

# **Oracle® Retail Clearance Optimization Engine**

Installation Guide

Release 14.0.3

**E64679-01**

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# Contents

<b>Send Us Your Comments .....</b>	<b>vii</b>
<b>Preface .....</b>	<b>ix</b>
Audience .....	ix
Documentation Accessibility .....	ix
Related Documents .....	ix
Customer Support .....	x
Review Patch Documentation .....	x
Improved Process for Oracle Retail Documentation Corrections .....	x
Oracle Retail Documentation on the Oracle Technology Network .....	xi
Conventions .....	xi
 <b>1 Overview</b>	
<b>Check for the Current Version of the Installation Guide .....</b>	<b>1-1</b>
<b>Overview of Clearance Optimization Engine .....</b>	<b>1-1</b>
Overview of Grid Designer .....	1-2
Clearance Optimization Engine Enterprise Components .....	1-3
<b>Overview of Oracle Configuration Manager .....</b>	<b>1-5</b>
<b>Roadmap for Implementing Clearance Optimization Engine .....</b>	<b>1-6</b>
 <b>2 Planning Your Installation</b>	
<b>Overview of the Planning Process .....</b>	<b>2-1</b>
Planning Your Environment .....	2-1
Planning for Optimal Clearance Optimization Engine Performance .....	2-2
<b>Supported Configurations .....</b>	<b>2-2</b>
Network Requirements .....	2-2
Database Requirements .....	2-2
User Requirements .....	2-3
Application Server Requirements .....	2-3
User Requirements .....	2-3
Client System Requirements .....	2-3
Miscellaneous Utilities .....	2-4
Supported Oracle Retail Products .....	2-4

### 3 Setting Up the Database

Installing the Database .....	3-1
Setting Up the Clearance Optimization Engine Database .....	3-1
Setting Up the Initialization Parameter File .....	3-2
Setting Up the System Data Dictionary .....	3-2
Setting Up the Tablespaces .....	3-2
Creating the Default User Accounts .....	3-3

### 4 Setting Up Your Application Server

Setting Up the Oracle WebLogic Server .....	4-1
Installing the WebLogic Server .....	4-1
Setting Up a WebLogic Domain .....	4-2
Setting Up the WebLogic Startup Script .....	4-4
Enabling SSL in the WebLogic Server .....	4-5
Setting Up Identity and Trust Keystores .....	4-6

### 5 Setting Up Password Stores

Password Stores Configuration Overview .....	5-2
Setting Up the Oracle Secret Store .....	5-3
Setting Up the Credential Storage Manager Password Store .....	5-4

### 6 Installing Clearance Optimization Engine

Overview of the Installation Process .....	6-1
Installing Clearance Optimization Engine .....	6-1
Accessing the Installation Software .....	6-2
Setting Up Your Installation Properties File .....	6-2
Setting Up Environment Variables .....	6-7
Installing Clearance Optimization Engine in Silent Mode .....	6-8
Installing Clearance Optimization Engine Using the Graphical Oracle Installer .....	6-9
Post-Installation Tasks .....	6-22
Setting Up User Accounts and Aliases .....	6-23
Setting Up a Single Instance Target for the Grid Designer .....	6-23
Loading Seed Data .....	6-24
Loading Business Rules .....	6-24
Loading User Roles .....	6-25
Implementing Security for the Web Services .....	6-25
Specifying Custom Header .....	6-25
Auditing Web Service Access .....	6-25
Encrypting Usenametoken and Custom Header .....	6-25
User Authentication .....	6-26
User Authorization .....	6-26
Upgrading to the Latest Release of Clearance Optimization Engine .....	6-26
Troubleshooting Installation Issues .....	6-28

### Index

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Oracle® Retail Clearance Optimization Engine Installation Guide, Release 14.0.3

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- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
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- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

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# Preface

This Installation Guide describes the requirements and procedures to install Oracle Retail Clearance Optimization Engine Release 14.0.3.

## Audience

This Installation Guide is for the following audiences:

- System administrators and operations personnel
- Database administrators
- System analysts and programmers
- Integrators and implementation staff personnel

## Documentation Accessibility

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## Related Documents

For more information about using the Clearance Optimization Engine application, the following documents are available in the Oracle Retail Clearance Optimization Engine Release 14.0.3 documentation set:

- *Oracle Retail Clearance Optimization Engine Release Notes*
- *Oracle Retail Clearance Optimization Engine Configuration Guide*

## Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

<https://support.oracle.com>

When contacting Customer Support, please provide the following:

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

## Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 14.0) or a later patch release (for example, 14.0.3). If you are installing the base release and additional patch releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch releases can contain critical information related to the base release, as well as information about code changes since the base release.

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This process will prevent delays in making critical corrections available to customers. For the customer, it means that before you begin installation, you must verify that you have the most recent version of the Oracle Retail documentation set. Oracle Retail documentation is available on the Oracle Technology Network at the following URL:

<http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html>

An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number E123456-02 is an updated version of a document with part number E123456-01.

If a more recent version of a document is available, that version supersedes all previous versions.

# Oracle Retail Documentation on the Oracle Technology Network

Oracle Retail product documentation is available on the following web site:

<http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html>

(Data Model documents are not available through Oracle Technology Network. You can obtain them through My Oracle Support.)

## Conventions

The following text conventions are used in this document:

Convention	Meaning
<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 Clearance Optimization Engine and a roadmap to install Clearance Optimization Engine (COE). It contains the following sections:

- Overview of Clearance Optimization Engine
- Overview of Grid Designer
- Overview of Oracle Configuration Manager
- Roadmap for Implementing Clearance Optimization Engine

### Check for the Current Version of the Installation Guide

Corrected versions of Oracle Retail installation guides may be published whenever critical corrections are required. For critical corrections, the rerelease of an installation guide may not be attached to a release; the document will simply be replaced on the Oracle Technology Network Web site.

Before you begin installation, check to be sure that you have the most recent version of this installation guide. Oracle Retail installation guides are available on the Oracle Technology Network at the following URL:

[http://www.oracle.com/technology/documentation/oracle\\_retail.html](http://www.oracle.com/technology/documentation/oracle_retail.html)

An updated version of an installation guide is indicated by part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number E123456-02 is an updated version of an installation guide with part number E123456-01.

If a more recent version of this installation guide is available, that version supersedes all previous versions. Only use the newest version for your installation.

### Overview of Clearance Optimization Engine

The Clearance Optimization Engine (COE) provides remote access to the WhatIf RMI interface via an RPAS special expression. This allows the application *Oracle Retail Item Planning* (certified with COE) to produce in-season price recommendations and forecasts that account for planned promotions and future markdowns in the product life cycle. The forecast includes a sales plan and an optimal price plan.

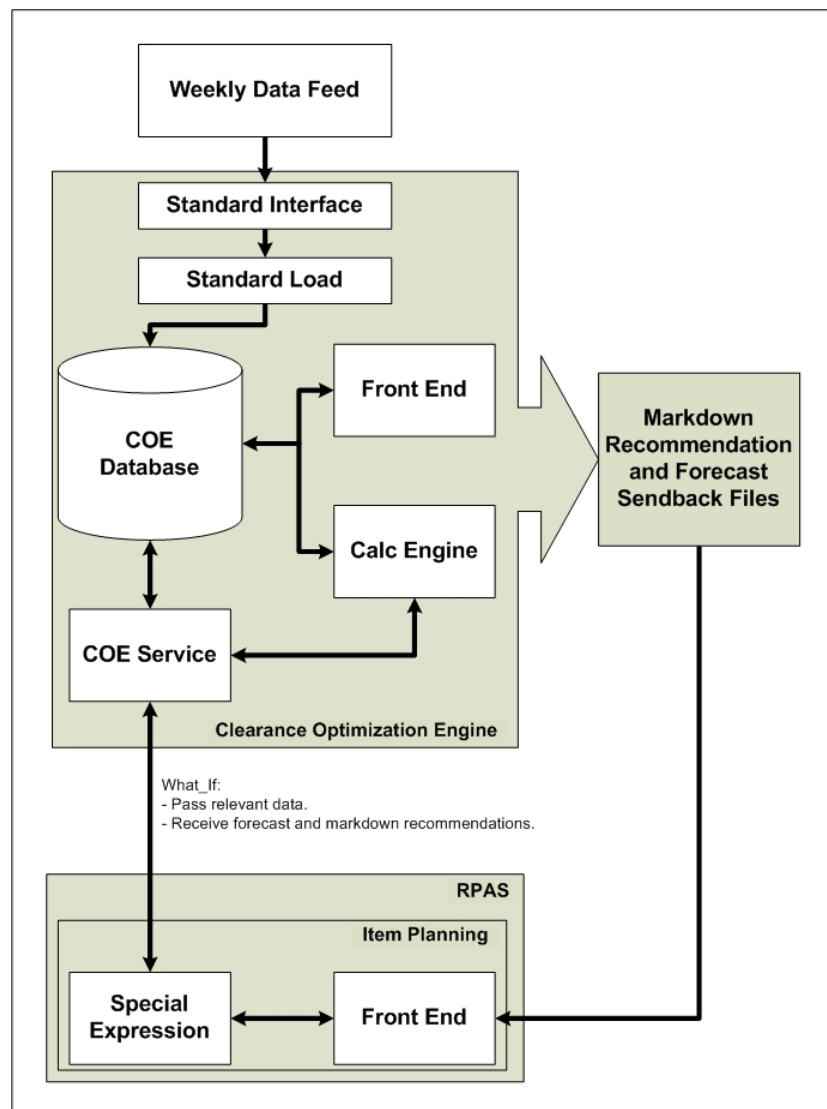
COE produces its recommendations during the weekly model run. The results of the model run are available in the sendback files that are generated from the results stored in the database.

Users have the ability to perform real-time What-If from within Item Planning and alter plans in order to see the results of those changes. The changes include changing future prices, changing an order, changing the exit date, changing the salvage value, and changing the sell-through target.

Business rules can also be imported from Item Planning into COE in a format that follows the COE standard interface. This load occurs weekly.

COE provides a sendback functionality that makes the model run results available to the Item Planning application. The relationship between COE and Item Planning is shown in [Figure 1-1, "Relationship between COE and Item Planning"](#).

**Figure 1-1 Relationship between COE and Item Planning**



## Overview of Grid Designer

Grid Designer is a Web-based rich application that enables you to modify the following main components of the grid configuration in a graphical user interface:

- Column Definitions.

- Grid Resources.
- Grid Configuration Files.

For more information on the Grid Designer, refer to the *Oracle Retail Clearance Optimization Engine Grid Designer User Guide*.

---

**Important:** When you install Clearance Optimization Engine, the Grid Designer application is also installed as a separate Web-based application. This also applies to cluster-based installations. All targeted clusters during the installation will also include their individual instance of the Grid Designer application.

To ensure that there is always a single copy of the grid configuration being updated, once the application installation is complete, you must set/pin the Grid Designer application target to a single instance. For more information, see [Setting Up a Single Instance Target for the Grid Designer](#).

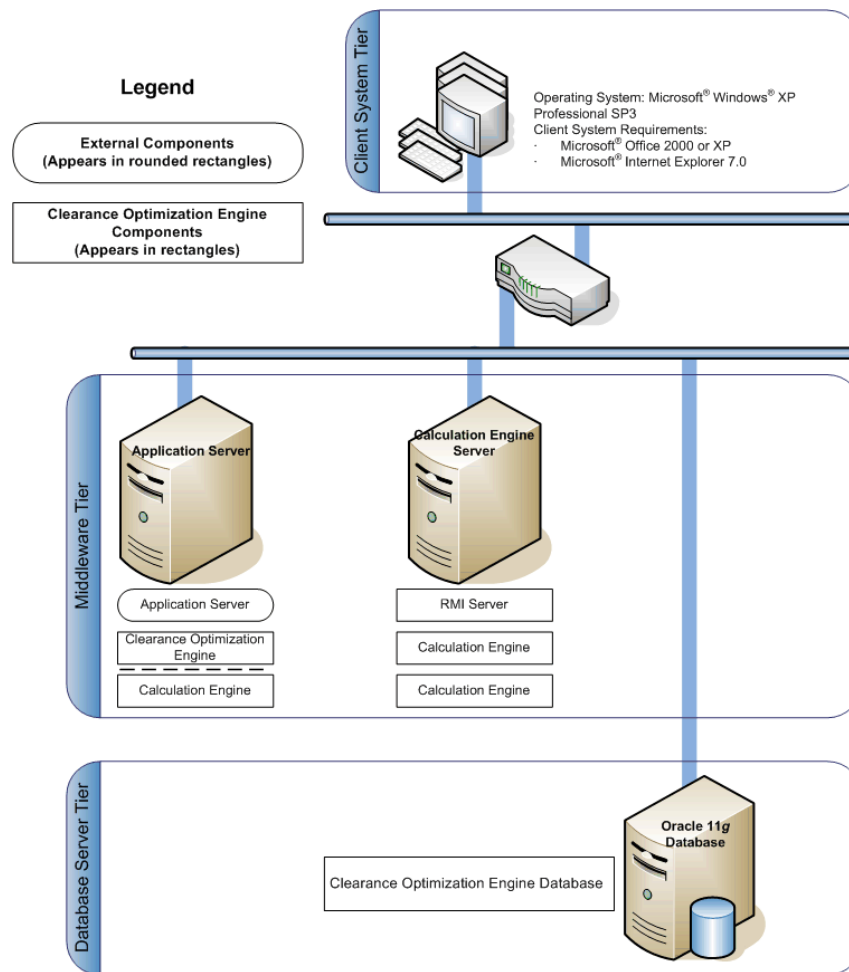
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## Clearance Optimization Engine Enterprise Components

The Clearance Optimization Engine 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](#)
- [Middleware Tier](#)
- [Database Server Tier](#)
- [Optional Components](#)

The following diagram depicts a typical setup for a large retailer at chain level or a specialty retailer at region level:

**Figure 1–2 Clearance Optimization Engine Network Diagram****Client System Tier**

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

- Microsoft Windows
- Microsoft Office
- Microsoft Internet Explorer

**Middleware Tier**

The Middleware tier consists of application servers, Calculation Engine instances, and RMI servers. The Application Server contains application server domains, clusters, and managed servers set up as a platform used by the Clearance Optimization Engine application. The Calculation Engine instances process forecast and optimization requests. RMI servers provide a remote interface for calling the Calculation Engine.

The Clearance Optimization Engine application consisting of the user interface and Web Service components resides on a domain configured on the J2EE-based application server. You can install and run multiple instances of the application server or multiple application server machines, based on your business needs. Application modules include Business Rule Property Manager, Pricing Group Manager,



Seasonality Manager, and User Management. The application also includes the COE Web Service module that includes the Engine Service Call for What-If.

The Calculation Engine is installed outside of the J2EE-based application server. It processes the weekly model runs as part of a batch process. To improve performance, you can install and run multiple engines, and move them to any other production server within your environment as needed. The What-If service call is also processed by the Calculation Engine through the RMI server.

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**Note:** You can choose to set up a single host for the application and Calculation Engine.

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### Database Server Tier

The Database Server tier contains the systems configured with the database management systems (Oracle 11g Database) along with the necessary database software.

The following essential schemas are created during the Clearance Optimization Engine installation:

- Clearance Optimization Engine Database – contains historical sales and other business information that originates from systems external to Clearance Optimization Engine.
- The database also contains the Retail Data Mart (RDM), a set of data generated that can be used with Oracle Business Intelligence Suite Enterprise Edition (BI EE).

### Optional Components

- Additional computational servers for implementing the Calculation Engine in a large-scale environment.
- Additional application server machines for implementing Clearance Optimization Engine for a large number of users.

## Overview of Oracle Configuration Manager

Oracle Premier Support offers an automated support capability through the Software Configuration Manager and Oracle Configuration Manager (OCM). OCM is a configuration data collector that provides continuous tracking of key Oracle and system configuration settings for machines on which it is installed. This tool collects configuration details for customer environments and uploads it to a repository that is viewable through the My Oracle Support Web site.

The OCM Installer packaged with this release installs the latest version of OCM. The following document is available through My Oracle Support (formerly MetaLink). Access My Oracle Support at the following URL:

<https://support.oracle.com>

### *Oracle Configuration Manager Installer Guide (Doc ID: 835024.1)*

This guide describes the procedures and interface of the Oracle Retail Oracle Configuration Manager Installer that a retailer runs near the completion of its installation process.

### OCM Documentation Link

<http://www.oracle.com/technology/documentation/ocm.html>

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**Important:** In case you choose to install the OCM collector, ensure that you have the My Oracle Support user account name, customer support identification number, and the country code (where the support agreement was issued) for the OCM installation.

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## Roadmap for Implementing Clearance Optimization Engine

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

The instructions in this guide assume knowledge of application servers, databases, and application installation or administration, 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 Clearance Optimization Engine for production, you must perform the following tasks in a sequence:

**Table 1–1** Roadmap for Implementing Clearance Optimization Engine

Task	Description
<i>Pre-installation Tasks</i>	
1.	Plan your environment, based on your business needs. 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 Your Application Server"</a> .
4.	Set up a password store. For more information, see <a href="#">Chapter 5, "Setting Up Password Stores"</a> .
<i>Installation Task</i>	
5.	Access the Clearance Optimization Engine installation software, set up the install.properties file, and run the Oracle installer. For more information, see <a href="#">Chapter 6, "Installing Clearance Optimization Engine"</a> .
<i>Post-installation Tasks</i>	
6.	Configure your business rules and user accounts. For more information, see the <i>Oracle Retail Clearance Optimization Engine Configuration Guide</i> .
7.	Load data and evaluate the results. For more information, see the <i>Oracle Retail Clearance Optimization Engine Configuration Guide</i> .
8.	To ensure that there is always a single copy of the grid configuration being updated, once the application installation is complete, you must set/pin the Grid Designer application target to a single instance. For more information, see <a href="#">Setting Up a Single Instance Target for the Grid Designer</a> .
9.	If you want to integrate the Clearance Optimization Engine as part of the Oracle Application Server Single Sign-On implemented with Oracle Retail Workspace, see <a href="#">Chapter 7, "Setting Up Single Sign-On"</a> .
10.	Modify the Clearance Optimization Engine user interface to accommodate your business needs, as described in the <i>Oracle Retail Clearance Optimization Engine Configuration Guide</i> . Concurrent with this activity, complete the remaining steps in this roadmap. You can continue refining the user interface iteratively, as needed (optional).
11.	Set up user accounts and introduce the end users to the application.
12.	Maintain the application as described in the <i>Oracle Retail Clearance Optimization Engine Configuration Guide</i> .

**Table 1–1 (Cont.) Roadmap for Implementing Clearance Optimization Engine**

<b>Task</b>	<b>Description</b>
13.	Perform and schedule the necessary data loads, as described in the <i>Oracle Retail Clearance Optimization Engine Operations Guide</i> .



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## Planning Your Installation

Before installing Clearance Optimization Engine, 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 setup.

This section contains the following topics:

- [Planning Your Environment](#)
- [Planning for Optimal Clearance Optimization Engine 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 needs, 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 Clearance Optimization Engine.

## Planning for Optimal Clearance Optimization Engine Performance

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

1. Determine the Clearance Optimization Engine 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 *Clearance Optimization Engine Configuration Guide*.
3. Plan the periodic batch loading of business and historical databases. This also includes the data feeds needed from the external systems for nightly, weekly, and periodic batch updates and recycling.

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**Important:** To ensure optimal performance, you must synchronize the clocks on the systems hosting the application server and database.

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## Supported Configurations

This section describes the hardware and network requirements for the Clearance Optimization Engine, and includes the following topics:

- [Network Requirements](#)
- [Database Requirements](#)
- [Application Server Requirements](#)
- [Client System Requirements](#)
- [Miscellaneous Utilities](#)
- [Supported Oracle Retail Products](#)

### 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.
- Network load balancers to provide scalability to the servers.

### Database Requirements

Clearance Optimization Engine requires the use of the Oracle database as described in the following table:

**Table 2–1 Database Requirements for Clearance Optimization Engine**

Software	Requirement
Database (64-bit)	Oracle Database 12c Release 1, Enterprise Edition (12.1.0.1.0) RAC or Single Instance

**Table 2–1 (Cont.) Database Requirements for Clearance Optimization Engine**

Software	Requirement				
Database Features	Oracle Partitioning  <b>Important:</b> Although this database feature is available in the Oracle Database Enterprise Edition, you may need a separate license to use this feature. For more information, refer to the <i>Oracle Database Licensing Information 12c Release 1</i> .				
Operating System (64-bit)	Oracle Linux 6.0 Update 3, x86-64 architecture based	Oracle Solaris 11, SPARC-based timezone patch 122032-01 or later and libc patch 119689-07 or later	HP-UX 11i v3 (11.31) Update 7, Itanium-based	IBM AIX 6.1 Technology Level 6 (TL6) and IBM AIX 7.1 Technology Level 1 (TL1) Power processor-based	Red Hat Enterprise Linux 6 Update 3
Utilities	file transfer protocol utility (ftp or ssh/scp/rsync) sudo utility				

### User Requirements

Your implementation may require you to set up multiple user accounts and user groups. Ensure that the user accounts, UIDs, user groups, GIDs, home directory, and shell are set up consistently across all the clusters and servers.

## Application Server Requirements

Clearance Optimization Engine supports the use of Oracle WebLogic Server 11g Release 1 (10.3.6), extended to use ADF 11.1.1.7. The following table lists the supported operating systems and the associated application server versions:

**Table 2–2 Application Server Requirements for Clearance Optimization Engine**

Software	Requirement				
Application Servers	Oracle WebLogic Server 11g Release 1 (10.3.6), extended to use ADF 11.1.1.7				
Database Client	Oracle Database 12c Client Release 1 (12.1.0.1.0)				
Operating Systems (64-bit)	Oracle Linux Release 6.0 Update 3, x86-64 based.	Oracle Solaris 11, SPARC-based.	IBM AIX 6.1 Technology Level 6 (TL6) and IBM AIX 7.1 Technology Level 1 (TL1) Power processor-based	HP-UX 11i v3 Update 7 (11.31), Itanium-based.	Red Hat Enterprise Linux 6 Update 3
JVM (64-bit)	Oracle's JDK 7.0 Update 80.	Oracle's JDK 7.0 Update 80	IBM JDK 1.7-SR6.	HP UX JDK 1.7.0-9	Oracle's JDK 7.0 Update 80.

### User Requirements

Your implementation may require you to set up multiple user accounts and user groups. Ensure that the user accounts, UIDs, user groups, GIDs, home directory, and shell are set up consistently across all the clusters and servers.

## Client System Requirements

The following table lists the supported client system options:

**Table 2–3 Client System Environment**

Software	Requirements
Microsoft Windows 7 Service Pack 1 (64-bit)	<ul style="list-style-type: none"> <li>Microsoft Office Professional Edition 2007</li> <li>Microsoft Office Professional Edition 2010</li> <li>Microsoft Internet Explorer 8.0 (32-bit)</li> <li>Microsoft Internet Explorer 9.0 (32-bit)</li> </ul>

## Miscellaneous Utilities

The following table lists some of the recommended utility packages for the application installation:

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**Important:** These packages must be installed on all the host systems.

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**Table 2–4 Miscellaneous Utilities**

Package Name	Required Version
GNU bash	Version 3.0 or higher.
GNU findutils	Version 4.1.7 or higher.
GNU less	Version 378 or higher.
GNU m4	Version 1.4 or higher. You must use the <i>GNU m4</i> for the Clearance Optimization Engine installation. Other <i>m4</i> implementations may not be supported.
GNU tar	Version 1.13 or higher.
Open SSH	Version 3.6 or higher. You may choose to use another SSH implementation.

## Supported Oracle Retail Products

The following Oracle Retail products are supported:

**Table 2–5 Supported Oracle Retail Product**

Product	Version
Oracle Retail Item Planning Configured for Clearance Optimization Engine (IP-COE)	14.0.2
Oracle Retail Analytic Parameter Calculator for Markdown Optimization (APC-MDO)	14.0.1

Clearance Optimization Engine is part of the Oracle Retail Fashion Planning Bundle.

### Overview of the Fashion Planning Bundle

The Fashion Planning Bundle is the integration of Item Planning (IP), Clearance Optimization Engine (COE), Assortment Planning (AP), Merchandise Financial Planning (MFP), and Size Profile Optimization (SPO) as a full-suite planning solution for fashion retailers.



---

## Setting Up the Database

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

- [Installing the Database](#)
- [Setting Up the Clearance Optimization Engine Database](#)

### Installing the Database

The application requires the use of the Oracle® Database 11g Release 2 (11.2.0.4.0).

---

**Note:** Before starting the installation, ensure that you have sufficient privileges to perform any database administrator (DBA) level tasks.

---

Install the database for the application, along with the software, referring to the relevant Oracle Database Documentation included with the software.

---

**Note:** Make sure that the NLS parameter in the database and application servers are the same.

---

#### Time Zone Consideration

Ensure that time zone set up for the database matches the time zone (TZ) set for the users. Oracle recommends that you set the TZ Unix environment variable for the database instance and TNS listener to the time zone set for the end users.

---

**Note:** Ensure that the locale and TZ are in sync in the environment running APC. For example, locale en\_US and TZ= "US/Eastern".

If the TZ and the locale settings are for different areas, where Daylight Savings changes in different weeks, unexpected errors may occur.

---

### Setting Up the Clearance Optimization Engine Database

Once you have the Clearance Optimization Engine database installed, you must set up the database using the following steps:

1. [Setting Up the Initialization Parameter File](#)
2. [Setting Up the System Data Dictionary](#)
3. [Setting Up the Tablespaces](#)

#### 4. Creating the Default User Accounts

### Setting Up the Initialization Parameter File

Set up the init.ora file in the <ORACLE\_HOME>/dbs directory. In addition to other parameters that you need set up for your specific environment, following is the list of the recommended parameters for Clearance Optimization Engine:

```
db_block_size = 8192
pga_aggregate_target = 1000M
workarea_size_policy = AUTO ( Oracle default)
undo_management = AUTO
global_names = FALSE (Oracle default)
cursor_sharing = SIMILAR
query_rewrite_enabled = TRUE
query_rewrite_integrity = TRUSTED
db_file_multiblock_read_count = 32
log_checkpoints_to_alert = TRUE
session_cached_cursors = 900
timed_statistics = TRUE
star_transformation_enabled = FALSE
open_cursors      1500
parallel_max_servers = (set to 3 * number of cpus)
processes         =      450
recyclebin        =      off
DEFERRED_SEGMENT_CREATION = FALSE
```

### Setting Up the System Data Dictionary

To create the system data dictionary, log in as the *sys* user, and run the following scripts:

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

### Setting Up the Tablespaces

You must set up the tablespaces for each database schema. Ensure that each database schema has the following system tablespaces:

**Table 3–1 Clearance Optimization Engine Tablespaces**

Tablespace	Description
DATA_01	Required. Default tablespace for Clearance Optimization Engine table.
INDEX_01	Required. Tablespace for indexes of Clearance Optimization Engine, STG, and ASH.
ITEM_DATA_PIN	Required. Tablespace for ITEM_DATA table of the Clearance Optimization Engine schema.
SYSTEM	System tablespace used for metadata.
SYSAUX	System tablespace used for system monitoring.
TEMP	Typical but not required. System tablespace used for temporary system swap space for Clearance Optimization Engine, STG, and ASH.
RBS	Typical but not required. System tablespace for resolving data write clashes.

---

**Note:** Tablespace size depends on your implementation. You must decide on the default tablespace sizes when you plan to install the database.

---

## Creating the Default User Accounts

You must also create the default database user account that will be used during the installation to access the application database.

To create the user accounts:

1. At the SQL prompt, type the following statement to create the users, and set the DATA\_01 as the default tablespace:

```
CREATE USER <COE USERNAME> IDENTIFIED BY <COE PASSWORD>
DEFAULT TABLESPACE DATA_01;
```

Replace the <COE USERNAME> and <COE PASSWORD> with the relevant user name and password.

2. Once the user is created, use the Oracle 11g Database Configuration Assistant and grant the relevant access privileges to both the users. The following table lists the access privileges you must assign to the user:

**Table 3–2 Access Privileges for the Users**

Type	Privileges
Roles	CONNECT
	RESOURCE
	SELECT_CATALOG_ROLE
Privileges	ANALYZE ANY
	ALTER SESSION
	QUERY REWRITE
	UNLIMITED TABLESPACE
	CREATE SEQUENCE
	CREATE PUBLIC SYNONYM
	CREATE SYNONYM
	CREATE TABLE
	CREATE MATERIALIZED VIEW
	CREATE VIEW
	SELECT ANY TABLE
	DROP TABLE
	EXECUTE PROCEDURE
	CREATE DATABASE LINK
	DROP PUBLIC SYNONYM

**Table 3–2 (Cont.) Access Privileges for the Users**

Type	Privileges
<b>Java Runtime Privileges</b>	exec dbms_java.grant_permission ( '<USERNAME>', 'SYS:java.lang.RuntimePermission', 'getClassLoader', " )
	exec dbms_java.grant_permission ( '<USERNAME>', 'SYS:java.lang.RuntimePermission', 'Verifier', " )
	exec dbms_java.grant_permission ( '<USERNAME>', 'SYS:java.lang.RuntimePermission', 'getenv.TNS_ADMIN', " )
	exec dbms_java.grant_permission ( '<USERNAME>', 'SYS:java.lang.RuntimePermission', 'getenv.ORACLE_HOME', " )
	exec dbms_java.grant_permission ( '<USERNAME>', 'SYS:java.util.PropertyPermission', 'oracle.net.tns_admin', 'write' )
	<b>Important:</b> Replace <COE USERNAME> with the relevant user name.

---

## Setting Up Your Application Server

Before installing Clearance Optimization Engine, you must set up a domain on the application server. Based on your business need, you must set up a domain to include one or more server instances and logically related resources and services.

Clearance Optimization Engine supports the use of Oracle WebLogic Server 11g Release 1 (10.3.6) along with Oracle Application Development Runtime (ADF) Release 11.1.1.7. This chapter provides instructions on setting up the application server selected for your business. It contains the following sections:

- [Setting Up the Oracle WebLogic Server](#)

---

**Note:** This chapter includes specific instructions required for Clearance Optimization Engine. Since the installation instructions for an application server may vary based on the operating system, Oracle recommends that you refer to the relevant installation documentation included with the application server.

---

If you plan to use clusters for the Clearance Optimization Engine installation, Oracle recommends that you specify the managed servers and clusters when you set up the domain. Otherwise, the managed servers must be added manually. When you set up the managed servers on different machines, ensure that they are set up on the same port and the installation base has the same directory structure or they use a network drive. For more information on managing clusters, refer to the Oracle WebLogic Server documentation.

### Setting Up the Oracle WebLogic Server

This section describes how you can set up a domain on the WebLogic server. It contains the following sections:

- [Installing the WebLogic Server](#)
- [Setting Up a WebLogic Domain](#)
- [Setting Up the WebLogic Startup Script](#)
- [Enabling SSL in the WebLogic Server](#)

### Installing the WebLogic Server

Install the Oracle WebLogic Server Release 11gR2 (10.3.6) referring to the Oracle WebLogic Server Documentation for guidance.

In this guide, the WebLogic installation directory is referred to as the <WLS\_HOME> directory.

## Setting Up a WebLogic Domain

Use the WebLogic Configuration Wizard to create and set up a domain on the WebLogic Server. This section describes how you can create and set up a domain. It also introduces the steps to configure the managed servers and clusters on the application server. For more information on the WebLogic Configuration Wizard and customizing the domain environments with managed servers and clusters, refer to the *Oracle Fusion Middleware 11g Creating Domains Using the Configuration Wizard*.

---

**Note:** In case you have an existing WebLogic domain, ensure that you extend it to be JRF enabled.

---

To set up a WebLogic domain:

1. In order to run the WebLogic Configuration Wizard in the graphical mode, export DISPLAY and have cygwin with X11 or other X windows system.
2. Navigate to the <WLS\_HOME>/common/bin directory, and run the following command to start the WebLogic Configuration Wizard in the graphical mode:

```
bash config.sh
```

3. On the WebLogic Configuration Wizard, follow the steps listed in the table below:

**Table 4–1 Steps to Set Up a WebLogic Domain**

Step	Screen	Task
1.	<i>Welcome Screen</i>	Click the <b>Create a new WebLogic domain</b> option, and then click <b>Next</b> .
2.	<i>Select Domain Source Screen</i>	Click the <b>Generate a domain configured automatically to support the following products</b> option, select the <b>Oracle JRF - 11.1.1.0 [oracle_common]</b> check box, and then click <b>Next</b> .  Note that the <b>Basic WebLogic Server Domain - 10.3.6.0 [wlserver_10.3]</b> check box is automatically selected and greyed out.
3.	<i>Specify Domain Name and Location Screen</i>	Enter a domain name in the <b>Domain Name</b> field.  In the <b>Domain location</b> field, specify the location where you want to install the domain.
4.	<i>Configure Administrator User Name and Password Screen</i>	Set up an administrative user name and password.  <b>Important:</b> Please keep a note of the user name and password. You must set up an alias in a password store using this user name and password. The Oracle Installer uses the alias name for this user account to connect to the WebLogic Server during the application installation. For more information on setting up a password store and an alias, see <a href="#">Setting Up the Credential Storage Manager Password Store</a> .
5.	<i>Configure Server Start Mode and JDK Screen</i>	

**Table 4–1 (Cont.) Steps to Set Up a WebLogic Domain**

Step	Screen	Task
		Under <b>WebLogic Domain Startup Mode</b> , click <b>Production Mode</b> .
		Under <b>JDK Selection</b> , select the relevant JDK.
		Click <b>Next</b> .
6.	<i>Select Optional Configuration Screen</i>	
		Select the configurations you want to customize and click <b>Next</b> . Go to Step 7.
		OR
		To proceed directly to creating your domain. Skip the following steps and go to Step 15.
7.	<i>Configure the Administration Server Screen</i>	
		Enter relevant information in the following fields: <ul style="list-style-type: none"> <li>■ <b>Name</b> – Valid server name. (String of characters that can include spaces.)</li> <li>■ <b>Listen address</b> – Listen address for a server instance.</li> <li>■ <b>Listen port</b> – Valid value for the listen port.</li> <li>■ <b>SSL listen port</b> – Valid value to be used for secure requests.</li> <li>■ <b>SSL enabled</b> – Select this check box to enable SSL. You can enter values in the SSL listen port field once you select this check box.</li> </ul>
		Click <b>Next</b> .
8.	<i>Configure Managed Servers Screen</i>	
		Click <b>Add</b> , and then enter relevant information in the following fields: <ul style="list-style-type: none"> <li>■ <b>Name</b> – Valid server name. (String of characters that can include spaces.)</li> <li>■ <b>Listen address</b> – Listen address for a server instance.</li> <li>■ <b>Listen port</b> – Valid value for the listen port.</li> <li>■ <b>SSL listen port</b> – Valid value to be used for secure requests.</li> </ul> Repeat this step to add more managed servers.
		Click <b>Next</b> .
9.	<i>Configure Clusters Screen</i>	
		This window appears, once you specify the managed servers. Click <b>Add</b> , and then enter relevant information in the following fields: <ul style="list-style-type: none"> <li>■ <b>Name</b> – Valid cluster name. (String of characters that can include spaces.)</li> <li>■ <b>Multicast address</b> – Address used by the cluster members to communicate with each other.</li> <li>■ <b>Multicast port</b> – Port used by the cluster members to communicate with each other.</li> <li>■ <b>Cluster address</b> – Address that identifies the Managed Servers in the cluster.</li> </ul> Repeat this step to specify more clusters.
		Click <b>Next</b> .

**Table 4–1 (Cont.) Steps to Set Up a WebLogic Domain**

Step	Screen	Task
10.	<i>Assign Servers to Clusters Screen</i>	<p>Use the arrow buttons and assign the servers to the clusters specified in the domain.</p> <p>Click <b>Next</b>.</p>
11.	<i>Configure Machines Screen</i>	<p>Click <b>Add</b>, and then add the machine (Unix-based) information.</p> <p>Click <b>Next</b>.</p>
12.	<i>Assign Servers to Machines Screen</i>	<p>Use the arrow buttons and assign the managed servers to the machines specified in the domain.</p> <p>Click <b>Next</b>.</p>
13.	Target Deployments to Clusters or Servers	<p>In the left pane, select the clusters or servers, and then select the relevant application check boxes in the right pane to target them to the specific cluster or managed server.</p> <p>For each cluster and managed server, select the <b>Library</b> check box.</p> <p>The WebLogic domain must be set up in such a manner that all the clusters and the relevant managed servers include all the libraries included with the WebLogic server.</p>
14.	Target Services to Clusters or Servers	<p>In the left pane, select the clusters or servers, and then select the relevant services check boxes in the right pane to target them to the specific cluster or managed server.</p>
15.	<i>Configuration Summary Screen</i>	<p>Review and confirm the configuration summary, and then click <b>Next</b>.</p>
16.	<i>Creating Domain Screen</i>	<p>Displays the domain configuration progress.</p> <p>Once the configuration is complete, click <b>Done</b>.</p>

## Setting Up the WebLogic Startup Script

To set up the WebLogic Startup script:

- Navigate to the `<WL_HOME>/user_projects/domains/<your domain name>/bin` directory, and ensure that the following parameters are set within the `startWebLogic.sh` script:
  - **WL\_HOME** – The location where the WebLogic Server is installed.
  - **JAVA\_VENDOR** – The Java Development Kit (JDK) installed for the WebLogic Server. You can specify IBM, HP, or Sun.
  - **JAVA\_HOME** – The location where the JDK is installed.
  - **CONFIGROOT** – The application configuration root directory.
  - **JAVA\_OPTIONS** – Append the following to the parameter value:  
`" -Dcom.profitlogic.configroot=$CONFIGROOT"`



- **CLASSPATH** – Append the location of the Engine sub folder located within the application configuration root directory.

---

**Note:** In case you have set up clusters or managed servers, you must also set up the **startManagedWebLogic.sh** script in the similar manner.

---

### For Example

```
#!/bin/sh
WL_HOME="

```

## Enabling SSL in the WebLogic Server

You can choose to install the application over HTTP or HTTPS protocol. Before you start the application installation, you must choose and set up the HTTP protocol for the application. This section highlights how you can enable Secure Sockets Layer (SSL) protocol for your server using the WebLogic Server Administration Console.

For more information on SSL in WebLogic Server, refer to the Oracle WebLogic Server documentation.

To enable SSL in the WebLogic:

1. Log on to the WebLogic Server Administration Console by typing the following address in a Web browser:

```
http://mycompany.domain.com:<admin-port>/console
```

2. In the **Domain Configurations** section, under the **Environment** section, click **Servers**. The **Summary of Servers** page appears.

You can also click **Environment** under the **Domain Structure** section in the left navigation pane.

3. On the **Summary of Servers** page, select the server you want for enabling SSL. The **Settings for <servername>** page appears.
4. In the **Settings for <servername>** page, under **Configuration**, click the **General** tab.
5. Click **Lock & Edit**.
6. Select the **SSL Listen Port Enabled** check box, and then enter a relevant port number in the **SSL Listen Port** field. By default, the port number is set to **7002**.

7. Click **Save**.
8. Click **Activate Changes**.

### Setting Up Identity and Trust Keystores

SSL can be configured as a one-way or two-way implementation. In a one-way SSL, the server presents a certificate to the client and the client is not required to present a certificate to the server. In a two-way SSL, the server presents a certificate to the client and the client presents a certificate to the server.

In case you enable SSL for your application, the application utility requires that you set up a identity and trust keystore on the WebLogic server. Once set, the WebLogic server presents a certificate to the client. Once the client system verifies the certificate from the server, the server then verifies the client by authenticating the user credentials from the wallet.

For more information on setting up trust keystore, refer to the *Oracle Fusion Middleware Securing Oracle WebLogic Server* documentation.

You can use the WebLogic Server Administration Console to configure the identity and trust keystores. For more information, refer to the *Oracle WebLogic Server Administration Console Help*.

---

---

**Note:** Keep a note of the location where the trust store is installed and the alias name for the trust store. You will need to specify these when you use the PriceAdmin utility. For more information, refer to the *Oracle Retail Clearance Optimization Engine Operations Guide*.

---

---

---

## Setting Up Password Stores

Password stores are secure software containers that store the encrypted user credentials. As part of the Oracle Software Security Assurance (OSSA) program, sensitive information such as user credentials must be encrypted and stored in a secure location called as the password stores. When the installation starts, all the necessary user credentials will be retrieved from the password stores based on the alias name associated with the user credentials. The relevant applications, installers, and scripts can retrieve the credentials using aliases that were set up when encrypting and storing the user credentials in the password store.

Once configured, the application installation and the other relevant scripts no longer need to use embedded user names and password. This reduces any security risks that may exist because user names and passwords are no longer exposed.

This chapter describes how you can set up the password stores. It includes the following steps:

1. Review and understand the required password stores configuration. See [Password Stores Configuration Overview](#).
2. Set up a password store for the database user accounts using Oracle Wallet on the application database side. In this document, this password store is referred to as the *Oracle Secret Store*. See [Setting Up the Oracle Secret Store](#).
3. Set up another password store for the application installation using the Credential Storage Manager. This password store will store the user credentials of the relevant application server and the database user accounts. In this document, this password store is referred to as the *Credential Storage Manager Password Store*. See [Setting Up the Credential Storage Manager Password Store](#).

---

**Note:** In a clustered-based implementation, ensure that the password stores are installed at a location that is accessible to all the cluster nodes

---

### Important Consideration

Before you start setting up the password stores, ensure that you have the set up the following:

- Environment variables. For more information, see [Setting Up Environment Variables](#).
- Latest supported JDK. For more information, see [Supported Configurations](#).

## Password Stores Configuration Overview

Before you start the application installation, you must set up the following two password stores:

- *Oracle Secret Store* – This password store will be used for the database user accounts, and set up using the Oracle Wallet (mkstore) available in the SQL\*Plus client installation. This password store will store the database user accounts required for the application. The database user credentials are available for the SQL scripts and other batch scripts by means of an alias set up in this password store for each database user account. Ensure that you create a password store using Oracle Wallet for each database client installation.
- *Credential Storage Manager Password Store* – This password store is used for the application installation, and set up using the Credential Storage Manager available in the COE installation media. This password store will store user credentials for the application server and database user accounts.

Although you added the database user account credentials in the *Oracle Secret Store*, ensure that you also add the same database user account credentials to the *Credential Storage Manager Password Store*, including the same alias name. The application installer uses these aliases to gain access to the relevant user account credentials required during installation.

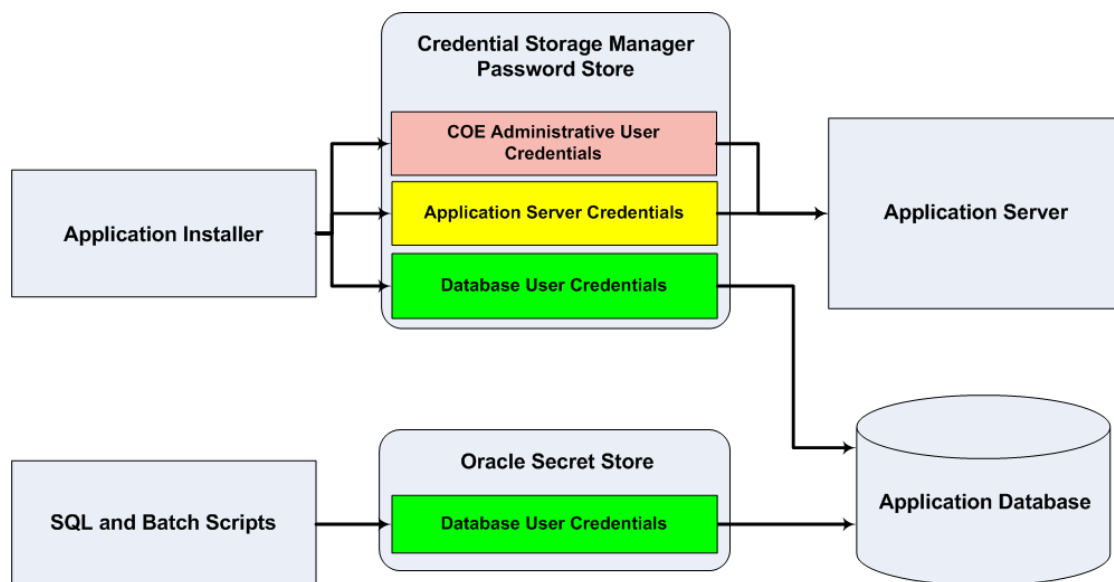
---

**Note:** Both the password stores must be set up on different directories or locations.

---

The following figure illustrates the password stores setup and usage for an installation:

**Figure 5–1 Password Stores Required for an Installation**



In the figure above, the Database User Credentials boxes in both the password stores have the same color. This is to indicate that the same database credentials must be set up in both the password stores.

## Setting Up the Oracle Secret Store

Once the database is installed and the default database user accounts set up, you must set up a password store using the Oracle Wallet tool. In this document, this password store is referred to as the *Oracle Secret Store*. Setting up this password store involves assigning an alias for the user name and associated password for each database user account. The alias will later be used during the application installation. This password store must be created on the system where the application server and database client are installed.

This section highlights the steps you must take to set up a wallet and then the aliases for the database user accounts. For more information on configuring authentication and password stores, refer to the *Oracle Database Security Guide*.

---

---

**Note:** In this section, `<store_location>` is a placeholder text for illustration purposes.

Before running the relevant commands in the procedure below, ensure that you replace the text `<store_location>` (including the `<` and `>`) with the path to the folder where you want to create the Oracle Secret Store.

In step 7 below, replace the text `<store_location>` with the path to the folder where you created the Oracle Secret Store.

For example, `/u00/db/admin/wallet`.

---

---

To set up the Oracle Secret Store:

1. Create a store using the following command:

```
mkstore -wrl <store_location> -create
```

Once you run the command, a prompt appears to enter a password for the Oracle Secret Store.

---

---

**Note:** The *mkstore* utility is included in the Oracle Database Client installation.

---

---

The store is created with the auto-login feature enabled. This feature enables the database client to access the store contents without using the password. For more information, refer to the *Oracle Database Advanced Security Administrator's Guide*.

2. Create the database connection credentials in the store using the following command:

```
mkstore -wrl <store_location> -createCredential <alias-name>  
<database-user-name>
```

3. Once you run the command, prompts appear to enter and confirm the password associated with the database user account.
4. After you enter the password for the database user account, press **Enter**. A prompt appears to enter the password associated with the store.
5. Enter the password you specified when you created the store in step 1, and then press **Enter**.
6. Repeat steps 2 through 5 to add all the database user accounts.

7. List the entries in the store to confirm the alias associated with the user name

```
mkstore -wrl <store_location> -listCredential
```

When prompted, enter the Oracle secret store password set up in step 1.

8. Update the **sqlnet.ora** file to include the following statements:

```
WALLET_LOCATION = (SOURCE = (METHOD = FILE) (METHOD_DATA = (DIRECTORY = <store_
location>)))
SQLNET.WALLET_OVERRIDE = TRUE
SSL_CLIENT_AUTHENTICATION = FALSE
```

---

**Note:** If you are using Oracle Database 12cR1, make sure to edit the sqlnet.ora file on the database server and add a parameter "SQLNET.ALLOWED\_LOGON\_VERSION\_SERVER=8".

---

9. Update the **tnsnames.ora** file to include the following entry for each alias name to be set up:

```
<alias-name> =
  (DESCRIPTION =
    (ADDRESS_LIST =
      (ADDRESS = (PROTOCOL = TCP) (HOST = <host>) (PORT = <port>))
    )
    (CONNECT_DATA =
      (SERVICE_NAME = <service>)
    )
  )
```

In the statement above, the following placeholder text are used for illustration purposes. Ensure that you replace these with the relevant values:

- **<alias name>** – Alias name associated with the database user account.
- **<host>** – Host name of the system where the database is hosted.
- **<port>** – Port number associated with the database.
- **<service>** – Name of the database.

For example,

```
MDO_ALIAS =
  (DESCRIPTION =
    (ADDRESS_LIST =
      (ADDRESS = (PROTOCOL = TCP) (HOST = DBHOST-SYSTEM) (PORT = 1521))
    )
    (CONNECT_DATA =
      (SERVICE_NAME = MDODB)
    )
  )
```

## Setting Up the Credential Storage Manager Password Store

Before starting the application installer, you must set up the user credentials for the application server, database user accounts, and the application administrative user account. The application installation includes a Credential Storage Manager that you

can use to set up a password store for the application installation. In this document, this password store is referred to as the *Credential Storage Manager Password Store*.

---

**Note:** In this section <COE\_CD\_IMAGE> refers to the location where you extract the Clearance Optimization Engine installation media. To proceed ahead, you must first access and extract the installation media. For more information, see [Accessing the Installation Software](#).

---

To set up the Credential Storage Manager Password Store:

1. Navigate to the following subfolder in the <COE\_CD\_IMAGE> folder:

```
<COE_CD_IMAGE>/CSM/lib/
```

For more information on the <COE\_CD\_IMAGE> folder, see [Accessing the Installation Software](#).

2. For each relevant database and application server user accounts, run the following command:

---

**Important:** Although you added the database user account credentials in the Oracle Secret Store, ensure that you also add the same database user account credentials to the Credential Storage Manager Password Store, including the same alias name.

---

```
java -jar retail-public-security-api.jar <alias-name> <user-name>  
<locationofwalletDir>
```

Once you run this command, you will be prompted to enter the password associated with the user name.

---

**Note:** In the command above, <alias-name>, <user-name>, and <locationofwalletDir> are placeholder text for illustration purposes. For each set of user name and associated password, you must specify a unique alias name.

For the <locationofwalletDir> argument, you must specify the location where you want to store the wallet file that contains the encrypted user credentials. Keep a note of this location. You will need to set this location as the value for the CSM\_HOME before starting the application installation. For more information, see [Setting Up Environment Variables](#).

---

3. Repeat step 2 to set up aliases for all the administrative user accounts. This includes administrative user accounts for the application, application server, and database.

### Example

To set up an alias with a name **COEAdminAlias** for the user **coe-admin** and store the wallet file at **/u00/product/oracle/coe/wallet/**, specify the following:

```
java -jar retail-public-security-api.jar COEAdminAlias coe-admin  
/u00/product/oracle/coe/wallet/
```

### **Important Considerations**

- Alias names are case sensitive.
- For database user accounts, ensure that you set up the same alias names between the password stores (Oracle Secret Store and Credential Storage Manager Password Store).
- Keep a note of all the aliases you have set up. During the application installation, you will need to enter the alias names for the application installer to connect to the database and application server.



---

## Installing Clearance Optimization Engine

After you have set up your database management system and application server, you can install Clearance Optimization Engine (COE) as described in this chapter. This chapter contains the following sections:

- [Overview of the Installation Process](#)
- [Installing Clearance Optimization Engine](#)
- [Post-Installation Tasks](#)
- [Upgrading to the Latest Release of Clearance Optimization Engine](#)
- [Troubleshooting Installation Issues](#)

### Overview of the Installation Process

---

**Note:** Although options for Oracle Application Server, IBM DB2, and WebSphere appear in the Oracle Installer, they are not supported in this release.

---

In order to install Clearance Optimization Engine, your first task is to obtain the installation media.

Then, you need to set up the Clearance Optimization Engine installation properties file. Once set up, you can choose of the following installation modes:

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

To begin the installation process, see [Installing Clearance Optimization Engine](#).

### Installing Clearance Optimization Engine

Installing Clearance Optimization Engine consists of the following tasks:

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

## Accessing the Installation Software

In order to install Clearance Optimization Engine, you first need to obtain the software media, which is available for download on the Oracle Software Delivery Cloud Web site or the My Oracle Support Web site.

---

**Note:** Installation media files for an Enterprise release (for example, 14.0) are available on the *Oracle Software Delivery Cloud Web site* (<http://edelivery.oracle.com>), and Patch releases (14.0.x) and Hot Fixes (14.0.x.y) are available on the *My Oracle Support Web site* (<https://support.oracle.com>).

---

To download the Clearance Optimization Engine software:

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

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

The **Oracle Software Delivery Cloud** download page displays.

2. On the **Oracle Software Delivery Cloud** page, click **Sign In/Register**.
3. On the **Sign In** page, log on to the **Oracle Software Delivery Cloud** Web site.
4. On the **Terms & Restrictions** page, review and accept the licensing agreement by selecting the check boxes.
5. Click **Continue**. The **Media Pack Search** screen displays.
6. Respond to the following and click **Go**.
  - **License List** - Review the list to determine which Product Packs you need to download.
  - **Product Pack** - Select **Oracle Retail Applications**.
  - **Platform** - Select the desired operating system.

The **Oracle Retail Clearance Optimization Engine Media Pack** screen displays.

7. In the **Select** column, click **Download** next to Oracle Retail Clearance Optimization Engine Release 14.0.
8. Unpack the ZIP file to a temporary directory. In this guide, the directory that contains the installation media is referred to as the <COE\_CD\_IMAGE> directory.

Now you can set up your Clearance Optimization Engine installation properties file.

---

**Note:** Before you proceed with setting up the installation properties file, ensure that you have set up the password stores. For more information, see [Setting Up Password Stores](#).

---

## Setting Up Your Installation Properties File

In order to install Clearance Optimization Engine, 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 <Clearance Optimization Engine\_CD\_IMAGE> directory exists and is populated as described in [Accessing the Installation Software](#), on page 6-2.
2. Navigate to the <Clearance Optimization Engine\_CD\_IMAGE> directory and copy the reference.coe.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. For more information on the parameters, see [Install.properties Parameter Reference](#).

Now you can install Clearance Optimization Engine, using either of the following modes:

- [Installing Clearance Optimization Engine in Silent Mode](#)
- [Installing Clearance Optimization Engine Using the Graphical Oracle Installer](#)

### Install.properties Parameter Reference

The following table describes the parameters in the install.properties file that you must set up before you install Clearance Optimization Engine:

**Table 6–1 Install.properties Parameters Reference**

Parameter	Description
<b>Architecture Properties</b>	
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, linux_x86_64, sunos_sun4u, or hpux_ia64.
http.protocol	The type of HTTP protocol used to host Clearance Optimization Engine.
install.command.shell	The shell command to use when you want to execute the shell scripts.
<b>Wallet Information</b>	
oracle.admin.alias	Use this parameter to specify the alias name set up for the Oracle Application Server administrative user account. For more information, see <a href="#">Setting Up the Credential Storage Manager Password Store</a> .
install.csm.home	Use this parameter to specify the path where the Wallet is installed. This location was referred to as <wallet_location> in the chapter Setting Up Password Stores. For more information, see <a href="#">Setting Up Password Stores</a> .
suite.host	The host name or IP address where the application will be installed and can later be accessed by users.
suite.port	The port associated with the host name specified in suite.host parameter where the application will run.
delphi.rmi.host	The host name or IP address where the Delphi RMI server will be installed.
delphi.rmi.port	The port associated with the host name specified in the delphi.rmi.host parameter where the Delphi RMI server will run. This has to be different from the one used for WebLogic Server, and should be a free port.
<b>Database Properties</b>	

**Table 6–1 (Cont.) Install.properties Parameters Reference**

Parameter	Description
install.database	Use this parameter to specify the installed database.
<b>Oracle Properties</b>	
dbms.oracle.host	The host name or IP address where the Oracle database is installed.
dbms.oracle.port	The port to connect to the Oracle database.
dbms.oracle.db	Use this parameter to specify the Oracle database name.
dbms.oracle.alias	Use this parameter to specify the Oracle database alias name.
dbms.oracle.user	Use this parameter to specify the user name to connect to the Oracle database. This is the default database user account created for the application database (<Clearance Optimization Engine USERNAME>). For more information, see <a href="#">Creating the Default User Accounts</a> .
database.commondb.oracle.address	Use this parameter to specify the URL (host name or IP address) 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.
<i>Properties for databases with Real Application Clusters (RAC)</i>	
database.commondb.oracle.racenabled	Use this parameter to indicate that the database is set up with Real Application Clusters (RAC).
database.commondb.oracle.dbhostlist	Use this parameter to specify the host names (with port numbers) of the servers hosting the database.
database.commondb.oracle.dburl	<p>Optional. Use this parameter to specify the database URL for JDBC connectivity.</p> <p>When you leave this field blank, the installer will automatically build the database URL based on the values entered in the other database parameters. In case you specify the database URL, the installer will use the values specified here during the installation.</p> <p><b>Syntax:</b></p> <p>For non RAC database,</p> <pre>jdbc:oracle:thin:@&lt;host name&gt;:&lt;dbport&gt;:&lt;dbname&gt;</pre> <p>For RAC database,</p> <pre>jdbc:oracle:thin:@(DESCRIPTION = (ADDRESS_LIST = (ADDRESS = (PROTOCOL = TCP)(HOST = &lt;host name1&gt;)(PORT = &lt;dbport1&gt;)) (ADDRESS = (PROTOCOL = TCP)(HOST = &lt;host name2&gt;)(PORT = &lt;dbport2&gt;)) (ADDRESS = (PROTOCOL = TCP)(HOST = &lt;host name3&gt;)(PORT = &lt;dbport3&gt;)) (ADDRESS = (PROTOCOL = TCP)(HOST = &lt;host name4&gt;)(PORT = &lt;dbport4&gt;)) ) (CONNECT_DATA = (SERVICE_NAME = &lt;dbname&gt;) (failover_mode = (type=select) (method=basic) (retries=60) (delay=5)) ) )</pre>
database.commondb.oracle.create	Use this parameter to specify that a new database schema must be created. Valid values are Yes or No.
database.commondb.oracle.upgrade	Use this parameter to specify that the existing database schema be upgraded. Valid values are Yes or No.
install.appserver	The default application server for Clearance Optimization Engine.
database.commondb.oracle.dbdriver	Use this parameter to specify the database driver that provides connection to the database.

**Table 6–1 (Cont.) Install.properties Parameters Reference**

Parameter	Description
<b>WebLogic Server Properties</b>	
weblogic.server	Use this parameter to specify the name of the server instance.
weblogic.admin.alias	Use this parameter to specify the alias name set up for the WebLogic Server administrative user account. For more information, see <a href="#">Setting Up the Credential Storage Manager Password Store</a> .
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 Oracle WebLogic Server base directory.
<b>WebLogic JNDI Properties</b>	
weblogic.managedserver.address	Use this parameter to specify the host name or IP address of the managed server that will be set in the jndi.properties file (located in the <Clearance Optimization Engine_Installation>/modules/tools/conf directory). For example, acme1,acme2,acme3.
weblogic.managedserver.port	Use this parameter to specify the port set up for the managed server that will be set in the jndi.properties file. For example, 7001,7002,7003.
<b>Note:</b>	
For a single server installation, you must enter the administrative server's host name and port.	
For a clustered installation, you must enter all the host names and associated ports separated by commas for the relevant parameters.	
<b>WebLogic Cluster Properties</b>	
scope.fetarget.serverobject	Use this parameter to specify the name of the server or cluster where you want to install the Clearance Optimization Engine application.
scope.fetarget.type	Use this parameter to specify the type of the server object. You can specify cluster or server.
scope.gdtarget.serverobject	Use this parameter to specify the name of the server or cluster where you want to install the Grid Designer application.
scope.gdtarget.type	Use this parameter to specify the type of the server object. You can specify cluster or server.
<b>Note:</b>	
Since the Grid Designer is a single user single instance application, ensure that you set the installer to deploy the application to only one instance in a clustered configuration.	
<b>WebLogic Cluster (Calc Engine) Properties</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.
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).

**Table 6–1 (Cont.) Install.properties Parameters Reference**

Parameter	Description
product.admin.alias	Use this parameter to specify the alias name associated with the administrative user credentials required to log on to the Clearance Optimization Engine application for the first time (previously known as the <i>root</i> user). This is the alias name you set up in the CSM password store for the application installation. For more information on setting up an alias for the administrative user, see <a href="#">Setting Up the Credential Storage Manager Password Store</a> .
<b>Post-installation Properties Files</b>	
install.properties.savefile	Use this parameter to specify the path to the folder where you want to store the properties file (last-session.properties) that contains the parameter values used in the last installation session.
missing.properties.savefile	Use this parameter to specify the path to the folder where you want to store the properties file (missing-entries.properties) that contains the parameter values the Oracle installer tried to use during installation.
<b>Audit Database Connection Information for Oracle</b>	
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.
<b>Properties for databases with Real Application Clusters (RAC)</b>	
database.auditdb.oracle.racenabled	Use this parameter to indicate that the Audit database is set up with Real Application Clusters (RAC).
database.auditdb.oracle.dbhostlist	Use this parameter to specify the host names (with port numbers) of the servers hosting the Audit database.
database.auditdb.oracle.dburl	<p>Optional. Use this parameter to specify the Audit database URL for JDBC connectivity.</p> <p>When you leave this field blank, the installer will automatically build the database URL based on the values entered in the other database parameters. In case you specify the database URL, the installer will use the values specified here during the installation.</p> <p><b>Syntax:</b></p> <p>For non RAC database,</p> <pre>jdbc:oracle:thin:@&lt;host name&gt;:&lt;dbport&gt;:&lt;dbname&gt;</pre> <p>For RAC database,</p> <pre>jdbc:oracle:thin:@(DESCRIPTION = (ADDRESS_LIST = (ADDRESS = (PROTOCOL = TCP)(HOST = &lt;host name1&gt;)(PORT = &lt;dbport1&gt;)) (ADDRESS = (PROTOCOL = TCP)(HOST = &lt;host name2&gt;)(PORT = &lt;dbport2&gt;)) (ADDRESS = (PROTOCOL = TCP)(HOST = &lt;host name3&gt;)(PORT = &lt;dbport3&gt;)) (ADDRESS = (PROTOCOL = TCP)(HOST = &lt;host name4&gt;)(PORT = &lt;dbport4&gt;)) ) (CONNECT_DATA = (SERVICE_NAME = &lt;dbname&gt;) (failover_mode = (type=select) (method=basic) (retries=60) (delay=5)) ) )</pre>
<b>AUDIT property for Creating the Database</b>	
database.auditdb.oracle.create	Use this parameter to indicate that a new Audit database must be created.
<b>AUDIT property for Upgrading the Database</b>	
database.auditdb.oracle.upgrade	Use this parameter to specify that the existing database be upgraded to include the Audit schema.

**Table 6–1 (Cont.) Install.properties Parameters Reference**

Parameter	Description
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> .
<b>Oracle Configuration Manager (OCM) Properties</b>	
basedest.baseocm.dir	Use this parameter to specify the path to the folder that contain the OCM files. Oracle recommends that this path be in the base installation folder.
product.ocm.install	Use this parameter to accept or decline the OCM license agreement. The value defaults to <i>no</i> and indicates that OCM will not be installed (rest of the OCM properties are ignored).
ocm.distribution	Use this parameter to specify the architecture of the operating system on which OCM is being installed.
ocm.disconnected	Use this parameter to specify one of the following OCM connection mode: <ul style="list-style-type: none"> <li>Connected – to proceed installing OCM. You must also procure the Customer Support Identifier, My Oracle Support user account name, and the country code to install the OCM.</li> <li>Disconnected – to skip the OCM configuration.</li> </ul>
ocm.csi_id	Use this parameter to specify the Customer Support identification number.
ocm.metalink_id	Use this parameter to specify the My Oracle Support user account name associated with the Customer Support identification number.
ocm.country_code	Use this parameter to specify the country code where the support agreement was initiated.
ocm.http.proxyenabled	Use this parameter to indicate that the system will connect to the Internet using proxy. Valid values are <i>yes</i> or <i>no</i> .
ocm.http.proxyhost	Use this parameter to specify the host name of the proxy server.
ocm.http.proxyport	Use this parameter to specify the port number of the proxy server.
ocm.http.proxyuser	Use this parameter to specify the user name to connect to the proxy server.
ocm.http.proxypassword	Use this parameter to specify the password associated with the user name to connect to the proxy server.
<b>Internationalization Properties</b>	
dataset.load.characterset	<p>Use this parameter to specify the character set to be used in the data control (.ctl) files.</p> <p>For more information on the correct character set syntax, refer to the appendix <i>Locale Data</i> in the <i>Oracle Database Globalization Support Guide</i> included in the <i>Oracle Database 10g Release 2 Documentation</i>.</p> <p>In case you choose not to set the value for this parameter, the default character set (UTF8) will be used for the application.</p>

## Setting Up Environment Variables

Before you start the installation, ensure that the following environment variables are set in the system:

- JAVA\_HOME
- ORACLE\_HOME

- PATH
- LD\_LIBRARY\_PATH (applies to Linux, HP-UX, Solaris based systems)
- LD\_LIBRARY\_PATH\_64 (applies to Linux, HP-UX, Solaris based systems)
- LIBPATH (applies to IBM AIX based systems)
- TNS\_ADMIN
- CSM\_HOME

Although it is recommended that these variables be set up in relevant bash shell startup files (*.bash\_profile*) of the system, you can also set up the variables using the *EXPORT* command at the UNIX prompt. For more information on setting up these variables in the startup files, refer to the operating system documentation.

To set up the environment variables for the current session, at the UNIX prompt type the following commands in sequence:

```
export JAVA_HOME=<path where JVM is installed>
```

For example, /usr/lib/java/jdk1.7

```
export ORACLE_HOME=<path where the Oracle client is installed>
```

For example, /u01/app/oracle/product/11.2.0/db\_1

```
export PATH=$ORACLE_HOME/bin:$PATH
```

```
export LD_LIBRARY_PATH=$ORACLE_HOME/lib:$LD_LIBRARY_PATH
```

For example, export LD\_LIBRARY\_PATH = \$ORACLE\_HOME/lib; \$LD\_LIBRARY\_PATH

```
export LIBPATH=$ORACLE_HOME/lib:$LIBPATH
```

For example, export LIBPATH= \$ORACLE\_HOME/lib; \$LIBPATH

```
export LD_LIBRARY_PATH_64=$ORACLE_HOME/lib:$LD_LIBRARY_PATH_64
```

For example, export LD\_LIBRARY\_PATH\_64= \$ORACLE\_HOME/lib; \$LD\_LIBRARY\_PATH\_64

```
export TNS_ADMIN=<path where the tnsnames.ora file for the database is located.>
```

For example, /u01/app/oracle/product/11.2.0/db\_1/NETWORK/ADMIN

```
export CSM_HOME=<path where the Oracle Wallet is installed>
```

For example, /u00/product/oracle/coe/wallet/

---

---

**Note:** Once the ORACLE\_HOME environment variable is set up, the password stores set up with the alias, ensure that you can connect to the database via sqlplus using the following command:

```
$sqlplus /@<alias_name>
```

---

---

## Installing Clearance Optimization Engine in Silent Mode

This section describes how to install Clearance Optimization Engine in silent mode. Silent mode is non-interactive.

To install Clearance Optimization Engine in silent mode:

1. Ensure that you have completed "[Setting Up Your Installation Properties File](#)" on page 6-2.
2. Make sure that your application server is running.
3. From your application server machine, enter the following command with relevant arguments:



```
bash install.sh
```

### install.sh

The install.sh command enables you to install Clearance Optimization Engine.

### 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.
-h	Optional. Prints a help message.

### Return Value

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

### Output

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

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

## Installing Clearance Optimization Engine Using the Graphical Oracle Installer

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

To install Clearance Optimization Engine using the Oracle Installer:

1. Ensure that you have completed "[Setting Up Your Installation Properties File](#)" on page 6-2.

---

**Note:** Although you can run the installation without setting up the installation properties file, ensure that you set up the installation properties file, and then start the installation.

---

2. Ensure 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 Clearance Optimization Engine in Silent Mode](#).

---

---

The **Welcome** screen appears.

**Figure 6–1 Welcome Screen**



5. Click **Next**. The **Clearance Optimization Engine Installation Destination** screen appears.

**Figure 6–2 Clearance Optimization Engine Installation Destination Screen**

**ORACLE**  
**RETAIL** Clearance Optimization Engine Installation Destination

General Installation  
Application Servers  
Databases  
Custom  
OCM

Destination directory  Browse...

Spool directory  Browse...

Log directory  Browse...

OCM installation root  Browse...

The following attributes apply to multi-server installations

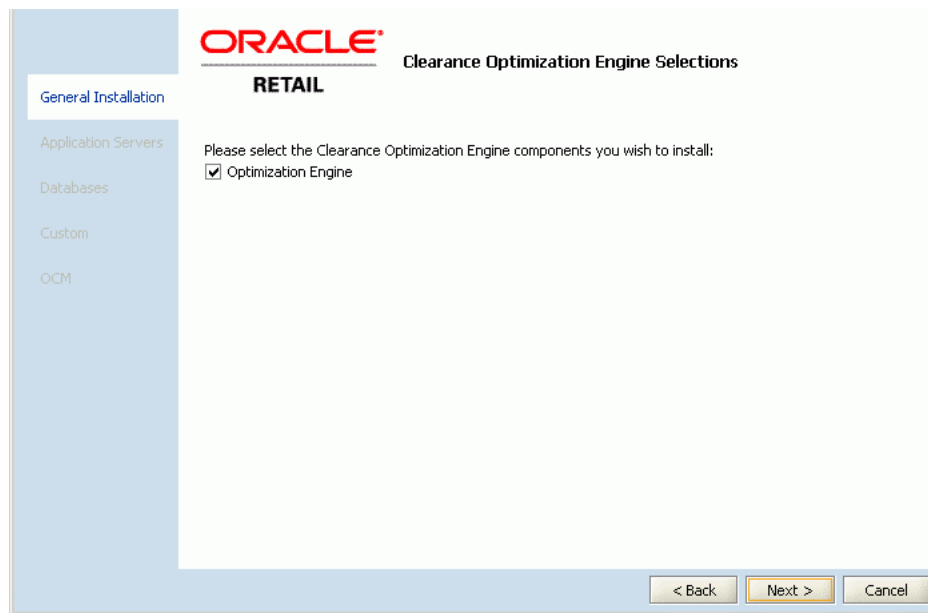
Remote shell

Remote command

Host List  Add Host Remove

< Back Next > Cancel

6. On the **Clearance Optimization Engine Installation Destination** screen, specify the paths for the following:
  - **Destination Directory** - path to the Clearance Optimization Engine installation target directory.
  - **Spool Directory** – path to the Clearance Optimization Engine spool directory.
  - **Log Directory** – path to the Clearance Optimization Engine installation log files.
  - **OCM installation root** – path to the location where the Oracle Configuration Manager (OCM) is installed.
7. Click **Next**. The **Clearance Optimization Engine Selections** screen appears.

**Figure 6–3 Clearance Optimization Engine Selections Screen**

8. On the **Clearance Optimization Engine Selections** screen, select the component you want to install, and click **Next**. The **Application Server Selections** screen appears.

**Figure 6–4 Application Server Selections Screen**

9. On the **Application Server Selections** screen, click **Oracle WebLogic Application Server**, and then click **Next**. The **WebLogic Application Server** screen appears.

**Figure 6–5 Oracle Application Server Screen**

10. On the **WebLogic Application Server** screen, enter the relevant information in the following fields to connect to the application server set up for the application:

- **WebLogic Home** – specify the location where the WebLogic Server is installed.
- **Domain Name** – specify the name of the WebLogic domain.
- **Server Name** – specify the name of the server instance where the application will be installed.
- **Host Name** – specify the host name of the system where the WebLogic server is installed.
- **Startup** – Optional. Location of the WebLogic Startup script for the WebLogic domain. You can choose to leave this field blank.
- **Admin Port** – specify the port number associated with the WebLogic Administrative Server instance.
- **Admin Alias** – specify the alias name associated with the administrative user credentials required to log on to the WebLogic server. This is the alias name you set up in the CSM password store for the application installation. For more information, see [Setting Up the Credential Storage Manager Password Store](#).

---

**Note:** In case the installation does not proceed ahead, check the application server information or the status of the application server.

---

11. Click **Next**. The **Java Message Server Properties** screen appears.

**Figure 6–6 Java Message Server Properties Screen**

The screenshot shows the 'Java Message Server Properties' window. On the left is a navigation pane with 'General Installation' selected. The main area has the Oracle logo and 'RETAIL' text. Below this, there are radio buttons for 'Server' (selected) and 'Cluster'. A text field for 'Server Name' contains the placeholder '<for example: my server>'. At the bottom right are buttons for '< Back', 'Next >', and 'Cancel'.

12. Clearance Optimization Engine currently does not use a Java Message Server (JMS). Click **Next**. The **Scope Properties** screen appears.

**Figure 6–7 Scope Properties Screen**

The screenshot shows the 'Scope Properties' window. On the left, 'Databases' is selected in the navigation pane. The main area has the Oracle logo and 'RETAIL' text. It contains two identical sections for defining scope targets. Each section has a 'Scope Id' (e.g., 'gdtarget'), a 'Type' dropdown menu (set to 'server'), and a 'Server Object' text field (containing the placeholder '<for example: myserver>'). At the bottom right are buttons for '< Back', 'Next >', and 'Cancel'.

13. On the **Scope Properties** screen, for the Clearance Optimization Engine and Grid Designer application, set the scope targets using the following:
- For Scope Id **gdtarget**:
    - **Type** – From the drop-down list, select the type of the server object.
    - **Server Object** – Specify the name of the server or cluster where you want to install the Grid Designer application.

---

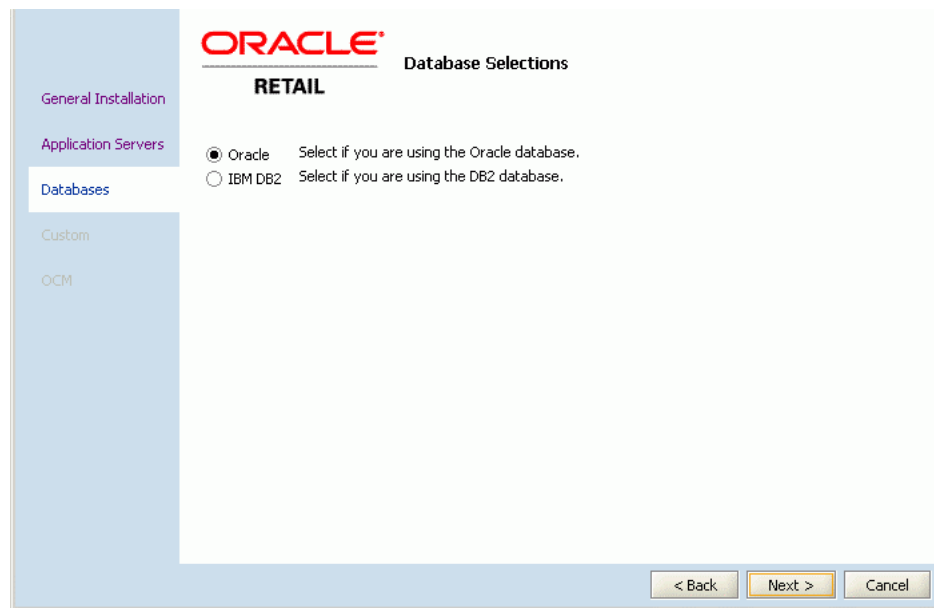
**Note:** Since the Grid Designer is a single user single instance application, ensure that you set the installer to deploy the application to only one instance in a clustered configuration.

---

- For Scope Id **fetarget**:
  - **Type** – From the drop-down list, select the type of the server object.
  - **Server Object** – Specify the name of the server or cluster where you want to install the Clearance Optimization Engine application.

14. Click **Next**. The **Database Selections** screen appears.

**Figure 6–8 Database Selections Screen**



15. On the **Database Selections** screen, click **Oracle**, and then click **Next**. The **Database Properties** screen appears.

**Figure 6–9 Database Properties Screen**

16. On the **Database Properties** screen, enter the following database information for the **Audit**, and **CommonDB** databases:

- **RAC Database** – Select this check box to indicate that the database is set up with Real Application Clusters (RAC). Once you select this check box, you must then specify the RAC host list and properties in the **RAC Host List** and **RAC Properties** fields.
- **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.
- **Database URL** – Optional. Use this parameter to specify the Audit database URL for JDBC connectivity.

When you leave this field blank, the installer will automatically build the database URL based on the values entered in the other database parameters. In case you specify the database URL, the installer will use the values specified here during the installation.

#### Syntax:

For non RAC database,

```
jdbc:oracle:thin:@<host name>:<dbport>:<dbname>
```

For RAC database,

```
jdbc:oracle:thin:@(DESCRIPTION = (ADDRESS_LIST = (ADDRESS = (PROTOCOL =
TCP)(HOST = <host name1>)(PORT = <dbport1>)) (ADDRESS = (PROTOCOL =
TCP)(HOST = <host name2>)(PORT = <dbport2>)) (ADDRESS = (PROTOCOL =
TCP)(HOST = <host name3>)(PORT = <dbport3>)) (ADDRESS = (PROTOCOL =
TCP)(HOST = <host name4>)(PORT = <dbport4>)) ) (CONNECT_DATA = (SERVICE_NAME
= <dbname>) (failover_mode = (type=select) (method=basic)
(retries=60)(delay=5)) ) )
```



- **Tables** – Select one of the following options:
  - **No Change** – Select this option 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** – Select this option if you are installing a new database schema for Clearance Optimization Engine. The Oracle Installer drops all the schemas and creates new ones.
  - **Upgrade** – Select this option 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.

17. Click **Next**. The **Product Administrator Credentials** screen appears.

**Figure 6–10 Product Administrator Credentials Screen**

18. On the **Product Administrator Credentials** screen, specify the alias name associated with the administrative user credentials required to log on to the Clearance Optimization Engine application for the first time (previously known as the *root* user). This is the alias name you set up in the CSM password store for the application installation. For more information on setting up an alias for the administrative user, see [Setting Up the Credential Storage Manager Password Store](#).
19. Click **Next**. The **Audit FE Schema Link Properties** screen appears.

**Figure 6–11 Audit FE Schema Link Properties Screen**

**ORACLE**  
**RETAIL** Audit FE Schema Link Properties

General Installation  
Application Servers  
Databases  
Custom  
OCM

Username associated with the Application schema: %common.feschema%

Name of the database link to the Application instance: %common.dblink%

< Back   Next >   Cancel

20. On the **Audit FE Schema Link Properties** screen, specify the user name and the database link associated with the application schema, and then click **Next**. The **Engine Properties** screen appears.

**Figure 6–12 Engine Properties Screen**

**ORACLE**  
**RETAIL** Engine Properties

General Installation  
Application Servers  
Databases  
Custom  
OCM

Architecture (linux\_i686,sunos\_sun4u,aix\_powerpc): %architecture%

Engine host name: %delphi.rmi.host%

Engine port number: %delphi.rmi.port%

< Back   Next >   Cancel

21. On the **Engine Properties** screen, specify the following information on the system hosting the Optimization Engine:
- **Architecture** – operating system on which the Optimization Engine runs.
  - **Engine host name** – host name associated with the server.
  - **Engine port number** – port number associated with the server.
22. Click **Next**. The **Internationalization Properties** screen appears.

23. On the **Internationalization Properties** screen, in the **Control File Character Set** field, specify the character set to be used in the data control (.ctl) files.

For more information on the correct character set syntax, refer to the appendix *Locale Data* in the *Oracle Database Globalization Support Guide* included in the Oracle Database 12c Release 1 Documentation.

In case you choose not to set the value for this parameter, the default character set (UTF8) will be used for the application.

24. Click **Next**. The **Oracle Configuration Manager Registration** screen appears.

**Figure 6–13 Oracle Configuration Manager Registration Screen**

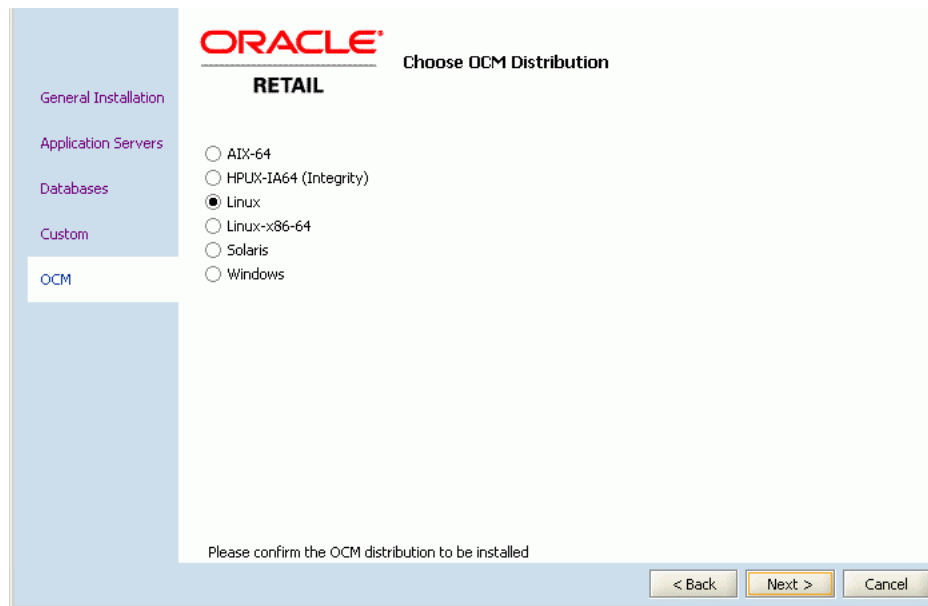



---

**Note:** For more information on Oracle Configuration Manager (OCM), see [Overview of Oracle Configuration Manager](#).

---

25. Click **Next**. The **Oracle Configuration Manager Licensing Agreement** screen appears. To skip installing the OCM, decline the license agreement, and click **Next**. The **Selection Verification** screen appears. Go to step 32.
26. Accept the license agreement, and click **Next**. The **Choose OCM Distribution** screen appears.

**Figure 6–14 Choose OCM Distribution Screen**

27. On the **Choose OCM Distribution** screen, select the operating system hosting the application, and click **Next**. The **Choose OCM Connection Mode** screen appears.

**Figure 6–15 Choose OCM Connection Mode Screen**

28. On the **Choose OCM Connection Mode** screen, select one of the following modes:
- **Disconnected** – select this mode of OCM installation, when there is no way to access the Oracle servers or you want to keep the automatic collection of configuration data disabled. The **Selection Verification** screen appears. Go to Step 32.
  - **Connected** – select this mode to continue installing OCM, and click **Next**. The **Oracle Customer Information** screen appears.

**Figure 6–16 Oracle Customer Information Screen**

**ORACLE** Oracle Customer Information

**RETAIL**

Customer Support Identifier

Metalink Account Username

Country Code

Provide your CSI number, Metalink account and Country Code where service agreement is initiated. This allows you to associate your configuration information with your Metalink account. When you log your service request with Oracle, you will be able to link the request with the pre-collected configuration data associated with your installation. If registration parameters are not provided or invalid, the configuration will not be performed. Follow the instructions in Release Notes to complete the installation if required.

< Back Next > Cancel

29. On the **Oracle Customer Information** screen, specify your Customer Support Identifier (CSI) number, My Oracle Support account user name, and the country code where the service agreement is initiated.
30. Click **Next**. The **Proxy Server Details** screen appears.

**Figure 6–17 Proxy Server Details Screen**

**ORACLE** Proxy Server Details

**RETAIL**

Enable Proxy ☐

Server

Port

Username

Password

If your network configuration requires it, the OCM collector can use a proxy server to connect to Oracle.

< Back Next > Cancel

31. On the **Proxy Server Details** screen, enter the relevant proxy server details, and click **Next**.

---

**Note:** Skip this step if your connection to the Internet does not require a proxy server.

---

The **Select Verification** screen appears.

**Figure 6–18 Selection Verification Screen**

32. Review the **Selection Verification** screen, and click **Install**.

The **Installation Progress** screen appears.

33. Once the installation is complete, verify that the application is accessible over the network. In a Web browser, enter the following URL in the **Address** bar, and press **Enter**:

`http://<suite.host>:<suite.port>/p4pgui`

---

**Note:** In the URL above, <suite.host> and <suite.port> represent the host name and port you set up for the application during the installation. You must specify the relevant host name and port in the Address bar.

---

34. Verify that the Grid Designer application is accessible over the network by entering the following URL in the **Address** bar, and pressing **Enter**:

`http://<suite.host>:<suite.port>/GridDesigner/faces/login`

Before you log on to the application, you must complete the post-installation tasks. For more information, [Post-Installation Tasks](#).

If the installation resulted in issues, see [Troubleshooting Installation Issues](#) on page 6-28.

## Post-Installation Tasks

Now that you have installed Clearance Optimization Engine, restart your application server software and proceed with the following options:

- Before you start working with your business data or set up user roles, you must set up aliases for the user account associated with the PriceAdmin utility.

For more information, see [Setting Up User Accounts and Aliases](#).

- The Clearance Optimization Engine installation includes a default user account with the user name *griduser1* that is set up with the GRID\_DESIGNER role. Before you start using or set up access to the Grid Designer application, ensure that you unlock and set up a new password for this user account. For more information on unlocking and changing the password for any account, refer to the *Oracle Retail Clearance Optimization Engine Administration Guide*.
- In case of an installation based on clusters, you must set the target for the Grid Designer application to a single instance. For more information, see [Setting Up a Single Instance Target for the Grid Designer](#).
- If you are ready to start working with your business data, perform the following tasks:
  1. [Loading Seed Data](#)
  2. [Loading Business Rules](#)
  3. [Loading User Roles](#)

---

**Note:** You must follow the above order to ensure that there are no errors when the users log on to the application.

---

- If you want to integrate Clearance Optimization Engine as part of the Oracle Application Server Single Sign-On implemented with Oracle Retail Workspace, see [Setting Up Single Sign-On](#).
- If you want to maximize system performance, you can tune your Calculation Engine.
- If you want to implement the security for the Web Services, see [Implementing Security for the Web Services](#).

## Setting Up User Accounts and Aliases

Before you run the User Management Bulk Loader script, you must set up an alias for the user account for the PriceAdmin utility in the password store set up using the Credential Store Manager.

The PriceAdmin utility requires that you set up an user account with the PRICE\_ADMIN\_USER role, and then set up an alias in the password store for the application.

---

**Note:** By default, the installation automatically adds a price\_admin user account (with the same password) associated to the PRICE\_ADMIN\_USER role. You can choose to use this user account for the PriceAdmin utility.

---

For more information on setting up aliases for the user accounts mentioned above, see [Setting Up the Credential Storage Manager Password Store](#).

## Setting Up a Single Instance Target for the Grid Designer

When you install Clearance Optimization Engine, the Grid Designer application is also installed as a separate Web-based application. This also applies to cluster-based installations. All targeted clusters during the installation will also include their individual instance of the Grid Designer application.

To ensure that there is always a single copy of the grid configuration being updated, once the application installation is complete, you must set/pin the Grid Designer application target to a single instance.

To set up a single instance target for the Grid Designer:

1. Log on to the WebLogic Server Administration Console by typing the following address in a Web browser:  
`http://mycompany.domain.com:<admin-port>/console`
2. In the **Domain Configurations** section, under the **Your Deployed Resources** section, click **Deployments**. The **Summary of Deployments** page appears.  
You can also click **Deployments** under the **Domain Structure** section in the left navigation pane.
3. On the **Summary of Deployments** page, click the Grid Designer application name under the Name column. The **Settings for GridDesigner** page appears.
4. On the **Settings for GridDesigner** page, click the **Targets** tab.
5. On the **Targets** tab, click the check box next to the **GridDesigner** enterprise application, and then click **Change Targets**. The **Change Target Assistant** screen appears.
6. Under **Target Deployments**, retain the check box next to the single instance to which you want to target the application.
7. Click **Yes**.
8. Click **Activate Changes**.

## Loading Seed Data

Clearance Optimization Engine provides a set of scripts that stage, transform, and load data into the target database tables in the Clearance Optimization Engine database. It is also referred to as the standard load.

Before starting the data load process, configure and run scripts that load the seed data. For more information, see the *Clearance Optimization Engine Configuration Guide*.

## Loading Business Rules

Use the Business Rules Management Administration shell script (brmadmin.sh) to load the business rule definitions set up for Clearance Optimization Engine. The script loads the business rule definitions specified in a rule definitions file.

The rule definitions are set up based on your business needs and includes the business rules information for Clearance Optimization Engine. Ensure that this file is available during the implementation. You can find a sample rules definition file, *rule\_definitions.xml*, at the following location:

```
<Clearance Optimization Engine_Installation>\modules\tools\conf\SampleRules
```

For more information, see the section *Loading Business Rule Definitions* in the *Clearance Optimization Engine Configuration Guide*.



## Loading User Roles

Use the User Management Bulk Loader script to load the user roles set up for Clearance Optimization Engine. 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 needs and include the user accounts and roles access information for Clearance Optimization Engine. Ensure that this file is available during the implementation. You can find sample user roles set files at the following location:

```
<Clearance Optimization Engine_Installation>\modules\tools\conf
```

For more information, see the chapter *User Management* in the *Clearance Optimization Engine Configuration Guide*.

## Implementing Security for the Web Services

Clearance Optimization Engine enables you to implement the security mechanism for the Web Service using the capabilities of the application server.

The Security mechanism is configurable and specific to your implementation. Based on your implementation, you can configure security features such as encryption, digital signature, and authentication for the Web Service using the features in the application server. For more information on configuring the application server for the security features, refer to the relevant application server documentation.

### Specifying Custom Header

Custom headers are used for specifying the remote user names (other than the Clearance Optimization Engine users) and are specified at the client side. They are used for auditing purposes only. Ensure that the request headers have the following format:

```
<appHeader:remoteUserCredentials xmlns:appHeader="MDO/appHeader">
<remoteUserName>remote_userid</remoteUserName>
</appHeader:remoteUserCredentials>
```

### Auditing Web Service Access

Auditing of the Web service access is an optional feature that you can enable or disable based on your implementation. Auditing is on by default. Once you enable auditing, the *audit\_tbl* database table will include the audit entries for every service request.

When specified with the Web service request, the remote user id will be logged in the *audit\_tbl* database table. When no user name is included, the value *anonymous* is logged for that entry. In case a user, other than the Clearance Optimization Engine users, is used or the authentication is turned off, the auditing entries are logged under the *root* user.

To enable or disable auditing the remote users that access the Web Service, you must set *audit.groupname.excluded* parameter in the *suite.properties* file.

For more information, refer to the *Oracle Retail Clearance Optimization Engine Configuration Guide*.

### Encrypting Usenametoken and Custom Header

To set up encryption for Usenametoken and custom header, you must complete the following instructions for the WebLogic server:

Use the *wls-encrypt-username.token.xml* and *wls-encrypt-appheader.xml* files to set up the WS-Policy for encryptions. These files are part of the p4pgui.ear and are available after the application is installed. The *wls-encrypt-username.token.xml* file is used for the encryption of only the user name token and password. The *wls-encrypt-appheader.xml* file is used for encryption of the custom headers.

These files must be applied for the inbound message policies only. For more information on applying these files, refer to the WebLogic Server documentation.

---

**Important:** If you do not plan to send the user name token as part of the Web service request, do not use *wls-encrypt-username.token.xml* file for encryption. If you do not plan to send the custom headers that contain the remote user name, do not use *wls-encrypt-appheader.xml* file for encryption.

---

## User Authentication

If you are planning to use the user-based authentication for the Web Service against the Clearance Optimization Engine database, you must complete the following instructions:

- [Setting Up Authentication on the WebLogic Server](#)

### Setting Up Authentication on the WebLogic Server

To set up the authentication for the Web Service on the WebLogic Server:

1. Copy the **COSOWLLLoginModule.jar** (located in the <Clearance Optimization Engine\_CD\_IMAGE>\price directory) to the <WebLogic Domain>\lib\mbeantypes directory on your application server, and restart the server for the JAR file to automatically get deployed.
2. Once deployed, you must modify the realm to use this JAR file for authentication. During this configuration of this realm, ensure that this JAR shows up second in the Authentication Providers list, and the Control Flag for the default provider is set to SUFFICIENT.
3. To perform any further configuration, refer to the WebLogic Server documentation.

## User Authorization

To enable or disable the authorization of the Clearance Optimization Engine users set up in the User Management, you must set the *coe.authorization.enabled* parameter in the config.properties file. For more information, refer to the *Oracle Retail Clearance Optimization Engine Configuration Guide*.

---

**Important:** For this feature to work, you must first configure user authentication against the Clearance Optimization Engine database. For more information, see [User Authentication](#).

---

## Upgrading to the Latest Release of Clearance Optimization Engine

This section describes how you can upgrade from a previous release to the latest release of Clearance Optimization Engine. Before you start the upgrade process, Oracle recommends that you study, procure, and set up the system configuration required for the upgrade. For more information, see [Planning Your Installation](#).

To upgrade to the latest release of Clearance Optimization Engine:

1. Download the latest Clearance Optimization Engine installation media files. For more information, see [Accessing the Installation Software](#).

---

---

**Note:** Installation media files for an Enterprise release (14.0) are available on the *Oracle Software Delivery Cloud* Web site (<http://edelivery.oracle.com>) and Patch releases (14.0.x) and Hot Fixes (14.0.x.y) are available on the *My Oracle Support* Web site (<https://support.oracle.com>).

---

---

2. Back up the database, configuration root, custom scripts, and so on.
3. Upgrade the operating system referring to the operating system documentation for guidance. Also, apply the necessary patches as described in the chapter [Planning Your Installation](#).

---

---

**Note:** Although you can upgrade an operating system from an existing version, Oracle recommends that you do a clean installation of the operating system.

---

---

4. Once you have installed the operating system, install the Oracle database referring to the database documentation for guidance. For more information on the database configuration required for Clearance Optimization Engine, see [Setting Up the Database](#).

---

---

**Important:** The Activities table will be reorganized when the *cdw\_978.sql* file runs during an upgrade from Release 13.2.2 or previous releases. Ensure that the database tablespace is large enough for this purpose. For this process to run successfully, it is recommended that you have at least one and a half times of the tablespace occupied by the activities table.

---

---

5. Install the supported application server (Oracle WebLogic Server) referring to the application server documentation for guidance. You must also extend the WebLogic domain to use ADF 11.1.1.7. For more information on the application server configuration required for Clearance Optimization Engine, see [Setting Up Your Application Server](#).
6. Verify the JVM version for the application server. The JVM versions differ based on the operating system. For more information on the compatible JVMs, see [Application Server Requirements](#).
7. Once you have set up the application server and database, edit the *install.properties* file and set up the database parameters in the following manner:
  - For the Common DB, set up the following parameters to indicate an upgrade to the existing database or schema:
    - set the **database.commondb.oracle.upgrade** parameter to **yes**.
    - set the **database.commondb.oracle.create** parameter to **no**.
  - For the Audit DB, set up the following parameters to indicate an upgrade to the existing database or schema:
    - set the **database.auditdb.oracle.upgrade** parameter to **yes**.
    - set the **database.auditdb.oracle.create** parameter to **no**.

- If a database schema did not exist before the upgrade and if you want to create them now, set the **database.<dbschema>.oracle.upgrade** parameter to **no** and the **database.<dbschema>.oracle.create** parameter to **yes** for the relevant database schema. For more information, see [Setting Up Your Installation Properties File](#).
8. Before you run the installer, set up the environment variables required for the Clearance Optimization Engine installation. For more information, see [Setting Up Environment Variables](#).
  9. Run the installer and install the application. For more information, see [Installing Clearance Optimization Engine in Silent Mode](#) or [Installing Clearance Optimization Engine Using the Graphical Oracle Installer](#). In case you choose to install the application in the graphical mode, ensure that you select the **Upgrade** check box in the **Database Properties** screens.
  10. Apply the relevant customizations that were backed up in step 2.

## 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 Clearance Optimization Engine).

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 Clearance Optimization Engine installation issues.

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

### Understanding Trace Output Messages

Note that the Oracle Installer displays messages that originate from multiple sources. Some messages are Clearance Optimization Engine-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 on-screen message prompts you to review the log files to determine the cause of the errors. However, since the installation had not completed, no log file was generated.

Instead, review the on-screen trace messages to determine the origin of the error.

Before the installation was interrupted, some components may already have got installed or deployed. Once you fix the errors, you must remove any existing files in the installation base, undeploy any modules from the server, and run the installation again.

**Installation Completes with Errors**

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

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

```
install-<YYYYMMDD>-<HHMMSS>.log
```

where HH is in 24-hour format.

Review the log file to determine the origin of the errors. Before the installation was interrupted, some components may already have got installed or deployed. Once you fix the errors, you must remove any existing files in the installation base, undeploy any modules from the server, and run the installation again.



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# Index

## A

---

access  
    installation, 6-2  
application server, 6-12  
    requirements, 2-3  
architecture properties, 6-3

## C

---

client system  
    requirements, 2-3  
create  
    default users, 3-3

## D

---

data dictionary, 3-2  
database  
    properties, 6-3, 6-15  
    requirements, 2-2  
    tablespaces, 3-2  
domain  
    setup, 4-2

## E

---

engine properties, 6-18  
enterprise components  
    application server tier, 1-4  
    client system tier, 1-4  
    database server tier, 1-5  
environment variables, 6-7

## G

---

graphical  
    install mode, 6-9  
guidelines  
    implementing plan, 1-6

## I

---

initialization parameter, 3-2  
install  
    graphical mode, 6-9  
    silent mode, 6-8

    weblogic server, 4-1  
installation  
    access, 6-2  
    planning, 2-1  
installation task, 1-6  
installer  
    welcome screen, 6-10  
install.sh, 6-9

## N

---

network  
    requirements, 2-2

## O

---

OCM, 1-5, 6-7, 6-19  
overview, 1-1

## P

---

plan  
    enterprise components, 1-3  
post-install, 6-22  
post-install properties, 6-6  
post-installation tasks, 1-6  
pre-installation tasks, 1-6

## R

---

RAC properties, 6-16  
requirements  
    application server, 2-3  
    client system, 2-3  
    database, 2-2  
    network, 2-2  
roadmap  
    implementing, 1-6

## S

---

set up  
    database, 3-1  
setup  
    environment variables, 6-7  
    weblogic domain, 4-2

- weblogic server, 4-1
- weblogic startup script, 4-4
- silent
  - install mode, 6-8
- startup script, 4-4
  - weblogic, 4-4
- supported configurations, 2-2
  - application server requirements, 2-3
  - client system requirements, 2-3
  - database requirements, 2-2
  - network requirements, 2-2

## **T**

---

- tasks
  - installation, 1-6
  - post-install, 6-22
  - post-installation, 1-6
  - pre-installation, 1-6
- tier
  - client system, 1-4

## **U**

---

- upgrade, 6-26

## **W**

---

- weblogic, 4-4
  - domain, 4-2
  - server, 4-1
- welcome screen, 6-10