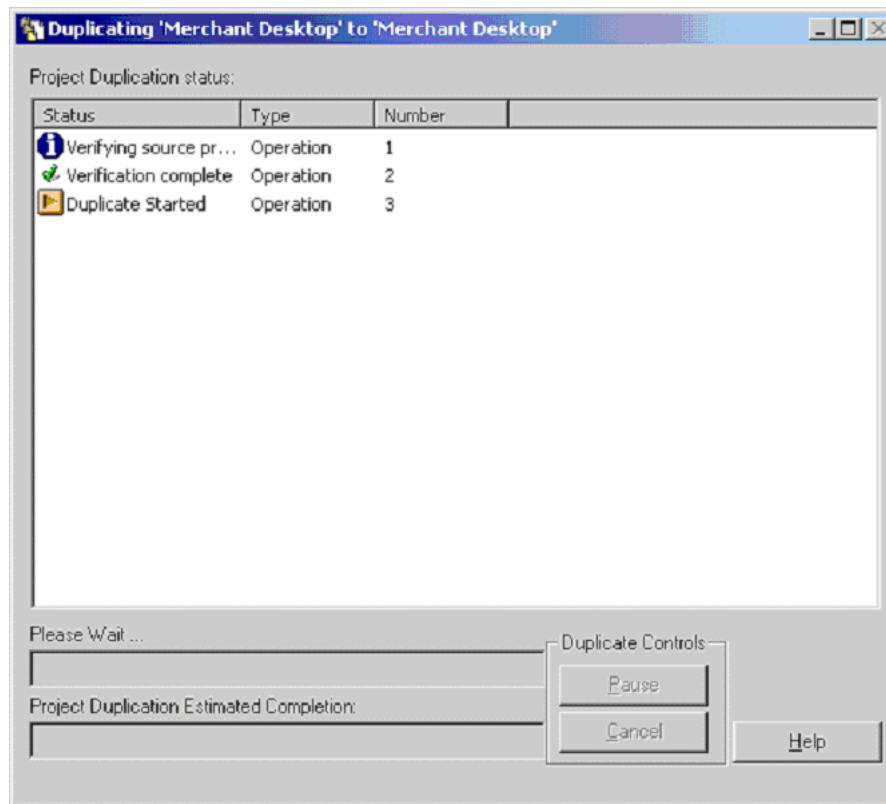
Help Cancel < Back Next > Finish

Select the **Project objects** you want to duplicate and click **Finish**.

When prompted to overwrite the event log, click **Yes to All**.

The **Project Duplication Status** screen displays.

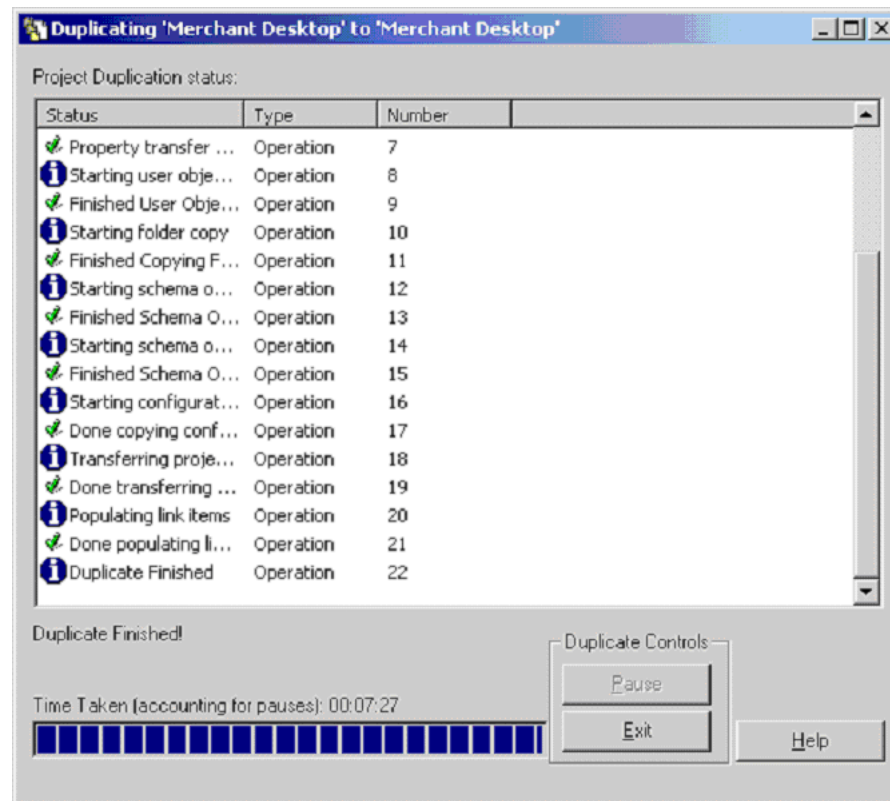
Figure 6–27 Project Duplication Status Screen (In Process)



The duplication process takes approximately 15 minutes.

- g.** When the **Duplicating Finished** notification displays, click **OK**.

The **Project Duplication Status** screen now displays an **Exit** button.

Figure 6–28 Project Duplication Status Screen (Completed)

- h. When the process finishes, click **Exit**.

Now the Merchant Desktop metadata has been migrated to the new server.

Now you can configure MicroStrategy to access the RDM database.

Configuring MicroStrategy to Access the RDM Database

This section describes how to configure MicroStrategy to point to the correct RDM database. This section contains the following topics:

- [Creating the Database Connection](#)
- [Mapping MicroStrategy Desktop to the RDM](#)

Creating the Database Connection

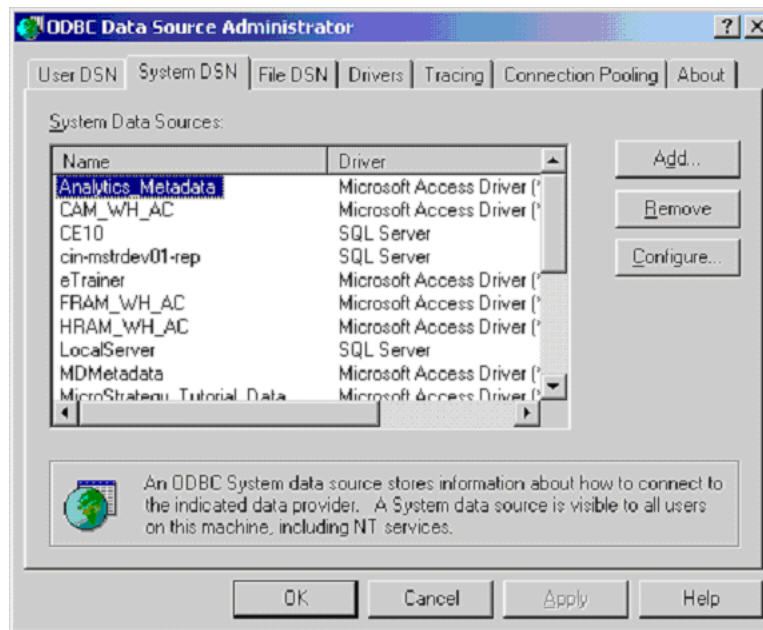
This section explains how to create an ODBC System DSN connection to the RDM database.

To connect the ODBC to the RDM database:

1. From Microsoft Windows, navigate to **Start > Settings > Control Panel > Administrative Tools > Data Sources (ODBC)**.

The **ODBC Data Source Administrator Screen** displays.

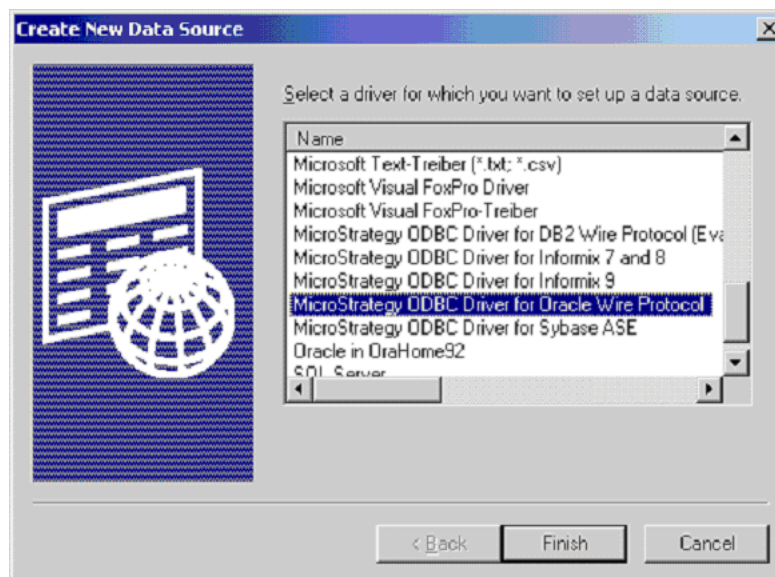
Figure 6–29 ODBC Data Source Administrator Screen



2. Click the **System DSN** tab, in the **System Data Sources** field select **Analytics_Metadata**, and click **Add**.

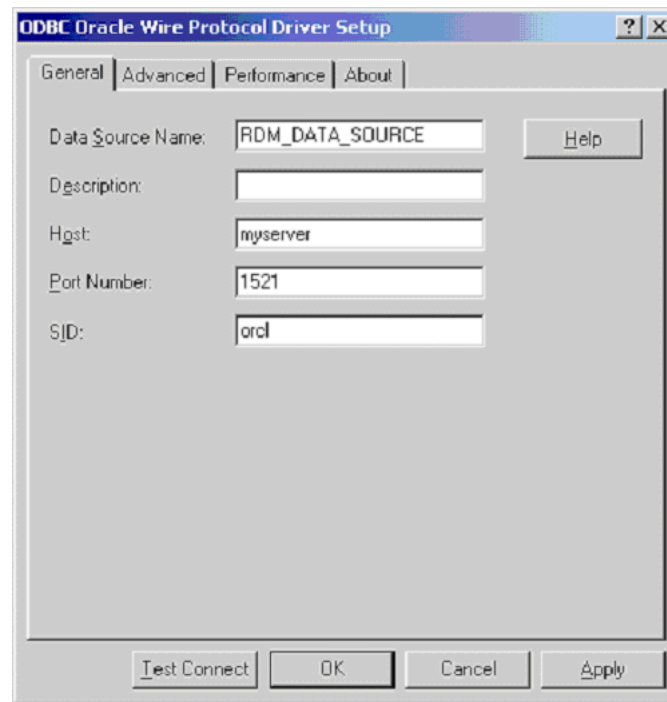
The **Create New Data Source** screen displays.

Figure 6–30 Create New Data Source Screen



Select **MicroStrategy ODBC Driver for Oracle Wire Protocol** and click **Finish**.

The **ODBC Oracle Wire Protocol Driver Setup** screen displays.

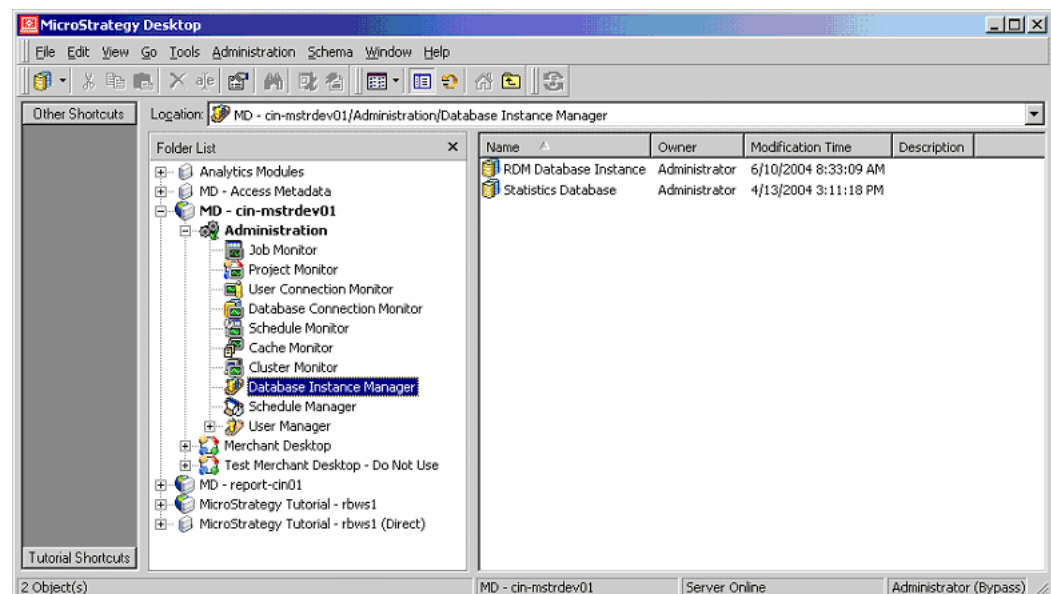
Figure 6–31 ODBC Oracle Wire Protocol Driver Setup Screen

For **Data Source Name** enter RDM_DATA_SOURCE, for **Port Number** enter 1521, for **SID** enter orcl, and click **OK**.

Mapping MicroStrategy Desktop to the RDM

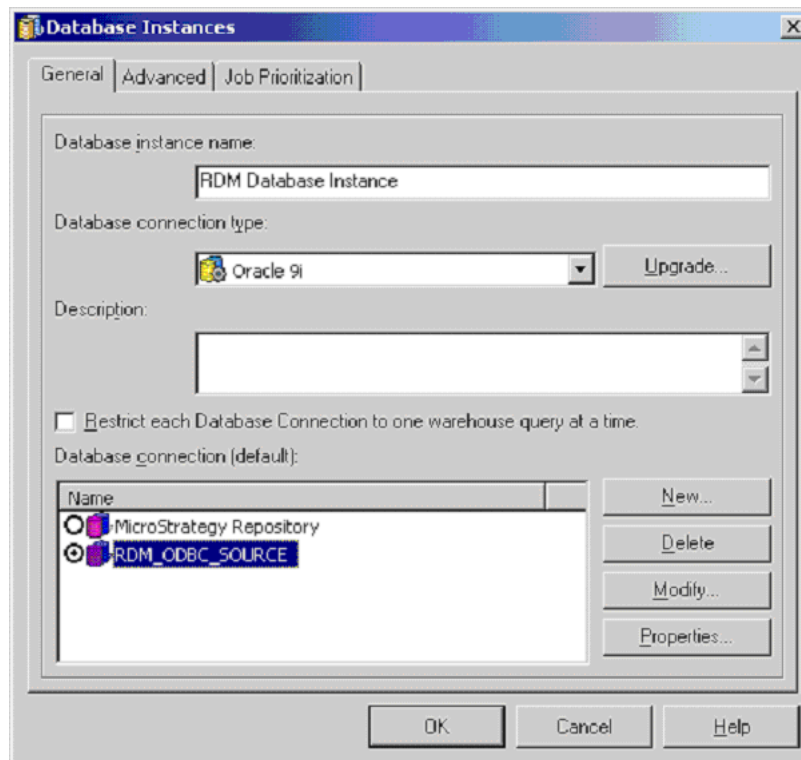
To map MicroStrategy Desktop to the RDM database:

1. Using MicroStrategy Desktop, map the MicroStrategy configuration to the RDM database instance as follows:

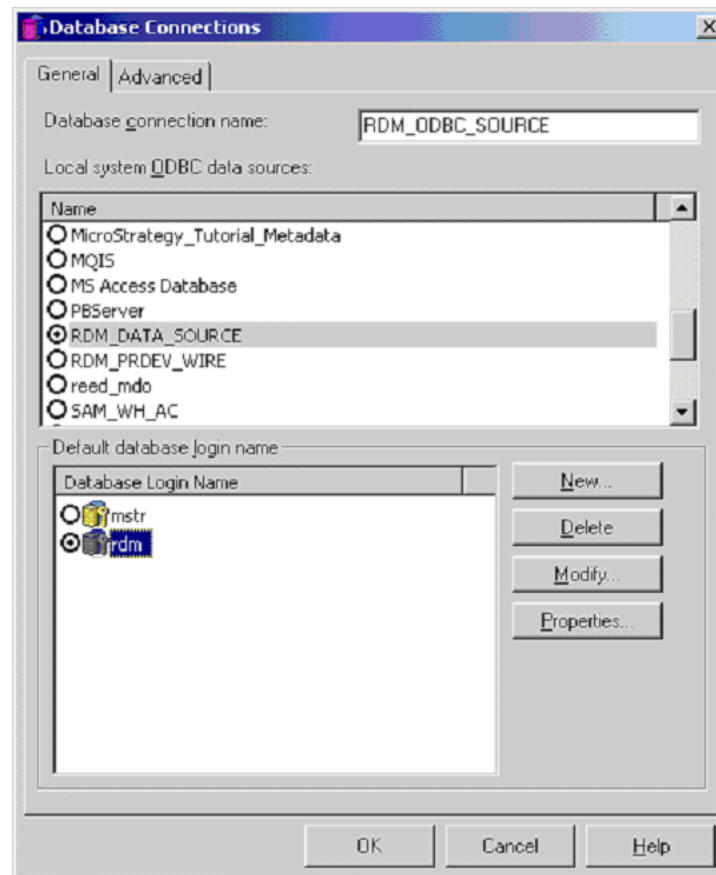
Figure 6–32 Mapping MicroStrategy to RDM Database Instance

2. From the **Folder List** panel, select **Project Source > Database Instance Manager**.
The **Database Instances** screen displays.

Figure 6–33 Database Instances Screen



3. Enter **Database instance name** as RDM Database Instance, select **RDM_ODBC_SOURCE**, and click **OK**.
The **Database Connections** screen displays.

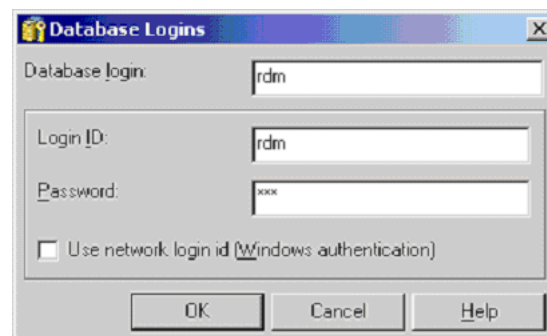
Figure 6–34 Database Connections Screen

From the **Database connection name** drop down menu, select **RDM_DATA_SOURCE**; in the **Local system ODBC data sources** field, select **DRM_DATA_SOURCE**; and in the **Database Login Name**, select **rdm**.

If your login does not already exist, click **New** and create your login ID.

Click **OK**.

4. The **Database Login** screen displays.

Figure 6–35 Database Login Screen

Enter the **Database Login**, **Login ID**, and **Password** for the database where the RDM is installed, and click **OK**.

Your data sources are now mapped to each other.

Mapping RDM and MicroStrategy Summarization Levels

This section contains the following topics:

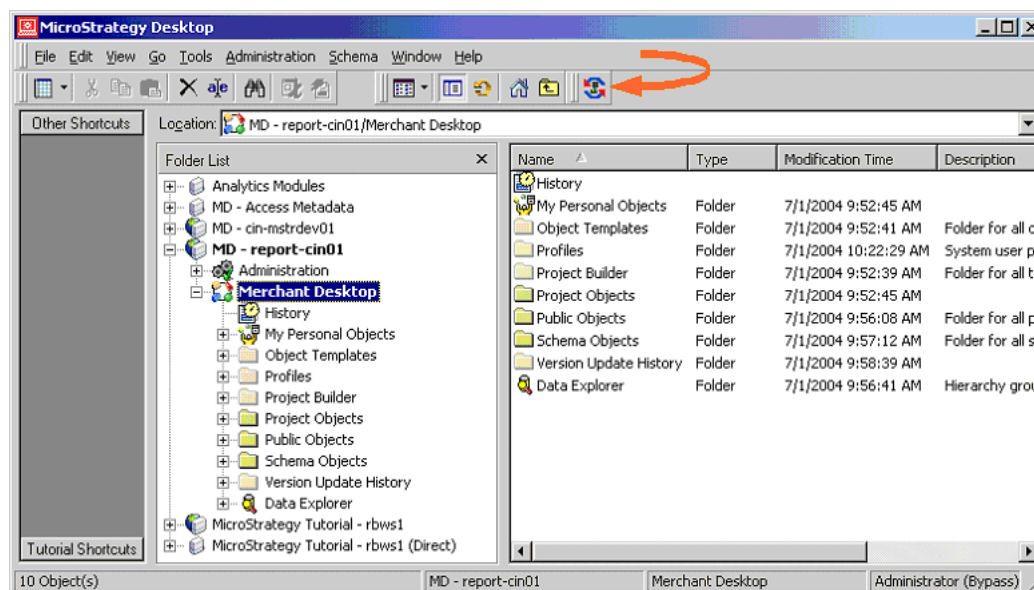
- [Understanding the Data Mapping](#)
- [Using MicroStrategy Desktop to Map Merchant Desktop Attributes](#)

Using MicroStrategy Desktop to Map Merchant Desktop Attributes

If the new summary levels for either hierarchy are below the appropriate levels, use MicroStrategy Desktop to update the schema as follows. Refer to Configuring RDM and MicroStrategy Summarization Levels for information.

1. Launch MicroStrategy Desktop and update the Merchant Desktop schema as follows:

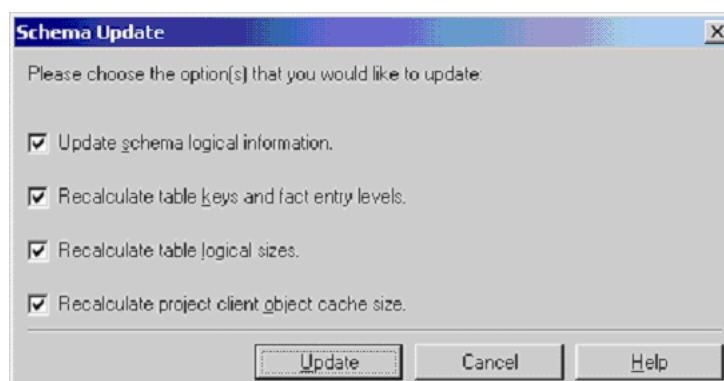
Figure 6–36 Updating the Merchant Desktop Schema



From the MicroStrategy Desktop menu, select **Schema > Update Schema** (or click the Schema Update button).

The **Schema Update** screen displays.

Figure 6–37 Schema Update Screen

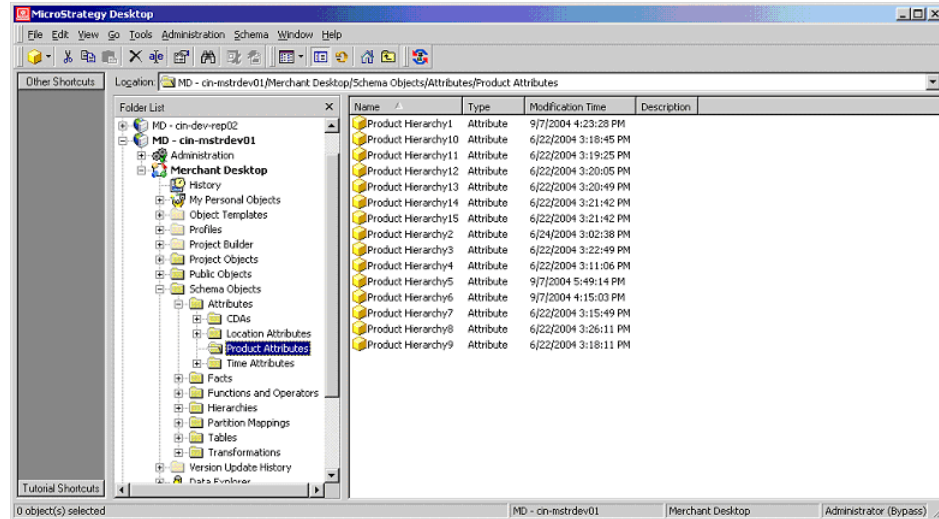


2. Ensure that all options are selected and click **Update**.

This updates the schema. The MicroStrategy Desktop displays.

3. Specify attribute mapping as follows:

Figure 6–38 MicroStrategy Desktop - Hierarchy Attributes Panel

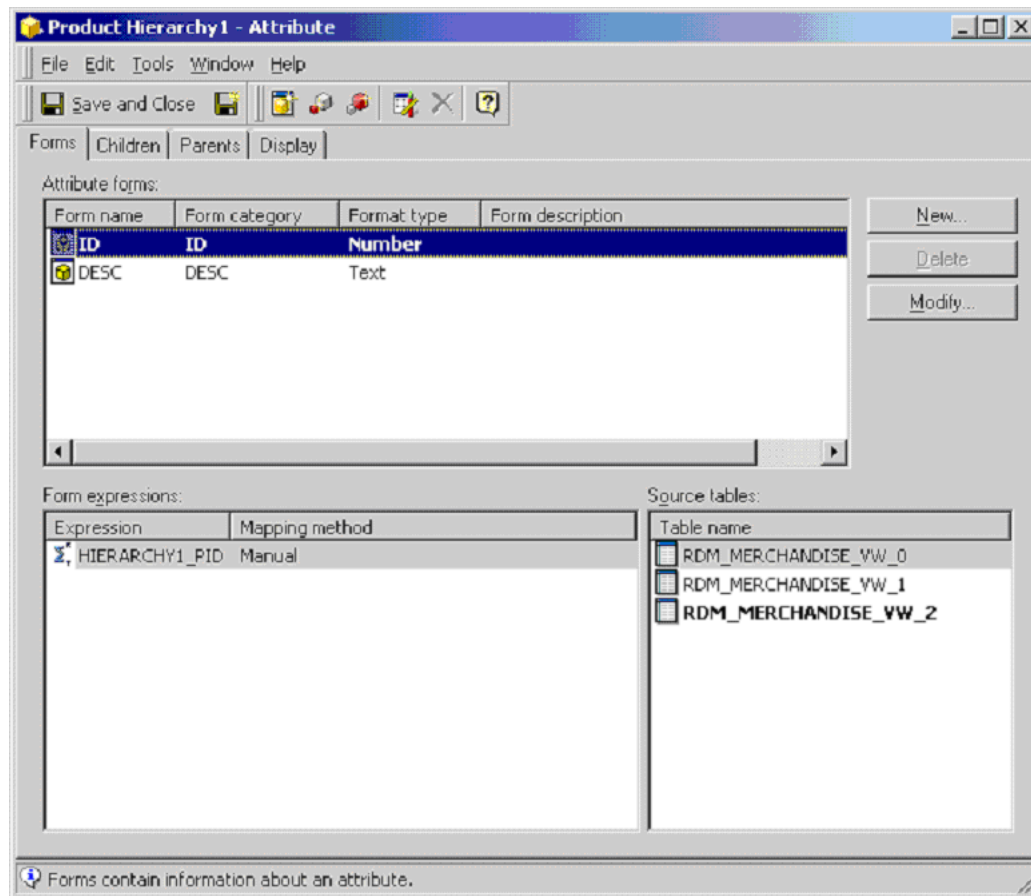


From the **Folder List** panel, navigate to **Schema Objects > Attributes** and select an appropriate Merchant Desktop attributes folder.

A list of hierarchy attributes displays in the right pane.

4. In the right pane, right click an attribute and select **Edit**.

The **Attribute** editor displays. The example screen, [Figure 6–39, Product Hierarchy1 - Attribute Screen](#) shows an **Attribute** screen.

Figure 6–39 Product Hierarchy1 - Attribute Screen


Product Hierarchy1 - Attribute

File Edit Tools Window Help

Save and Close

Forms Children Parents Display

Attribute forms:

Form name	Form category	Format type	Form description
ID	ID	Number	
DESC	DESC	Text	

New...
Delete
Modify...

Form expressions:

Expression	Mapping method
HIERARCHY1_PID	Manual

Source tables:

Table name
<input type="checkbox"/> RDM_MERCHANDISE_VW_0
<input type="checkbox"/> RDM_MERCHANDISE_VW_1
<input type="checkbox"/> RDM_MERCHANDISE_VW_2

Forms contain information about an attribute.

5. In the **Attribute** editor, select the appropriate **Form Expressions** and click **Modify**.

The **Modify Attribute Form** screen displays. The example screen, [Figure 6–40, Product Hierarchy4 \(ID\) Modify Attribute Screen](#) shows a **Modify Attribute Form** screen.

Figure 6–40 Product Hierarchy4 (ID) Modify Attribute Screen

Product Hierarchy4 (ID) - Modify Attribute Form

Definition | Column Alias

Form definition—

Expressions:

Expression	Mapping method
HIERARCHY4_PID	Manual

Source tables:

Table name	
RDM_MERCHANDISE_VW_0	<input type="checkbox"/>
RDM_MERCHANDISE_VW_1	<input type="checkbox"/>
RDM_MERCHANDISE_VW_2	<input checked="" type="checkbox"/>
RDM_MV_ACT_2	<input type="checkbox"/>
RDM_MV_FA_2	<input type="checkbox"/>
RDM_MERCHANDISE_TBL	<input type="checkbox"/>
RDM_MERCHANDISE_TBL_alias	<input type="checkbox"/>

New... Delete Modify... Set as Lookup

Form general information—

Name: ID

Description:

Form category—

Category used: ID Modify...

Form format—

Type: Number Default sort: None

OK Cancel Help

6. Select the appropriate tables in the **Source Tables** box and click **Modify**.

The **Attribute** screen displays. The example screen below, [Figure 6–41](#), shows the [Product Hierarchy6 Attribute Screen](#).

Note: The highlighted hierarchy summary view is the 'lookup' for the attribute. The correct 'lookup' is the highest hierarchy view that includes the attribute.

Figure 6–41 Product Hierarchy6 Attribute Screen

Product Hierarchy6 - Attribute

File Edit Tools Window Help

Save and Close

Forms Children Parents Display

Attribute forms:

Form name	Form category	Format type	Form description
ID	ID	Number	
DESC	DESC	Text	

New...
Delete
Modify...

Form expressions:

Expression	Mapping method
HIERARCHY6_PID	Manual

Source tables:

Table name
RDM_MERCHANDISE_YW_0

Forms contain information about an attribute.

7. Modify each **Attribute** screen as shown in the following tables.

- [Table 6–1, "Location Hierarchy Attributes"](#)
- [Table 6–2, "Product Hierarchy Attributes"](#)

Note: Plan has views but no materialized views.

Location Hierarchy Attributes. For each *location* hierarchy level, the attribute is configured to be available for the hierarchyN_lid for hierarchy, where N is the level of the hierarchy.

Table 6–1 Location Hierarchy Attributes

Attribute	Form Expression	Source Table
Location Hierarchy 1	HIERARCHY1_LID	RDM_LOCATION_2 ~12
	LOCATION_ID	RDM_LOCATION_1 RDM_LOCATION_CDA_1 RDM_PLAN_COMPANY_BUDGETS

Table 6–1 (Cont.) Location Hierarchy Attributes

Attribute	Form Expression	Source Table
Location Hierarchy 2	HIERARCHY2_LID	RDM_LOCATION_3 ~12
	LOCATION_ID	RDM_LOCATION_2 RDM_LOCATION_CDA_2 RDM_ACTUAL_HISTORY_2 RDM_ACTUAL_HISTORY_3 RDM_OPT_HISTORY_2 RDM_OPT_HISTORY_3
Location Hierarchy 3	HIERARCHY3_LID	RDM_LOCATION_4 ~12
	LOCATION_ID	RDM_LOCATION_3 RDM_LOCATION_CDA_3
Location Hierarchy 4	HIERARCHY4_LID	RDM_LOCATION_5 ~12
	LOCATION_ID	RDM_LOCATION_4 RDM_LOCATION_CDA_4
Location Hierarchy 5	HIERARCHY5_LID	RDM_LOCATION_6 ~12
	LOCATION_ID	RDM_LOCATION_5 RDM_LOCATION_CDA_5 RDM_ACTUAL_HISTORY_0 RDM_ACTUAL_HISTORY_1 RDM_OPT_HISTORY_0 RDM_OPT_HISTORY_1 RDM_PLANNED_PACK_OPT RDM_PLAN_COMPANY_BUDGETS RDM_PLAN_SEGMENT_1_DATA_0 RDM_PLAN_SEGMENT_1_DATA_1 RDM_PLAN_SEGMENT_2_DATA_0 RDM_PLAN_SEGMENT_2_DATA_1 RDM_PLAN_STORE_BUDGETS RDM_PLAN_VOLUME_GROUPS

Product Hierarchy Attributes. For each *product* hierarchy level, each attribute is configured to be available for the following form expressions:

- primary key join
- hierarchyN_pi_id, where N is the level of the hierarchy.

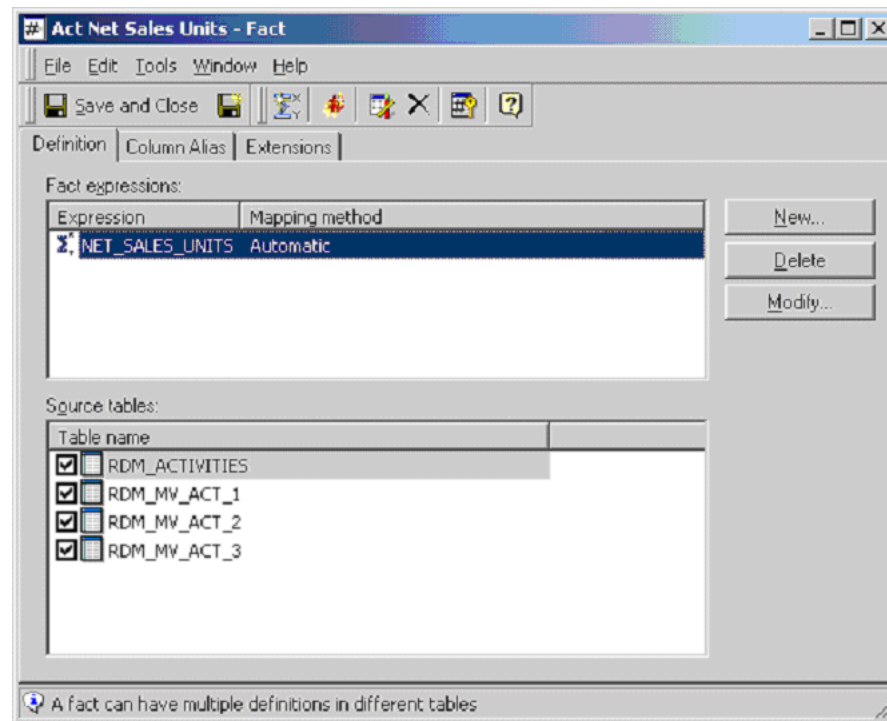
Table 6–2 Product Hierarchy Attributes

Attribute	Form Expression	Source Table
Product Hierarchy 1	HIERARCHY1_PI_ID	RDM_MERCHANDISE_2-15
	PI_ID	RDM_MERCHANDISE_1 RDM_MERCH_CDA_1
Product Hierarchy 2	HIERARCHY2_PI_ID	RDM_LOCATION_3-15
	PI_ID	RDM_MERCHANDISE_2 RDM_MERCHANDISE_CDA_2
Product Hierarchy 3	HIERARCHY3_PI_ID	RDM_MERCHANDISE_4-15
	PI_ID	RDM_MERCHANDISE_3 RDM_MERCHANDISE_CDA_3

Table 6–2 (Cont.) Product Hierarchy Attributes

Attribute	Form Expression	Source Table
Product Hierarchy 4	HIERARCHY4_PI_ID	RDM_MERCHANDISE_5-15
	PI_ID	RDM_MERCHANDISE_4 RDM_MERCHANDISE_CDA_4 RDM_PLAN_COMPANY_BUDGETS
Product Hierarchy 5	HIERARCHY5_PI_ID	RDM_MERCHANDISE_6-15
	PI_ID	RDM_MERCHANDISE_5 RDM_MERCH_CDA_5 RDM_ACTUAL_HISTORY_3 RDM_OPT_HISTORY_3
Product Hierarchy 6	HIERARCHY6_PI_ID	RDM_MERCHANDISE_7-15
	PI_ID	RDM_MERCHANDISE_6 RDM_MERCH_CDA_6
Product Hierarchy 7	HIERARCHY7_PI_ID	RDM_MERCHANDISE_8-15
	PI_ID	RDM_MERCHANDISE_7 RDM_MERCH_CDA_7
Product Hierarchy 8	HIERARCHY8_PI_ID	RDM_MERCHANDISE_9-15
	PI_ID	RDM_MERCHANDISE_8 RDM_MERCH_CDA_8 RDM_PLANNED_ITEMS_1 RDM_PLAN_SEGMENT_1_DATA_1 RDM_PLAN_SEGMENT_2_DATA_1
Product Hierarchy 9	HIERARCHY9_PI_ID	RDM_MERCHANDISE_10-15
	PI_ID	RDM_MERCHANDISE_9 RDM_MERCH_9 RDM_ACTUAL_HISTORY_1 RDM_ACTUAL_HISTORY_2 RDM_OPT_HISTORY_1 RDM_OPT_HISTORY_2 RDM_PLANNED_ITEMS_0 RDM_PLAN_COMPANY_BUDGETS RDM_PLAN_SEGMENT_1_DATA_0 RDM_PLAN_SEGMENT_2_DATA_0
Product Hierarchy 10	HIERARCHY10_PI_ID	RDM_MERCHANDISE_11-15
	PI_ID	RDM_MERCHANDISE_10 RDM_MERCH_CDA_10 RDM_OPT_HISTORY_0 RDM_ACTUAL_HISTORY_0 RDM_PLANNED_PACK_OPT

8. After you have created, added, or changed any summary levels, use MicroStrategy Desktop to modify the following folders to include the new summary levels:
- ../schema object/facts/actuals
 - ../schema object/facts/forecasts

Figure 6–42 Act Net Sales Units - Fact Screen

9. Change the lookup on all of the forms, not just the ID form.
Now you can map the display of hierarchies to display correctly.

Mapping the Display of Hierarchy Levels

Now you need to enable the correct display of hierarchy level descriptions for the user interface.

To enable the correct display of hierarchy level descriptions:

1. Start MicroStrategy Desktop.
2. From the **Folder List** pane, select **Merchant Desktop > Schema Objects > Attributes**.
3. In the **Attributes** folder, right-click each mapped attribute, select **Rename**, and enter the description listed in [Table 6–3, Mapping the Display of Hierarchy Levels](#).

Table 6–3 Mapping the Display of Hierarchy Levels

MicroStrategy Attributes	Merchant Desktop Descriptions
<i>Location Attributes</i>	
Location Attribute 1	Location Chain
Location Attribute 2	Company
Location Attribute 3	Zone
Location Attribute 4	Price Zone
<i>Merchandise Attributes</i>	
Product Attribute 1	Merchandise Chain

Table 6–3 (Cont.) Mapping the Display of Hierarchy Levels

MicroStrategy Attributes	Merchant Desktop Descriptions
Product Attribute 2	Company Chain
Product Attribute 3	Division
Product Attribute 4	Department
Product Attribute 5	Class
Product Attribute 6	Style
Product Attribute 7	Color
Product Attribute 8	Product Key

Configuring the User Link

Configuring the user link is the last step in integrating with MicroStrategy. This step automatically migrates user configuration data into MicroStrategy, eliminating the need to enter the same user management information into both Merchant Desktop and MicroStrategy.

After you have completed these steps, all MicroStrategy reporting will use the same security settings as specified for Plan/Merchant Desktop users.

1. From the Windows server where MicroStrategy is installed, run the following command:

```
..\MerchantDesktop.tar\MicrostrategyServerSetup\install.cmd
```

The Oracle Installer **Welcome** screen displays.

2. Respond to prompts on the Oracle Installer screens as follows:

- a. **Welcome** screen - Click **Next**.
- b. **Application Server** screen - Select **None** and click **Next**.
- c. **Database** screen - Select a database.

Note: Although this setting is not used by the MicroStrategy User Integration Server and will have no effect on its installation, a current limitation of the Oracle Installer does not allow the **None** selection.

- d. **Select Components** screen - Select **RMI/Jacob Server**, and make sure the destination directories point to the appropriate directory. Click **Next**.
- e. **Summary** screen - Click **Install**.

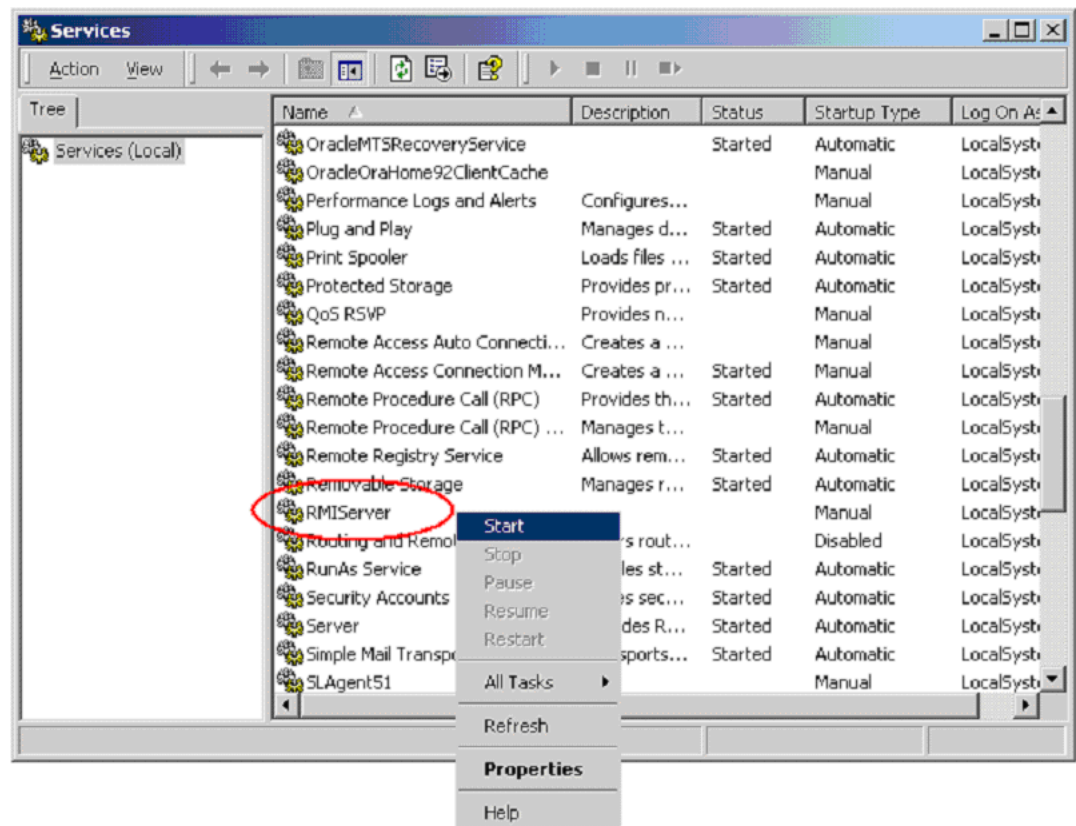
Now, the MicroStrategy User Integration Server is installed.

Next, start this service manually, as follows.

3. From Microsoft Windows, navigate to **Start > Settings > Control Panel > Administrative Tools > Services**.

The **Services** dialog box displays.

Figure 6-43 Services Dialog Box



4. Right click **RMIServer** and select **Start**.

A progress bar displays, and the status changes to **Started**.

Note: You can set the RMIServer service to run automatically by selecting **Properties** and on the **RMIServer Properties** dialog box, select **Automatic** for **Startup Type**.

5. Edit the <PLAN_HOME>/config/usermanagement.properties file as follows:

```
# Replace the value with your RMI host.
rmiHost=report-01.<host name>.com

# Specify your rmiHost and reportServer. In most cases they are the same.
rmiPort=44499
reportServer=report-01.<host name>.com

# Specify the administrator username and password for MicroStrategy.
administratorName=administrator
administratorPassword=password

## Specify the number of MicroStrategy licenses you have purchased.
microstrategy.users.max=0
```

Now you can test the user mapping.

6. Shut down your application server and restart it.
7. Enter the URL for Plan, login as root, and create some Merchant Desktop/Plan users.

8. When you have successfully created a user account with a Merchant Desktop and Plan role, enter the URL for Merchant Desktop and log on as an administrator.

Trouble Shooting

This section enables you to troubleshoot and resolve user management errors.

Error: Unable to update the MicroStrategy Users table: Licenses exceeded.

Edit the `usermanagement.properties` file as described in Step 5 and specify the correct number of MicroStrategy licenses. Then shut down and restart your application server.

Error: MicroStrategy Integration: General failure connecting to the remote registry.

Start the RMI service as described in Step 4.

Error when trying to add a role.

The role you are trying to create already exists in the MicroStrategy users database. Remove the user instance from the MicroStrategy users database, and then try to add the Merchant Desktop role again.

What's Next?

Now that you have set up Plan, Merchant Desktop, and MicroStrategy, you can load data and configure the user interface as described in the *Plan Configuration Guide*.

For information about using Plan and the Merchant Desktop, see the *Plan User Guide*.