# Sales Quote Demo – Setup

These steps must be completed before you run the Sales Quote Demo composite application. If you do not complete these steps, you will not be able to run the application.

## 1. Create Quote Schema

The Quote schema contains a table of products used by the Enter Quote task form to look up Products and Pricing Information.

To create the Quote schema, locate the SQL files in the `SalesQuoteDemo\sql` directory and complete the following commands. You can safely ignore any messages that a table or index does not exist. These drop commands are there so you can run the script multiple times but the first time the objects do not yet exist.

```
>cd c:\SalesQuoteDemo\sql
>sqlplus sys/welcome1 as sysdba @create_user.sql quote quote
>sqlplus quote/quote @quote.sql
```

## 2. Set up data source in WebLogic server

This application requires a database data source in order to access the Quote schema. You create this using the WebLogic Server console. First create the data source and then a connection pool for that data source.

1. Make sure your server is started. If it is not already open, open http://localhost:7001/console to start the Web Logic Server (WLS) console and login using weblogic/welcome (replace the host and port and username/password to match your own configuration).

2. On the left navigation bar, Click **Services > JDBC > Data Sources.**

3. At the top of the data source table, click **New**.

4. Enter the data source information
   **Name:** *quoteDS*
   **JNDI Name**: *jdbc/quoteDS*
   **Database Type:** *Oracle*

5. Click **Next**, click **Next** twice more

6. Enter the database information.
   **Database Name**: XE (your database SID)
   **Host name**: localhost (host where your database is running)
   **Port**: 1521 (set according to your configuration)
   **Database user name**: quote  (created in previous section)
   **Database user password**: quote



7. Click **Next**

8. Click **Test Configuration**.  Confirm success message at top of page.

9. Click **Next**

10. Select the **Target server** where your BPM component is running: *soa_server1* or *AdminServer*

11.  Click **Finish**

Now create the connection pool.  This step is not required for the Sales Quote Demo setup as the process accesses the database using ADFBC.  But, if you want to use the quoteDS data source for something else later, for example for a database adapter service, you need the connection pool.  Skip to the next section if you prefer not to create the connection pool at this time.

12.  To create the connection pool, you have to edit the database adapter application and it uses a Deployment Plan.  First, create a directory *DBPlan* to contain that plan. Create *C:\Oracle\Middleware\home_ bpm\Oracle_SOA1\soa\DBPlan* (adjust path according to your installation)

13.  In the WLS console left navigation bar, click **Deployments**.

14.  Click the DbAdapter application (click the name, not the checkbox)

15.  Click the **Configuration** tab, and then click the **Outbound Connection Pools** tab.
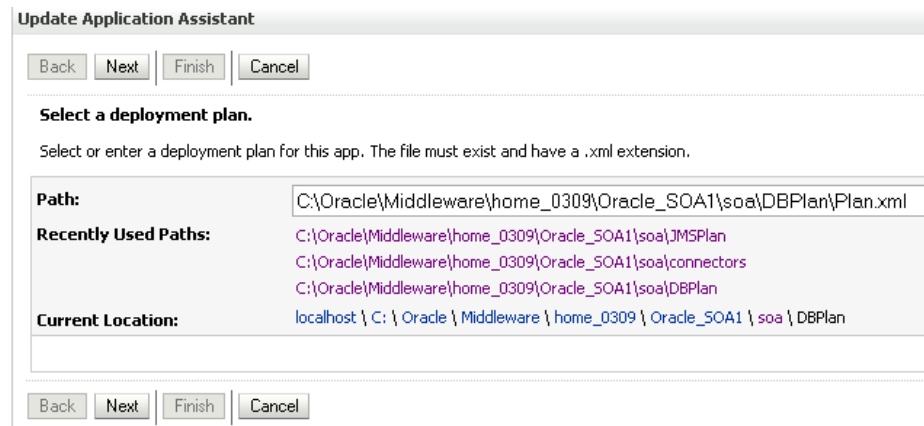
16.  Click **New**

17.  Select the radio button for javax.resource.cci.ConnectionFactory and click **Next**

18.  Enter the **JNDI Name** as follows: *eis/DB/quoteDS*
     Note that this is not the same value as in above step even though it is also called JNDI Name.  This will match the value you enter later in your database connection you create when building your application using JDeveloper.

19.  Click **Finish**

20.  At this point, you should be asked for the deployment plan location but if you've already created a data source you will instead update it.  Click on the path to the *DBPlan* directory you created earlier and enter the deployment plan name *Plan.xml.*

**Update Application Assistant**

| Back | Next | Finish | Cancel |

**Select a deployment plan.**

Select or enter a deployment plan for this app. The file must exist and have a .xml extension.

| Path: | C:\Oracle\Middleware\home_0309\Oracle_SOA1\soa\DBPlan\Plan.xml |
| Recently Used Paths: | C:\Oracle\Middleware\home_0309\Oracle_SOA1\soa\JMSPlan |
| | C:\Oracle\Middleware\home_0309\Oracle_SOA1\soa\connectors |
| | C:\Oracle\Middleware\home_0309\Oracle_SOA1\soa\DBPlan |
| Current Location: | localhost \ C: \ Oracle \ Middleware \ home_0309 \ Oracle_SOA1 \ soa \ DBPlan |

| Back | Next | Finish | Cancel |

21.  Click **OK**, or if you are updating, Click **Next** and then click **Finish**

22.  Confirm the name of the deployment plan
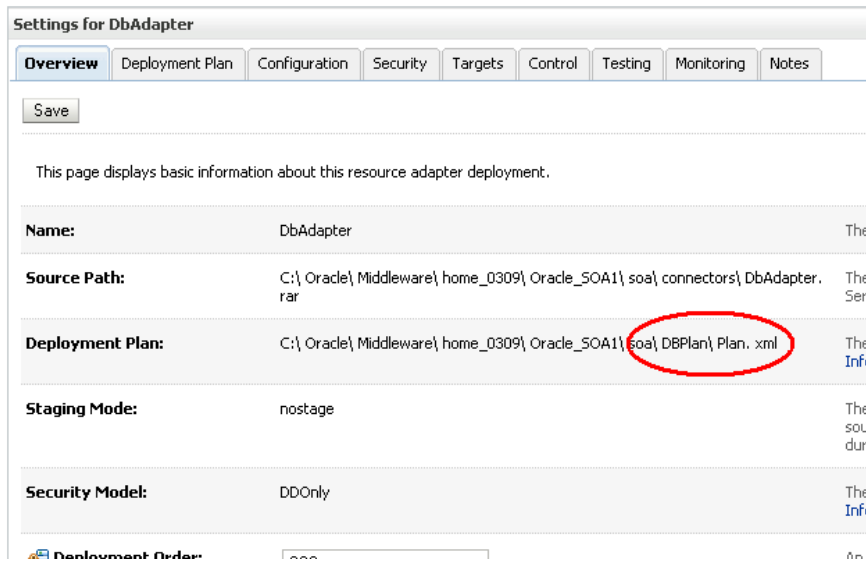
23. Now, edit the connection pool to reference the data source. Click the **Configuration** tab, expand the connection factory and click your new connection pool named *eis/DB/quoteDS* (click on the name, not the checkbox)

24. To change the property value, you must use the **ENTER** key and then **Save**.  Do not use the **TAB** key.  Follow these instructions exactly: In the **Properties** table, select the box to the far right of **xADataSource.**  The edit box appears. Type in your data source jndi name that you created: *jdbc/quoteDS*. Press the **ENTER** key to apply the value.
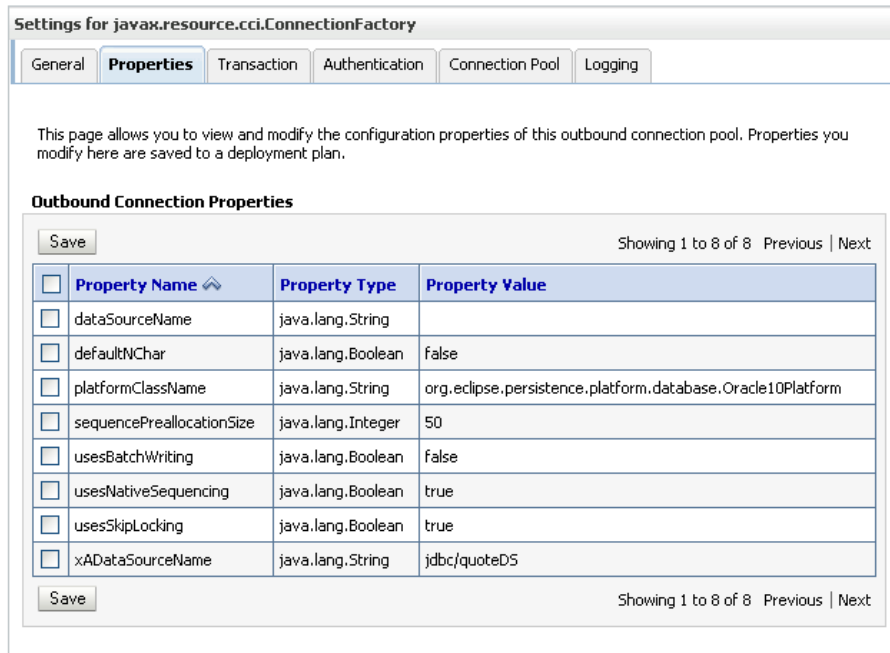


25. Click **Save.**
    You must use the **ENTER** key for the value to be entered in the field.  You must use the **Save** button to save the value.

26. Click **Deployments** in the left navigation bar to go back to the main **Deployments** page so you can update the DbAdapter with these changes.

27. Select the checkbox next to DbAdapter.

28. Click **Update**.

29. Select **Redeploy this application** and confirm the deployment plan location.



30. Click **Finish**

31. Confirm that the connection pool is added by going back to the **DbAdapter > Configuration > Outbound Connection Pools** and expand the connection factory listed there.

32. Confirm the value of the **xADataSource** property that you entered. Look closely! This is the most common place where the configuration is in error.

# 3. Perform Demo Seeding of Users & Groups

1. Follow the Readme instructions in the demo-community.zip file.

# 4. Create MDS connection in Oracle BPM Studio

This MDS connection is used to share the processes and rules between JDeveloper BPM Studio and BPM Process Composer.

1. Start **BPM Studio**

2. Open the **Resource Palette** by selecting the menu **View -> Resource**
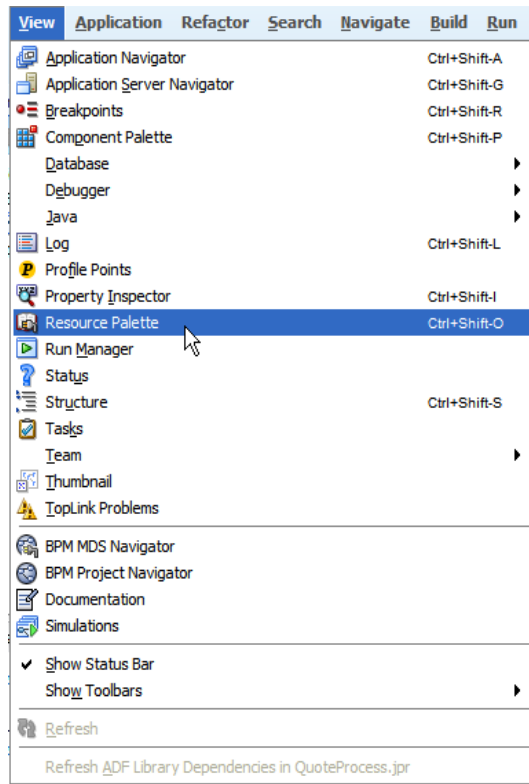
3. Click the folder with the "+" sign



4. Select **New Connection** and then click **Database.**



5. Create a database connection as shown in the screen shot below. You need to enter the following fields:

**Username** (generally is <prefix>_mds), **Password** and **Host Name** (which is the host where the database for your BPM server is installed), and **SID**. Once you're done, you can check the connection by pressing the **Test Connection** button, a **Success!** message appears if the parameters are correct. Press the *OK* button.
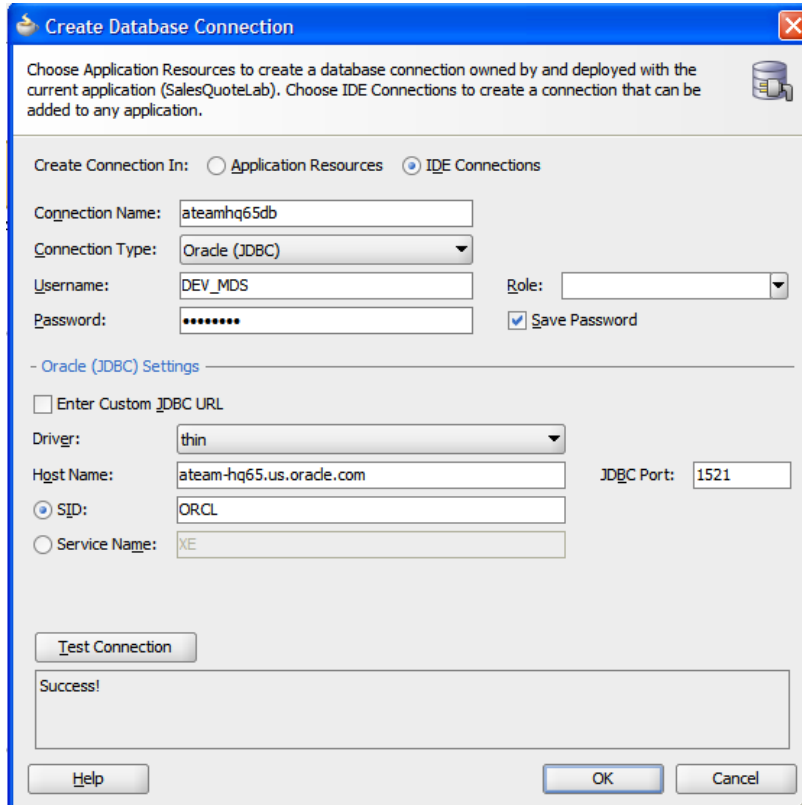


6. Then, click on the  symbol again. Select New Connection and select SOA-MDS.
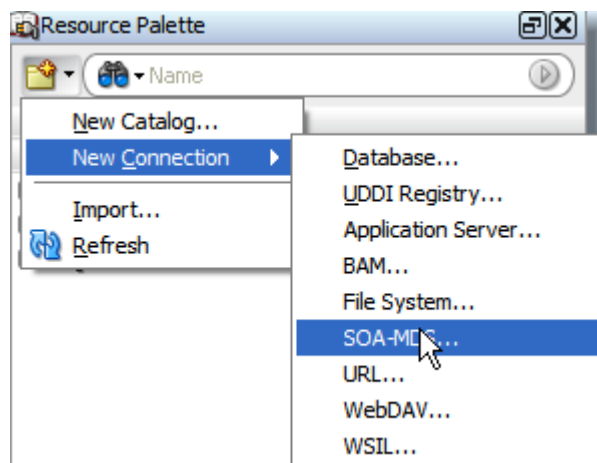


7. Create a new **SOA MDS Connection** as shown in the screen shot below. Choose the database connection that you just created in the previous step. For **Select MDS partition**, *obpm* should be already selected.
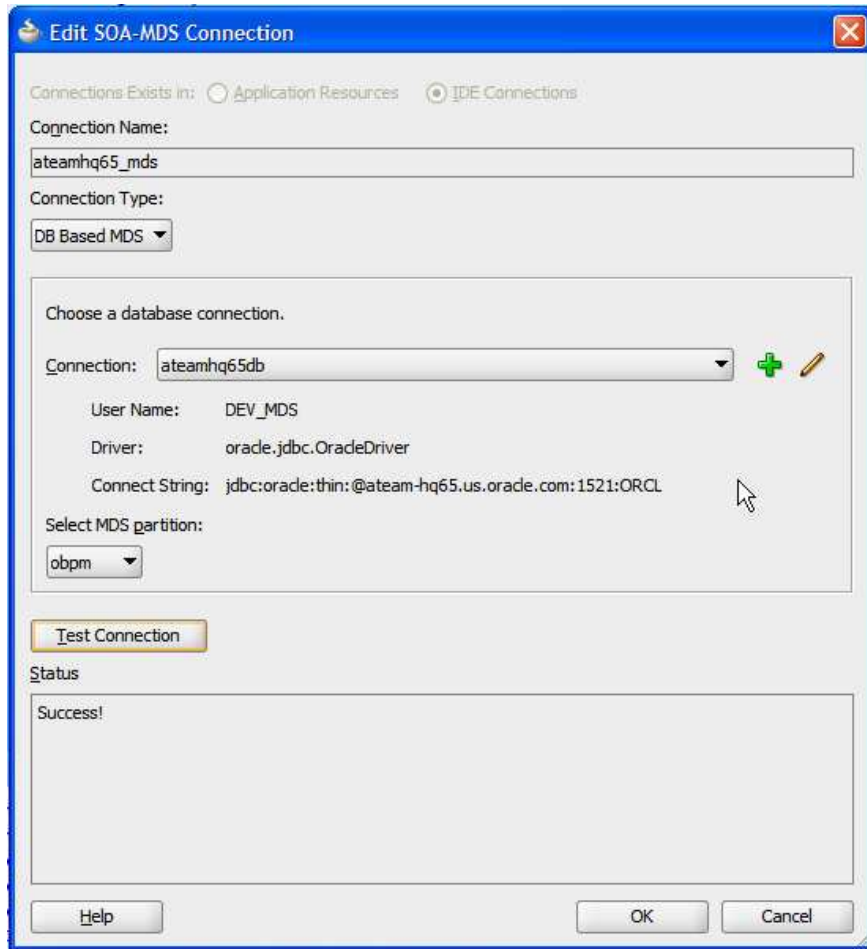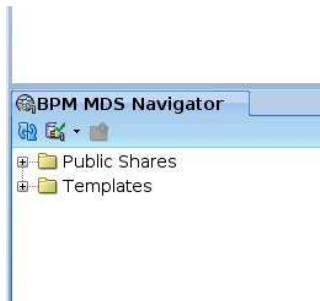
8. Go to **View/BPM MDS Navigator** to open the **BPM MDS Navigator**.

9. Choose the SOA MDS Connection that you just defined in the **Configure Connection** window.



10. Check that root folders **Public Shares** and **Templates** are shown in the **BPM MDS Navigator**.

11. You can now add additional folders under Public Shares and Templates as desired and share you processes and templates in the MDS.

# 5. Deploy the Sales Quote Demo project

A BPM project is simply a SOA composite project that also contains a BPM process component. Every BPM project is contained within a composite. To deploy the BPM project, you deploy the composite. Complete the following section.

## Create a Connection to Oracle WebLogic Server

You need to create a connection from JDeveloper to the Oracle WebLogic Server configured for Oracle BPM Suite in order to deploy from JDeveloper.

1. First, open the **Application Navigator** tab. If this tab is not visible you can open it from the View menu. From the **Application Menu**, select **New**.
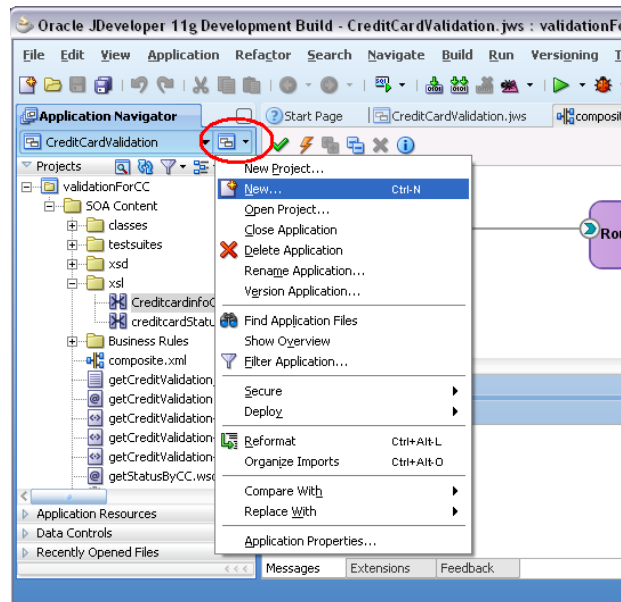


2. In the **New Gallery**, in the **Categories** tree, select **General**, and then **Connections**.
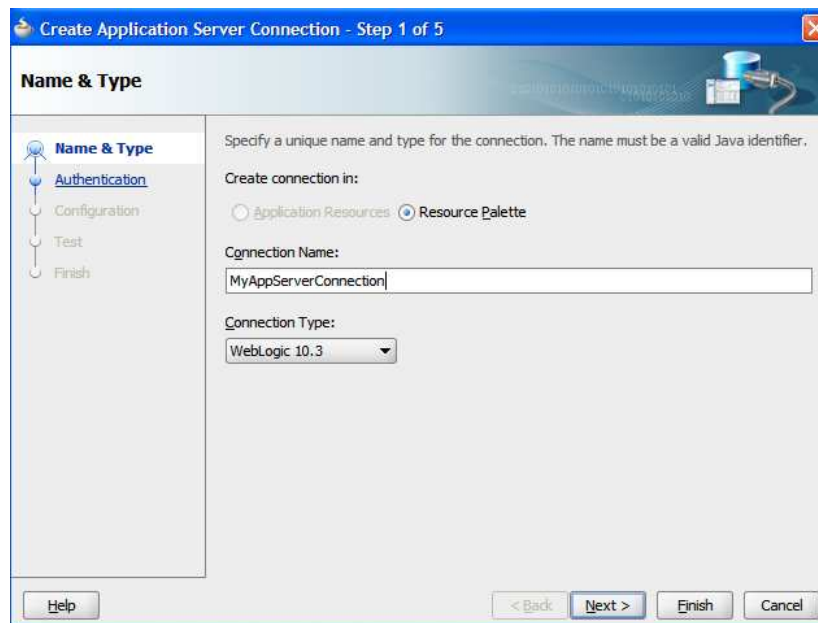
3. Select **Application Server Connection**
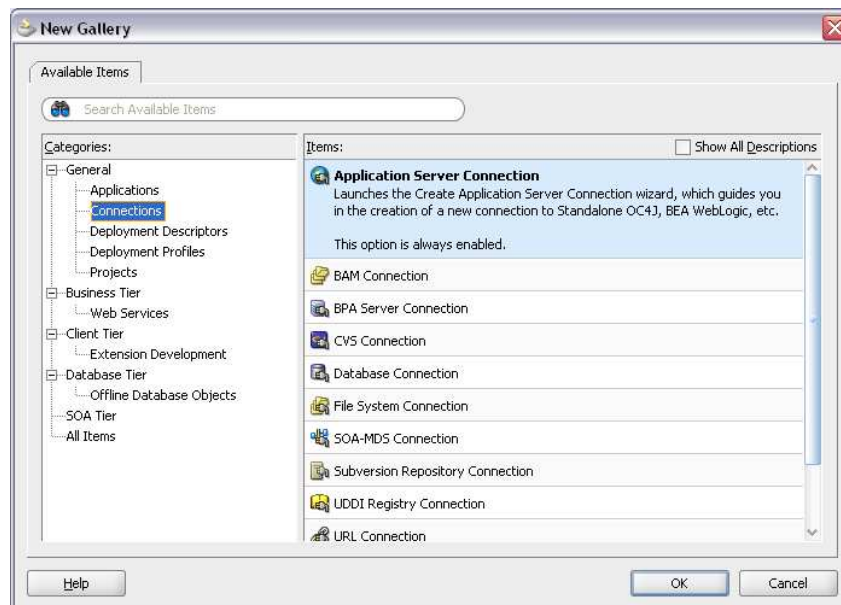
3. Click **OK**.

   The **Create Application Server Connection Type** page is displayed.

4. Enter MyAppServerConnection in the **Connection Name** field and select **WebLogic 10.3** from the **Connection Type** list.



6. Click **Next**.

   The **Connection Authentication** page is displayed.

7. Enter weblogic for the **Username** and the password for that administrator in the **Password** field.
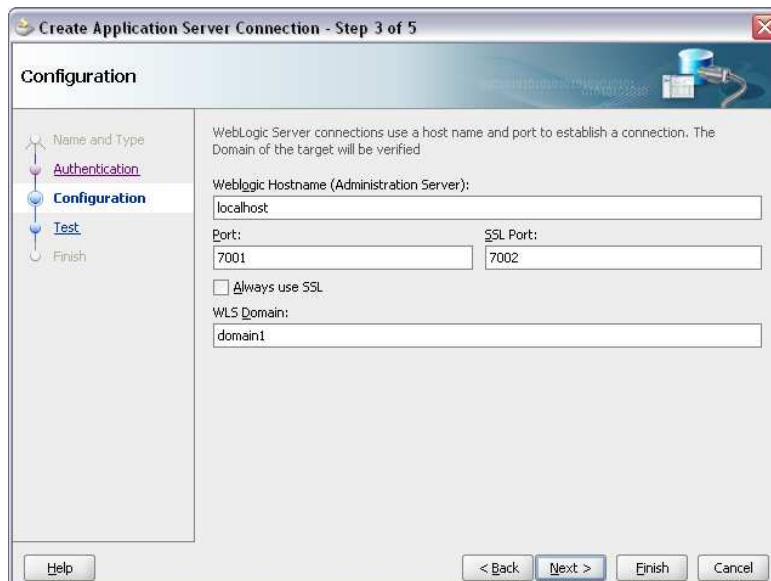
8. Click **Next**. The **Configuration** page displays.

9. Enter the following values (or as appropriate):

> **Weblogic Hostname (Administration Server):** localhost
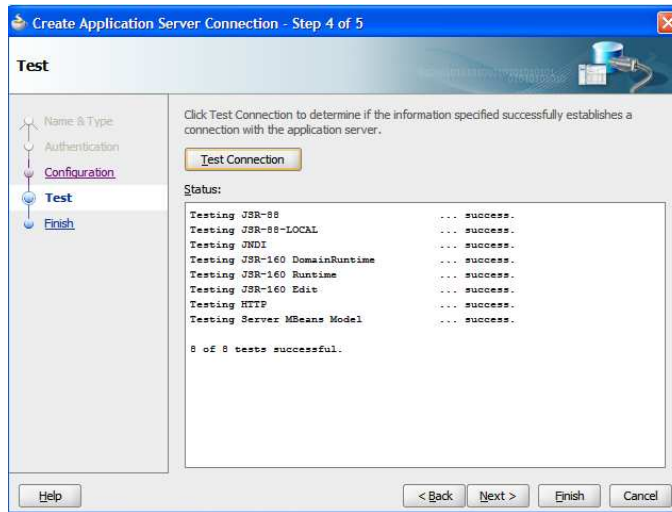>
> **Port:** 7001
>
> **WLS Domain:** domain1



10. Click **Next**. The **Test** page displays.

11. Click **Test Connection**.

The following status should appear:



If the test is unsuccessful, ensure that Oracle WebLogic Server status is RUNNING, and retry the test.

**12.** Click **Next**, and in the **Finish** page, click **Finish**.

## Deploying Composites to the Application Server

The Deploy command rebuilds the composite application and writes the binary to disk. It also brings up the deployment plan dialog before deploying. When the server is stopped and restarted, the applications will remain deployed.

1. In the project menu – right-click on the project name - select **Deploy** and follow the menu to select *MyAppServerConnection*. Make sure you have the project menu and not the application menu in order to see this option.
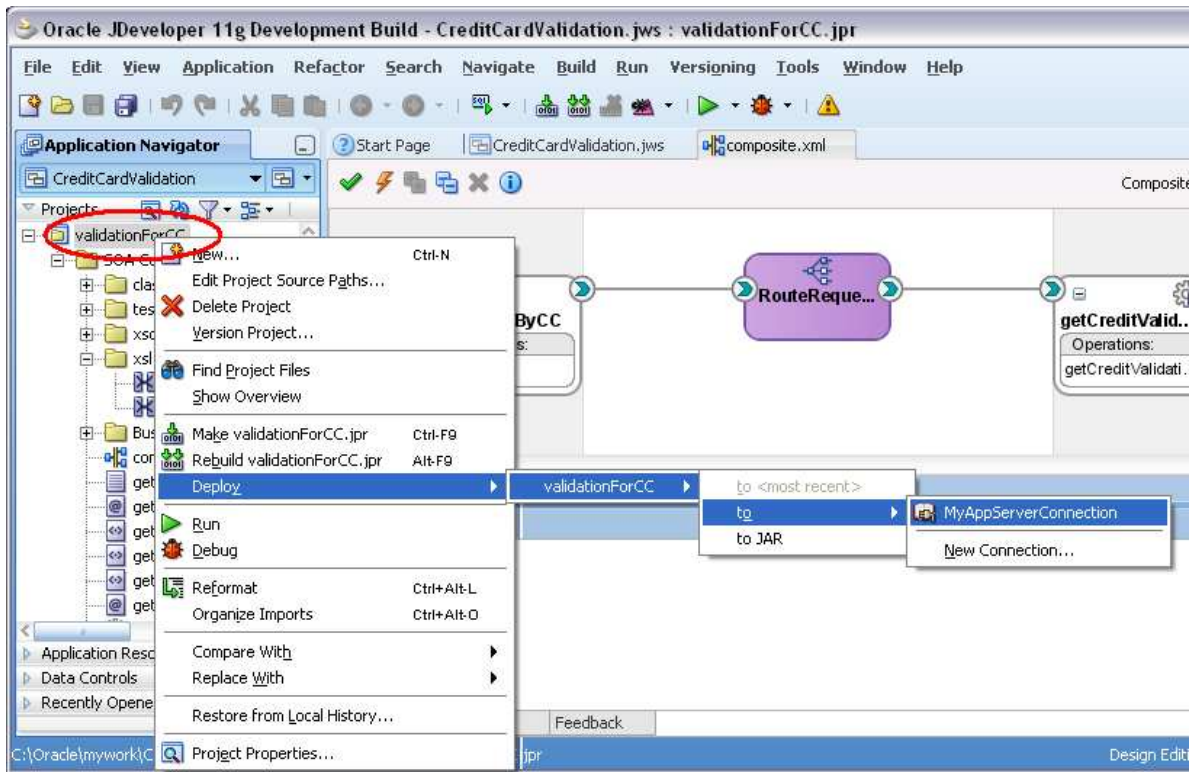
2. **SOA Deployment Configuration Dialog** opens. If you are redeploying your application, you must either select the checkbox to overwrite the previous version or you can enter a new version. Otherwise the deployment will fail.
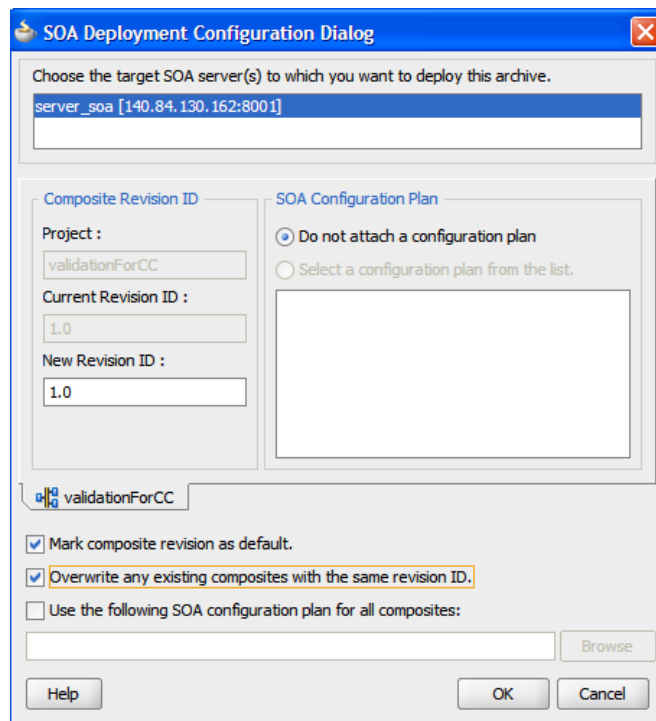


3. Click **OK**

4.  If your composite includes any Human Task form projects, you can select them to be deployed at this time. Select the Overwrite option if you have changed a form and want to redeploy it.

    Once you have deployed the task form projects once, you do not need to redeploy them unless they change. Later, you can redeploy your composite without redeploying the task form projects and save some deployment time.
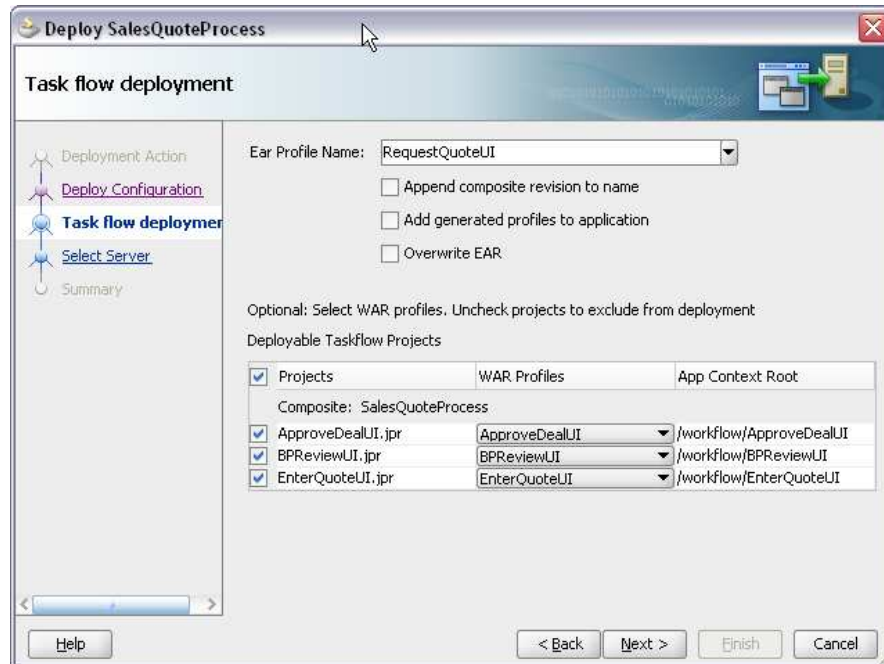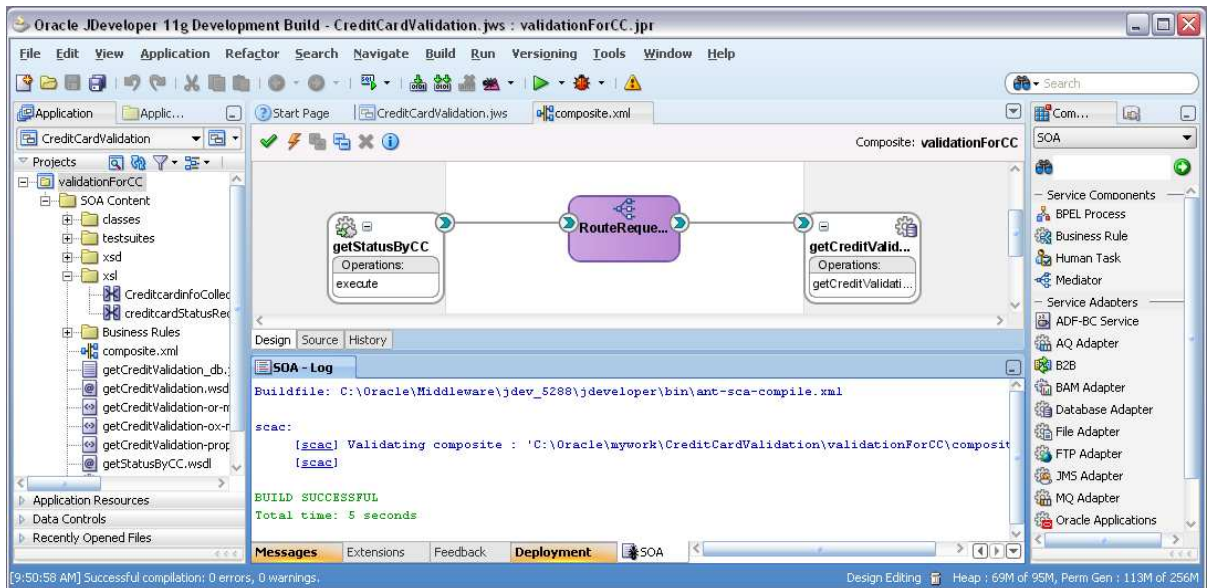


5.  Continue through the screens, clicking **Next** and then **Finish**.

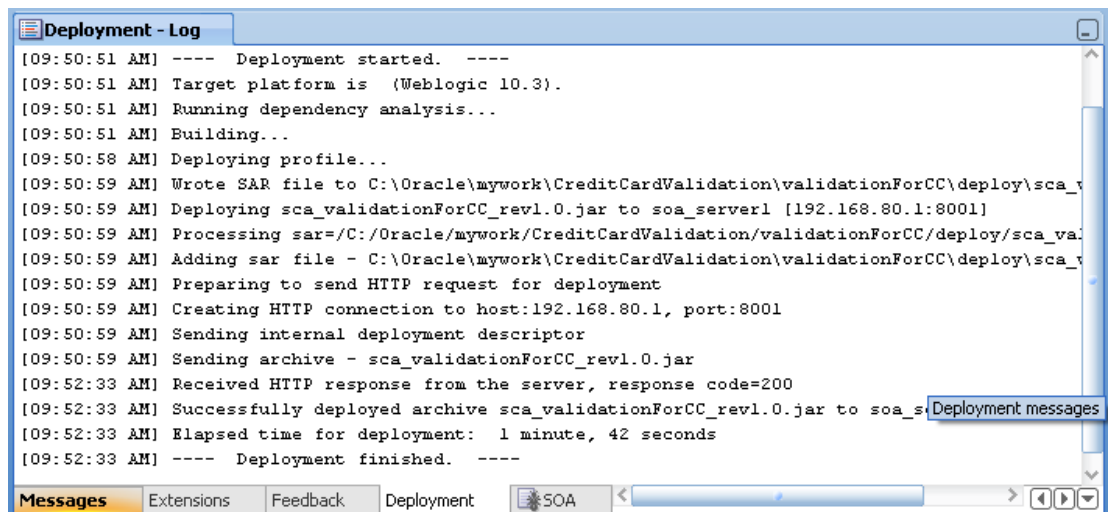6.  You may be prompted for the admin user name and password



7.  Enter the values and click **OK**

    Next the application is built and deployed. If there are no compilation errors, you will see on the SOA log, BUILD SUCCESSFUL and then the deployment starts.

In the Deployment log, view the details of the deployment.



Wait for your application to be deployed.

# 6. Set up of Tier-1 Approval Groups

In the Sales Quote Demo process, there is an Approval Group used to determine task assignment.

You need to create the **Tier1ApprovalGroup** in **BPM Workspace** and set the users for the **Tier1ApprovalGroup.**

1. Log in to **BPM Workspace** as an administrator: weblogic/welcome1

2. Click the **Administration** link at the top right of the window.
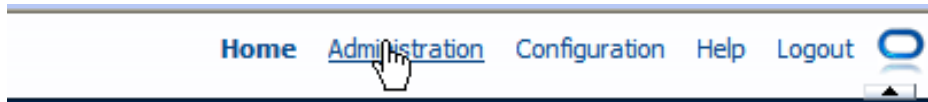
3. Click Approval Groups.



4. This opens up the Approval Groups editor on the right hand side. Use the + symbol to add an **Approval Group**. Choose static from the list of options.





5. Name the group **Tier1ApprovalGroup**

6. Click the + symbol on the far right of the pane to add users and add the user cdoyle.

# 7. Map LDAP users to process roles

The final step in configuration is to map the process roles to real users in your LDAP system. You populated your system with the Demo Community in an earlier step. Now, set the roles for the process to those users.

1. While still in the Workspace logged in as weblogic user and in the **Administration** area, click the **Roles** link in the **Organization** section in the left navigation bar.

2. Enter the role values as shown in the diagram. You do not have to set the role value for **Approvers** as that is set by the **Business Rule**.

   You will see these values already populated if this is the first time you have deployed the composite. In this case, just confirm they are set as below.



You have now completed setup and you can run the process. Refer to the section *Running the Sales Quote Process* in the "Sales Quote Demo – Understand and Run document."