

# Sales Quote Demo – Setup

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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

**Create a New JDBC Data Source**

Back Next Finish Cancel

**Connection Properties**  
Define Connection Properties.

What is the name of the database you would like to connect to?

**Database Name:** XE

What is the name or IP address of the database server?

**Host Name:** localhost

What is the port on the database server used to connect to the database?

**Port:** 1521

What database account user name do you want to use to create database connections?

**Database User Name:** quote

What is the database account password to use to create database connections?

**Password:** .....

**Confirm Password:** .....

Back Next Finish Cancel

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

## Sales Quote Demo - Setup

**Settings for DbAdapter**

Overview | Deployment Plan | Configuration | Security | Targets | Control | Testing | Monitoring | Notes

Save

This page displays basic information about this resource adapter deployment.

<b>Name:</b>	DbAdapter	The
<b>Source Path:</b>	C:\Oracle\Middleware\home_0309\Oracle_SOA1\soa\connectors\DbAdapter.rar	The Serv
<b>Deployment Plan:</b>	C:\Oracle\Middleware\home_0309\Oracle_SOA1\soa\DBPlan\Plan.xml	The Info
<b>Staging Mode:</b>	nostage	The sour durir
<b>Security Model:</b>	DDOnly	The Info

Deployment Order

- 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)
- 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 **xADDataSource**. The edit box appears. Type in your data source jndi name that you created: *jdbc/quoteDS*. Press the **ENTER** key to apply the value.

**Settings for javax.resource.cci.ConnectionFactory**

General | **Properties** | Transaction | Authentication | Connection Pool | Logging

This page allows you to view and modify the configuration properties of this outbound connection pool. Properties you modify here are saved to a deployment plan.

**Outbound Connection Properties**

Save Showing 1 to 8 of 8 Previous | Next

<input type="checkbox"/>	Property Name	Property Type	Property Value
<input type="checkbox"/>	dataSourceName	java.lang.String	
<input type="checkbox"/>	defaultNChar	java.lang.Boolean	false
<input type="checkbox"/>	platformClassName	java.lang.String	org.eclipse.persistence.platform.database.Oracle10Platform
<input type="checkbox"/>	sequencePreallocationSize	java.lang.Integer	50
<input type="checkbox"/>	usesBatchWriting	java.lang.Boolean	false
<input type="checkbox"/>	usesNativeSequencing	java.lang.Boolean	true
<input type="checkbox"/>	usesSkipLocking	java.lang.Boolean	true
<input type="checkbox"/>	xADDataSourceName	java.lang.String	<input type="text" value="jdbc/quoteDS"/>

Save Showing 1 to 8 of 8 Previous | Next

- 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.

Update Application Assistant

Back Next Finish Cancel

**Locate new deployment files**

You have elected to update the DbAdapter application.

☐ Update this application in place with new deployment plan changes. (A deployment plan must be specified for this option)

Deployment plan path: C:\Oracle\Middleware\home\_0309\Oracle\_SOA1\soa\DBPlan\Plan.xml Change Path

☒ Redeploy this application using the following deployment files:

Source path: C:\Oracle\Middleware\home\_0309\Oracle\_SOA1\soa\connectors\DbAdapter.rar Change Path

Deployment plan path: C:\Oracle\Middleware\home\_0309\Oracle\_SOA1\soa\DBPlan\Plan.xml Change Path

Back Next Finish Cancel

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 **xDataSource** property that you entered. Look closely! This is the most common place where the configuration is in error.

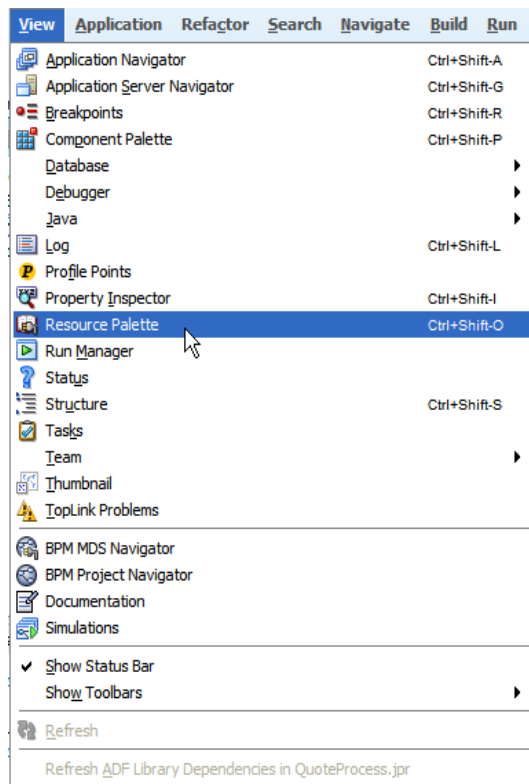
### 3. Perform Demo Seeding of Users & Groups

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.

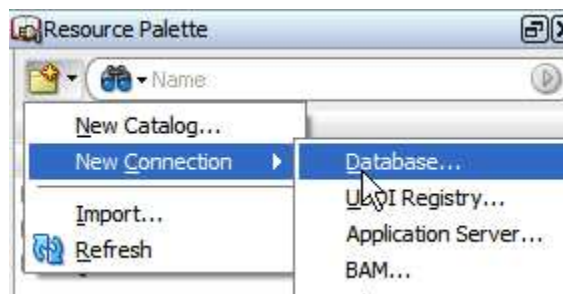
1. Start **BPM Studio**
2. Open the **Resource Palette** by selecting the menu **View -> Resource**



3. Click the folder with the “+” sign

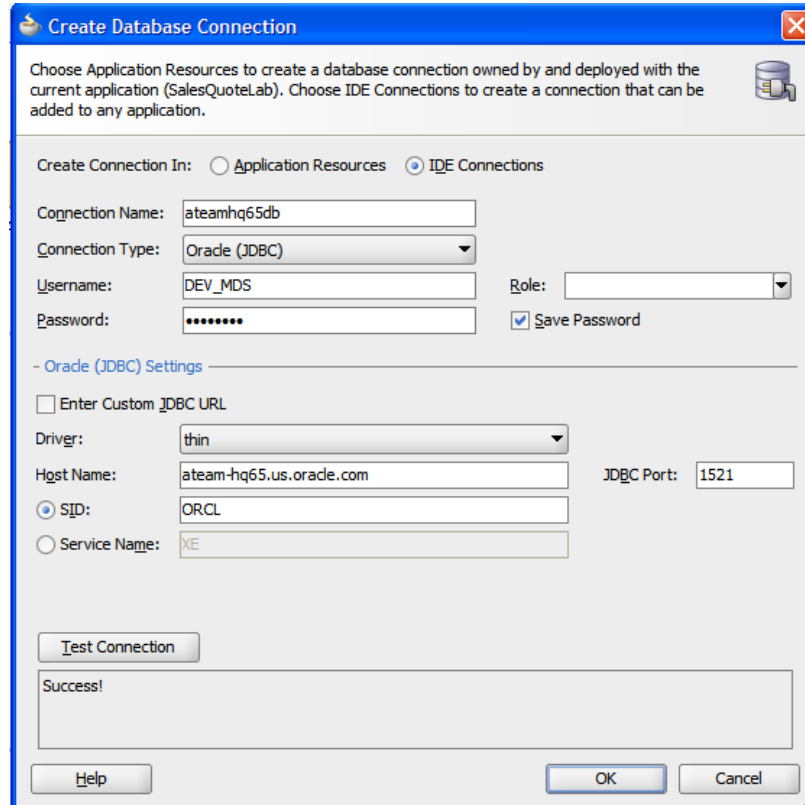


4. Select **New Connection** and then click **Database**.

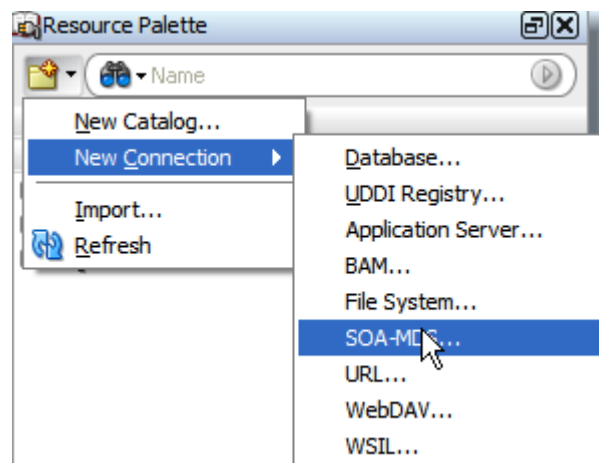


5. Create a database connection as shown in the screen shot below. You need to enter the following fields:

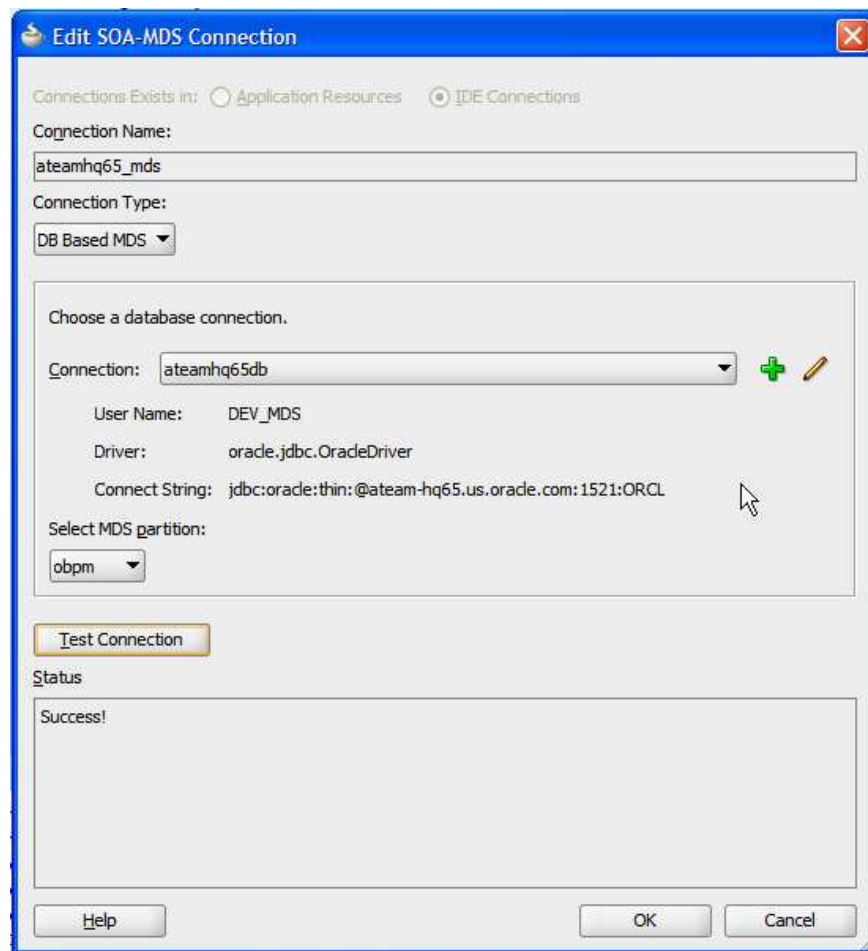
**Username** (generally is <prefix>\_mds), **Password** and **Host Name** (which is the host where the database for your BPM server is installed), and **SID**. Once you're done, you can check the connection by pressing the **Test Connection** button, a **Success!** message appears if the parameters are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



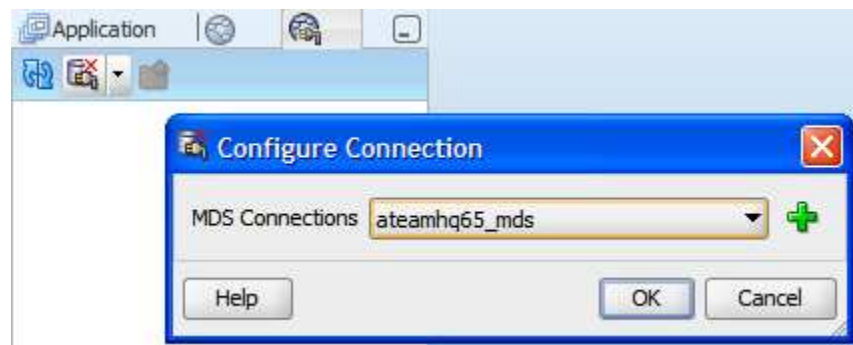
6. Then, click on the  symbol again. Select **New Connection** and select **SOA-MDS**.



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.

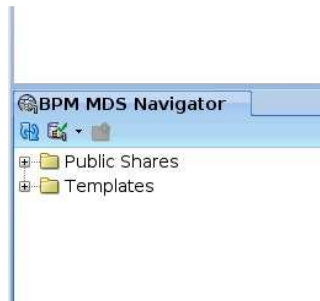


8. Go to **View/BPM MDS Navigator** to open the **BPM MDS Navigator**.
9. Choose the SOA MDS Connection that you just defined in the **Configure Connection** window.



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 your processes and templates in the MDS.

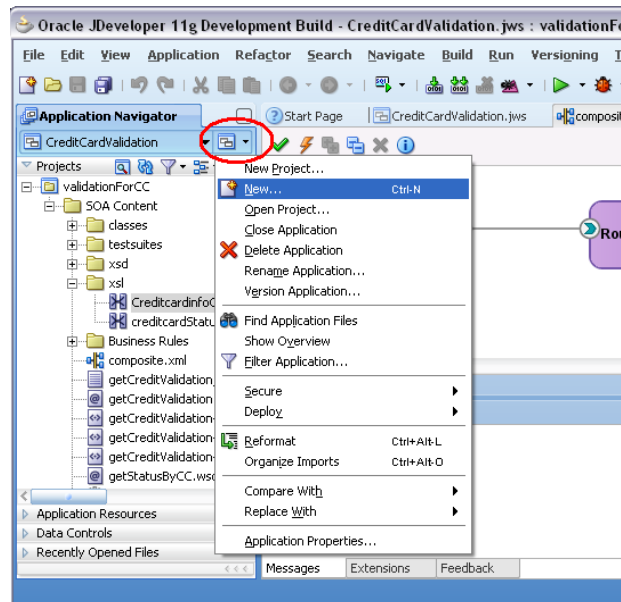
## 5. Deploy the Sales Quote Demo project

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.

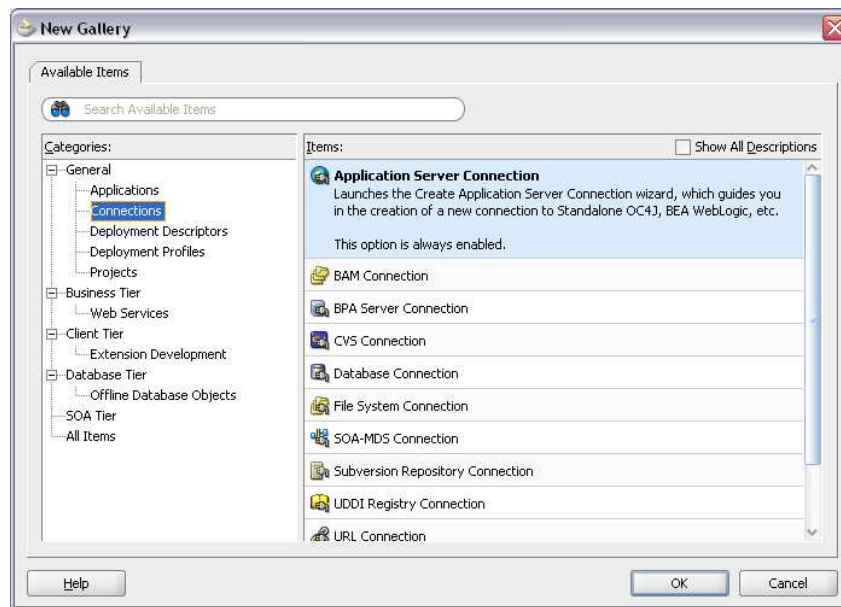
### Create a Connection to Oracle WebLogic Server

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**.



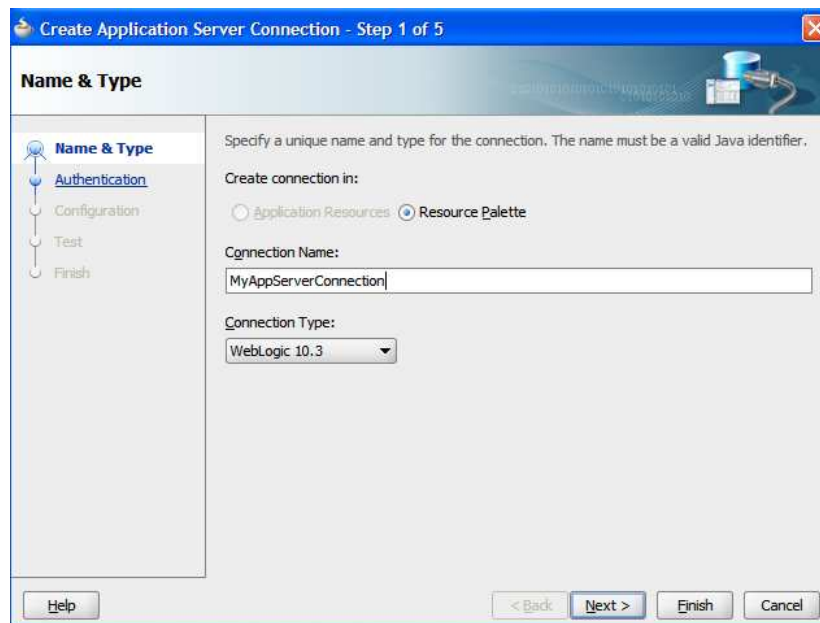
2. In the **New Gallery**, in the **Categories** tree, select **General**, and then **Connections**.
3. Select **Application Server Connection**



3. Click **OK**.

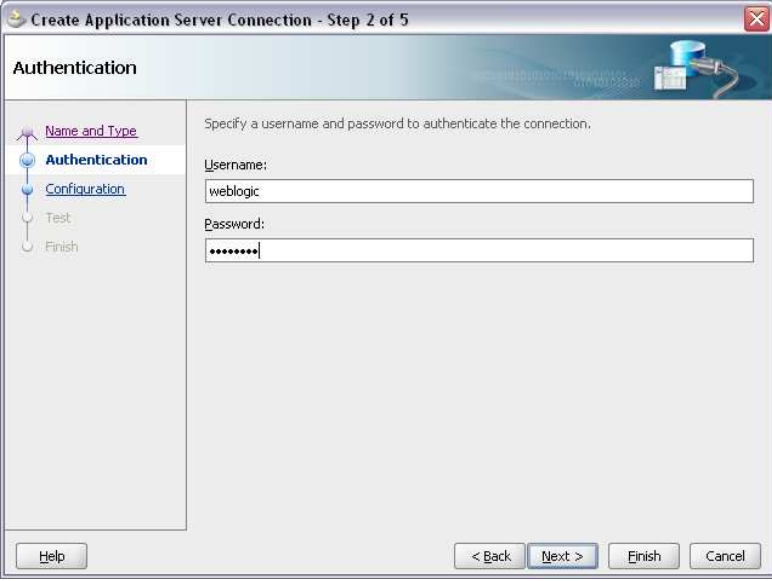
The **Create Application Server Connection Type** page is displayed.

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.



The screenshot shows the 'Authentication' step of a wizard. On the left, a tree view has 'Authentication' selected. The main area contains a 'Username' field with 'weblogic' and a 'Password' field with masked characters. Navigation buttons at the bottom include '< Back', 'Next >', 'Finish', and 'Cancel'.

Create Application Server Connection - Step 2 of 5

Authentication

Specify a username and password to authenticate the connection.

Username: weblogic

Password: .....

Help < Back Next > Finish Cancel

7. Enter weblogic for the **Username** and the password for that administrator in the **Password** field.

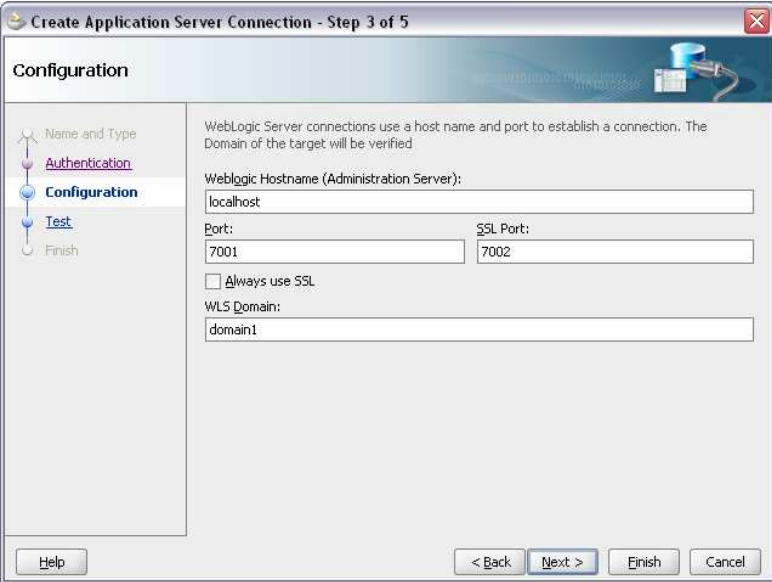
8. Click **Next**. The **Configuration** page displays.

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

**Weblogic Hostname (Administration Server):** localhost

**Port:** 7001

**WLS Domain:** domain1



The screenshot shows the 'Configuration' step of the wizard. The 'Configuration' option is selected in the left tree. The main area contains fields for 'Weblogic Hostname (Administration Server)' (localhost), 'Port' (7001), 'SSL Port' (7002), and 'WLS Domain' (domain1). There is an unchecked checkbox for 'Always use SSL'. Navigation buttons at the bottom include '< Back', 'Next >', 'Finish', and 'Cancel'.

Create Application Server Connection - Step 3 of 5

Configuration

WebLogic Server connections use a host name and port to establish a connection. The Domain of the target will be verified.

Weblogic Hostname (Administration Server): localhost

Port: 7001 SSL Port: 7002

☐ Always use SSL

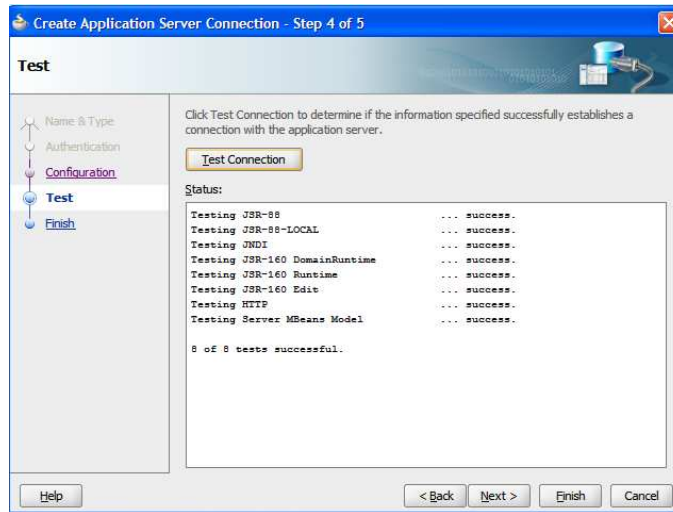
WLS Domain: domain1

Help < Back Next > Finish Cancel

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.

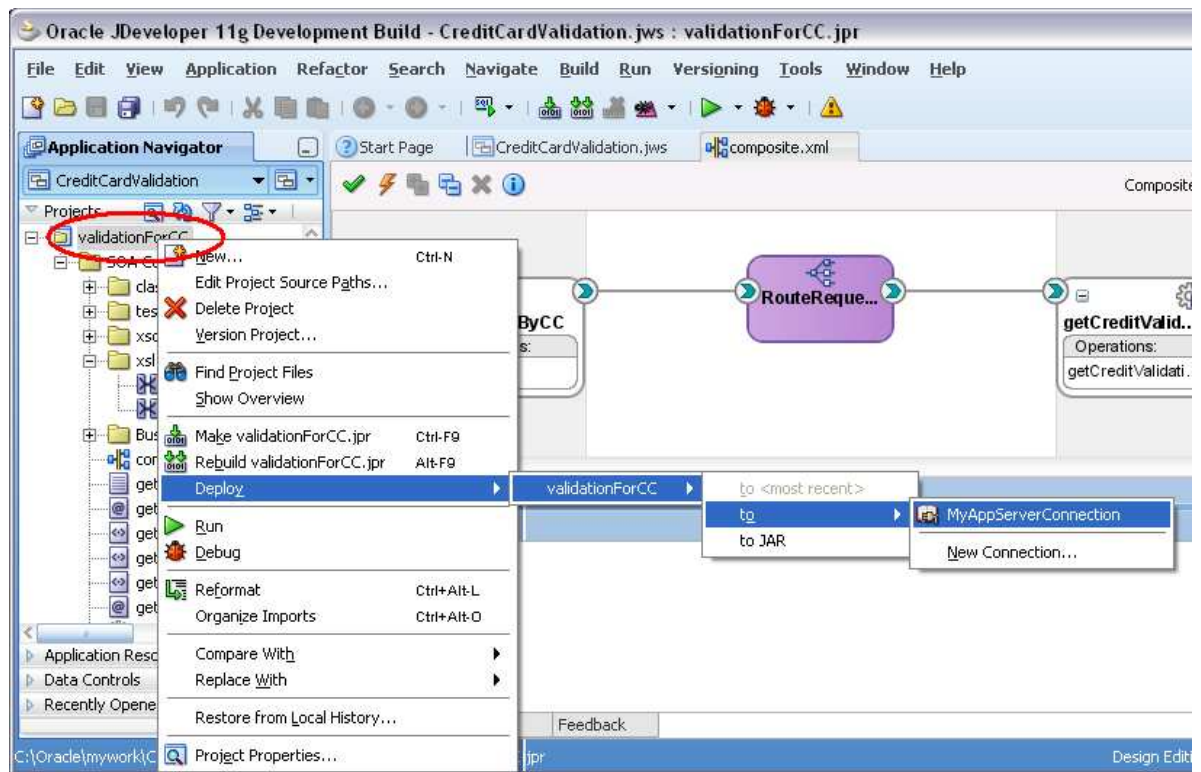
12. Click **Next**, and in the **Finish** page, click **Finish**.

## 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.

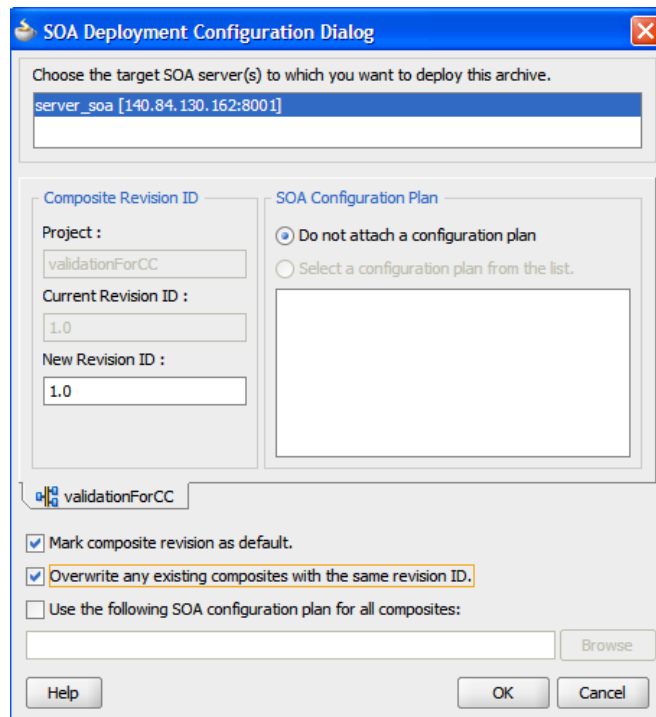
1. In the project menu – right-click on the project name - select **Deploy** and follow the menu to select *MyAppServerConnection*. Make sure you have the project menu and not the application menu in order to see this option.

## Sales Quote Demo - Setup



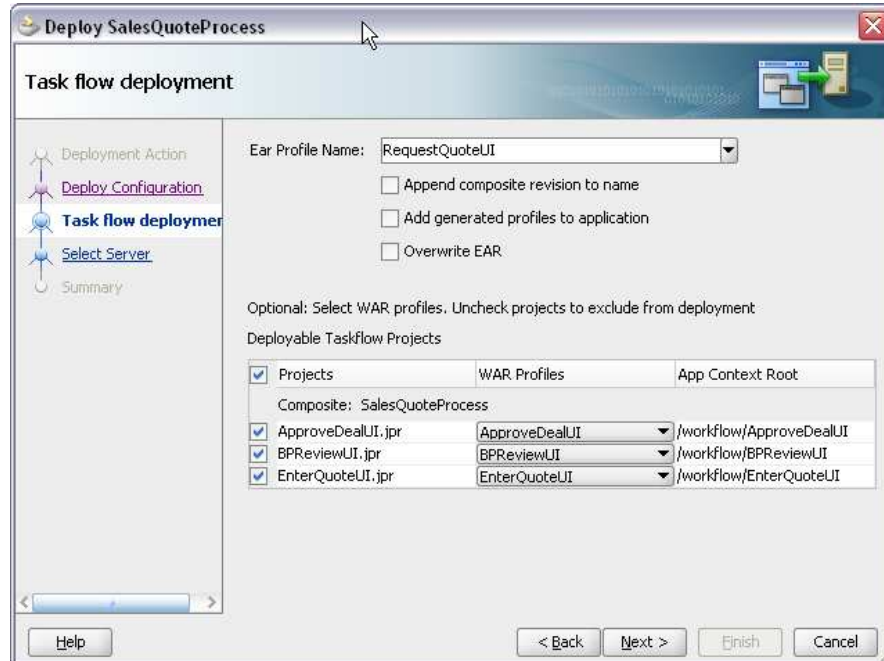
2. **SOA Deployment Configuration Dialog** opens. If you are redeploying your application, you must either select the checkbox to overwrite the previous version or you can enter a new version. Otherwise the deployment will fail.

This dialog looks slightly different in different software versions.

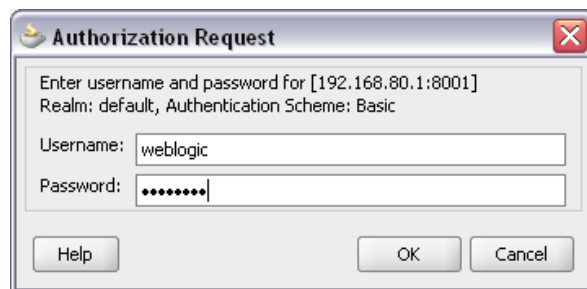


3. Click **OK**
4. If your composite includes any Human Task form projects, you can select them to be deployed at this time. Select the Overwrite option if you have changed a form and want to redeploy it.

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.

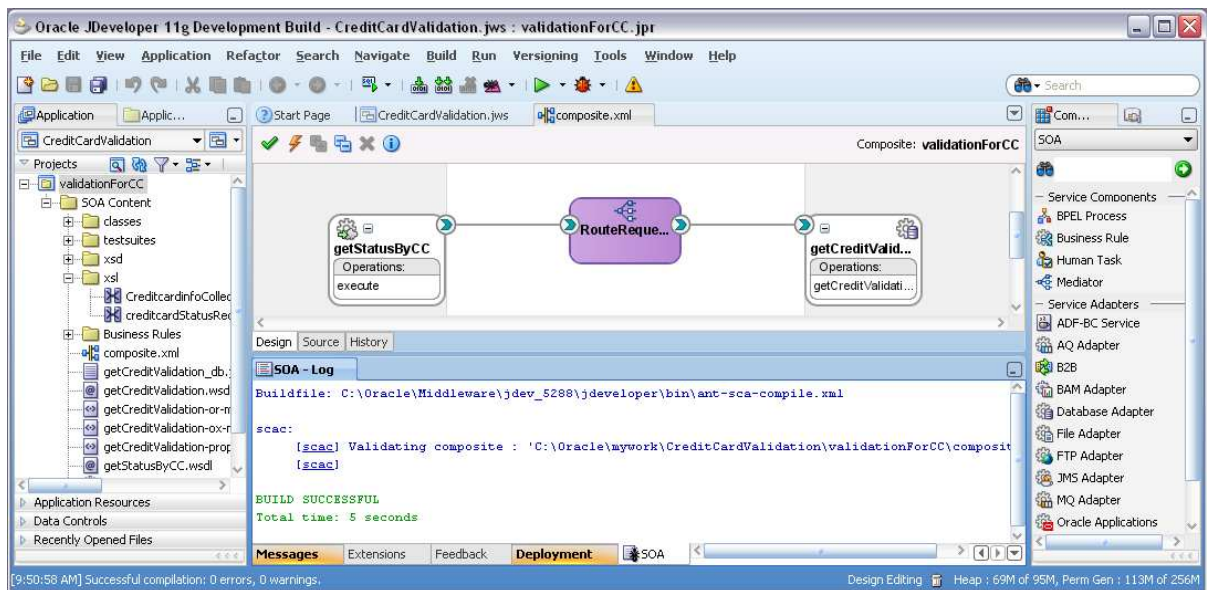


5. Continue through the screens, clicking **Next** and then **Finish**.
6. You may be prompted for the admin user name and password

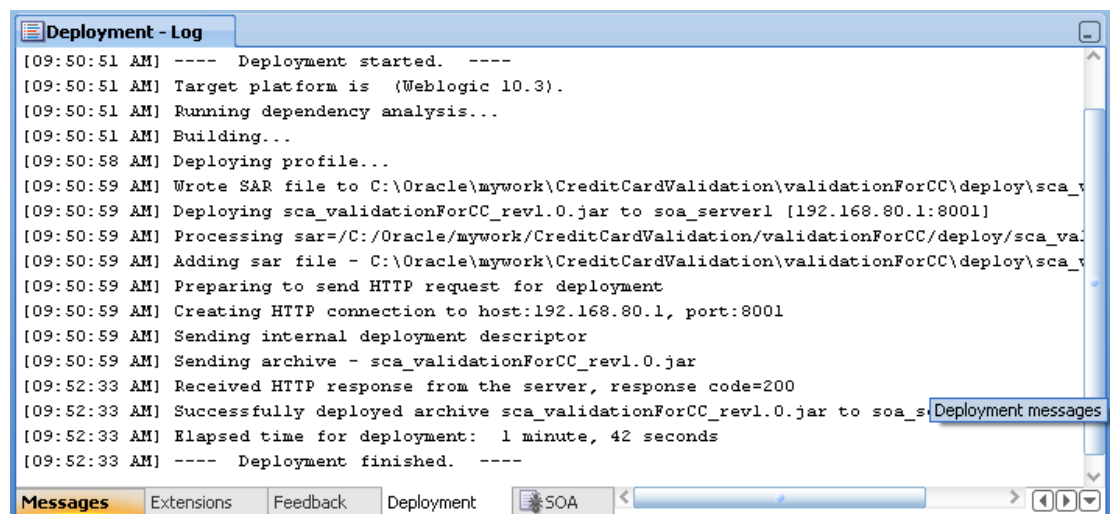


7. Enter the values and click **OK**

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.

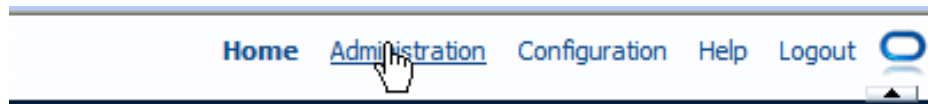
## 6. Set up of Tier-1 Approval Groups

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**. For SalesRep (not shown), set the user to jcooper.

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.

The screenshot shows the Oracle Business Process Workspace Administration interface. The left navigation pane is under the 'Organization' section, with 'Roles' selected. The main area displays a table of roles and their members.

Name	Members	Description	Context
SalesQuoteProcess.SalesRep	jcooper		OracleBPMProcessRolesApp
SalesQuoteProcess.BusinessPractices	jstein		OracleBPMProcessRolesApp
SalesQuoteProcess.Approvers			OracleBPMProcessRolesApp
SalesQuoteProcess.Contracts	cdickens		OracleBPMProcessRolesApp
SalesQuoteProcess.AutomaticHandler			OracleBPMProcessRolesApp
SalesQuoteProcess.ProcessOwner	jstein		OracleBPMProcessRolesApp

Below the table, the 'Details : SalesQuoteProcess.SalesRep' section is shown. It includes a 'Context' field set to 'OracleBPMProcessRolesApp'. There are two main sections: 'Members' and 'Calendars'. The 'Members' section contains a table with one entry:

Name	Type
jcooper	User

The 'Calendars' section is currently empty.

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."