

# **Oracle® Retail Plan**

Installation Guide

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# Preface

This guide enables you to install the Oracle® Retail Plan application, along with the server-side components required for 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 more information about using Plan, see the following documents:

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

## Conventions

The following text conventions are used in this document:

Convention	Description
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
<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.

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# Overview

This chapter provides an overview of Oracle® Retail Plan and a roadmap for implementing the application. It contains the following sections:

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

## Overview of Plan

Oracle® Retail Plan enables retail planners to meet customer demand throughout the course of a season. The Plan application 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

## Plan Enterprise Components

The Plan application is a distributed application, using an application server as the platform for the services, a database, and several other software components. It contains the following components:

### Client System Tier

The Client System tier contains the systems that connect to the Plan application using a Web browser. It includes systems with the following components:

- Microsoft® Windows®
- Microsoft® Office
- Microsoft® Internet Explorer® 6.0, with ActiveX control
- JRE for Merchant Desktop (optional).

### Application Server Tier

The Application Server tier contains the application server domains, clusters, and managed servers set up as a platform used by the application and calculation engine. This tier includes the following components:

- Application Server Software (BEA WebLogic Server®) The Plan application resides on a domain configured on this application server. You can install and run multiple instances of the application server or multiple application server machines, based on your business need.

- Calculation Engine – It also installs on a specific domain configured on the application server. To improve performance, you can 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

The Database Server tier contains the systems configured with the database management systems (along with the necessary database software). It includes the following components:

- Relational Database Management System (Oracle 10g Database) – This is the application database that includes the following schemas essential for the application:
  - Application Schema
  - Actual History Schema (ELM)
  - Retail Data Mart Schema (RDM)
  - Optimized History Schema (DOGWOOD)
  - Audit Schema (AUDIT)
  - Optional. Merchant Desktop (DESKTOPDB)

These schemas are created during the Plan installation.

- Optional. Merchant Desktop (an optional component) requires a Windows server for MicroStrategy.

## Roadmap for Implementing Plan

This guide explains how you can install and set up the Plan application, along with the required and optional software.

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.

In order to implement Plan for production, you must perform the following tasks in a sequence:

**Table 1–1** *Roadmap for Implementing Plan*

Task	Description
<i>Pre-installation Tasks</i>	
1.	Plan your environment, based on your business need. For more information on the planning process and the supported configurations, see <a href="#">Chapter 2, "Planning Your Installation"</a> .
2.	Set up your application database. For more information, see <a href="#">Chapter 3, "Setting Up the Database"</a> .
3.	Set up your application server. For more information, see <a href="#">Chapter 4, "Setting Up the Application Server"</a> .
<i>Installation Task</i>	

**Table 1–1 Roadmap for Implementing Plan**

Task	Description
4.	Access the Plan installation software, set up the <code>install.properties</code> file, and run the Oracle installer. For more information, see <a href="#">Chapter 5, "Installing Plan"</a> .  Additionally, you can also install the Place application to work along with an existing installation of Plan. For more information, see <a href="#">Chapter 6, "Installing Place Over Plan"</a> .
<i>Post-installation Tasks</i>	
5.	Configure your user accounts and business rules. For more information, see the <i>Plan Configuration Guide</i> .
6.	Optional. Modify the Plan user interface to accommodate your business needs, as described in the <i>Plan Configuration Guide</i> . Concurrent with this activity, complete the remaining steps in this roadmap. You can continue refining the user interface iteratively, as needed.
7.	If you are using Merchant Desktop and MicroStrategy, see <a href="#">Chapter 7, "Integrating with MicroStrategy."</a>
8.	Set up user login accounts and introduce end users to the application.
9.	Perform and schedule the necessary data loads, as described in the <i>Plan Operations Guide</i> .



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## Planning Your Installation

Before installing the Plan application, you must first determine the performance and availability goals for your business, and then plan the hardware, network, and storage requirements accordingly. This chapter provides some basic considerations for the implementation. It also includes the list of hardware and software requirements.

This chapter includes the following sections:

- [Overview of the Planning Process](#)
- [Supported Configurations](#)

### Overview of the Planning Process

Planning your implementation prior to an installation also gives you a better understanding of the environment, and enables you to adapt faster to any future changes in the environment set up.

This section contains the following topics:

- [Planning Your Environment](#)
- [Planning for Optimal Plan Performance](#)

### Planning Your Environment

Use the following steps to plan and prepare the product environment:

1. Plan and design the infrastructure, based on your business need, for the installation. This includes:
  - Meeting the hardware and associated software requirements.
  - Acquiring the prerequisite software (and licensing).
  - Setting up the load balancers and clusters.
  - Gathering the capacity data.
  - Planning the data security policies.
  - Designing the backup and recovery strategies.
2. Determine the size of the implementation.
3. Identify source systems. Identify the systems that will exchange data with Plan.

## Planning for Optimal Plan Performance

Consider 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.

## Supported Configurations

This section describes the hardware and network requirements for the Plan application, and includes the following topics:

- [Network Requirements](#)
- [Database Requirements](#)
- [Application Server Requirements](#)
- [Merchant Desktop Requirements](#)
- [Client System Requirements](#)

## 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 MBps is sufficient.

### Clusters and Multi-Server Requirements

Plan supports any combination of the following cluster configurations:

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

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

## Database Requirements

Plan requires the use of the Oracle® database as described in the following table:

**Table 2–1 Oracle Database Requirements**

Software	Requirement
Operating System	Solaris™ 8 or Solaris™ 10
Database	Oracle® 10g R2 (10.2.0.2)
Utilities	file transfer protocol utility (ftp or ssh/scp/rsync) sudo utility

## Application Server Requirements

Plan requires the use of the BEA WebLogic 8.1 SP5 application server.

### WebLogic Application Server

Plan supports the use of the BEA WebLogic Server on the Linux platform:

The following table lists the Linux requirements for the WebLogic Server:

**Table 2–2 Linux Requirements for WebLogic**

Software	Requirement
Operating System	Red Hat Enterprise Linux 3.0
Application Server	BEA WebLogic Server® 8.1 SP 5
JVM	BEA WebLogic Jrockit™ 1.4.2_08

## Merchant Desktop Requirements

Merchant Desktop is optional. If you are using Merchant Desktop, see the following table for the supported configuration.

If you are using Merchant Desktop with MicroStrategy, Merchant Desktop must be installed on the application server node and MicroStrategy must be installed on a system that hosts a Microsoft® Windows® 2003 server.

**Table 2–3 Merchant Desktop Server Requirements**

Software	Requirements
Operating System	Windows® Server 2003
Business Intelligence Tool	MicroStrategy® 8
Java	Sun JDK 1.4.2_05 (32 bit)

## Client System Requirements

The following table list the supported client system options:

**Table 2–4** *Client System Environment*

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

---

## Setting Up the Database

This chapter describes how you can set up your database, and the various database components. It contains the following sections:

- [Creating the Business Data Database](#)
- [Creating the History Data Database](#)
- [Creating the Database Links](#)
- [Merchant Desktop and RDM Performance](#)
- [Installing the Sample Dataset](#)

---

**Note:** If your database requires multi-byte support, specify the following properties in your init.ora file:

```
CHARACTER_SET=AL32UTF8  
NLS_LENGTH_SEMANTICS=CHAR
```

---

### 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 the Prerequisite Software

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

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

- Oracle application software
- Oracle J Accelerator

## Creating the Business Data Database

Creating the business data 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

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**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 table spaces:

**Table 3–1 Business Database Tablespaces**

Tablespace	Description
DATA_01	Application tablespace for Plan. Recommended size: 5 GB.
INDEX_01	Application tablespace for indexes of Plan, STG, and ASH. Recommended size: 5 GB.
SYSTEM	System tablespace used for metadata.
SUS AUX	System tablespace used for system monitoring.
TEMP	System tablespace used for temporary system swap space.

**Table 3–1 Business Database Tablespaces**

Tablespace	Description
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
_ugl_large_heap_warning_threshold = 8388608
```

## Creating the History Data Database

---

**Note:** The size 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	Application tablespace for historical data.
INDEX_01	Application tablespace for indexes of historical data.
OPT_DATA_01	Application tablespace for optimized historical data.
OPT_INDEX_01	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', '');
```

## Creating the Database Links

If you plan to install the Plan application across two database instances, you must create the AE\_USER schema on one database instance, and the remaining database schemas (HIST\_USER, RDM\_USER, and OPT\_USER) on the other database instance. You must then set up the database links between the two instances.

To create the database links:

1. At the SQL prompt, connect to the AE\_USER schema on INSTANCE1, and then run the following command:

```
create database link <dblink_name> connect to HIST_USER identified by HIST_USER
using 'INSTANCE2';
```

2. At the SQL prompt, connect to the HIST\_USER schema on INSTANCE2, and then run the following command:

```
create database link <dblink_name> connect to AE_USER identified by AE_USER
using 'INSTANCE1';
```

3. At the SQL prompt, connect to the RDM\_USER schema on INSTANCE2, and then run the following command:

```
create database link <dblink_name> connect to AE_USER identified by AE_USER
using 'INSTANCE1';
```

4. At the SQL prompt, connect to the OPT\_USER schema on INSTANCE2, and then run the following command:

```
create database link <dblink_name> connect to AE_USER identified by AE_USER
using 'INSTANCE1';
```

Use the same *dblink\_name* used in step 3.

## Merchant Desktop and RDM Performance

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

### 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.

#### Planning for RDM Storage Requirements

Typically, the following tables can be very large objects in the RDM:

- RDM\_ACTIVITES (extracted from Plan)
- RDM\_FORECAST\_ACTIVITIES

The RDM\_FORECAST\_ACTIVITIES and the summary tables can be very large. When RDM is installed, allocate extra storage in the amount of the sum of Activities and Forecast Activities. For example, if the size of the Plan dataset is 10 GB, the size of Activities is 3 GB, and Forecast Activities is 1 GB, RDM requires an addition 4 GB of space.

- RDM\_MERCHANDISE\_TBL (extracted from Plan)
- Summary tables and indexes

## Increasing the Speed of the Report Generation Process

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

### Merchant Desktop Reports

The speed of data drilling during report generation depends on the number of product hierarchies your company has implemented.

To increase the speed of the Merchant Desktop report generation process, you can index specific hierarchy columns within the MERCHANDISE\_TBL and RDM\_MV\_ACT\_BASE2\_1 tables as needed. 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 increase the speed of the report generation process by adding indexes to the RDM tables for the summary levels that are described in [Chapter 7, "Integrating with MicroStrategy."](#)

## Installing the Sample Dataset

The Plan installation comes along with a sample dataset that can be used during implementation and demonstrations. This dataset contains generic data and is designed to work along with the default product configuration. The data files, along with the necessary data load scripts, are included as part of the installation media.

When you run the Oracle Installer, the sample dataset does not get installed by default. You must manually access and run the data load script to load the sample data.

You can find the sample dataset and the data load scripts at the following location in your Plan installation directory:

```
<Plan_installation>/modules/Datasets/AESample/Data
```

```
<Plan_installation>/modules/Datasets/AESample/DeployScripts
```

To load the sample data:

1. Navigate to the following location in the Plan installation directory:

```
<Plan_installation>/modules/Datasets/AESample/Data
```

2. Run the following script:

```
Plan.sh
```

---

---

**Note:** You can also modify the database schema locations by specifying the appropriate locations in the following script files:

- plexports.sh for business data schema
  - plexports\_elm.sh for actual history data schema
  - plexports\_opt.sh for optimized history data schema
  - plexports\_rdm.sh for retail data mart schema
- 
-



---

# Installing Your Application Server

This chapter contains the following sections:

- [Before You Begin](#)
- [Installing and Configuring WebLogic](#)
- [Setting Up the Maximum Message Size](#)

## Before You Begin

This chapter describes how to install your application server.

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

If you are clustering instances of your application server, create them before installing Plan—otherwise any 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 <b>WLS Domain</b> .
Server Type	Select <b>Admin Server with Clustered Managed Server(s)</b> .
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	<b>Important:</b> Select a unique port number that is not in use by other applications.  Recommended value: 8000  <b>Tip:</b> 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="<PLAN_HOME>/config"
JAVA_OPTION=" "-Dcom.profitlogic.configroot=${CONFIG_ROOT}
-Dweblogic.management.username=${WLS_USER}
-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.
```

## Setting Up the Maximum Message Size

The maximum message size setting, for the WebLogic Server, helps guard against any attempts that force the server to allocate more memory (than is available) and prevent the server from responding quickly to other requests. This setting defaults to a maximum message size of 10MB.

For the Plan application and Calculation Engine to provide proper forecasts, you must set this value to 128MB for the Plan application and Calculation Engine server domains.

To update the maximum message size value:

1. Log on to the WebLogic Administration console. You can access the console at the following URL:  
`http://servername:portnumber/console`
2. On the WebLogic Server Console, under **Domain Configurations**, click **Servers** in the **Network Configuration** column.
3. On the **Servers** page, under **Name**, click the server you want.  
The server configuration page appears.
4. On the **Protocols** tab, in the **General** section, click the **Show** link next to **Advanced Options**.
5. In the **Advanced Options** section, type **1280000000** in the **Maximum Message Size** field.
6. Click **Apply**.



---

## Installing Plan

After you have set up your database and application server, you can install Plan using the guidelines provided in this chapter. This chapter contains the following sections:

- [Overview of the Installation Process](#)
- [Installing Plan](#)
- [Install.properties Parameters Reference](#)
- [Troubleshooting Installation Issues](#)

### Overview of the Installation Process

---

**Note:** Although the options for IBM AIX, DB2, and WebSphere display on the Oracle Installer, they are not supported in this release.

---

In order to install Plan, your first task is to obtain the installation media. You can then choose the installation mode you prefer. Whichever mode you use, you first need to set up the Plan properties file. The installation modes are as follows:

- Graphical mode – In the graphical mode, the Oracle Installer displays a graphical user interface and prompts you to enter or modify the value of the properties specified in the properties file.
- Silent mode – In the silent mode, the installer processes the properties file without any manual intervention.

### Installing Plan

Installing Plan consists of the following tasks:

- [Accessing the Installation Software](#)
- [Setting Up Your Installation Properties File](#)
- [Setting Up the Jndi.properties File](#)
- [Installing Plan in the 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, available on a DVD or on a secure URL in a ZIP file. This section explains how you can 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. Type the appropriate information in the following fields, and then 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 check box.
- **Export Restrictions** - Click the check box.

The **Media Pack Search** screen displays.

4. Type appropriate information in the following fields, and then 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 Installation 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.install.properties file to the same directory, naming it install.properties.

3. Edit the `install.properties` file, specifying values as described within the file, and save it.

Now you can install Plan using one of the following modes:

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

## Setting Up the Jndi.properties File

The `jndi.properties` is a application resource file that include JNDI parameters required by the application. It includes the following parameters:

- **`java.naming.factory.initial`** – This parameter specifies the classname (including the package) of the Initial Context Factory for the JNDI service provider
- **`java.naming.provider.url`** – This parameter specifies the URL (DNS host name and port number) of the machine running the JNDI service, essential for the User Management Bulk Loader (`plansecurityload.sh`) utility.

If you decide to install the Plan application over a clustered environment, `java.naming.provider.url` parameter will point to the administrative server host and port number.

For the User Management Bulk Loader utility to work properly, you must edit the `jndi.properties` file, and update this parameter to point to the application server that is running the JNDI service.

You can find the `jndi.properties` file at the following location in the Plan installation:

```
<Plan_Installation>\modules\tools\conf\
```

## Installing Plan in the Silent Mode

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

To install Plan in silent mode:

1. Ensure that you have completed "[Setting Up Your Installation 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:

```
bash install.sh -s
```

### install.sh

The `install.sh` command enables you to install Plan.

### Syntax

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

### 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 the silent mode (install.sh -s), a trace message appears on the console (the stdout). When run in the 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, a log file and two properties files are generated.

If the installation resulted in issues, see [Troubleshooting 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 Installation 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:

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

4. From your application server machine, enter the following command.

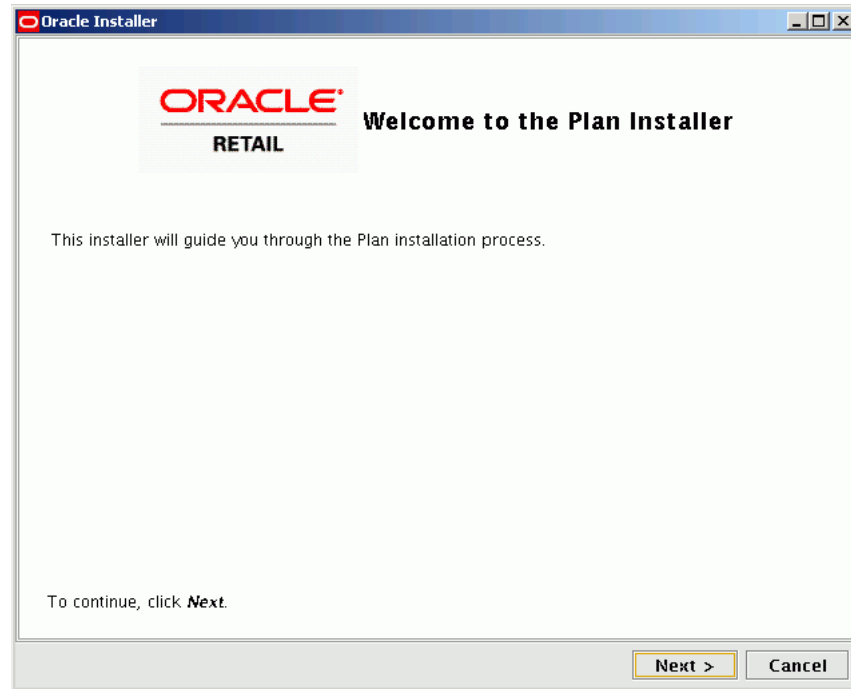
```
bash install.sh
```

---

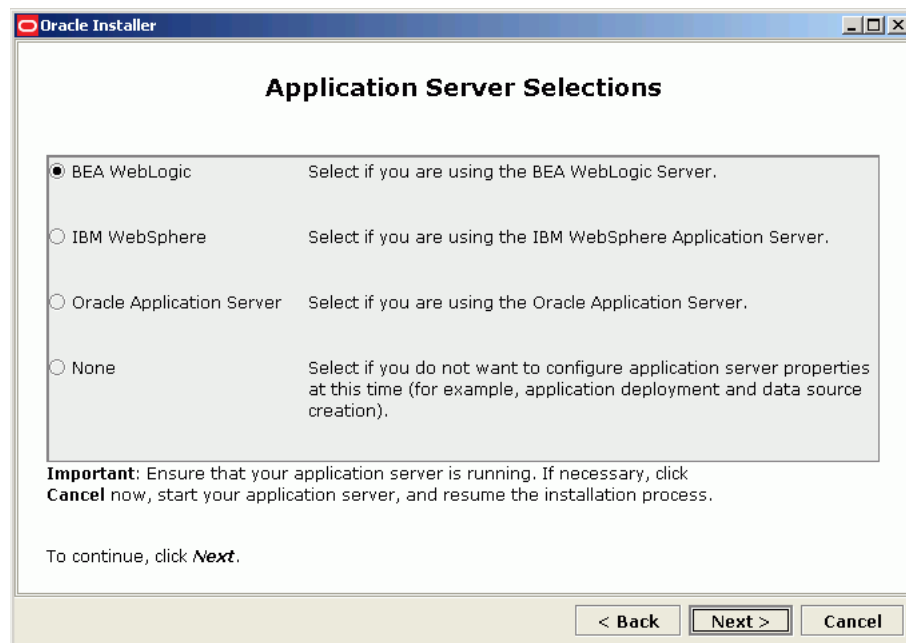
**Note:** For more information about this command, see [Installing Plan in the Silent Mode](#).

---

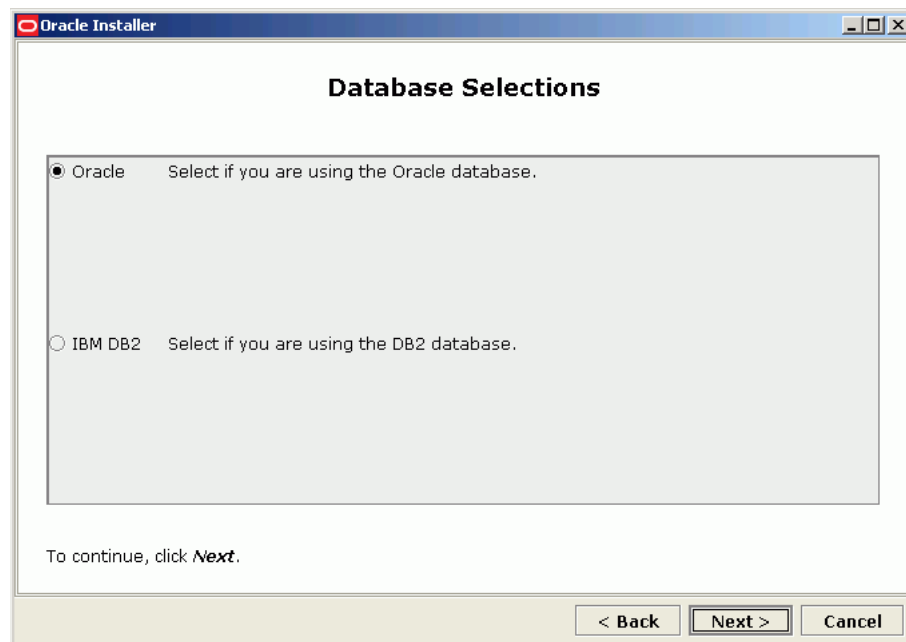
The **Welcome** screen appears.



5. Click **Next**.
6. On the **Application Server Selections** window, click **BEA WebLogic**, and then click **Next**.

**Figure 5–1 Application Server Selections Window**

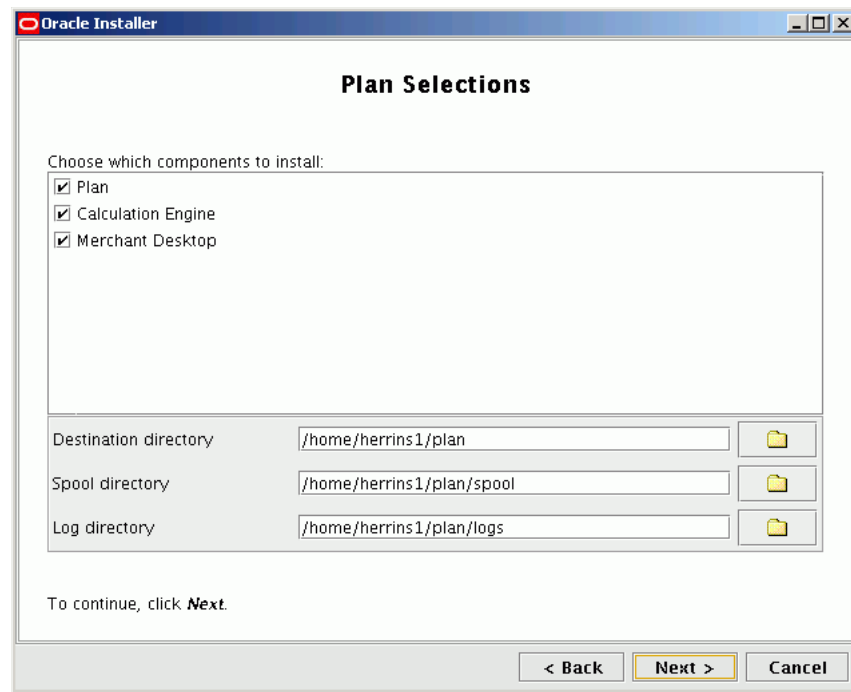
7. On the **Database Selections** window, click **Oracle**, and then click **Next**.

**Figure 5–2 Database Selections Window**

8. On the **Plan Selections** window, select the components you want to install, and then specify paths for the following:
  - **Destination Directory** - indicates the path to the Plan target directory.
  - **Spool Directory** - indicates the path to the Plan spool.

- **Log Directory** - indicates the path to the Plan installation log files.

**Figure 5–3 Plan Selections Window**



9. Click **Next**.
10. On the **Custom Settings** window, type the name or IP address, including port number of the server where you want to install the Calculation Engine.
11. Click **Next**.
12. On the **Network Properties** window, specify the network options in the following fields:
  - **Gateway host name** - Enter the host name 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.

**Figure 5–4 Network Properties Window**

The screenshot shows the 'Oracle Installer' window with the title 'Network Properties'. It prompts the user to 'Enter the following:'. There are three input fields: 'Gateway host name' with the value '10.176.158.54', 'Gateway port number' with the value '7005', and 'Protocol to use (https or http)' with the value 'http'. Below the fields, it says 'To continue, click **Next**.' At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

13. Click **Next**.

14. On the **Retail Data Mart** window, specify the user name and database link associated with the application schema, and then click **Next**.

**Figure 5–5 Retail Data Mart Window**

The screenshot shows the 'Oracle Installer' window with the title 'Retail Data Mart'. It prompts the user to 'Enter the following:'. There are two input fields: 'Username associated with the Application schema' with the value 'herrins', and 'Name of the database link to the Application instance' with the value '%rdm.oak.dblink%'. Below the fields, it says 'To continue, click **Next**.' At the bottom right, there are three buttons: '< Back', 'Next >', and 'Cancel'.

15. On the **Retail Data Mart - Actual and Optimized History** window, specify the user name and database link associated with the actual and optimized history schema, and then click **Next**.

**Figure 5–6 Retail Data Mart - Actual and Optimized History Window**

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

16. On the **Database Properties** windows, enter the following database information for the **Application**, **Actual History**, **Retail Data Mart**, **Optimized History**, **Audit**, and **Merchant Desktop** databases:
  - **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 data sources, 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 the 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.

**Figure 5–7 Database Properties – Application Database Window**

Enter the following:	
Database driver	oracle.jdbc.driver.OracleDriver
Database server address	oracle-db-host
Database server port	1521
Database name	oracledb
Database alias	dbalias
User ID	build441
Password	*****
Leave database "as is"	<input checked="" type="radio"/>

To continue, click **Next**.

< Back    **Next >**    Cancel

- On the **Selection Verification** window, verify the specifications you set for the installation, and then click **Install**.

**Figure 5–8 Selection Verification Window**

**Selection Verification**

The following components will be installed:

- Plan 2.6.1
- Calculation Engine 4.4.2
- Suite 1.4.0
- Store Sets 2.0.1
- AE Sample Dataset 1.0.0
- Installer 2.0.3

**Important:** If you click **Install** and the installation process fails, you may need to restore some original system settings before attempting to install Place Suite Display again. To ensure that your selections are correct, you can verify them by clicking **Back**, modifying as needed, and then returning to this screen. If all options are correct, click **Install**.

To proceed, click **Install**.

< Back    **Install**    Cancel

The **Installation Progress** window appears.

If the installation resulted in issues, see [Troubleshooting Installation Issues](#) on page 5-22.

---

**Note:** Now that you have installed Plan, restart your application server software and proceed with one of the following options:

- 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.
- 

## Install.properties Parameters Reference

The install.properties file enables you to set up the following parameters before you install Plan:

- [Architecture Properties Settings](#)
- [Plan Properties Settings](#)
- [Oracle Database Settings](#)
- [Application Server and Database Settings](#)
- [WebLogic Application Server Settings](#)
- [Cluster Properties](#)
- [Microstrategy Properties](#)
- [Post-Installation Properties Files](#)

### Architecture Properties Settings

The Architecture Properties settings enable you to set up the paths where you want the base installation, log, and spool files to be stored.

The following table describes the Architecture Properties settings:

**Table 5–1 Architecture Properties**

Parameter	Description
installdir	Use this parameter to specify the path to the default base installation folder.
basedest.basedest.dir	Use this parameter to specify the path to the base installation folder.
basedest.baselog.dir	Use this parameter to specify the path to the folder that contains the log files.
basedest.basespool.dir	Use this parameter to specify the path to the folder that contains the spool files.
architecture	Use this parameter to specify the operating system for the application. Valid values are aix_powerpc, linux_i686, or sunos_sun4u. For Plan, specify linux_i686.
http.protocol	Use this parameter to specify the type of HTTP protocol used to host the Plan application.
install.command.shell	Use this parameter to specify the shell command to use when you want to execute the shell scripts.
suite.host	Use this parameter to specify the URL where the User Management module is installed.

**Table 5–1 Architecture Properties**

Parameter	Description
suite.port	Use this parameter to specify the port to connect to the User Management module.

## Plan Properties Settings

The Post-Installation Properties Files settings enable you to specify the installation of the Plan-specific features.

The following table describes the Plan Properties settings:

**Table 5–2 Plan Properties Settings**

Parameter	Description
ce.url	Use this parameter to specify the URL where the Calculation Engine is installed.
product.planfe.install	Use this parameter to indicate the installation of the Plan Front End schema.
product.planengine.install	Use this parameter to indicate the installation of the Plan engine.
product.desktop.install	Use this parameter to indicate the installation of the Merchant Desktop.

## Oracle Database Settings

The Oracle Database settings enable you to specify the Oracle database parameters for the Plan application. The following table describes the following database settings:

- [Connection and Authentication Settings](#)
- [Actual History Database Properties](#)
- [Retail Data Mart Database Properties](#)
- [Optimized History Database Properties](#)
- [Audit Database Properties](#)
- [Merchant Desktop Database Properties](#)

### Connection and Authentication Settings

The Connection and Authentication settings enable you to specify the parameters used by the Plan application to communicate with the database.

The following table describes the Connection and Authentication settings:

**Table 5–3 Connection and Authentication Settings**

Parameter	Description
install.database.default	Use this parameter to specify the default database. For Plan, specify <b>oracle</b> .
install.database	Use this parameter to specify the installed database.
<b>Custom Values – These parameters are used to set values in the other database parameter, and are not used in the Oracle Installer directly.</b>	
dbms.oracle.host	Use this parameter to specify the URL where the Oracle database is installed.

**Table 5–3 Connection and Authentication Settings**

Parameter	Description
dbms.oracle.port	Use this parameter to specify the port to connect to the database.
dbms.oracle.db	Use this parameter to specify the database name.
dbms.oracle.alias	Use this parameter to specify the database alias name.
dbms.oracle.user	Use this parameter to specify the user name to connect to the database.
dbms.oracle.pass	Use this parameter to specify the password to connect to the database.
<b>Oracle DB Configuration</b>	
database.commondb.oracle.address	Use this parameter to specify the URL where the Oracle database is installed.
database.commondb.oracle.dbalias	Use this parameter to specify the database alias name.
database.commondb.oracle.dbname	Use this parameter to specify the database name.
database.commondb.oracle.dbport	Use this parameter to specify the port to connect to the database.
<b>Database Authentication Credentials</b>	
database.commondb.oracle.auth.commonoracleauth.user	Use this parameter to specify the user name to connect to the database.
database.commondb.oracle.auth.commonoracleauth.password	Use this parameter to specify the password to connect to the database.
database.commondb.oracle.auth.cepineauth.user	Use this parameter to specify the user name to connect to the PINE (CE Database) schema in the Calculation Engine.
database.commondb.oracle.auth.cepineauth.password	Use this parameter to specify the password to connect to the PINE (CE Database) schema in the Calculation Engine.
database.commondb.oracle.auth.ceweedauth.user	Use this parameter to specify the user name to connect to the WEED (CE Output) schema in the Calculation Engine.
database.commondb.oracle.auth.ceweedauth.password	Use this parameter to specify the password to connect to the WEED (CE Output) schema in the Calculation Engine.
database.commondb.oracle.auth.cedar.user	Use this parameter to specify the user name to connect to the CEDAR (CE Demand Parameters) schema in the Calculation Engine.
database.commondb.oracle.auth.cedar.password	Use this parameter to specify the password to connect to the CEDAR (CE Demand Parameters) schema in the Calculation Engine.

### Actual History Database Properties

The Actual History Database (ELM schema) properties enable you to specify the connection and authentication parameters for the ELM schema in the Plan database.

The following table describes the Actual History Database properties:

**Table 5–4 Actual History Database Properties**

Parameter	Description
elm.oracle.host	Use this parameter to specify the host name of the ELM database.
elm.oracle.port	Use this parameter to specify the port for the ELM database.
elm.oracle.db	Use this parameter to specify the database name.
elm.oracle.alias	Use this parameter to specify the database alias name.
elm.oracle.user	Use this parameter to specify the user name to connect to the ELM database.
elm.oracle.pass	Use this parameter to specify the associated password to connect to the ELM database.
elm.sau.oracle.user	Use this parameter to specify the SAU user name to connect to the ELM database.
elm.sau.oracle.pass	Use this parameter to specify the associated SAU password to connect to the ELM database.
database.elmdb.oracle.elm_main_dblink	Use this parameter to specify the database link name for the ELM schema to access the main database. If they exist in the same instance, specify <i>none</i> .
database.elmdb.oracle.create	Use this parameter to indicate that a new ELM database be created. Valid values are Yes or No.
database.elmdb.oracle.upgrade	Use this parameter to indicate that the existing ELM database be upgraded. Valid values are Yes or No.
database.elmdb.oracle.address	Use this parameter to specify the URL where the ELM database is installed.
database.elmdb.oracle.dbalias	Use this parameter to specify the ELM database alias name.
database.elmdb.oracle.dbname	Use this parameter to specify the ELM database name.
database.elmdb.oracle.dbport	Use this parameter to specify the port to connect to the ELM database.
database.elmdb.oracle.auth.elmauth.user	Use this parameter to specify the user name to connect to the ELM database.
database.elmdb.oracle.auth.elmauth.password	Use this parameter to specify the password to connect to the ELM database.
<b>SAU User for CE to access ELM and CommonDB</b>	
database.elmdb.oracle.auth.sauoracleauth.user	Use this parameter to specify the SAU user name to connect to ELM database.
database.elmdb.oracle.auth.sauoracleauth.password	Use this parameter to specify the SAU password to connect to the ELM database.
rdm.elm.schema	Use this parameter to specify the user name to create the RDM synonym.

### Retail Data Mart Database Properties

The Retail Data Mart Database (RDM schema) properties enable you to specify the connection and authentication parameters for the RDM schema in the Plan database.

The following table describes the Retail Data Mart Database properties:

**Table 5–5 Retail Data Mart Database Properties**

Parameter	Description
rdm.oracle.host	Use this parameter to specify the host name of the RDM database.
rdm.oracle.port	Use this parameter to specify the port for the RDM database.
rdm.oracle.db	Use this parameter to specify the database name.
rdm.oracle.alias	Use this parameter to specify the database alias name.
rdm.oracle.user	Use this parameter to specify the user name to connect to the RDM database.
rdm.oracle.pass	Use this parameter to specify the associated password to connect to the RDM database.
rdm.oak.dblink	Use this parameter to specify the database link name for the RDM schema to access the main database. If they exist in the same instance, specify <i>none</i> .
database.rdmdb.oracle.create	Use this parameter to indicate that a new RDM database be created. Valid values are Yes or No.
database.rdmdb.oracle.upgrade	Use this parameter to indicate that the existing RDM database be upgraded. Valid values are Yes or No.
database.rdmdb.oracle.address	Use this parameter to specify the URL where the RDM database is installed.
database.rdmdb.oracle.dbalias	Use this parameter to specify the RDM database alias name.
database.rdmdb.oracle.dbname	Use this parameter to specify the RDM database name.
database.rdmdb.oracle.dbport	Use this parameter to specify the port to connect to the RDM database.
database.rdmdb.oracle.auth.rdmauth.user	Use this parameter to specify the user name to connect to the RDM database.
database.rdmdb.oracle.auth.rdmauth.password	Use this parameter to specify the password to connect to the RDM database.
database.rdmdb.oracle.user	Use this parameter to specify the user name to connect to the RDM database.
database.rdmdb.oracle.password	Use this parameter to specify the password to connect to the RDM database.
rdm.feschema	Use this parameter to specify the database name for the front end schema.
rdm.oakschema	Use this parameter to specify the database name for the OAK schema.

### Optimized History Database Properties

The Optimized History Database (Dogwood schema) properties enable you to specify the connection and authentication parameters for the Dogwood schema in the Plan database.

The following table describes the Optimized History Database properties:

**Table 5–6 Optimized History Database Properties**

Parameter	Description
dogwood.oracle.host	Use this parameter to specify the host name of the DOGWOOD database.
dogwood.oracle.port	Use this parameter to specify the port for the DOGWOOD database.
dogwood.oracle.db	Use this parameter to specify the database name.
dogwood.oracle.alias	Use this parameter to specify the database alias name.
dogwood.oracle.user	Use this parameter to specify the user name to connect to the DOGWOOD database.
dogwood.oracle.pass	Use this parameter to specify the associated password to connect to the DOGWOOD database.
dogwood.oak.dblink	Use this parameter to specify the database link name for the DOGWOOD schema to access the main database. If they exist in the same instance, specify <i>none</i> .
database.dogwooddb.oracle.create	Use this parameter to indicate that a new DOGWOOD database be created. Valid values are Yes or No.
database.dogwooddb.oracle.upgrade	Use this parameter to indicate that the existing DOGWOOD database be upgraded. Valid values are Yes or No.
database.dogwooddb.oracle.address	Use this parameter to specify the URL where the DOGWOOD database is installed.
database.dogwooddb.oracle.dbalias	Use this parameter to specify the DOGWOOD database alias name.
database.dogwooddb.oracle.dbname	Use this parameter to specify the DOGWOOD database name.
database.dogwooddb.oracle.dbport	Use this parameter to specify the port to connect to the DOGWOOD database.
database.dogwooddb.oracle.auth.dogwoodoracleauth.user	Use this parameter to specify the user name to connect to the DOGWOOD database.
database.dogwooddb.oracle.auth.dogwoodoracleauth.password	Use this parameter to specify the password to connect to the DOGWOOD database.
database.dogwooddb.oracle.user	Use this parameter to specify the user name to connect to the DOGWOOD database.
database.dogwooddb.oracle.password	Use this parameter to specify the password to connect to the DOGWOOD database.
rdm.optschema	Use this parameter to specify the DOGWOOD database user name to create a RDM synonym.

### Audit Database Properties

The Audit Database properties enable you to specify the connection and authentication parameters for the Audit database.

The following table describes the Audit Database properties:

**Table 5–7 Audit Database Properties**

Parameter	Description
audit.oracle.host	Use this parameter to specify the host name of the AUDIT database.
audit.oracle.port	Use this parameter to specify the port for the AUDIT database.
audit.oracle.db	Use this parameter to specify the database name.
audit.oracle.alias	Use this parameter to specify the database alias name.
audit.oracle.user	Use this parameter to specify the user name to connect to the AUDIT database.
audit.oracle.pass	Use this parameter to specify the associated password to connect to the AUDIT database.
database.auditdb.oracle.address	Use this parameter to specify the URL where the Audit database is installed.
database.auditdb.oracle.dbalias	Use this parameter to specify the Audit database alias name.
database.auditdb.oracle.dbname	Use this parameter to specify the name of the Audit database.
database.auditdb.oracle.port	Use this parameter to specify the port to connect to the Audit database.

**Database Authentication Credentials for AUDIT**

database.auditdb.oracle.auth.auditoracleauth.user	Use this parameter to specify the user name to connect to the Audit database.
database.auditdb.oracle.auth.auditoracleauth.password	Use this parameter to specify the password to connect to the Audit database.

**AUDIT property for Creating the Database**

database.auditdb.oracle.create	Use this parameter to indicate that a new Audit database must be created.
--------------------------------	---

**AUDIT property for Upgrading the Database**

database.auditdb.oracle.upgrade	Use this parameter to specify that the existing database be upgraded to include the Audit schema.
common.feschema	Use this parameter to specify the user name associated with the application schema.
common.dblink	Use this parameter to specify the database link to access the common components schema through the audit schema. If the schema exists in the same instance, specify <i>none</i> .

**Merchant Desktop Database Properties**

The Merchant Desktop Database (Desktopdb schema) properties enable you to specify the connection and authentication parameters for the Desktopdb database.

The following table describes the Merchant Desktop Database properties:

**Table 5–8 Merchant Desktop Database Properties**

Parameter	Description
desktopdb.oracle.host	Use this parameter to specify the host name of the DESKTOPDB database.
desktopdb.oracle.port	Use this parameter to specify the port for the DESKTOPDB database.

**Table 5–8 Merchant Desktop Database Properties**

Parameter	Description
desktopdb.oracle.db	Use this parameter to specify the database name.
desktopdb.oracle.alias	Use this parameter to specify the database alias name.
desktopdb.oracle.user	Use this parameter to specify the user name to connect to the DESKTOPDB database.
desktopdb.oracle.pass	Use this parameter to specify the associated password to connect to the DESKTOPDB database.
database.desktopbdb.oracle.address	Use this parameter to specify the URL where the Desktopdb database is installed.
database.desktopbdb.oracle.port	Use this parameter to specify the port to connect to the Desktopdb database.
database.desktopbdb.oracle.dbname	Use this parameter to specify the name of the Desktopdb database.
database.desktopbdb.oracle.dbalias	Use this parameter to specify the Desktopdb database alias name.
<b>Database Authentication Credentials for DESKTOPDB</b>	
database.desktopbdb.oracle.auth.desktopdboracleauth.user	Use this parameter to specify the user name to connect to the Desktopdb database.
database.desktopbdb.oracle.auth.desktopdboracleauth.password	Use this parameter to specify the password to connect to the Desktopdb database.
<b>DESKTOPDB property for Creating the Database</b>	
database.desktopbdb.oracle.create	Use this parameter to indicate that a new Desktopdb database must be created.
<b>DESKTOPDB property for Upgrading the Database</b>	
database.desktopbdb.oracle.upgrade	Use this parameter to specify that the existing database be upgraded to include the Desktopdb schema.

## Application Server and Database Settings

The Application and Database settings enable you to specify the default application server for the Plan application and the database.

The following table describes the Application Server and Database settings:

**Table 5–9 Application Server and Database Settings**

Parameter	Description
install.appserver.default	Use this parameter to specify the default application server. For Plan, specify weblogic.
install.database.appserver	Use this parameter to specify the application server for the database. For Plan, specify weblogic.
weblogic.connectionpool.min	Use this parameter to specify the minimum database connections in a connection pool.
weblogic.connectionpool.max	Use this parameter to specify the maximum database connections in a connection pool.

## WebLogic Application Server Settings

The WebLogic Application Server settings enable you to specify the application server parameters for the Plan application.

The following table describes the WebLogic Application Server settings:

**Table 5–10 WebLogic Application Server Settings**

Parameter	Description
bea.home	Use this parameter to specify the path to the BEA base directory. For example, C:\BEA.
weblogic.server	Use this parameter to specify the name of the server instance.
weblogic.domain	Use this parameter to specify the name of the domain created on the WebLogic application server.
weblogic.admin.userid	Use this parameter to specify the WebLogic admin user name.
weblogic.admin.password	Use this parameter to specify the WebLogic admin password.
weblogic.admin.port	Use this parameter to specify the port to connect to the WebLogic application server.
weblogic.server.address	Use this parameter to specify the URL to connect to the WebLogic application server.
weblogic.home	Use this parameter to specify the path to the WebLogic server in the BEA base directory. For example, C:\BEA\weblogic81\server
weblogic.start	Use this parameter to specify the path to the WebLogic startup shell script (startWebLogic.sh).
weblogic.dbcpool.commonconnectionpool.min	Use this parameter to specify the minimum database connections in the common connection pool.
weblogic.dbcpool.commonconnectionpool.max	Use this parameter to specify the maximum database connections in the common connection pool.
weblogic.dbcpool.businessconnectionpool.min	Use this parameter to specify the minimum database connections in the business connection pool.
weblogic.dbcpool.businessconnectionpool.max	Use this parameter to specify the maximum database connections in the business connection pool.
weblogic.dbcpool.forecastconnectionpool.min	Use this parameter to specify the minimum database connections in the forecast connection pool.
weblogic.dbcpool.forecastconnectionpool.max	Use this parameter to specify the maximum database connections in the forecast connection pool.
weblogic.dbcpool.historicalconnectionpool.min	Use this parameter to specify the minimum database connections in the historical connection pool.
weblogic.dbcpool.historicalconnectionpool.max	Use this parameter to specify the maximum database connections in the historical connection pool.
weblogic.dbcpool.analyticalconnectionpool.min	Use this parameter to specify the minimum database connections in the analytical connection pool.
weblogic.dbcpool.analyticalconnectionpool.max	Use this parameter to specify the maximum database connections in the analytical connection pool.
weblogic.dbcpool.runtimeconnectionpool.min	Use this parameter to specify the minimum database connections in the runtime connection pool.
weblogic.dbcpool.runtimeconnectionpool.max	Use this parameter to specify the maximum database connections in the runtime connection pool.

**Table 5–10 WebLogic Application Server Settings**

Parameter	Description
weblogic.dbcpool.auditconnectionpool.min	Use this parameter to specify the minimum database connections in the audit connection pool.
weblogic.dbcpool.auditconnectionpool.max	Use this parameter to specify the maximum database connections in the audit connection pool.
weblogic.dbcpool.desktopconnectionpool.min	Use this parameter to specify the minimum database connections in the desktop connection pool.
weblogic.dbcpool.desktopconnectionpool.max	Use this parameter to specify the maximum database connections in the desktop connection pool.

## Cluster Properties

The Cluster properties enable you to set up parameters that apply to installations in a clustered environment.

The following table describes the Cluster properties:

**Table 5–11 Cluster Properties**

Parameter	Description
<b>Plan Application</b>	
scope.fetarget.serverobject	Use this parameter to specify the name of the server or cluster where the Plan Front End database is installed.
scope.fetarget.type	Use this parameter to specify the type of the server object. You can specify cluster or server.
<b>Calc Engine</b>	
scope.cetarget.serverobject	Use this parameter to specify the name of the server or cluster where the Calculation Engine is installed.
scope.cetarget.type	Use this parameter to specify the type of the server object. You can specify cluster or server.
<b>JMS Server Name in Cluster</b>	
jms.server	Use this parameter to specify the name of the JMS server (in the cluster) where the Plan application is installed.
jms.deployment	Use this parameter to specify the type of deployment. The value defaults to <b>Server</b> . For cluster-based deployment, specify <b>Cluster</b> .
jms.ce.server	Use this parameter to specify the name of the JMS server (in the cluster) where the Calculation Engine is installed.
jms.ce.deployment	Use this parameter to specify the type of deployment. The value defaults to <b>Server</b> . For cluster-based deployment, specify <b>Cluster</b> .
<b>Install Base Replication Host List</b>	
host.list	This is the list of managed servers, where you want the installer to deploy an instance of Calculation Engine.  <hostname1,hostname2...>, When installing in a clustered environment across multiple hosts, the install base needs to be replicated on all the hosts involved. (This is not needed if the install base is on network drive shared among the servers).

## Microstrategy Properties

The Microstrategy Properties settings enable you to specify the connection and authentication parameters for Microstrategy. It also enables you to specify the highest hierarchy level, in your business, for the merchandise and location hierarchy.

The following table describes the Microstrategy Properties settings:

**Table 5–12 Last Session Properties Files**

Parameter	Description
mstr.admin.server	Use this parameter to specify the host name or the IP address of the Microstrategy administration server.
mstr.server	Use this parameter to specify the host name or the IP address of the Microstrategy server.
mstr.report.server	Use this parameter to specify the host name or the IP address of the Microstrategy reports server.
mstr.project	Use this parameter to specify the project source name.
mstr.port	Use this parameter to specify the port number to connect to the Microstrategy server.
mstr.admin.userid	Use this parameter to specify the administrative user name to connect to the Microstrategy server.
mstr.admin.password	Use this parameter to specify the administrative password to connect to the Microstrategy password
merchandise.chain.level.name	Use this parameter to specify the highest chain level in the merchandise hierarchy for your business.
location.chain.level.name	Use this parameter to specify the highest chain level in the location hierarchy for your business.
mstr.users.max	Use this parameter to specify the maximum number of users that can connect to the Microstrategy server at a time.
bi.server	Use this parameter to specify the Business Intelligence (BI) server version. Valid values are MS7 or MS8. For Plan, specify MS8.

## Post-Installation Properties Files

The Post-Installation Properties Files settings enable you to specify the location where you want to store the last-session.properties and missing-entries.properties files.

The following table describes the Post-Installation Properties Files settings:

**Table 5–13 Last Session Properties Files**

Parameter	Description
install.properties.savefile	Use this parameter to specify the location where you want to store the last-session.properties file. This file generates once you exit from the installer, and contains all the property names and values used in the last installation.
missing.properties.savefile	Use this parameter to specify the location where you want to store the missing-entries.properties file. This file generates just before the installer exits, and contains all the property names and values that could not be resolved during installation.

## Troubleshooting 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 the 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 was not complete, no log file was generated.

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

### 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.

The file naming convention of the log file is as follows:

install-<YYYYMMDD>-154213.log

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## Installing Place Over Plan

This chapter describes how you can install the Place application to work along with an existing installation of Plan. It includes the procedures you can use to deploy the Place application in the same WebLogic domain used by Plan.

It includes the following sections:

- [Setting Up the Plan Installation](#)
- [Removing the Merchant Desktop from the Installation](#)
- [Setting Up the Place Installation](#)
- [Configuring Place](#)

You can install the Place application over an existing installation of Plan version 2.6 (or above) only. Ensure that you install Plan version 2.6 or upgrade from the existing version to Plan version 2.6, before installing Place.

### Setting Up the Plan Installation

Before you install or upgrade the Plan application, you must edit the AUDIT schema settings in the installation properties file and direct the installer to create a new AUDIT schema.

To set up the installation properties for the Plan application:

- Edit the `install.properties` file to reflect the following settings in the Oracle Properties (Audit Database) section:

```
database.auditdb.oracle.create=yes
```

```
database.auditdb.oracle.upgrade=no
```

When running an upgrade, specify the following settings for all the other schemas:

```
database.<schema_name>.oracle.create=no
```

```
database.<schema_name>.oracle.upgrade=yes
```

For more information on the installation properties file and the Plan installation procedure, see [Installing Plan](#).

## Removing the Merchant Desktop from the Installation

The Place application does not recognize the Merchant Desktop module and the associated schemas. Before you install the Place application, you must remove the Merchant Desktop module from the existing Plan installation.

Since the Oracle installer is unable to remove the Merchant Desktop installation, you must manually remove the Merchant Desktop module.

To remove the Merchant Desktop module:

1. Log on to the WebLogic Administration console. You can access the console at the following URL:

`http://servername:portnumber/console`

**Table 6–1    Servername and Portnumber Description**

Where	Is
servername	The name of the application server where the application is installed.
portnumber	The port number that the application server uses for the application.

2. On the WebLogic Server Console, under **Domain Configurations**, click **Applications** in the **Your Deployed Resources** column.
3. On the Applications page, click the **Delete** icon (at the right) for the Merchant Desktop module.  
A confirmation message appears.
4. Click **Yes**.
5. Once you delete the Merchant Desktop module from the WebLogic application server, you must also delete the Merchant Desktop Enterprise Archive (MerchantDesktop.ear) file from the installation folder. This file is located at the following location in the Plan installation folder:

`<install_dir>/modules/MerchantDesktop/`

## Setting Up the Place Installation

Before you start installing the Place application, you must edit the installation properties file and direct the installer to create a new place schema. Since the other schemas are already created during Plan installation, you must direct the installer to upgrade (and not create) the other schemas.

To set up the place schema properties for the Place application:

1. Edit the `install.properties` file to reflect the following settings in the Oracle Properties (Place Schema) section:

```
database.placedb.oracle.create=yes
```

```
database.placedb.oracle.upgrade=no
```

For all other schemas, specify the following:

```
database.<schema_name>.oracle.create=no
```

```
database.<schema_name>.oracle.upgrade=yes
```

2. Run the Oracle Installer to start installing the Place application.

For more information on the installation properties file and the Place installation procedure, see the chapter *Installing Place* in the *Place Installation Guide*.

## Configuring Place

Once the Place application is installed, you must load the user roles and business rules used between Place and Plan. You must also run certain scripts that load seed data for the Place application.

This section includes the following tasks you must perform to load the user roles, business rules, and seed data:

- [Loading User Roles](#)
- [Loading Business Rules](#)
- [Loading Seed Data](#)

### Loading User Roles

Use the User Management Bulk Loader script to load the user roles set up for the Place and Plan applications. The Bulk Loader script loads the user roles specified in a role set file.

The role set and role assignments are set up (based on your business need) in a common file, and include the user accounts and roles access information for both the applications. Ensure that this file is available during the implementation. You can find a sample user roles set file, `ae_role_set.xml`, at the following location:

```
<Place_Installation>/modules/tools/conf/
```

For more information on loading the user roles, see the section *Understanding the User Management Bulk Loader Utility* section in the *Plan Configuration Guide*.

### Loading Business Rules

Use the Business Rules Management Administration shell script (`brmadmin.sh`) to load the business rule definitions set up for the Place and Plan applications. The script loads the business rule definitions specified in a rule definitions file.

The rule definitions are set up (based on your business need) in a common file, and includes the business rules information for both the applications. Ensure that this file is available during the implementation. You can find a sample rules definition file, `ae_rule_definitions.xml`, at the following location:

```
<Place_Installation>/modules/tools/conf/SampleRules
```

For more information on loading the business rules, see the section *Loading Business Rule Definitions* in the *Plan Configuration Guide*.

### Loading Seed Data

For the Place application to work along with the Plan application, you must run certain scripts to load the seed data required by both the applications. These scripts help you load generic and customized data required for your business.

You can find the sample scripts at the following location in the Place installation directory:

```
<Place_Installation>/Datasets/AESample/Data/Seed
```

Before you start the load process, ensure that the custom scripts are set up based on your business need. You can run the generic scripts, without any modifications, and

load the seed data. For more information on the scripts, see [Reference to the Data Load Scripts](#).

To load the seed data:

1. At the SQL prompt, run the following scripts:

- custom\_ir\_objects.sql (Custom script)
- pl\_dd\_attributes.sql (Generic script)
- data\_levels\_tbl.sql (Custom script)
- dist\_centers\_tbl.sql (Custom script)

These scripts are common for the Place and Plan applications.

---

**Note:** You need not run these scripts for the Plan application, if the application was upgraded to Plan Version 2.6.

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2. Run the following scripts for the Place application:

- create\_default\_users.sql (Generic script)
- merch\_admin\_setting\_types\_tbl.sql (Generic script)
- merchandise\_admin\_settings\_tbl.sql (Custom script)
- otr\_component\_types\_tbl.sql (Custom script)
- grid\_data\_population.sql (Generic script)
- upd\_static\_grid\_data.sql (Generic script)

These scripts load data specific to the Place application.

3. Add the following script to the automation set up for the nightly-run:

- pl\_load\_client\_place.sql (Place-specific script)

4. After the first automation process, run the following scripts:

- store\_set\_data.sql (Generic script)
- store\_attribute\_names\_tbl.sql (Generic script)
- planned\_item\_types.sql (Generic script)
- media\_types.sql (Generic script)
- emphasis\_types.sql (Generic script)
- indicator\_types.sql (Generic script)
- pricing\_types.sql (Generic script)

---

**Note:** You need not run these scripts for the Plan application, if the application was upgraded to Plan Version 2.6.

---

5. Run the Initialization Load process, and then the following script in the Place application:

- a4p\_required\_data.sql (Place-specific script)

## Reference to the Data Load Scripts

The following table describes the scripts (required for the data load), and lists their location in the AESample directory:

**Table 6–2 Data Load Scripts for Place and Plan**

Script Name	Script Location (Place_Install\DataSets\AESample)	Script Description
<i>Custom Scripts</i>		
custom_ir_objects.sql	AESample\Data\Seed	This SQL script loads the customized inference rules.
data_levels_tbl.sql	AESample\Data\Seed	This SQL script loads the size profile information, based on your business, for the merchandise and location hierarchy.
dist_centers_tbl.sql	AESample\Data\Seed	This SQL script loads the information on the distribution centers.
merchandise_admin_settings_tbl.sql	AESample\Data\Seed\Place	This SQL script loads the customized merchandise administration settings.
otr_component_types_tbl.sql	AESample\Data\Seed\Place	This SQL script loads the customized Open to Receive (OTR) metric values.
<i>Generic Scripts</i>		
a4p_required_data.sql	AESample\Data\Seed\Place	This SQL script loads the essential business data required by the Place application.
create_default_users.sql	AESample\Data\Seed\Place	This SQL script creates the default user required by the Place application.
emphasis_types.sql	AESample\Data\Seed	This SQL script loads the emphasis types.
grid_data_population.sql	AESample\Data\Seed\Place	This SQL script loads the grid and column configurations.
media_types.sql	AESample\Data\Seed	This SQL script loads the information on the type of media used in a promotion.
merch_admin_setting_types_tbl.sql	AESample\Data\Seed\Place	This SQL script loads the merchandise administration setting types.
page_indicator_types.sql	AESample\Data\Seed	This SQL script loads the information on the location, front or back, where the promotion advertisement can be placed.
pl_dd_attributes.sql	AESample\Data\Seed	This SQL script enables the merchandise hierarchy and location hierarchy CDAs (disabled by default.)
pl_load_client_place.sql	AESample\DeployScripts\Place	This SQL script executes various procedures to load the warehouse inventory, daily inventory, OTR feeds, and weekly sales for the Place application.
planned_item_types.sql	AESample\Data\Seed	This SQL script loads the planned item types.
pricing_types.sql	AESample\Data\Seed	This SQL script loads the pricing types.
store_attribute_names_tbl.sql	AESample\Data\Seed	This SQL script loads the store division (Str Div) and subset records in the STORE_ATTRIBUTES_NAMES_TBL table. These records are the initial set of location hierarchy level descriptions (in the Store Set User Interface) essential for the application.
store_set_data.sql	AESample\Data\Seed	This SQL script loads the store set information.
upd_static_grid_data.sql	AESample\Data\Seed\Place	This SQL script loads the Store Division (STR DIV) record in the CT_COLUMNS_TBL table. This table stores the grid and column information in the database.

---

## 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](#)
- [Migrating to the Microstrategy 8 Platform](#)
- [Configuring MicroStrategy to Access the RDM Database](#)
- [Mapping RDM and MicroStrategy Summarization Levels](#)
- [Mapping the Display of Hierarchy Levels](#)
- [Configuring the User Link](#)

### 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 **MDPriceMetadata.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.
2. Select **Metadata Repository and Statistics Tables** and click **Next**.  
The **Configuration Tasks** screen displays.
3. Select **Create Metadata Tables** and **Create Statistics Tables**, and click **Next**.  
The **ODBC Data Source Name** screen displays.

**Figure 7-1 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.

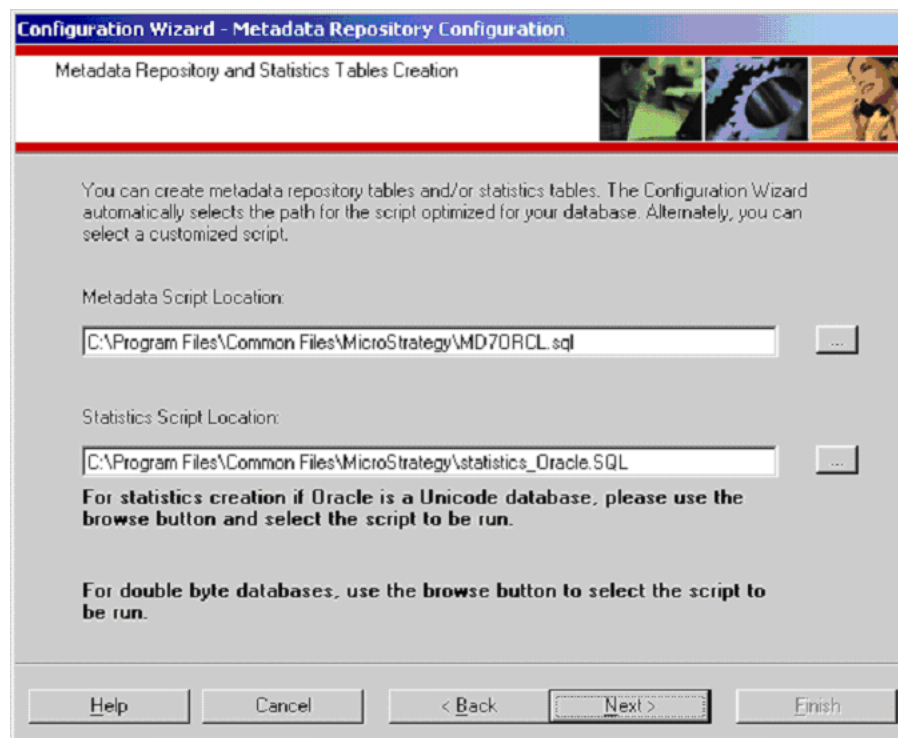
**Figure 7-2 Driver Selection Screen**

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

**Figure 7–3 Oracle Driver Details Screen**

The screenshot shows the 'Driver Details' screen of the 'MicroStrategy Connectivity Configuration Wizard'. The title bar reads 'MicroStrategy Connectivity Configuration Wizard'. Below the title bar, the text 'Driver Details' is displayed. To the right of the text are three small icons: a green abstract shape, a blue gear, and a person's face. Below this, a message states: 'Enter the following information to connect to Oracle using the Oracle Wire Protocol Driver.' There are four input fields: 'Data Source Name' with the value 'OraServer orcl metadata\_user', 'Host Name' with the value 'OraServer', 'SID' with the value 'orcl', and 'Port Number' with the value '1521'. Below these fields is a text box containing the instruction: 'A string that identifies this Oracle data source configuration in the system information. Examples include Accounting Or Oracle-Serv1.' To the right of this text box is a 'Test...' button. At the bottom of the window are five buttons: 'Help', 'Cancel', '< Back', 'Next >', and '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 7–4 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**.

---

**Note:** For UTF-8 encoded data, select the **Metadata Script Location** /MicroStrategy/md7orcutf8.sql.

---

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

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

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

**Figure 7-5 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.

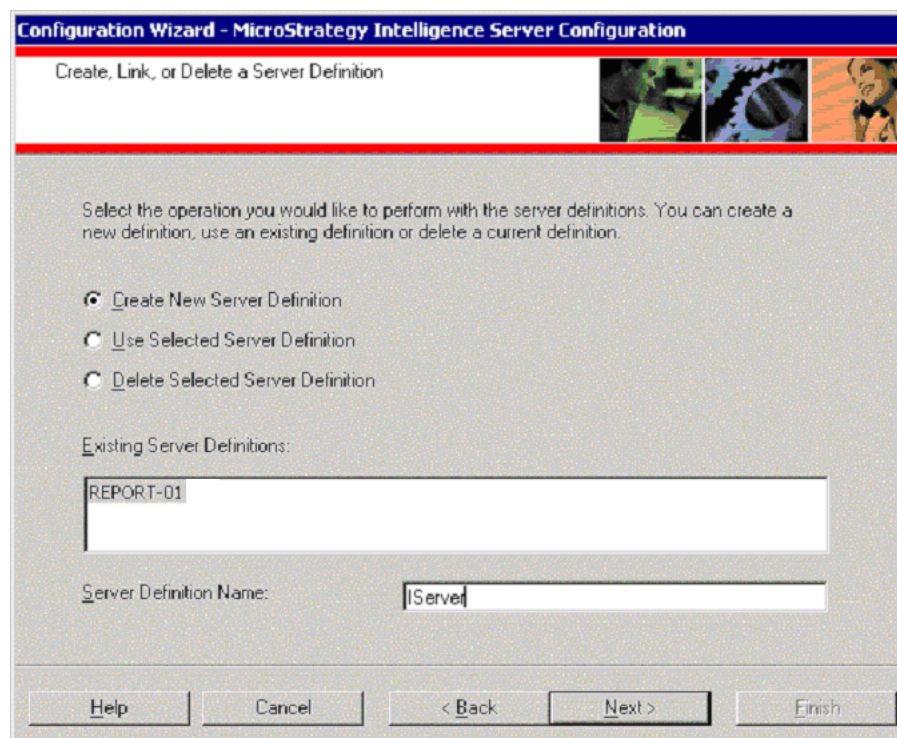
**Figure 7-6 User Authentication Screen**

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](#) on page 7-29.

**Figure 7-7 Create, Link, or Delete a Server Definition Screen**



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.

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.

Select **Project Sources**, click **Next**, and complete the **Project Sources** wizard.

After you finish, migrate your metadata.

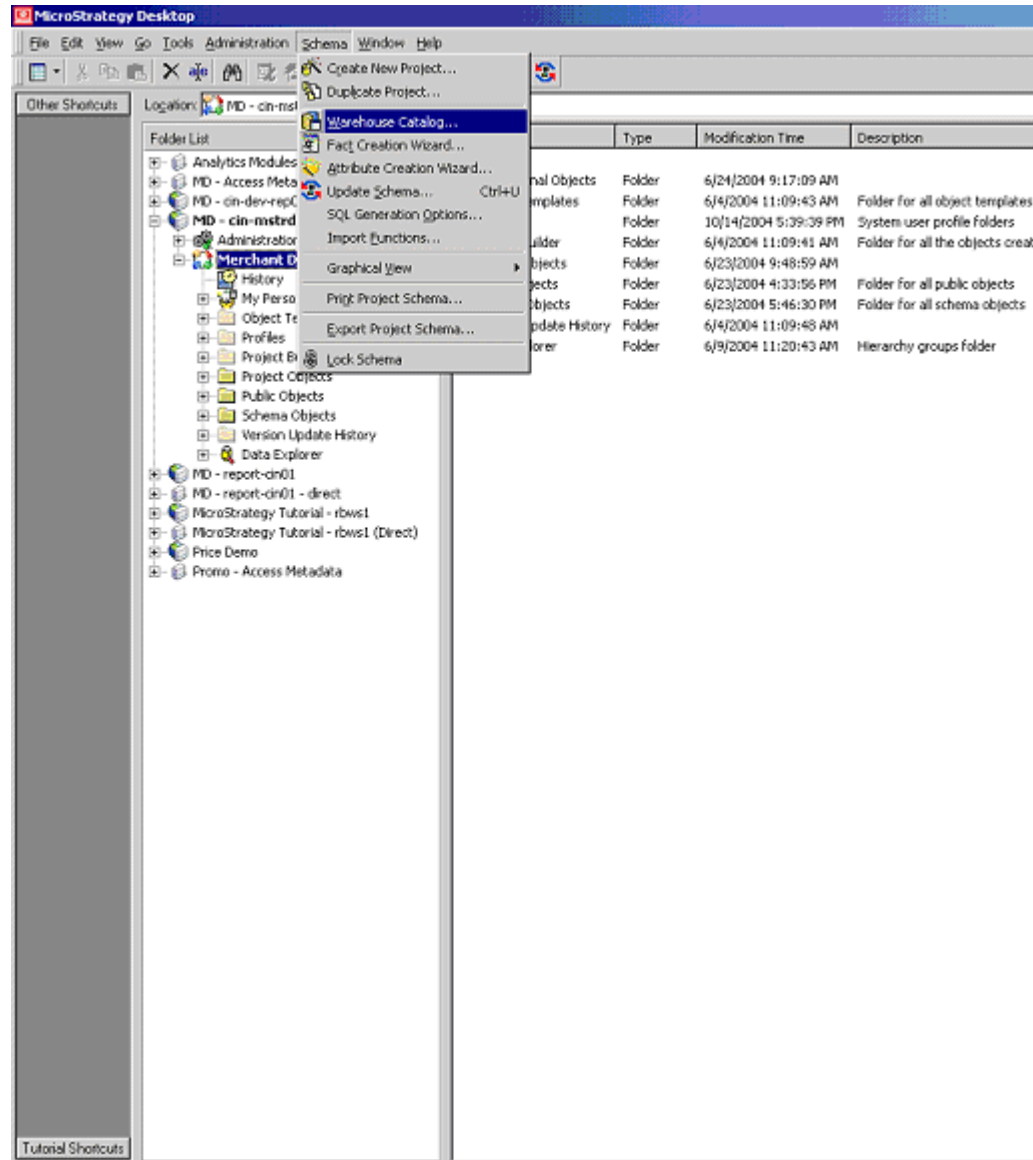
## Migrating the Metadata

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.

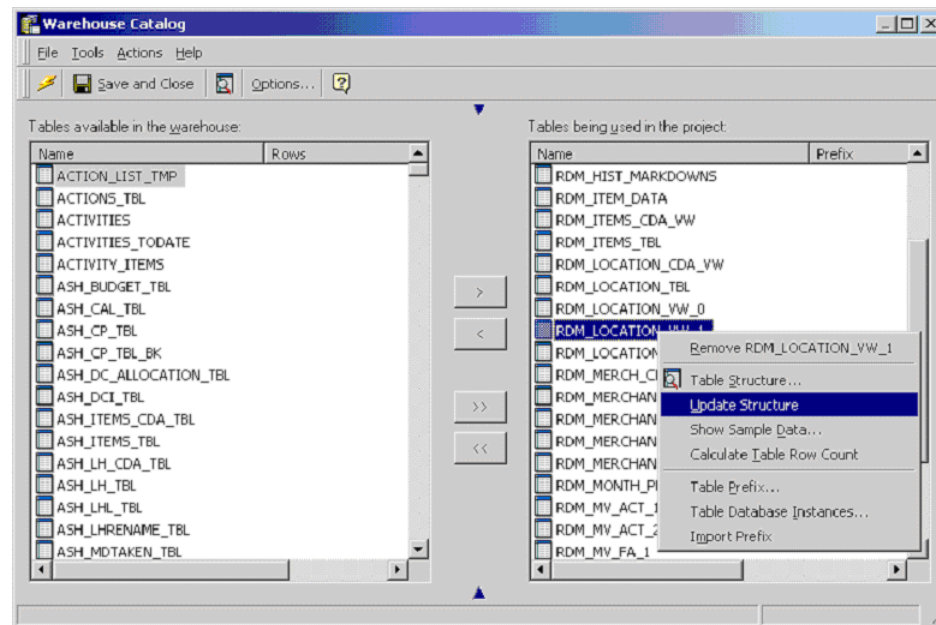
**Figure 7–8 Updating Warehouse Catalog Schema**



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

The **Warehouse Catalog** screen displays.

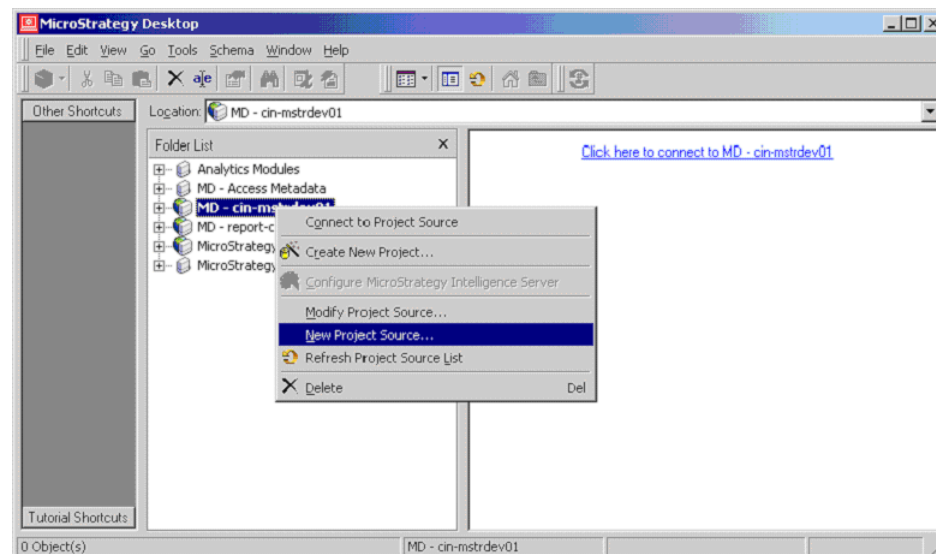
Figure 7–9 Warehouse Catalog Screen



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 7–10 Creating a Project Source for the Intelligence Server

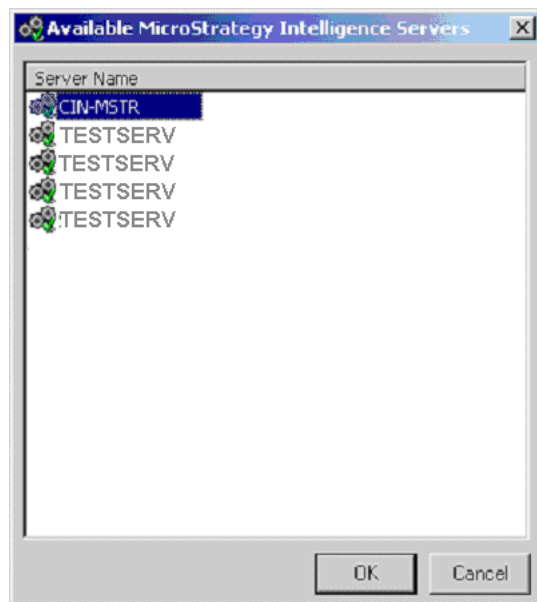


From the **Folder List** pane, right-click **MD - cin** and select **New Project Source**.

The **Project Source Manager** screen displays.

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

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

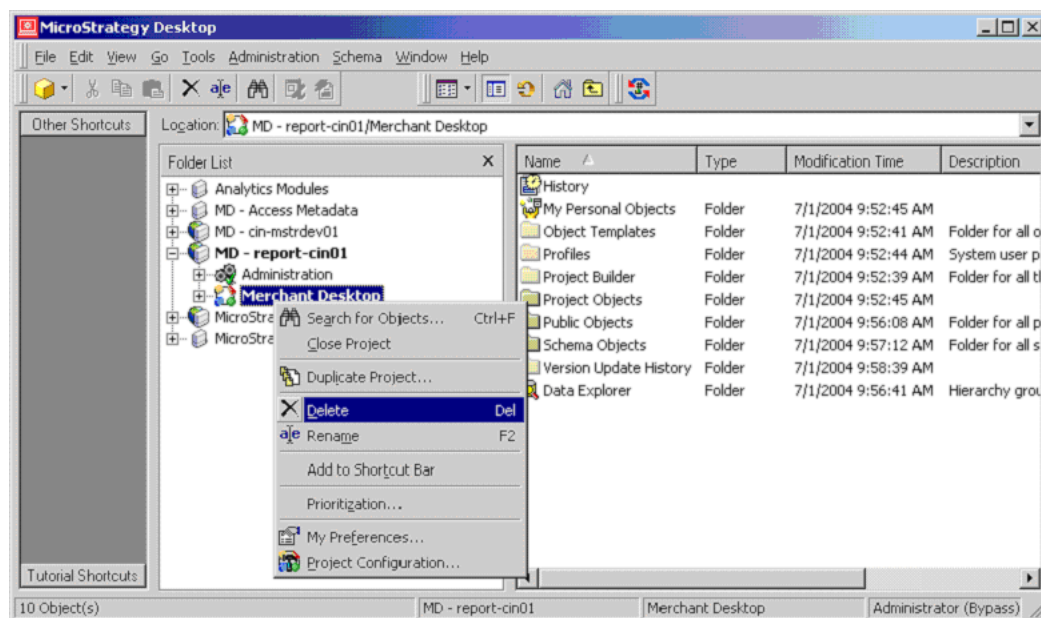
**Figure 7–11 Available MicroStrategy Intelligence Servers**

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

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

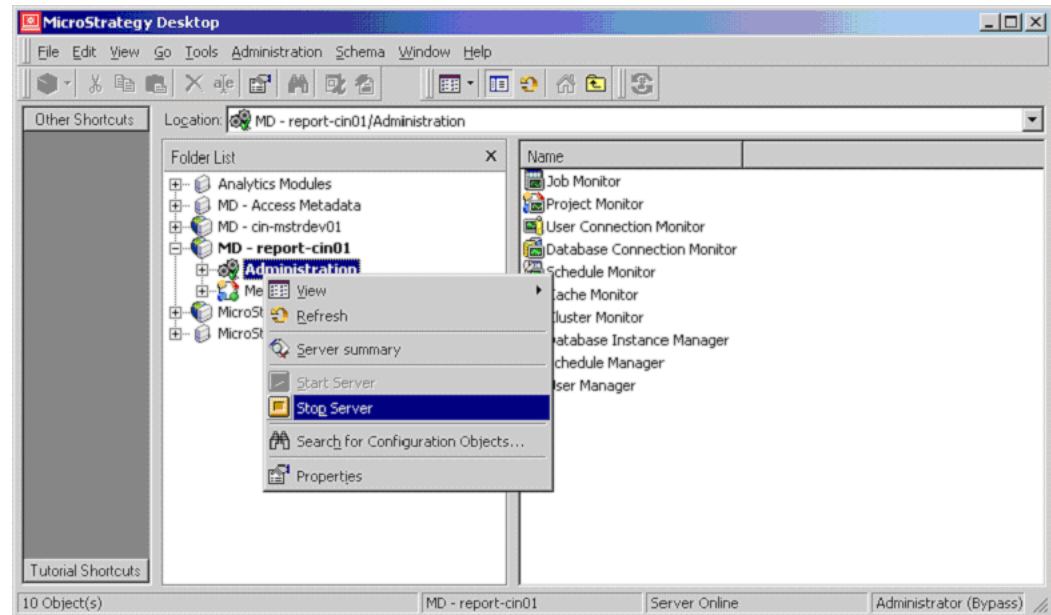
The **MicroStrategy Desktop** screen displays.

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

**Figure 7–12 Deleting Old Merchant Desktop Projects**

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

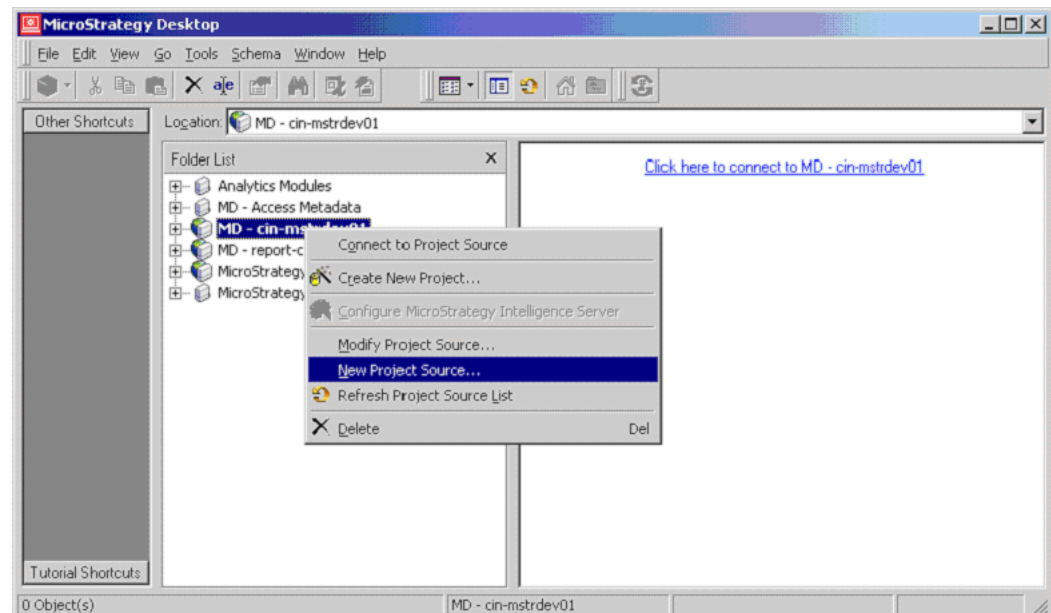
4. Stop and restart the Intelligence Server as follows:

**Figure 7–13 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 7–14 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 7–15 Project Source Manager Screen**

The screenshot shows the 'Project Source Manager' dialog box. At the top, the 'Project source' text box contains 'Access Metadata'. Below it, the 'Connection mode' dropdown menu is set to 'Direct'. There are four tabs: 'Connection' (selected), 'Advanced', 'Caching', and 'Metadata Table Prefix'. Under the 'Connection' tab, the 'Direct' section is active. It includes an 'ODBC DSN' dropdown menu with 'MDMetadata' selected, a 'New...' button to its right, and empty text boxes for 'Login id' and 'Password'. Below these is a 'Description' box containing the text: 'This connection type connects directly to the metadata via an ODBC data source name.' At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Help'.

- 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 7-16 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 7-17 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 7–18 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 7-19 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 7-20 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
  - ☐ Project-related objects only
- ☒ Configuration objects
  - ☐ All objects
  - ☐ Project-related objects only
  - ☐ Selected users and groups...
- ☒ Users and user groups
  - ☐ All users and user groups
  - ☐ Project-related users and groups only
  - ☒ Include all groups even if not project related (preserve grou...

Select users...

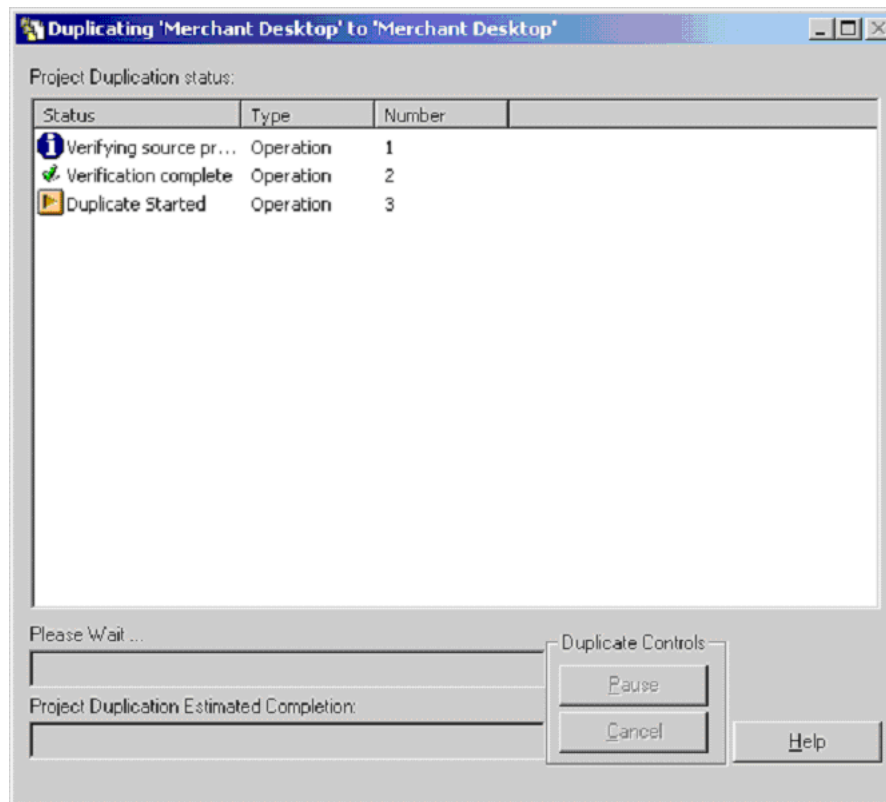
Help Cancel < Back Next > Finish

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.

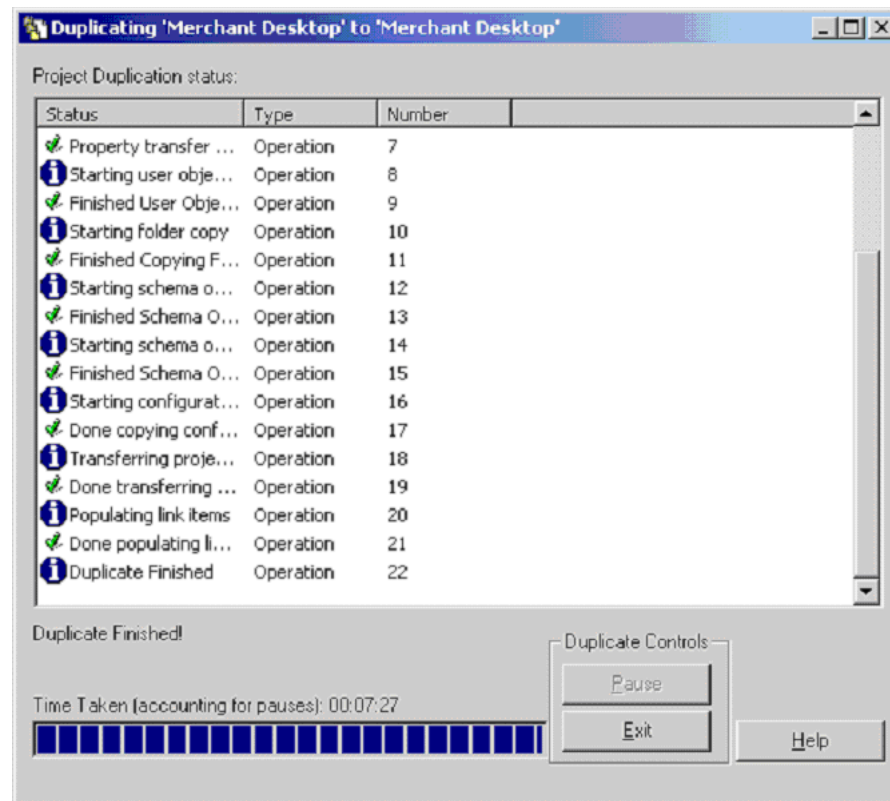
**Figure 7–21 Project Duplication Status Screen (In Process)**



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 7–22 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.

## Migrating to the Microstrategy 8 Platform

Microstrategy Product Platform installation does not support installing a different version of the platform over an existing platform. You must install Microstrategy 8 on a different system or uninstall Microstrategy platform from the system, and then install Microstrategy 8.

This migration process involves the following tasks:

- Back up all the projects in 2-tier mode, using Microsoft Access database.
- Install Microstrategy 8 product platform, along with the Intelligence Server.
- Start the Intelligence Server service.
- Create the ODBC DNS data source for the Access database, and connect to the blank database
- Create a 2-tier project source in the new Microstrategy desktop to store the metadata from the earlier version.
- Create a 3-tier project source in the new Microstrategy desktop using the Intelligent Server.
- Duplicate the 2-tier project to the 3-tier project source.

This section describes how you can migrate from the existing version of the Microstrategy platform to Microstrategy 8, keeping all the project sources and settings intact. It includes the following sections:

- [Backing Up All Projects in 2 Tier Mode](#)
- [Install Microstrategy Desktop and Intelligent Server](#)
- [Restore All Projects in Microstrategy 8.0](#)

---

**Important:** Ensure that the metadata repository is available before the installation. This includes the user name and password, in the Oracle instance, that is used to store the Microstrategy statistics and objects data.

---

## Backing Up All Projects in 2 Tier Mode

Before you uninstall the existing version of the Microstrategy platform, or start the Microstrategy 8 installation process, you must back up all the existing projects in 2-tier mode.

To back up all the projects:

1. Create a blank Access database in Microsoft® Access.
2. Use the following steps, and create an ODBC datasource to connect to this database:
  - a. In the **Microsoft Control Panel**, double-click **Administrative Tools**.
  - b. In **Administrative Tools**, double-click **Data Sources (ODBC)**. The **ODBC Data Source Administrator** window appears.
  - c. On the **System DSN** tab, click **Add**. The **Create New Data Source** window appears.
  - d. Select **Microsoft Access Driver (\*.mdb)**, and click **Finish**. The **ODBC Microsoft Access Setup** window appears.
  - e. On the **ODBC Microsoft Access Setup** window, type a data source name and description you want.
  - f. In the **Database** section, click **Select**. The **Select Database** window appears.
  - g. On the **Select Database** window, navigate to the location where you have stored the blank Access database, select the database, and then click **OK**.
  - h. On the **ODBC Microsoft Access Setup** window, click **OK**.
  - i. On the **ODBC Data Source Administrator** window, click **OK**.
3. On the **Microstrategy Desktop**, run **Update Schema** process, from the **Schema** menu, to refresh the schemas.
4. Run the **Microstrategy Configuration Wizard**, and use the following steps to configure a repository in the Access database:
  - a. On the **Configuration Wizard** screen, click the **Metadata Repository and Statistics Tables** check box, and click **Next**.
  - b. On the **Configuration Tasks** screen, click the **Create Metadata Tables** and **Create Default Project Source (2 Tier with Standard Authentication)** check boxes, and then type a project source name you want.

- c. Click **Next**.
  - d. On the **ODBC Data Source Names** screen, click the **Configure repository in an Access database** check box, and then select the blank Access database.
  - e. Click **Finish**, and then click **Exit**.
5. On the **Microstrategy Desktop**, use the following steps to duplicate the 3 tier master project (3 tier) in to the 2 tier project source:
    - a. Select the master project that you want to deploy in Microstrategy 8.
    - b. On the **Schema** menu, click **Duplicate Project**.
    - c. On the **Project Duplication** wizard, enter appropriate information on the screens. For more information, see [Migrating the Metadata](#).

---

**Note:** Ensure that you specify the project source name, you created using the Microstrategy Configuration Wizard, as the destination project source name.

---

6. Copy the Access database into a shared directory that is accessible to the Microstrategy 8 installation.

## Install Microstrategy Desktop and Intelligent Server

Use the Microstrategy documentation, and install the following components:

- Microstrategy Intelligence Server
- Microstrategy Desktop
- Microstrategy OLAP services

You must install Microstrategy 8 on a different system or uninstall the existing Microstrategy platform from the system, and then install Microstrategy 8.

## Restore All Projects in Microstrategy 8.0

Once Microstrategy 8 is installed, you can restore the existing project sources, and start running the reports.

---

**Note:** Before you start the restore process, ensure that the Intelligence Server service is running.

---

To restore the projects:

1. Create an ODBC data source to the RDM data warehouse.
2. On the **Microstrategy Desktop**, specify the following settings in the **Project Source Manager** (on the **Tools** menu), and create a project in 3 Tier mode:
  - **Project Source** – Type a project name you want.
  - **Connection mode** – Select the **Server** option.
  - **Server name** – The server where the Microstrategy platform is installed.
  - **Login id** – The user name to connect to this server.

- **Password** – The password, associated with the user name, to connect to this server.
- 3. Create an ODBC data source that connects to the Access database (This is the database that holds the backup projects). For more information, see [Backing Up All Projects in 2 Tier Mode](#).
- 4. Specify the following settings in the **Project Source Manager**, and create another project source that will hold this Access database.
  - **Project Source** – Type a project name you want.
  - **Connection mode** – Select the **Direct** option.
  - **ODBC DSN** (in the **Direct** section) – Select the ODBC data source that you created in step 3.
- 5. Open this project source again. A confirmation message appears that lets you upgrade the project source to Microstrategy 8.
- 6. Click **Yes**.
- 7. Use the following steps, and duplicate the projects in to the 3 Tier mode:
  - a. Select the project source that holds the Access database. (See step 4).
  - b. On the **Schema** menu, click **Duplicate Project**. The **Project Duplication** wizard appears.
  - c. In the **Project Duplication** wizard, specify the available and destination project names.

Ensure that you specify the 3 Tier project source name (created in step 2) as the destination project source. Enter appropriate information on the other fields. For more information, see [Migrating the Metadata](#).

## 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](#)

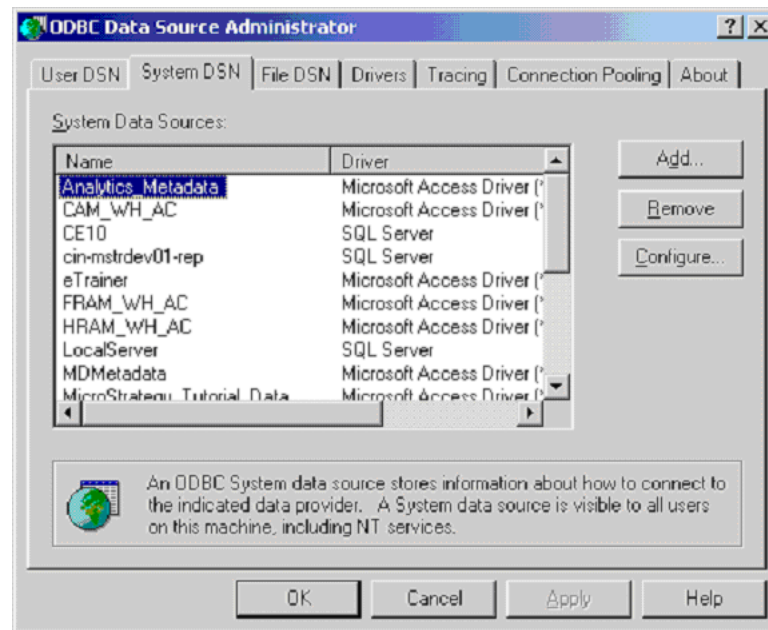
### Creating the Database Connection

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

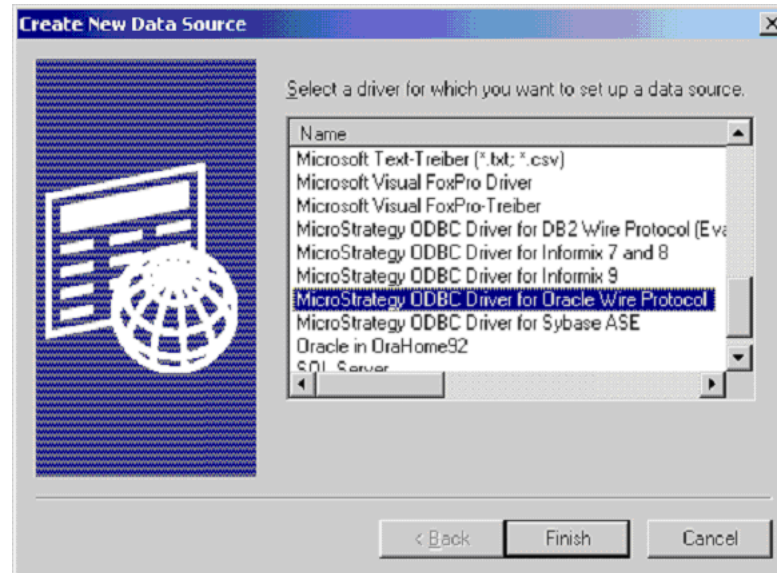
To connect the ODBC to the RDM database:

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

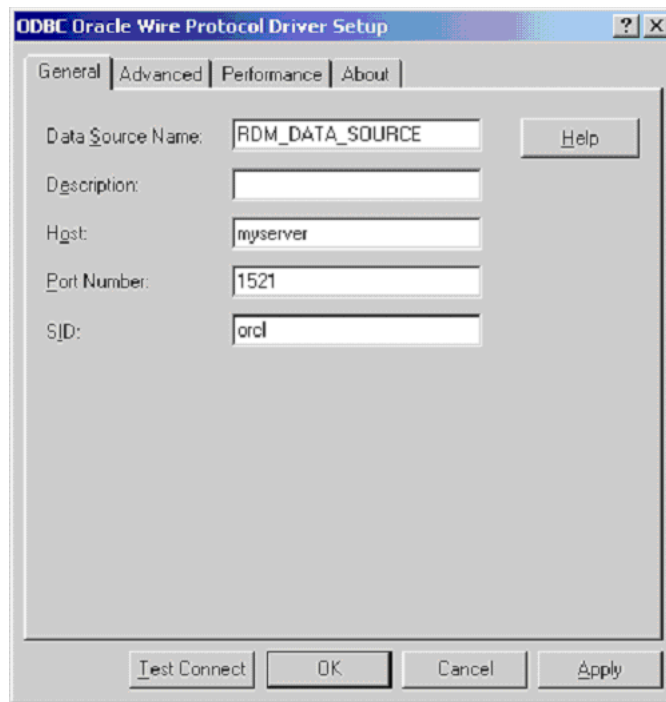
The **ODBC Data Source Administrator Screen** displays.

**Figure 7–23 ODBC Data Source Administrator Screen**

2. Click the **System DSN** tab, and click **Add**.  
The **Create New Data Source** screen displays.

**Figure 7–24 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.

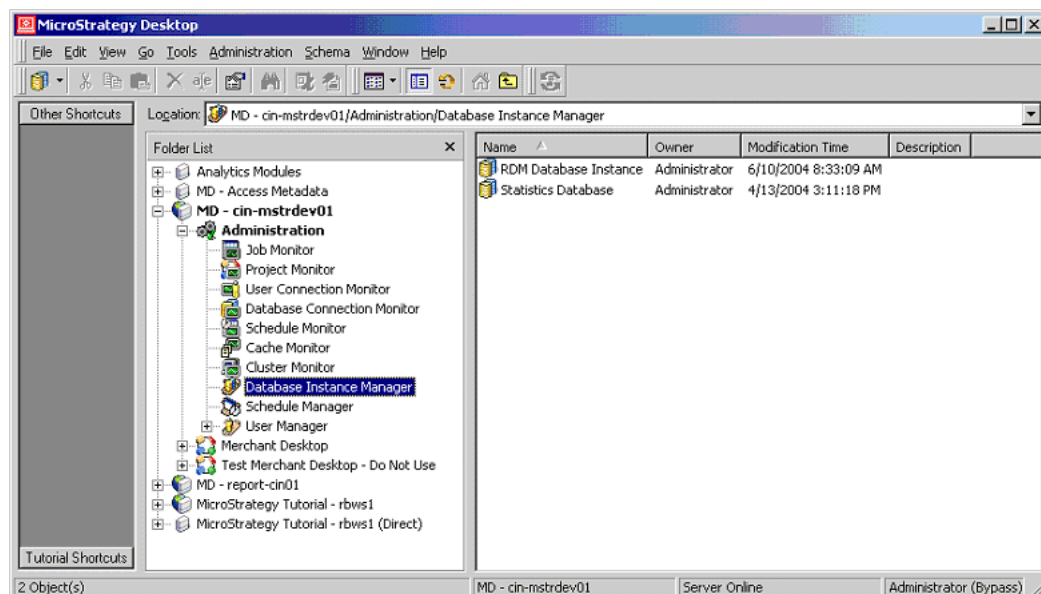
**Figure 7–25 ODBC Oracle Wire Protocol Driver Setup Screen**

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

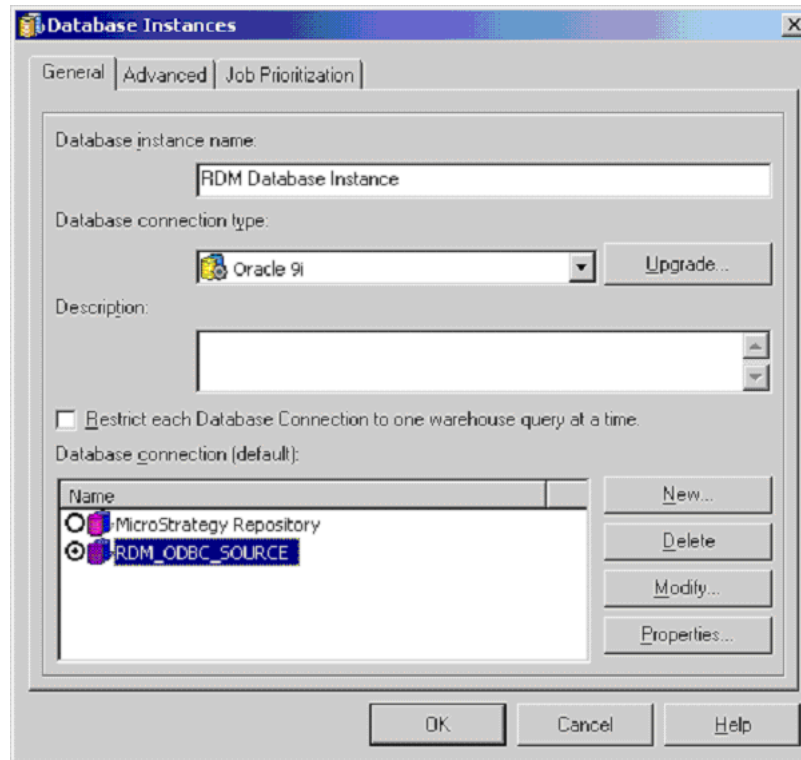
To map MicroStrategy Desktop to the RDM database:

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

**Figure 7–26 Mapping MicroStrategy to RDM Database Instance**

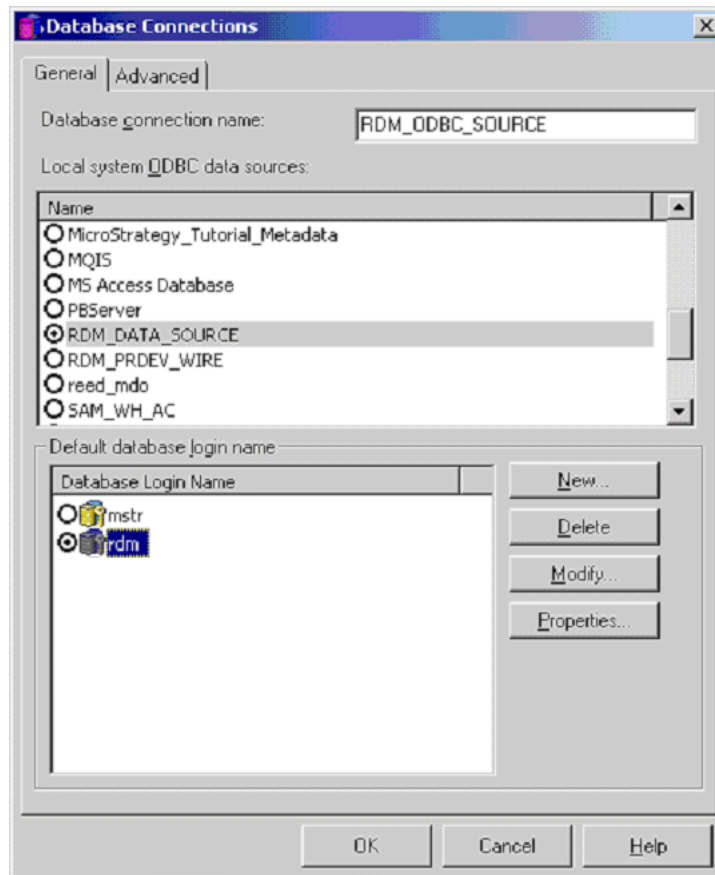
2. From the **Folder List** panel, select **Project Source > Database Instance Manager**.  
The **Database Instances** screen displays.

**Figure 7-27 Database Instances Screen**



3. Enter **Database instance name** as RDM Database Instance, select **RDM\_ODBC\_SOURCE**, and click **OK**.

The **Database Connections** screen displays.

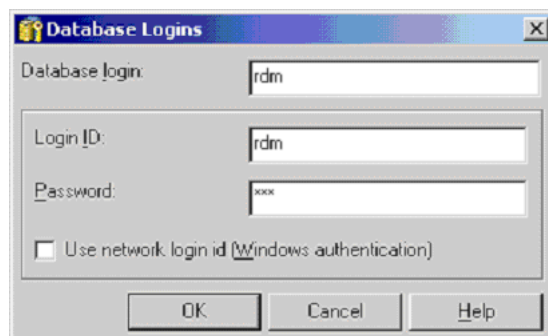
**Figure 7–28 Database Connections Screen**

From the **Database connection name** drop down menu, select **RDM\_DATA\_SOURCE**; in the **Local system ODBC data sources** field, select **RDM\_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 7–29 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 Summarization Mapping](#)
- [Using MicroStrategy Desktop to Map Merchant Desktop Attributes](#)

### Understanding the Summarization Mapping

For information about summarization level mapping, see the following table.

**Table 7–1 Mapping the Summarization Levels**

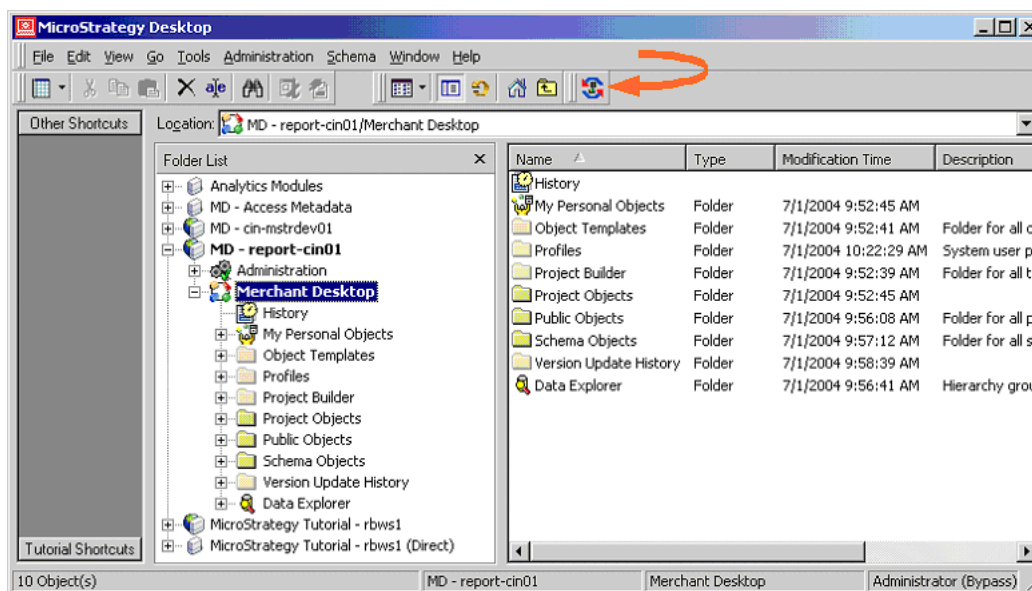
Hierarchy	Summarization Level
<i>Location Hierarchies</i>	
Location Hierarchy 1	At summary levels: 0, 1 and 2 Between summary levels: B Optimization levels: test
Location Hierarchy 2	At summary levels: 0, 1 and 2 Between summary levels: B Optimization levels: test
Location Hierarchy 3	At summary levels: 0, 1 and 2 Between summary levels: B Optimization levels: test
Location Hierarchy 4	At summary levels: 0 and 1 Between summary levels: B Optimization levels: test
<i>Merchandise Hierarchies</i>	
Product Hierarchy 1	At summary levels: 0, 1, and 2 Between summary levels: B Optimization levels: test
Product Hierarchy 2	At summary levels: 0, 1 and 2 Between summary levels: B Optimization levels: test
Product Hierarchy 3	At summary levels: 0, 1 and 2 Between summary levels: B Optimization levels: test
Product Hierarchy 4	At summary levels: 0, 1 and 2 Between summary levels: B Optimization levels: test
Product Hierarchy 5	At summary levels: 0 and 1 Between summary levels: B Optimization levels: test
Product Hierarchy 6	At summary levels: 0 Between summary levels: B Optimization levels: test
Product Hierarchy 7	At summary levels: 0 Between summary levels: B Optimization levels: test
Product Hierarchy 8	At summary levels: 0 Between summary levels: B Optimization levels: test

## 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:

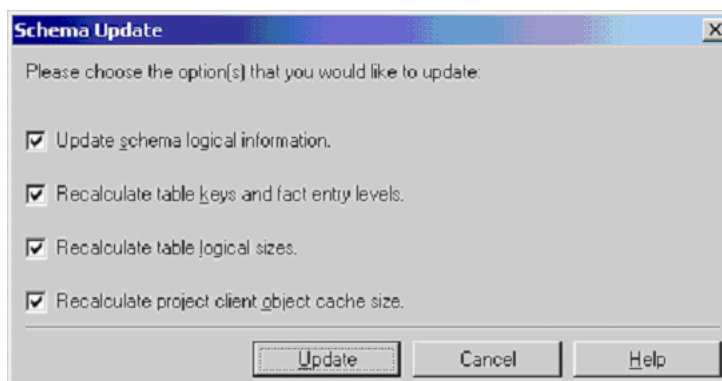
**Figure 7–30 Updating the Merchant Desktop Schema**



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

The **Schema Update** screen displays.

**Figure 7–31 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:

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

- [Table 7–2, "Location Hierarchy Attributes"](#)
- [Table 7–3, "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 7–2 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
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:

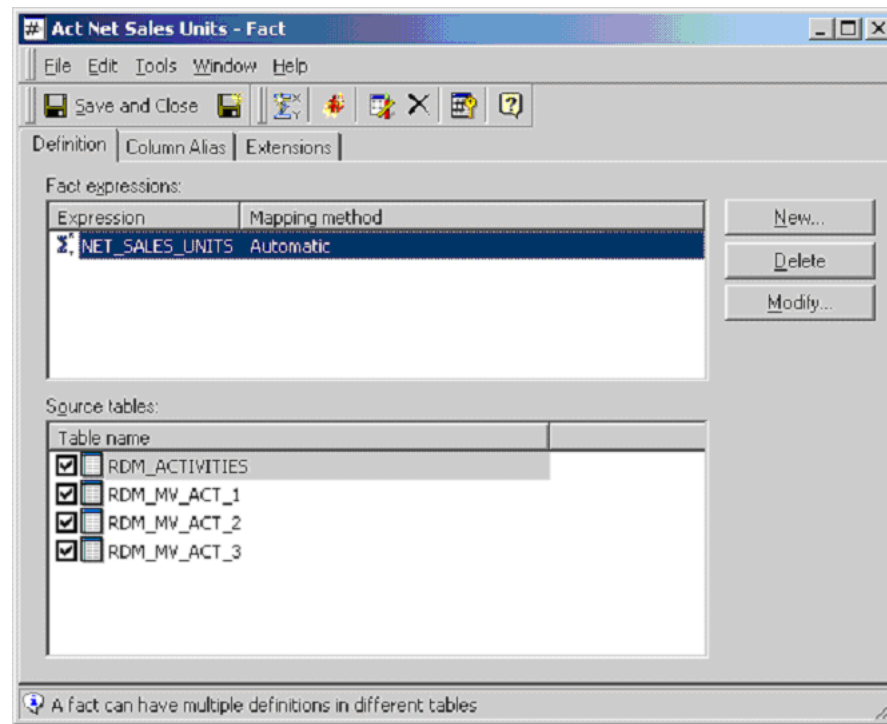
- primary key join
- hierarchyN\_pi\_id, where N is the level of the hierarchy.

**Table 7–3 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
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

4. 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 7–32 Act Net Sales Units - Fact Screen**



5. 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 for each level based on your location and merchandise hierarchy levels.

## 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:

```
<CD>/MicrostrategyServerSetup/CDImage/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**.

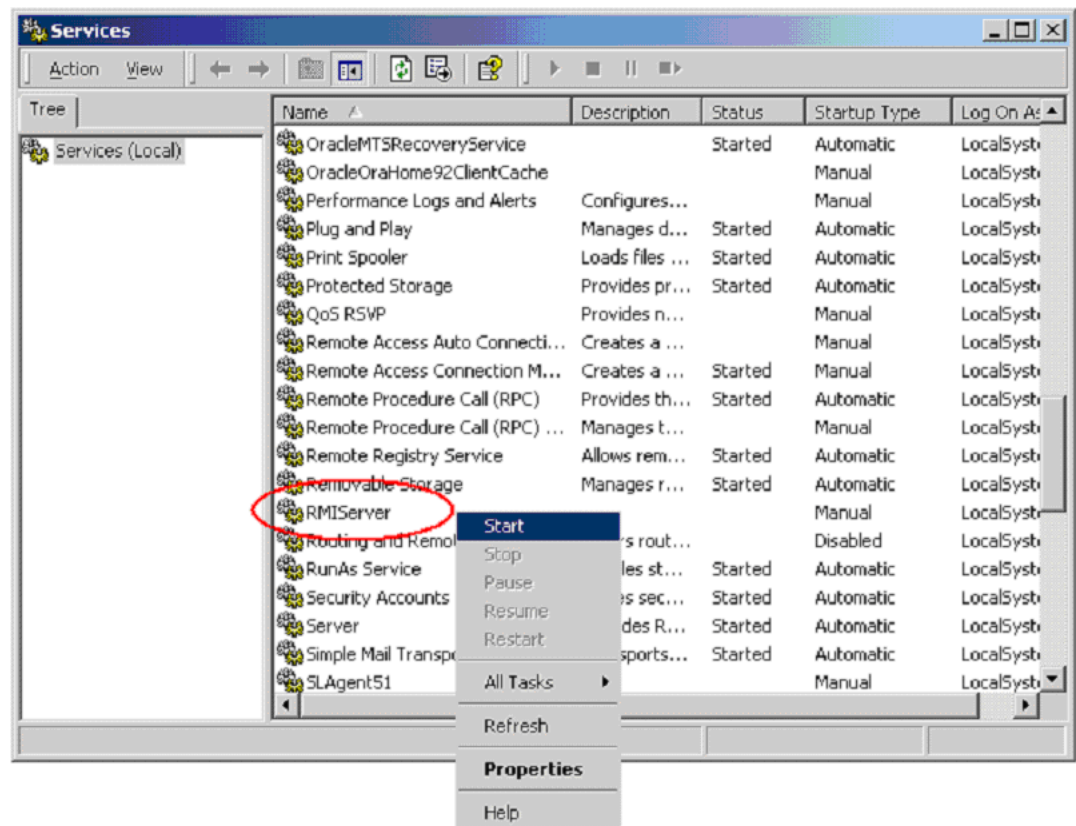
Now, the MicroStrategy User Integration Server is installed.

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 7-33 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:

---

**Note:** You can skip to step 6, if the install.properties settings were configured correctly when installing the application.

---

```
# 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=<host name or ip address>

# Specify the administrator username and password for MicroStrategy.
administratorName=administrator
administratorPassword=<password specified when you set up the Project Source>

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

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.

### **Troubleshooting**

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.

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