

# **Oracle® Retail Macro Space Planning**

Installation Guide

Release 5.4.027.1

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Oracle Retail Macro Space Planning, Installation Guide, Release 5.4.027.1

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document.

Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- 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?
- Do you need different information or graphics? If so, where, and in what format?
- 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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**Note:** Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Applications Release Online Documentation CD available on My Oracle Support and [www.oracle.com](http://www.oracle.com). It contains the most current Documentation Library plus all documents revised or released recently.

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Please give your name, address, electronic mail address, and telephone number (optional).

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If you require training or instruction in using Oracle software, then please contact your Oracle local office and inquire about our Oracle University offerings. A list of Oracle offices is available on our Web site at [www.oracle.com](http://www.oracle.com).



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# Preface

Oracle Retail Installation Guides contain the requirements and procedures that are necessary for the retailer to install Oracle Retail products.

This guide enables you to install the Oracle Retail Macro Space Management and In-Store Space Collaboration applications, along with the required server-side components.

## Audience

This Installation Guide is written for the following audiences:

- Database administrators (DBA)
- System analysts and designers
- Integrators and implementation staff

## Related Documents

For more information on Macro Space Management, see the following documents in the Oracle Retail Macro Space Management Release 5.4.027.1 documentation set:

- *Oracle Retail Macro Space Management Administration Guide*
- *Oracle Retail Macro Space Management Configuration Guide*
- *Oracle Retail Macro Space Management Release Notes*
- *Oracle Retail Macro Space Management User Guide*
- *Oracle Retail Macro Space Planning Licensing Information*

For more information on In-Store Space Collaboration see the following documents in the Oracle Retail In-Store Space Collaboration Release 5.4.46.1 documentation set:

- *Oracle Retail In-Store Space Collaboration Release Notes*
- *Oracle Retail In-Store Space Collaboration User Guide*

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Note: The Macro Space Management Administration Module is used to configure privileges in In-Store Space collaboration. The Macro Space Management Administration Guide contains information on how to configure these.

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## 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

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## Review Patch Documentation

If you are installing the application for the first time, you install either a base release or a later patch release. If you are installing a software version other than the base release, be sure to read the documentation for each patch release (since the base release) before you begin installation. Patch documentation can contain critical information related to the base release and code changes that have been made since the base release.

## Oracle Retail Documentation on the Oracle Technology Network

In addition to being packaged with each product release (on the base or patch level), all Oracle Retail documentation is available on the following Web site (with the exception of the Data Model which is only available with the release packaged code):

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

Documentation should be available on this Web site within a month after a product release. Note that documentation is always available with the packaged code on the release date.

## Conventions

**Navigate:** This is a navigate statement. It tells you how to get to the start of the procedure and ends with a screen shot of the starting point and the statement “the Window Name window opens.”

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**Note:** This is a note. It is used to call out information that is important, but not necessarily part of the procedure.

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This is a code sample  
It is used to display examples of code

[A hyperlink appears like this.](#)

## Third Party Applications

Oracle Retail Macro Space Management includes the following third party applications:

Software Provider: Pegasus Imaging Corporation

Software Name: ImageXpress

Provider Web Site: <http://www.pegasusimaging.com/imagxpress.htm>

Software Provider: FarPoint Technologies, Inc.

Software Name: Spread

Provider Web Site: <http://www.fpoint.com/products/spread/spread.aspx>

Software Provider: ComponentOne, LLC

Software Name: True DBGrid version 5 (part of the Studio Enterprise for WinForms)

Provider Web Site:

<http://www.componentone.com/SuperProducts/TrueDBGridWinForms/>

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# Getting Started

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**Note:** The Oracle Retail Macro Space Planning Release 5.4.027.1 is a documentation-only release. There is no code associated with this release identifier. The Oracle Retail Macro Space Management Release 5.4.027 and In-Store Space Collaboration Release 5.4.46 remain the current version of the code.

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Macro Space Management (MSM) and In-Store Space Collaboration (ISSC) are continuously being improved and developed. The hardware configuration and requirements required to run the system may change from time to time. Although this document includes the latest configuration and requirements, refer to the Release Notes to confirm the current requirements for the version being installed.

The current base release of the software can be obtained from the Oracle E-Delivery website. <http://edelivery.oracle.com>. Users should also check for any subsequent patches. These are available from the My Oracle Support website <https://support.oracle.com>. That ensures the user is installing the latest modifications and bug fixes.

This chapter provides an overview of the typical installation configuration of the Oracle Retail Macro Space Management and In-Store Space Collaboration applications. It is intended to assist in planning the most efficient implementation of the applications. It includes the following sections:

- [Interrelationship between Macro Space Management and In-Store Space Collaboration](#)
- [Overview of Typical Infrastructures](#)
- [Software Architecture](#)
- [Steps for Installing Macro Space Management](#)
- [Steps for Installing Macro Space Management and In-Store Space Collaboration](#)
- [Reports](#)

## Interrelationship between Macro Space Management and In-Store Space Collaboration

The Macro Space Planning family consists of two products:

1. Macro Space Management
2. In-Store Space Collaboration

Macro Space Management is the 'core' application and must be installed. In-Store Space collaboration is optional and may or may not be installed depending on the user's preference.

This Installation Guide contains instructions on how to install either Macro Space Management, or both Macro Space Management and In-Store Space Collaboration. Where there are differences between the two types of installation, alternative instructions have been provided.

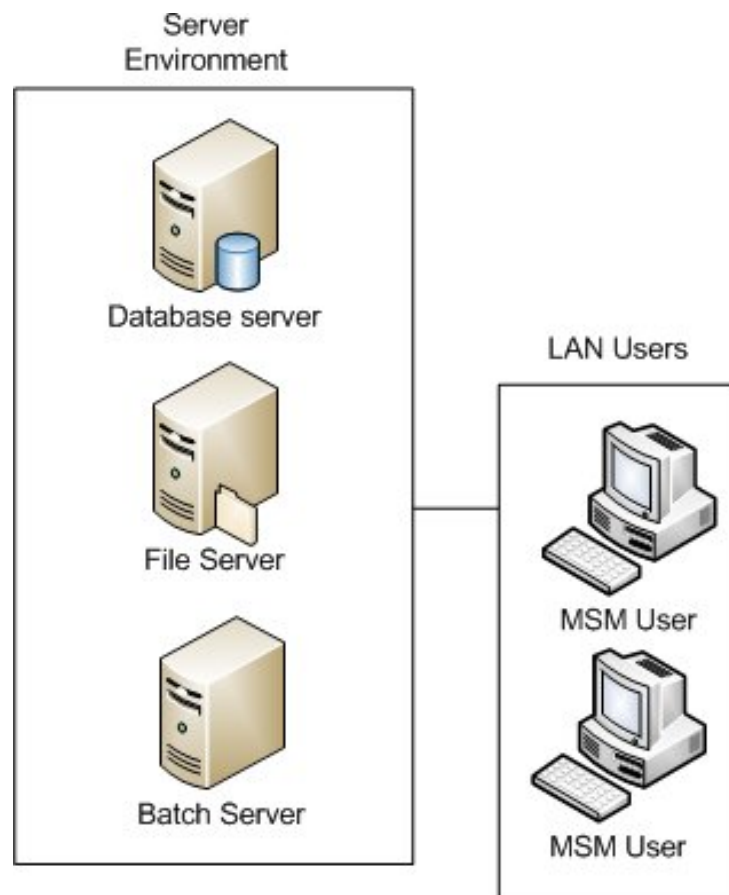
## Overview of Typical Infrastructures

A typical infrastructure may contain several server configurations and multiple user workstation environments. The infrastructure required will depend on whether users install just Macro Space Management, or whether they install both Macro Space Management and In-Store Space Collaboration.

### Installing Macro Space Management Only

A typical environment may contain several server configurations and multiple user workstation environments for internal (LAN) clients. Similar to the traditional client-server environments, you must define the following environments:

- Database Server
- File Server
- Batch Server
- LAN Client Workstation



**Figure 1-1: Typical Infrastructure with MSM Only Installed**

### Installing Macro Space Management and In-Store Space Collaboration

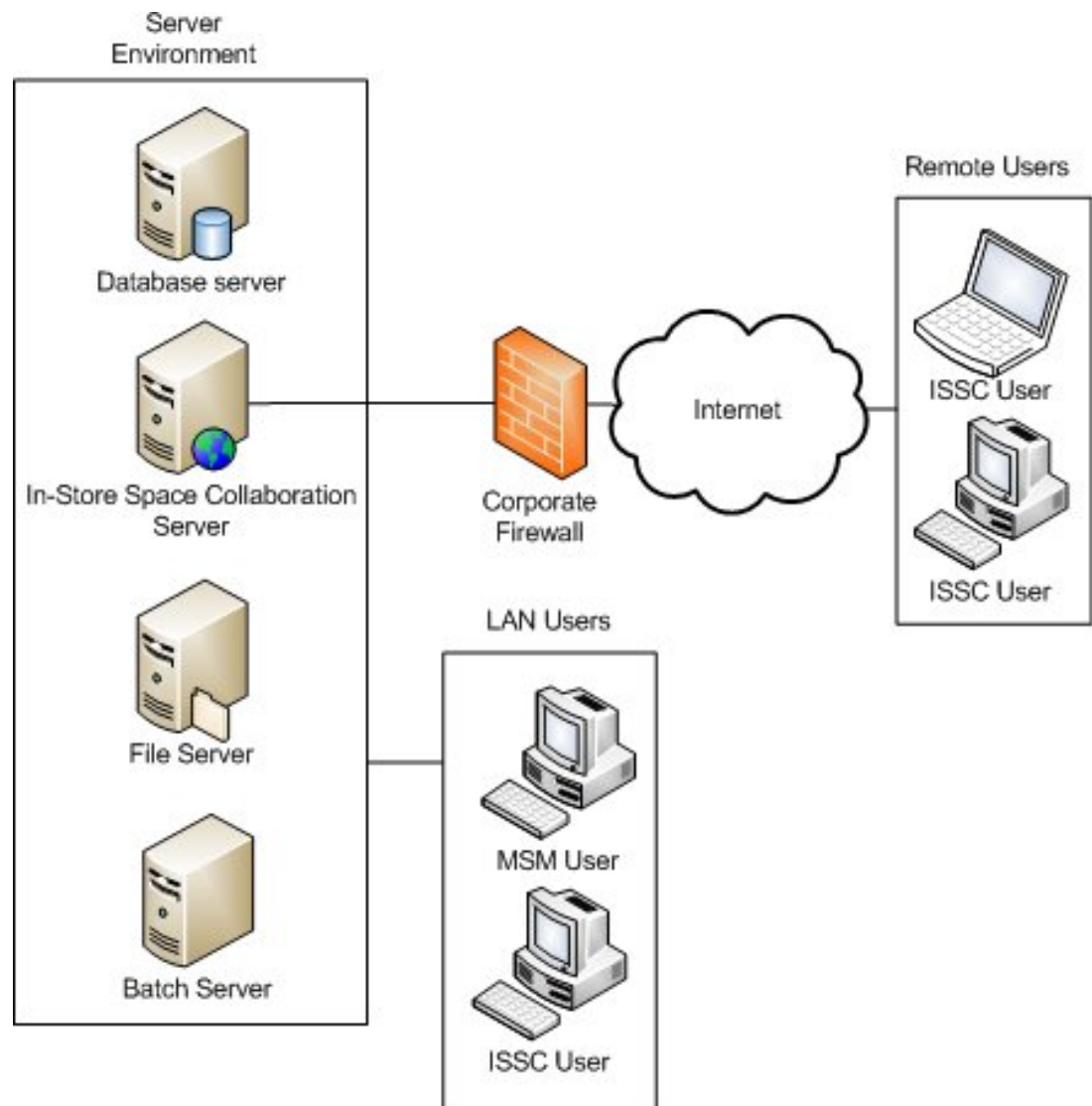
The environment for when both Macro Space Management and In-Store Space Collaboration are installed is slightly more complex as it contains several server

configurations and the multiple user workstation environments needed to support both internal (LAN) and external (Web-enabled) clients.

Similar to the traditional client-server environments, you must define the following environments:

- Database Server
- In-Store Space Collaboration Server File Server
- File Server
- Batch Server
- LAN Client Workstation
- In-Store Space Collaboration Client (Remote User) Workstation

Users may be grouped into two basic user types—LAN and Remote (Web-Enabled) Users. LAN users can be either Macro Space Management or In-Store Space Collaboration users. The remote users are the In-Store Space Collaboration clients.



**Figure 1-2: Typical Infrastructure with MSM and ISSC Installed**

Macro Space Management workstations can only be run over a LAN. In-Store Space Collaboration clients can be either on a LAN or installed remotely.

## About the Server Infrastructure

It is not required for each server identified in the above diagrams to be a dedicated independent server machine. Depending on the perceived load that each server is likely to be given, the servers can either share a machine with another Macro Space Management/In-Store Space Collaboration server or be located on an existing machine within the existing IT infrastructure.

## About Macro Space Management Users

Macro Space Management users must be on a Local Area Network (LAN). They connect to the database and file servers through this internal network. This connection is both at the file system level as well as through ActiveX Data Object (ADO) and Data Access Objects (DAO) connections to the database. Macro Space Management supports trusted connections to the database server or NT security.

For application licensing there are two models available for LAN users—Named User and Networked. The main difference between the two models is that the networked version allows for more client workstations to have the software installed. However, only a certain number of them can be active at any given time. Network installs require a license server to manage the active connections and control the deployment of the package to each client workstation. The license manager and Batch machines can be one and the same.

## About In-Store Space Collaboration Users

In-Store Space Collaboration Users may connect to the central application database either via an LAN or remotely via the web. The client application is configured to connect to the Server application, and the server application control security and all of the connections to the database.

The In-Store Space Collaboration application is a thin client application and runs on a Microsoft Windows operating system. The application is configured during installation to locate a server and port. When this has been done, the user can log into the system using their user name, or be authenticated using LDAP (LDAP being also configured on the first execution of the application).

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**Note:** The In-Store Space Collaboration application connects to a specific IP address through a configurable port. This allows for the opening of a specific port through a company's firewall to allow remote access to the In-Store Space Collaboration Server application.

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The In-Store Space Collaboration and Macro Space Management applications share the same database. This allows ISSC users to open, edit and save store plans, with the modified data subsequently available to MSM users.



## Software Architecture

The following diagram illustrates the major components of the Macro Space Planning application suite.

**Note:** Macro Space Management is mandatory. In-Store Space Collaboration is optional.

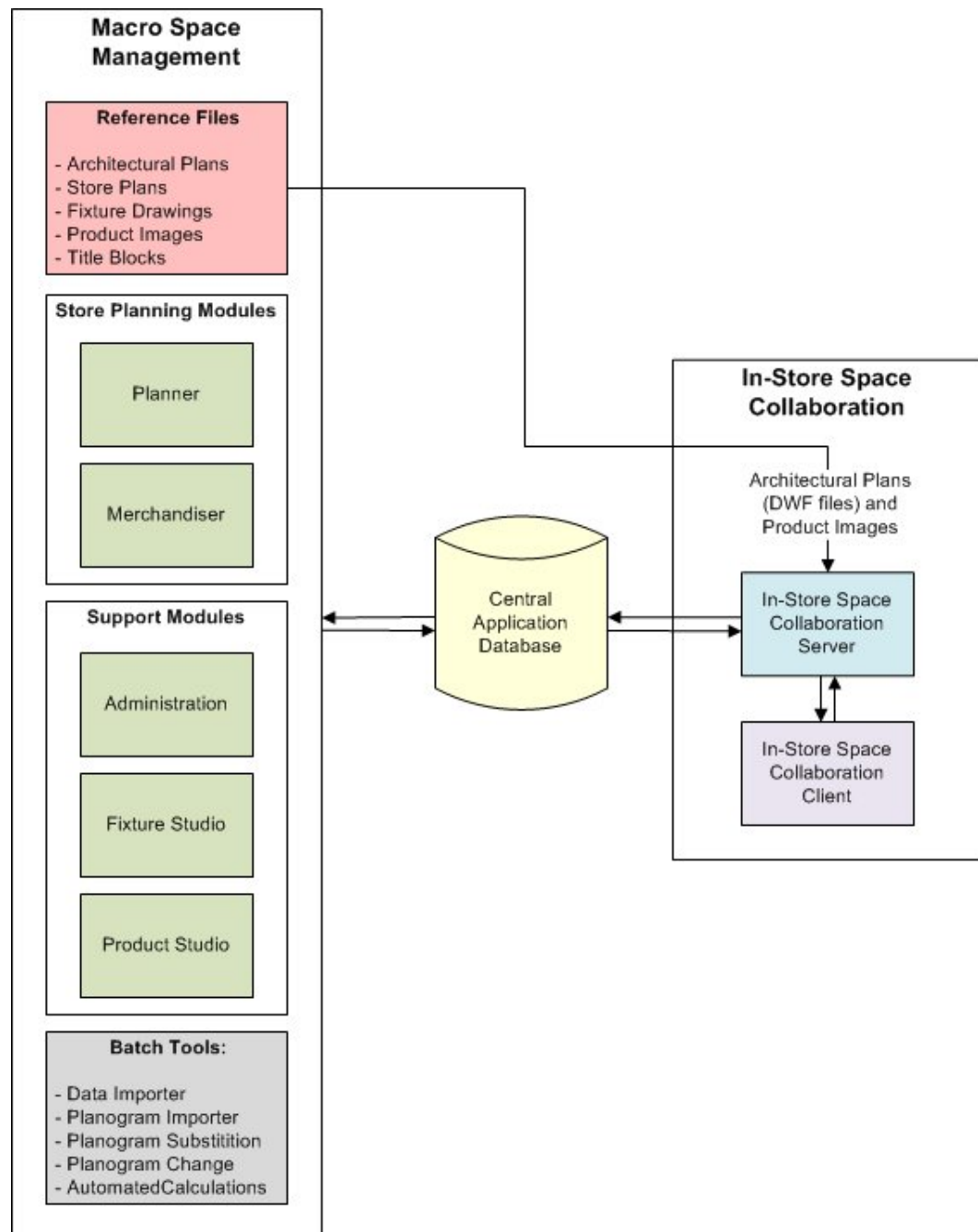


Figure 1-3: Software Architecture

## Reference Files

The reference files are held on the File Server and provide a central repository for non-database information required by the Macro Space Management and In-Store Space Collaboration applications. Administration of the reference files is done via the Macro Space Management application.

The reference files include:

1. Architectural Plans in the form of DWG and DWF files
2. Store Plans in the form of DWG files
3. Fixture drawings in the form of DWG, 3DS and LWO files
4. Product Images
5. Title Blocks

The majority of this information is used in the Macro Space Management application. The In-Store Space Collaboration application server has an interface which allows it to use DWF files and product images.

## MSM Store Planning Modules

The Planner and Merchandiser modules provide alternative ways to add, edit, delete and manage store plans. (The Planner Module provides a AutoCAD environment; the Merchandiser Module provides a virtual reality environment).

The Planner and Merchandiser modules read and write data to and from the central database. They also read and write to and from the reference files.

## MSM Support Modules

The Macro Space Management Modules allow the creation and maintenance of information used in the generation and revision of store plans. These tools include:

1. Administration Module – used to configure the global operation of the software
2. Fixture Studio – used to maintain the fixtures, fittings and shelves placed in store plans
3. Product Studio – used to maintain the product hierarchy

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**Note:** The Merchandiser module has a facility for creating and editing Planograms.

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The support modules read and write data to and from the central database. Fixture Studio and Product Studio also read and write to and from the reference files.

## Macro Space Management Batch Tools

The Macro Space Management Batch tools are installed on the Batch Service server. This can be done by installing the entire Macro Space Management into the Batch Service server. The specific tools required for batch operations can then be run automatically at specified times.

These batch tools are for the bulk processing of data and are usually run during periods of low demand on the Macro Space Management system, such as overnight. These tools allow:

1. Import of data from third party databases
2. Import of Planogram designs from third parts databases
3. Carrying out Planogram substitution

4. Carrying out Planogram version change
5. Carrying out automated calculations on the drawings

Use of the Batch tools will result in changes being made to the central database and to the reference files.

## ISSC Server Application

The In-Store Space Collaboration server application is normally installed on the In-Store Space Collaboration server machine. It authenticates In-Store Space Collaboration users when they log-in, either directly with the Macro Space Management database, or via LDAP as appropriate.

The server application allows the use of specific types of reference files within In-Store Space Collaboration. These are:

1. DWF files for Architectural Plans
2. Product images for Schematic Previews of Planograms

The server application also allows data to be passed to and from the database when the In-Store Space Collaboration client applications open, edit and save store plans.

### In-Store Space Collaboration Server Log Information

Log information generated by the In-Store Space Collaboration server is stored in one of two locations; the Windows Event viewer and the Macro Space Management database. Where data is stored will depend on the type of event being logged.

## ISSC Client Application

The In-Store Space Collaboration Client application is installed on the user's computer. It connects to the central database via the In-Store Space Collaboration server and allows users to read and update information in the database.

The In-Store Space Collaboration Client application may either be installed on a LAN or may be remote, connecting via the Internet.

Note: the In-Store Space Collaboration Client application can be installed on a PC, Laptop or Tablet PC depending on the user's preference. If using remote access, it is possible to use a WiFi connection, enabling the user to (for example) walk round a store while using the software).

## Steps for Installing Macro Space Management

This guide explains how you install and set up the Macro Space Management, along with the required software.

The instructions in this guide assume knowledge of application servers, databases, and application installation, and are intended for system administrators and experienced IT personnel. Before carrying out any of these activities, ensure that you understand Windows administrative functions, SQL commands, and directory operations.

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

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## Steps for Implementing Macro Space Management

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Step	Description
------	-------------

*Pre-installation Steps*

- |    |  |
|----|--|
| 1. | Plan your environment, based on your business needs. For more information on the planning process and the supported configurations, see <a href="#">Planning Your Installation</a> . |
| 2. | Install and set up your application database. For more information, see <a href="#">Setting Up the Database</a> .  |
| 3. | Macro Space Management requires an installation of Autodesk AutoCAD. Install and set up your AutoCAD license. For more information, see <a href="#">Setting Up AutoCAD</a> .         |

*Installation Steps*

- |    |   |
|----|---|
| 4. | Access the Macro Space Management installation software, set up your installation, and run the installer. For more information, see <a href="#">Installing Macro Space Management</a> . |
|----|---|
- 

## Steps for Installing Macro Space Management and In-Store Space Collaboration

This guide explains how you install and set up the Macro Space Management and Install Space collaboration, along with the required software.

The instructions in this guide assume knowledge of application servers, databases, and application installation, and are intended for system administrators and experienced IT personnel. Before carrying out any of these activities, ensure that you understand Windows administrative functions, SQL commands, and directory operations.

In order to implement Macro Space Management and In-Store Space Collaboration for production, you must perform the following tasks in a sequence:

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**Steps for Implementing Macro Space Management and In-Store Space Collaboration**


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**Step Description**
*Pre-installation Steps*

1. Plan your environment, based on your business needs. For more information on the planning process and the supported configurations, see [Planning Your Installation](#).
2. Install and set up your application database. For more information, see [Setting Up the Database](#).
3. Macro Space Management requires an installation of Autodesk AutoCAD. Install and set up your AutoCAD license. For more information, see [Setting Up AutoCAD](#).

*Installation Steps*

4. Access the Macro Space Management installation software, set up your installation, and run the installer. For more information, see [Installing Macro Space Management](#).
  5. Access the In-Store Space Collaboration server installation software and run the installer. For more information, see [Installing the In-Store Space Collaboration Server](#).
  6. Access the In-Store Space Collaboration client installation software and run the installer. For more information, see [Installing the In-Store Space Collaboration Client](#).
  7. Install the Macro Space Management Online Help. For more information, see [Installing the In-Store Space Collaboration Help](#).
- 

## Reports

Reporting within the Oracle Macro Space Management and In-Store Space Collaboration applications is provided in three ways:

1. Quick Reports, which generally show information pertinent to the currently open floor plan
2. KPI Reports, with use Hot-spotting to color objects within the floor plan
3. BI Publisher Reports which are able to display any information within the Macro Space Management database.

A set of standard reports are provided for each type, but users are not limited to these reports and can develop their own. The set of standard BI Publisher reports is available as a patch from My Oracle Support <https://support.oracle.com>

The BI Publisher application must be installed before the user can make use of the BI Publisher reports and requires a BI Publisher license.

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Note: The license for Macro Space Management and In-Store Space Collaboration does not include a license to run BI Publisher.

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Detailed information on the use of BI Publisher is outside the scope of this document. Please see the BI Publisher documentation at <http://www.oracle.com/technology/products/xmlpublisher/index.html>



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# Planning Your Installation

## Overview of the Planning Process

Before installing the Oracle Retail applications, you must first determine the performance and availability goals for your business, and then plan the hardware, network, and storage requirements accordingly. These requirements will vary from client to client and the information in this chapter should be used for guidance purposes only and not regarded as specific recommendations for a given installation.

This chapter provides suggestions on some basic considerations for the implementation. It also includes the list of hardware and software requirements.

This section contains the following topics:

- [Implementation Capacity Planning](#)
- [Planning Your Environment](#)
- [Planning for Optimal Macro Space Planner Performance](#)
- [Supported Configurations and Requirements](#)

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**Note:** The planning process must take into account whether Macro Space Management alone is to be installed, or whether both Macro Space Management and In-Store Space Collaboration are to be installed.

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## Implementation Capacity Planning

There is significant complexity involved in the deployment of Oracle Retail applications, and capacity planning is site specific. Oracle Retail strongly suggests that before installation or implementation you engage your integrator (such as the Oracle Retail Consulting team) and hardware vendor to request a disk sizing and capacity planning effort.

Sizing estimates are based on a number of factors, including the following:

- Workload and peak concurrent users and batch transactions
- Hardware configuration and parameters
- Data volume
- Application features utilized
- Length of time history is retained

Additional considerations during this process include your high availability needs as well as your backup and recovery methods.

## Planning Your Environment

After establishing the required capacities, plan and prepare the production environment, 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.
- Planning the data security policies.
- Designing the backup and recovery strategies.

## Planning for Optimal Macro Space Planner Performance

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

1. Determine the Macro Space Planner 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.
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.

## Supported Configurations and Requirements

This section describes the hardware and network requirements for the Macro Space Management and In-Store Space Collaboration applications, and includes the following topics:

- [Server Requirements](#)
- [LAN Client Workstation Requirements](#)
- [In-Store Space Collaboration \(Remote\) User System Requirements](#)

### Server Requirements

The specific server requirements will depend on the results of the Implementation Capacity Planning. No specific recommendations can be made as these will vary from implementation to implementation.

Oracle Retail strongly suggests that before installation or implementation you engage your integrator (such as the Oracle Retail Consulting team) and hardware vendor to request a disk sizing and capacity planning effort.

General requirements for the Database, In-Store Space Collaboration, File and Batch Servers are as follows:

#### Operating System Requirements

Full installation of the following operating systems:

- Windows XP Professional SP2
- Windows 2000 Professional SP4
- Windows Server 2003 R2



### Database Requirements

Macro Space Management supports one of the following databases:

- Oracle Database 9i
- Oracle Database 10g release 2 (10.2)
- Microsoft SQL Server 2000 Service pack 4
- Microsoft SQL Server 2005

## LAN Client Workstation Requirements

These requirements are for a LAN client workstation running the Macro Space Management application. For LAN client workstations running only the In-Space Store Collaboration application, the minimum requirements can match those for Remote Users in the section below.

### Hardware Requirements

- Minimum 3.0 GHz processor clock speed.
- Minimum 2GB RAM.
- 1024 x 768 VGA video display with 256 colors.
- 256MB Graphics Accelerator card for Macro Space Management Merchandiser users.

### Operating System Requirements

Full installation of the following operating systems

- Windows XP SP2
- Windows 2000 SP4

### Software Requirements

- Autodesk AutoCAD 2007, 2008, or 2009
- Autodesk AutoCAD Map 3D 2006, 2007, 2008, or 2009
- Microsoft .Net Framework 2.0
- MDAC 2.8 Service Pack 1 or higher
- Visual Basic 6 patch KB896559-v1
- If using an Oracle Database:
  - Oracle Database 9i/10g Client Run Time environment and Administrative tools (if using Oracle)
  - Oracle Data Provider for .Net 10.2.

### Free Disk Space Requirements

A minimum of 1 GB is recommended.

- Macro Space Management 100 MB
- Macro Space Management Client Specific (varies) approximately 30MB

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**Note:** LAN Client Workstations to be used for running the Planner module should also comply with the requirements for running AutoCAD. For more information visit the Autodesk website at <http://usa.autodesk.com>

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## **In-Store Space Collaboration (Remote) User System Requirements**

### **Hardware Requirements**

- Minimum 1.0 GHz processor clock speed
- Minimum 1 GB RAM
- 1024 x 768 VGA video display with 256 colors

### **Operating System Requirements**

Full installation of the following operating systems:

- Windows XP Service Pack 2
- Windows 2000 Service Pack 4

### **Software Requirements**

None

### **Free Disk Space Requirements**

A total of 20 MB free disk space is required. However, there should be sufficient disk space for windows to operate in addition to this 20 MB.

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## 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 Software](#)
- [Creating an Application Database](#)
- [Creating the Default Data User Account](#)
- [Installing the Template Database](#)
- [Using the Upgrade Scripts](#)

---

**Note:** The steps to set up the database are identical irrespective of whether just Macro Space Management or both Macro Space Management and In-Store Space collaboration are to be installed.

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### Installing the Database Software

The application requires the use of the Oracle® 10g Database Release 2 (10.2.0.2) and the Natively Compiled Java Libraries (in the Oracle Database Companion CD). Ensure that the Oracle Database software is installed along with the Natively Compiled Java Libraries. For more information, see the *Oracle Database Installation Guide, 10g Release 2 (10.2)* and *Oracle Database Companion CD Installation Guide, 10g Release 2 (10.2)*.

### Creating an Application Database

You can create a database when installing the database software, using a Database Configuration Assistant, or using your own scripts. To ensure optimal performance, Oracle recommends that you plan the logical storage structure, database design, and the backup strategy before creating the database. For more information, see the *Oracle Database Administrator's Guide, 10g Release 2 (10.2)*.

---

**Note:** If using an Oracle database then the MSM client machines and the ISSC server must have Oracle Client installed. MSM and ISSC server require the run time environment with the ODBC drivers. This can be installed by selecting the Administrator option when prompted to 'Select installation type' during the installation of Oracle Client.

---

### Creating the Default Data User Account

Once you have the database installed, you must create a default database user account that will be used during the installation to access the application database.

You may choose to create default data user account using the Oracle Enterprise Manager 10g Database Control or through SQLPlus. This section describes how you can create the user account using the Oracle Enterprise Manager Database Control.

To create the user account:

1. On a Web browser, enter the Database Control URL in the Address field, and press Enter. The URL will be similar to the following address:

`http://<host-name>:<dbportnumber>/em`

Where,

- <host-name> – is the host name of the system where the database is installed.
  - <dbportnumber> – is the database control port number.
2. On the **Database Login** page, log on to the database instance using the system user name and password.
  3. Once logged in, click the **Administration** tab.
  4. On the **Administration** tab, under the **Schema** area, click **Users** in the **Users & Privileges** section.
  5. On the **Users** page, click **Create**. This button appears on the right corner of the screen.
  6. On the **Create User** page, under the **General** tab, type the user name and password for the default data user. Retain the default options set in **Profile** and **Authentication** drop-down lists.

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**Note:** If tablespaces have not been set or planned, you may choose to leave the Default Tablespace and Temporary Tablespace fields blank.

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7. Click the **Roles** tab.
8. On the **Roles** tab, click **Edit List** (appears on the right), and ensure that the **CONNECT** and **RESOURCE** roles are selected.
9. On the **Create User** page, click **Ok**. The user account is created.

## Installing the Template Database

If the application is being installed for the first time, the Template Database should be installed. This contains sufficient information for the software to function. Four template databases are supplied: metric and imperial versions for both Oracle and SQL databases.

1. The Metric and Imperial versions of the Template Database have different values for system variables, tolerances, block parameters, etc
2. The Oracle and SQL databases have different SQL, different pre-configured reports, etc

The person tasked with installing the Template Database must select the version appropriate to the installation.

The Template Database is supplied in the form of an SQL script. This can be run against the application database previously created by the user. The database will then contain the tables required by the application.

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**Note:** The installed tables contain a partial set of data. Additional data will have to be imported or input during the Implementation stage before the application contains the full set of data necessary for store planning.

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To install the Template Database:

1. Determine the correct Template Database to install
2. Open a suitable database management tool such as Oracle SQL Developer
3. Connect to the required database
4. Copy the required Template Database script into SQL Developer
5. Run the script
6. Confirm from the results that the script has executed without error

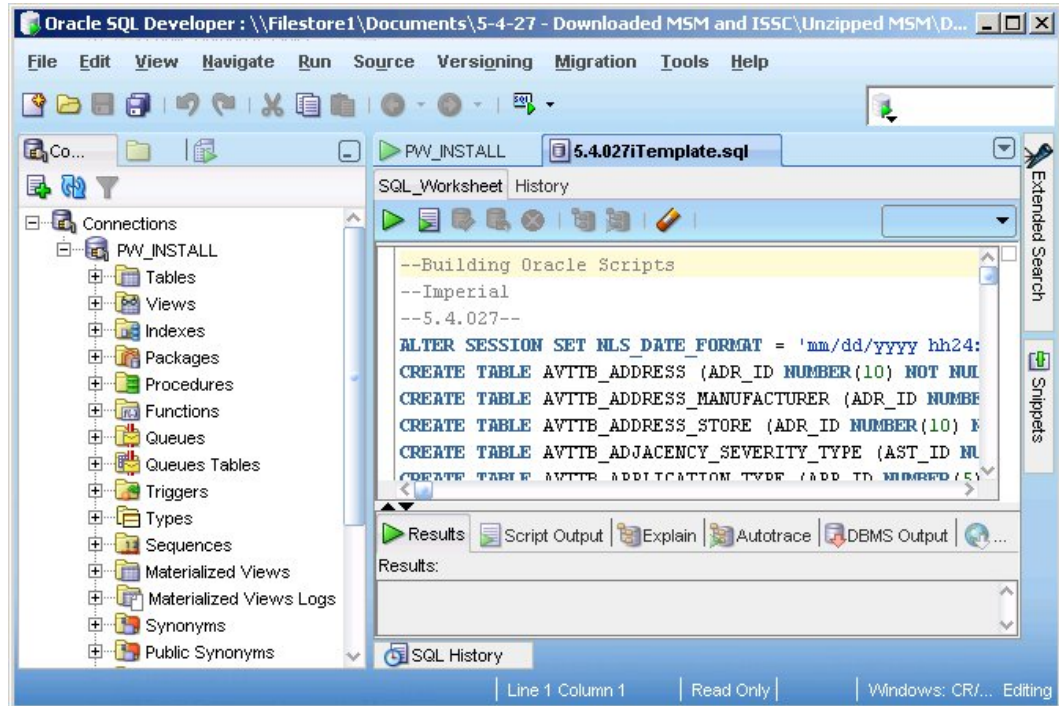


Figure 3-1: Using Oracle SQL Developer to install the Template Database

## Using the Upgrade Scripts

If the application is being installed as an upgrade to a previous installation, it may be necessary to run upgrade scripts to modify the database so it is suitable for the upgraded application.

**Note:** Before running the upgrade scripts, it is good practice to backup the existing database.

A set of upgrade scripts are supplied. The build number of the application to be removed for upgrading should be noted and compared with the build number of the application to be installed. The necessary upgrade scripts can then be selected.

A number of sets of upgrade scripts are supplied for both Oracle and SQL databases.

1. Some upgrade scripts are specifically marked for either imperial or metric databases. The appropriate type of upgrade script should be selected for the database to be upgraded. These upgrade scripts modify general information in the database and should not affect the subsequent functioning of the application.
2. Generic upgrade scripts modify general information in the database and should not affect the subsequent functioning of the application. They can be used on both imperial and metric databases.

3. Custom upgrade scripts are often used to alter the SQL held within the database. This SQL is used to populate dialog boxes within the application. It is possible that this SQL has been modified in the existing database in order to customize the information displayed to users. It is therefore suggested that the effect of running the custom upgrade scripts be determined before running them and modifying the database.

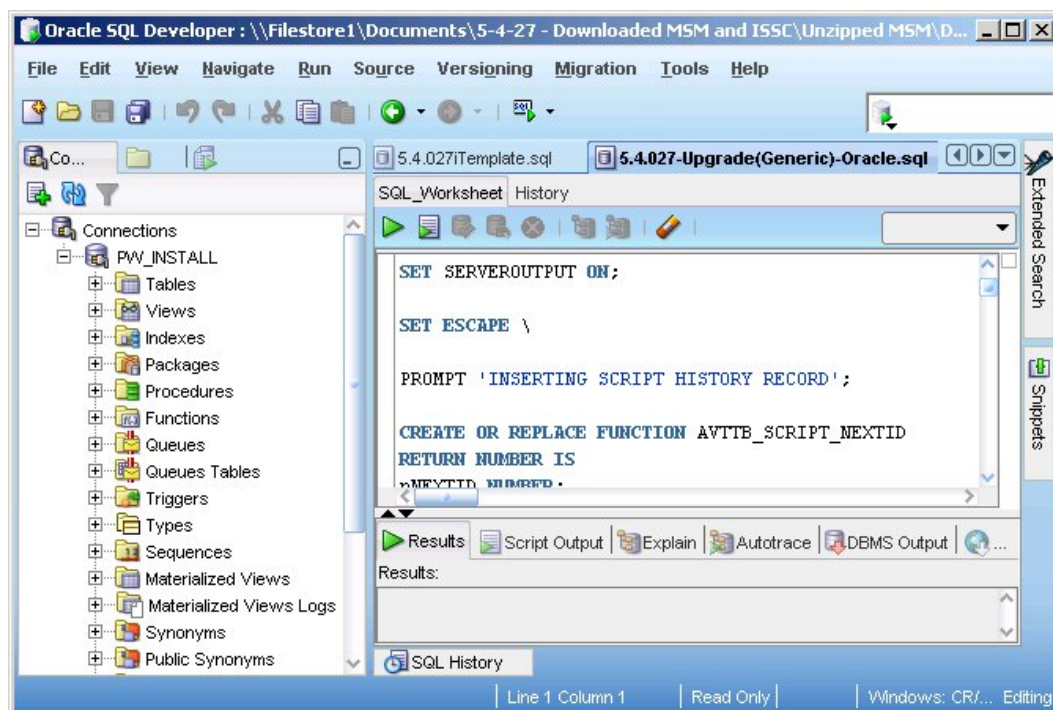
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**Note:** If necessary contact Oracle Technical Support for assistance.

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To use the upgrade scripts

1. Determine if the database is Oracle or Microsoft SQL
2. Determine if the database is imperial or metric
3. Determine the build number of the software/database currently in use
4. Determine the build number of the software to be upgraded to
5. Determine which upgrade scripts are required and the sequence they are required in
6. If any of the upgrade scripts are 'custom' upgrade scripts, determine the impact on the database and decide on any associated actions
7. Open a suitable database management tool such as Oracle SQL Developer
8. Connect to the required database
9. Copy the first required upgrade script into SQL Developer
10. Run the script
11. Confirm from the results that the script has executed without error
12. Continue to run the upgrade scripts in sequence until all the required scripts have been executed



**Figure 3-2: Using Oracle SQL Developer to run Upgrade Scripts**

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## Setting Up AutoCAD

Macro Space Management requires the use of Autodesk AutoCAD for creating and maintaining store plans. Based on your business need, you may need to purchase a standalone or network AutoCAD license, install the application, and configure the relevant components.

This chapter introduces you to the AutoCAD installation process and provides any specific considerations required for Macro Space Management. It contains the following sections:

- [Installing AutoCAD](#)
- [Troubleshooting AutoCAD Installation](#)
- [Creating a Registry Entry](#)
- [AutoCAD Error Messages after Macro Space Management has been Installed](#)
- [AutoCAD Workspaces](#)
- [3DSOut Patch](#)

### Installing AutoCAD

Install the Autodesk AutoCAD referring to the documentation included with the application for guidance. Based on your business requirement, you may choose to install in a standalone or a networked mode. This section includes the following:

- [Considerations for a Network-based Installation](#)
- [AutoCAD Components](#)

### Considerations for a Network-based Installation

It is important that the components that make up the network install are deployed in the correct order, and more importantly configured correctly.

The order of deployment:

- Autodesk Network License Manager
- Autodesk Network Installation Wizard

The order of configuration:

- Creating the deployment image
- Creating services in LMTOOLS to configure the license.

### AutoCAD Components

During the installation, the Select Installation Type screen enables you to perform a custom installation and choose the components you must install. For optimal performance,

- Remove the following features:
  - CAD Standards
  - Drawing Encryption
  - New Features Workshop
  - Migrate Custom Settings

- Samples
- Tutorials
- Autodesk Impression Toolbar
- Those features that are mandatory on the custom install are:
  - Dictionaries
  - Express Tools
  - Fonts
  - Portable License Utility
  - Reference Manager
  - VBA Support
  - Material Library
  - Database

## Troubleshooting AutoCAD Installation

This section includes the following:

- [Permissions Restrictions](#)
- [Corrupt or Duplicate User Profiles](#)

### Permissions Restrictions

In Windows XP, restricted users are prevented from modifying files, folders, and registry entries outside their user profile. To support restricted user accounts, all customizable AutoCAD files and registry settings are stored within the user profile. Users must have Full Control permissions to all files and folders in the *C:\Documents and Settings\%username%*. Additionally, users must have Full Control permissions to all registry keys and values in the HKEY\_CURRENT\_USER key in the registry. Restrictions that limit a user's permissions to these locations could cause failures in the AutoCAD secondary installer or within the program. Typical errors include Microsoft Windows Installer errors such as *Error 1321: Insufficient permissions to modify file*. Errors in the 14##, 13##, and 17## range could also indicate permission restrictions.

To correct this issue, you must remove permission restrictions from the user, restart the system, and then try to run AutoCAD again.

### Corrupt or Duplicate User Profiles

During the secondary installer process, a hard-coded link is established between your registry settings and your profile folders. In case the name of the user or the profile folder changes, the required content may not be accessible. In this situation, errors indicating that content cannot be found will usually be displayed.

To work around this issue:

1. Ensure that the registry values in the **HKEY\_CURRENT\_USER\Software\Autodesk\AutoCAD\R16.2\ACAD-4001:409** sub key are pointing to the current user profile. If they are pointing to the correct location, it may be necessary to back up any data in the profile and recreate it on the machine and/or the network.
2. Check for duplicate profile folders in the format **%username%.domainname** or **%username%.computername**. This condition indicates that there are problems or



changes with user profiles that may need to be addressed on the machine or the network.

The errors in AutoCAD can often be resolved by backing up and deleting the following registry sub key:

HKEY\_CURRENT\_USER\Software\Autodesk\AutoCAD\R16.2\ACAD-4001:409

Once deleted, you can launch AutoCAD to trigger the secondary installer process.

---

**Note:** During the secondary installer process, many user specific settings will be reset to the default settings. You must back up any customizations before you proceed. Also, this workaround will not address the problem that is causing the user profile to be duplicated or corrupted.

---

## Creating a Registry Entry

After installing AutoCAD and **before installing Macro Space Management** it is essential to open and then close AutoCAD. This causes AutoCAD to write entries to the registry on the computer. These registry entries will be referenced by Macro Space Management during its installation process. If they are not present, the Planner Module will not work correctly after MSM has been installed.

## AutoCAD Error Messages after Macro Space Management has been Installed

The Macro Space Management installation process will result in changes being made to the registry entries originally written by AutoCAD. When the Planner Module is first opened after installing MSM, this will also result in AutoCAD opening. Because the MSM installation process changed the registry entries originally written by AutoCAD during its installation, AutoCAD will display an error message warning that the installation may have errors.

Click OK when the error message appears and it will disappear. This may have to be repeated a number of times as an error message will appear for each changed entry in the registry. Once the last error message has been closed, close and reopen the Planner Module. It should now open without error messages.

## AutoCAD Workspaces

The Macro Space Management installation process will also result in a new workspace called Planner being added to the existing AutoCAD workspaces. . When the Planner Module is opened after installing MSM, the workspace should be set to Planner from the available drop down list. This will result in AutoCAD displaying the correct menus and toolbars when used within the Planner Module.

## 3DSOut Patch

The Macro Space Management Merchandiser module uses 3DS files to represent equipment and merchandise. AutoCAD Map 3D 2007 and 2008 are not shipped with the 3DSOut function. You must procure or download this function from the Autodesk Web site and install it separately. Failure to install the patch will result in an error message if a user attempts to create 3DS files using Macro Space Management functionality.



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## Removing Previous Versions of the Software

This chapter describes how to remove previous versions of Macro Space Management, In-Store Space Collaboration Server, In-Store Space Collaboration Client and In-Store Space Collaboration Help if you are upgrading to a newer version of the software. It contains the following sections:

- [Backing up Data Folders](#)
- [Removing Previous Versions](#)

### Backing up Data Folders

Oracle strongly recommends that Installers take a backup copy of all data folders prior to removing parts of the application. This is particularly important where a copy of Macro Space Management is to be reinstalled on a server containing system data folders.

### Removing Previous Versions

To remove a previous version of part of the application:

1. From the Windows **Start** menu, navigate to the **Control Panel**.

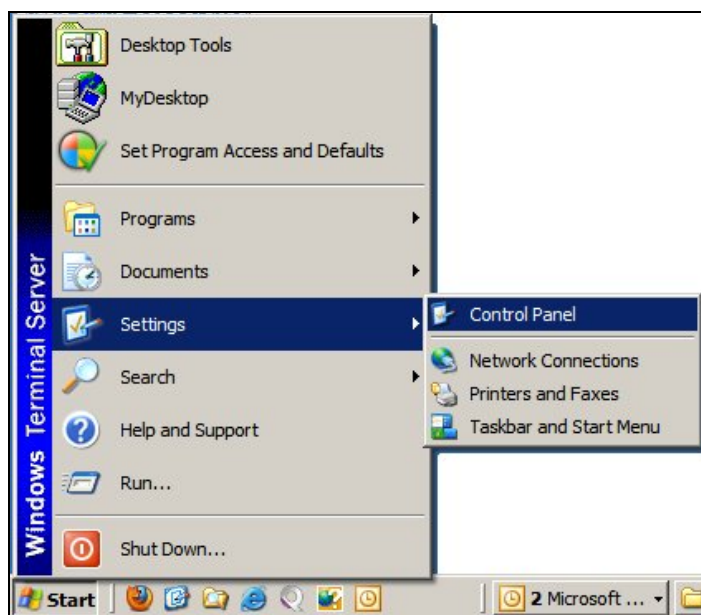










Figure 5-1: Access Control Panel from the Start Menu

2. In the **Control Panel**, double-click **Add or Remove Programs**.

Name ▲	Comments
 Accessibility Options	Adjust your computer settings for vision, hearing, and mobility.
 Add Hardware	Installs and troubleshoots hardware
 <b>Add or Remove Programs</b>	Install or remove programs and Windows components.
 Administrative Tools	Configure administrative settings for your computer.
 Autodesk Plot Style Manager	Adds, removes and changes plot style tables.
 Autodesk Plotter Manager	Adds, removes and changes plotters properties.
 Automatic Updates	Set up Windows to automatically deliver important updates
 Date and Time	Set the date, time, and time zone for your computer.

**Figure 5-2: Add or Remove Programs in the Control Panel**

3. In the **Add or Remove Programs** window, ensure that **Change or Remove Programs** is selected in the left hand menu, and select the previously installed version of the application in the list.
4. Click **Remove**. A confirmation message appears.
5. Click **Yes**.

---

**Note:** Failing to remove an older version of the application prior to installing the upgraded version may result in an error message requesting the older version be removed before continuing with the installation process.

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# Installing Macro Space Management

This chapter describes how you can install and configure the Macro Space Management application. It includes the following sections:

- [Before You Begin](#)
- [Installing Macro Space Management](#)

## Before You Begin

Before starting the installation, ensure that the database is correctly configured. It should either be the Template database for new installations, or upgraded (via upgrade scripts) for an existing installation.

For new installations, AutoCAD should have been opened and closed to create an entry in the registry.

## System Requirements

The Macro Space Management database is hosted from a server machine and is accessed via a suite of client applications installed on the user's system. For more information on the client and server requirements, see [Supported Configurations](#).

## Previous Installation

If a previous version of Macro Space Management exists on the target machine, you must back up the data and uninstall the application before installing the current version. For more information see [Removing Previous Versions of the Software](#).

An appropriate version of AutoCAD must be installed on the target machine before installation.

## User Access Privileges

Before installing the application, ensure that you have administrative privileges on the local machine.

## Installing Macro Space Management

### Locations to Install Macro Space Management

It is usual practice to install one copy of Macro Space Management on each client work station. In addition, a copy of Macro Space Management should be installed on the server designated for batch operations. This will ensure that batch operations will always be carried out as scheduled and (if the server is fitted with a UPS) unaffected by power failures.

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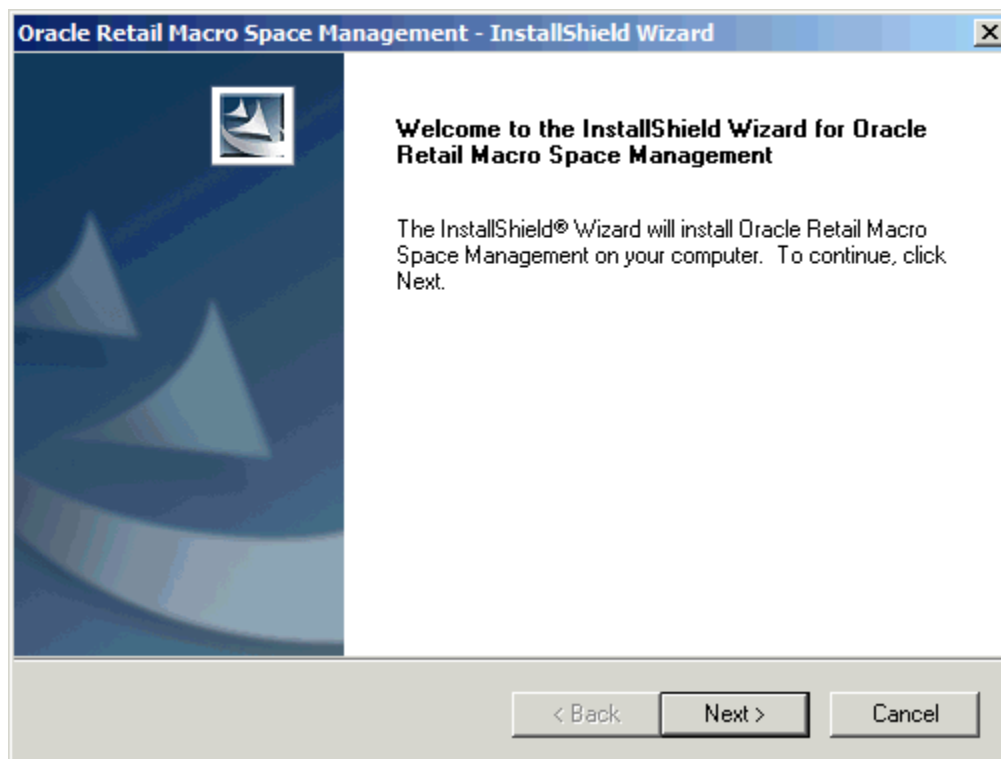
**Note:** Instructions on how to set up batch operations are contained in the Implementation Guide.

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## Installation of Macro Space Management

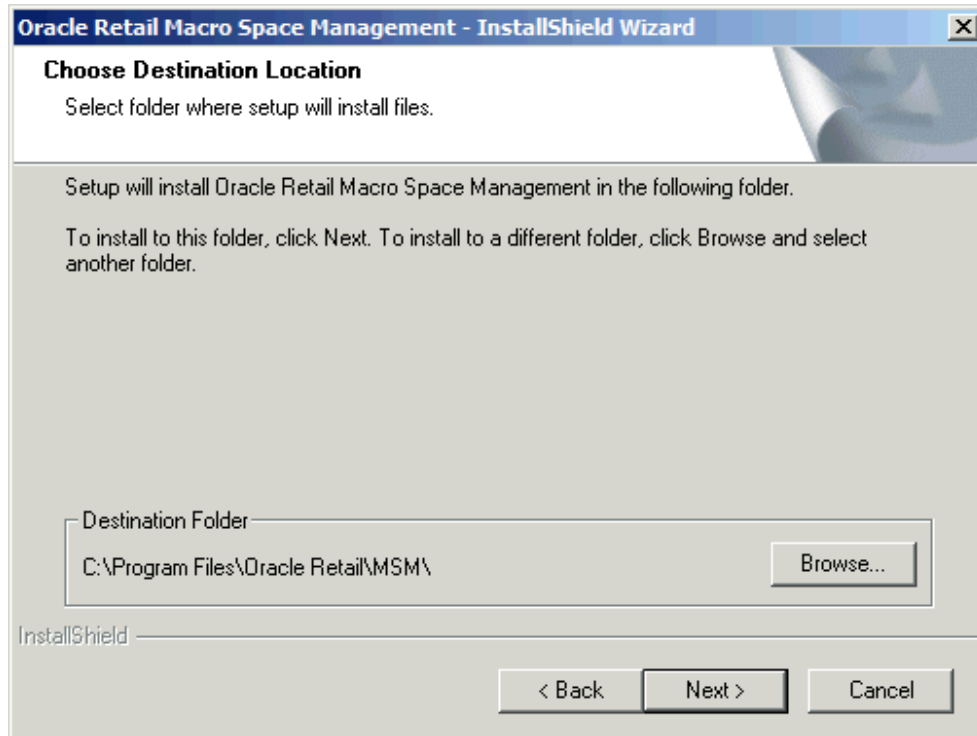
To install the Macro Space Management application:

1. If the application has been delivered in a compressed file format, for example WinZip, extract the installation files to a temporary folder that can be accessed by the installer.
2. Navigate to the location where the installation files are located and double click the **setup.exe** file. The installation wizard starts.



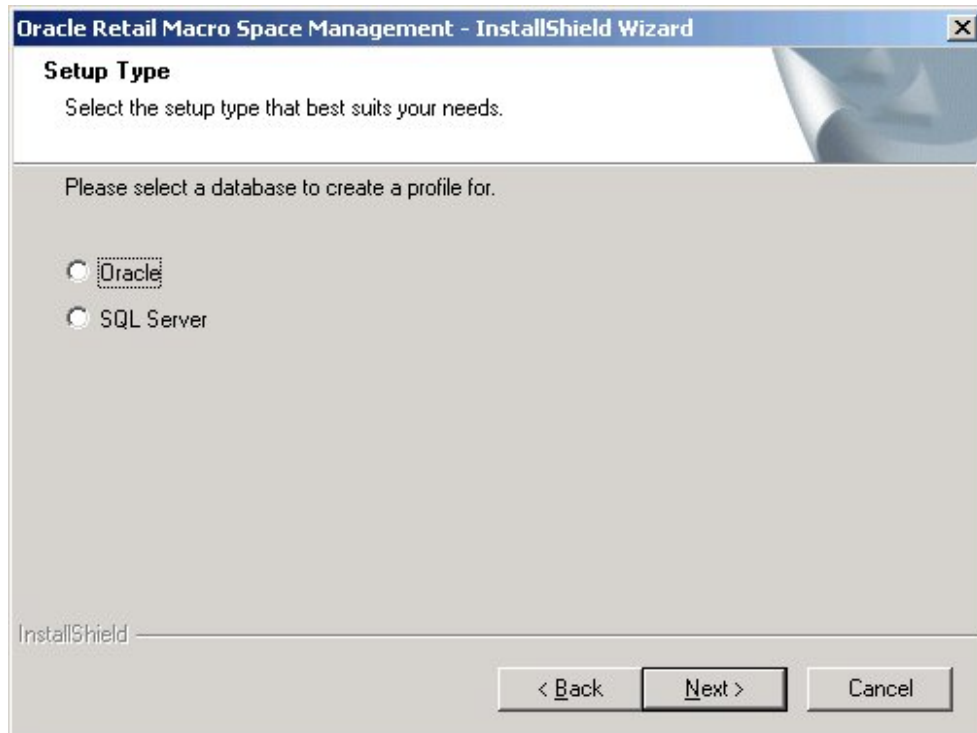
**Figure 6-1: Welcome Screen**

3. On the **Welcome** screen, click **Next**. The **Choose Destination Location** screen appears.

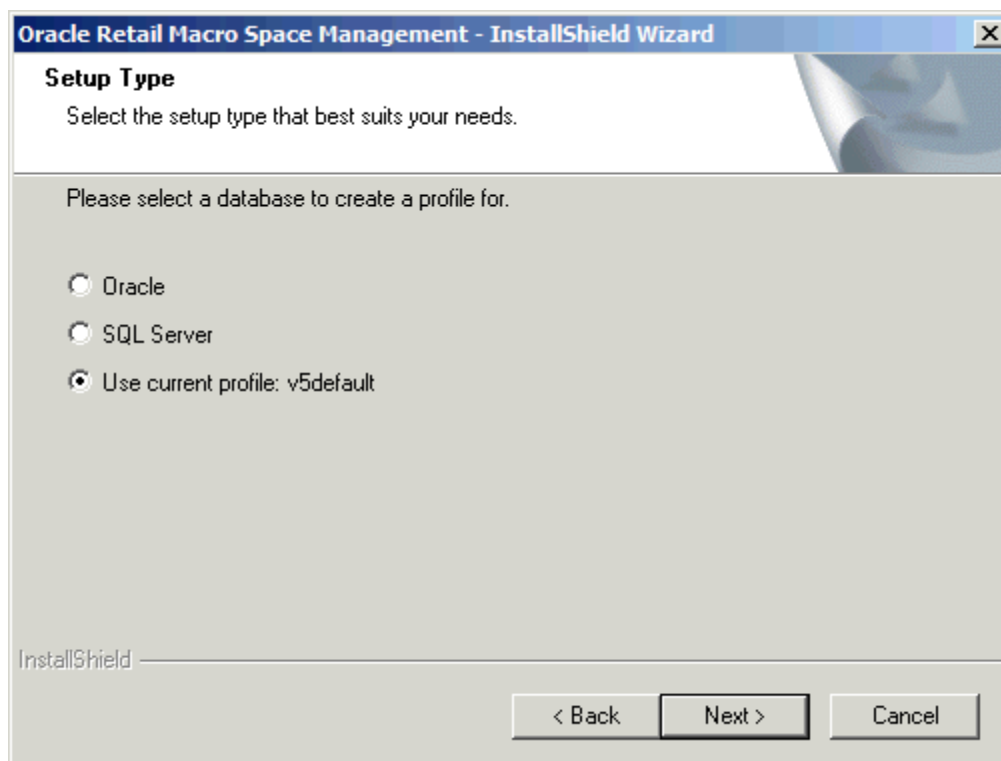


**Figure 6-2: Choose Destination Location Screen**

4. On the **Choose Installation Folder** screen, select an installation location, and click **Next**. The **Setup Type** screen appears. This will differ slightly depending on whether it is a new installation, or an upgrade of an existing one.

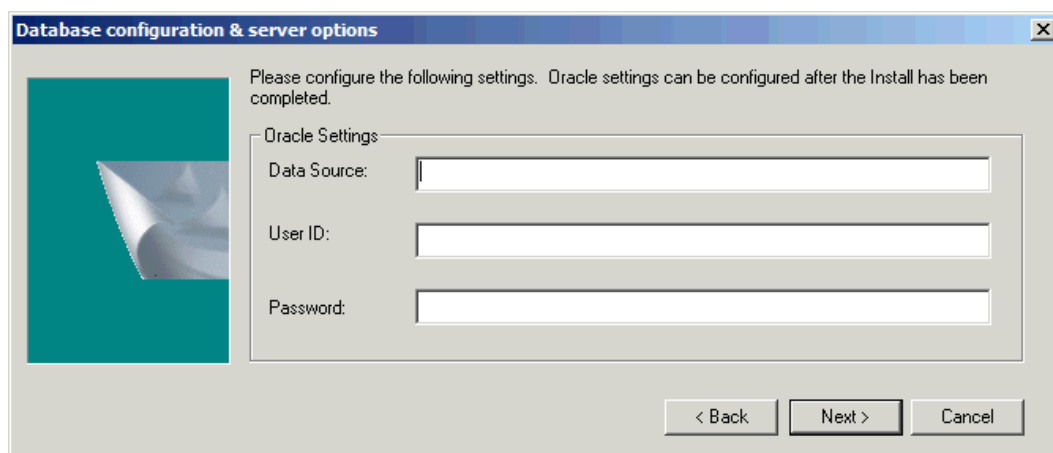


**Figure 6-3: Setup Type Screen – New Installation**



**Figure 6-4: Setup Type Screen – Existing Installation**

5. If Macro Space Management was previously installed, use the radio button to select the current profile and click **Next** to use the last database connection profile used. Go to step 9 below.
6. If this is the first time Macro Space Management is being installed, select the appropriate database type, and click **Next**. The Database configuration & server options screen appears with settings available based on the database type selected.



**Figure 6-5: Database configuration & server options Screen for Oracle database**



**Database configuration & server options**

Please configure the following settings. SQL settings can be configured after the Install has been completed.

SQL Server Settings

Server Name:

Database Name:

☐ Use Windows Authentication for database connection.

Username:

Password:

< Back    Next >    Cancel

**Figure 6-6: Database configuration & server options Screen for SQL Server**

7. Complete the database settings and click **Next**. The **Setup Information** screen appears. This will differ slightly depending on whether it is a new installation, or an upgrade of an existing one.

**Oracle Retail Macro Space Management - InstallShield Wizard**

**Setup has enough information to start installation.**

Please review the installation settings. If you want to change any settings click Back. If you are satisfied with the settings, click Install to begin copying files.

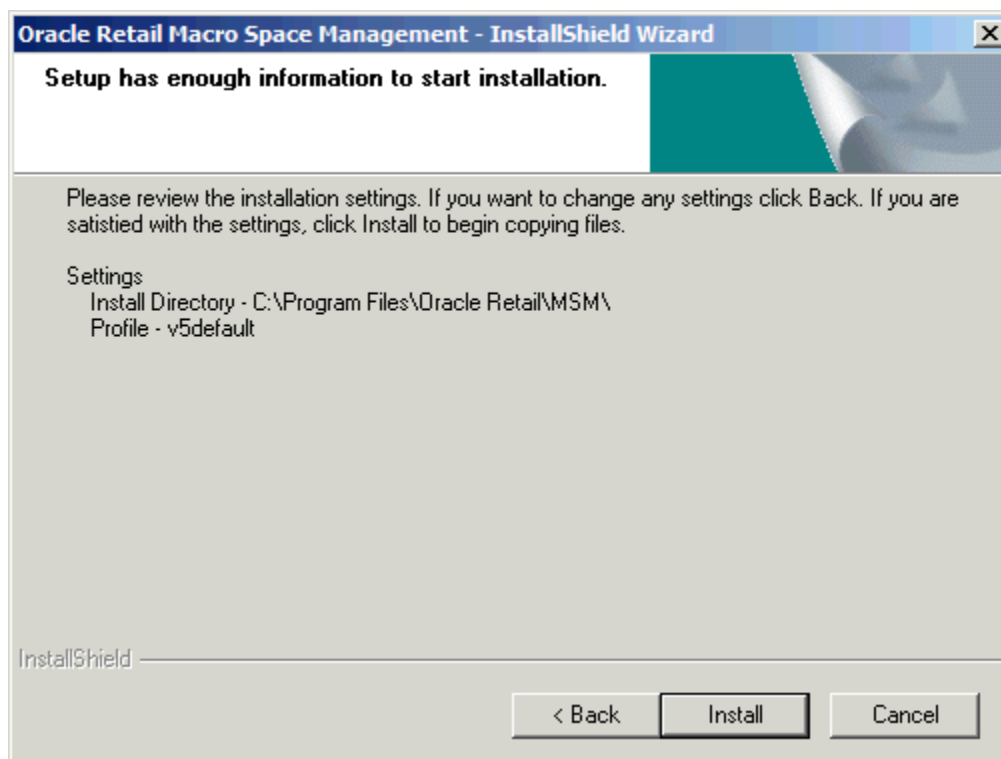
Settings  
Install Directory - C:\Program Files\Oracle Retail\MSM\  
Profile -

Database  
Server Name - AVT4  
User Name - PW\_INSTALL

InstallShield

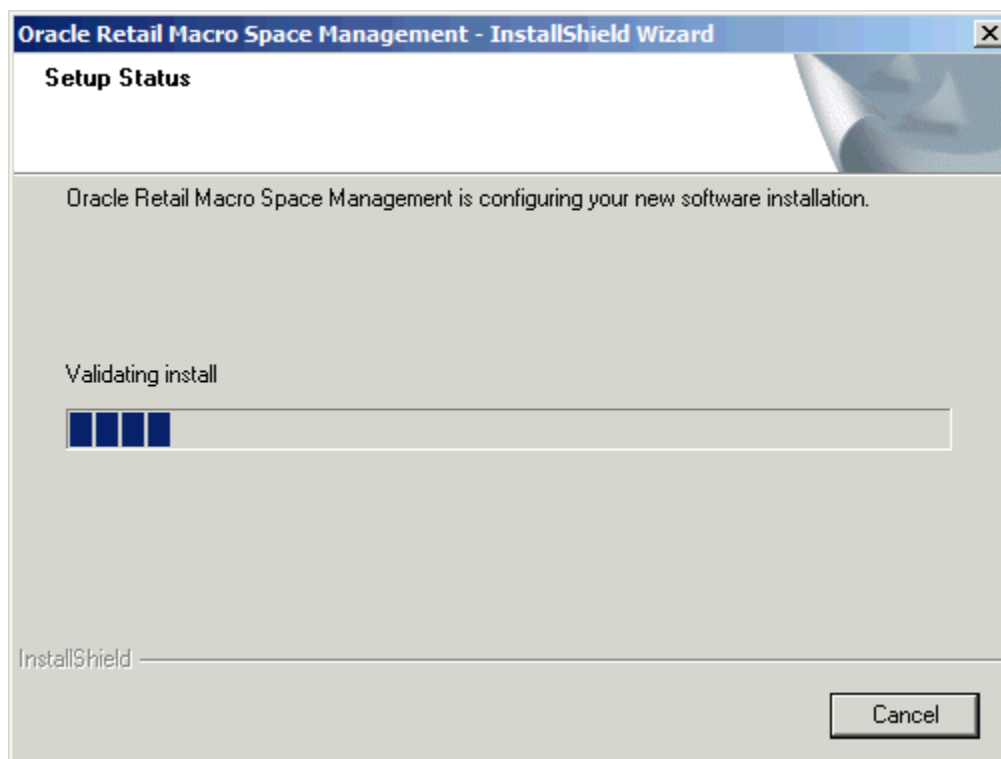
< Back    Install    Cancel

**Figure 6-7: Setup Information Screen – New Installation**



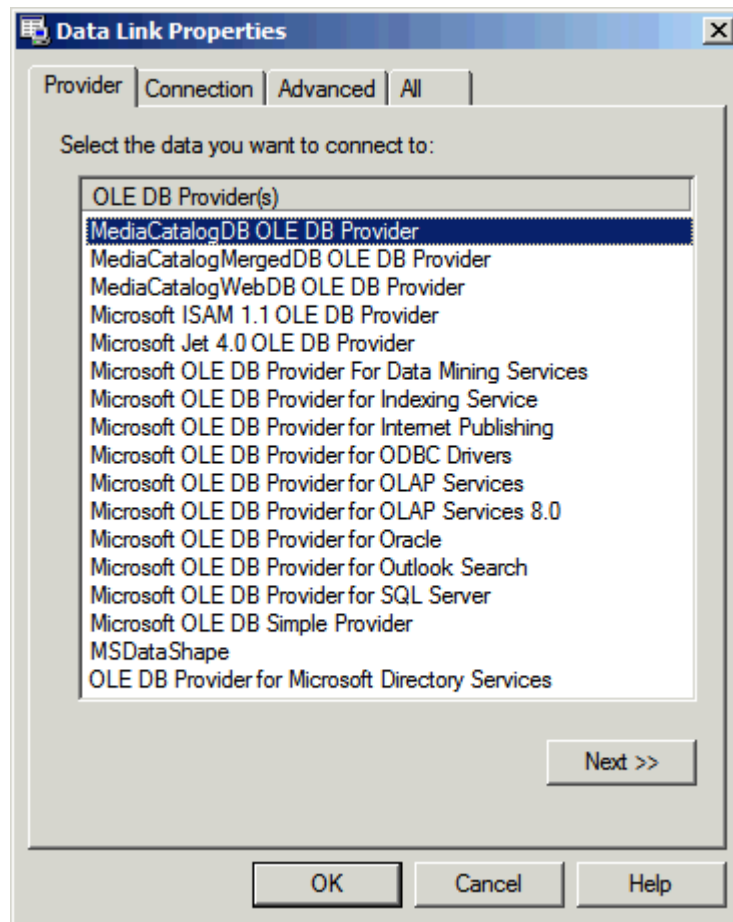
**Figure 6-8: Setup Information Screen – Upgrade to Existing Installation**

8. On the **Setup Information** screen, click **Install** to start the installation. The **Setup Status** screen appears showing the progress of the installation.



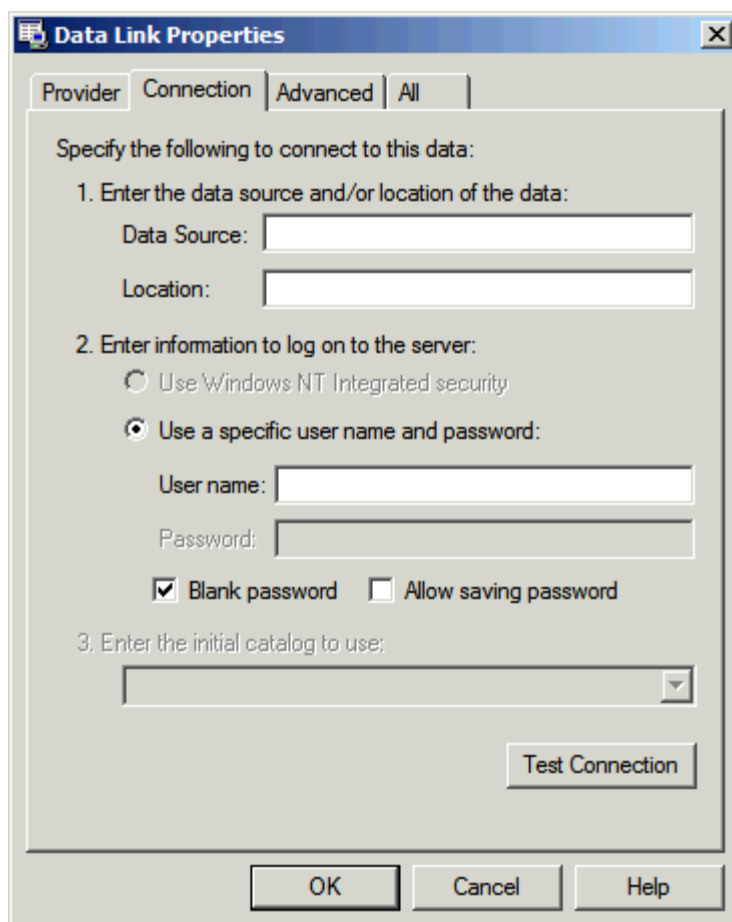
**Figure 6-9: Setup Status Screen**

9. When the installation is complete, the **Installation Wizard Complete** screen appears.
10. Click **Finish** to close the installation wizard. The Macro Space Management installation is complete.
11. In order to use the Planogram Report Designer or Planogram printing functions in Macro Space Management Merchandiser, a valid connection must be set up. Navigate to the **AVT5PogReporter** folder (the default location for this is *C:\Program Files\Oracle Retail\MSM\APPS\AVT5PogReporter*).
12. Double click **AVT5ReportDesigner.exe** file to run the Planogram Report Designer. This will create the **AVT5ReportDesigner.udl** file. If it does not already exist, an error message appears.
13. Click the **OK** button to close the dialogue.
14. Double click the **AVT5ReportDesigner.udl** file and the **Data Link Properties** window appears.
15. On the **Data Link Properties** window, click the **Provider** tab.



**Figure 6-10: Data Link Properties Window**

16. On the Provider tab, select the appropriate provider.
  - a. For an Oracle database this will be **Oracle Provider for OLE D**. Click **Next**. The **Connection** tab appears.
  - b. For a SQL database this will be **Microsoft OLE DB Provider for SQL Server**. Click **Next**. The **Connection** tab appears.



**Figure 6-11: Connection Tab on Data Link Properties Window**

17. On the **Connection** tab, enter a data source name in the **Data Source** field, and then the user name and password.

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**Note:** The values shown above are for illustrative purposes only.

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18. Select the **Allow saving password** check box.
19. Click **Test Connection** to test the database connection.
20. Once the test is successful, click **OK**.

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# Installing the In-Store Space Collaboration Server

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**Note:** Installation of the In-Store Space Collaboration (ISSC) server is optional. It should only be installed if you are installing the In-Store Space Collaboration (ISSC) application. In-Store Space Collaboration (ISSC) cannot be used without Macro Space Management being installed.

---

This chapter describes how you can install and configure the In-Store Space Collaboration (ISSC) server. It contains the following sections:

- [Before You Begin](#)
- [Windows Firewall Consideration](#)
- [Installing the In-Store Space Collaboration Server](#)
- [Setting Up the In-Store Space Collaboration Server](#)

The In-Store Space Collaboration Server application is the server part of the In-Store Space Collaboration application suite. The Server application is installed as a service and supplies multiple clients with all the data required for the thin clients rendering of a store drawing and the store hierarchy from the Macro Space Management database over a LAN, WAN internet or on a local machine.

The In-Store Space Collaboration Server application may be installed onto either a local machine or onto a dedicated server.

## Before You Begin

For the application to run, a Macro Space Management database instance needs to exist. For a new installation, it should be the Template Database. For an upgrade to an existing application, it should already be upgraded to the latest database version by means of upgrade scripts, before attempting to install the upgraded In-Store Space Collaboration Server.

Many of the actions possible in a store plan opened using the In-Store Space Collaboration Server is controlled by settings in the Administration Module of Macro Space Management. These include:

1. Access rights for Users
2. Stores visible to Users
3. Store Plans visible to Users

Until this (and other) information is configured in the Administration Module, no stores or store plans will be accessible in In-Store Space Collaboration.

It is therefore essential for the configuration of In-Store Space Collaboration that Macro Space Management 5.4 is installed on a central machine.

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**Note:** Details of how to configure the operation of In-Store Space Collaboration using the Administration Module of Macro Space Management are specified within the User Guide for the Administration Module included with this installation.

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## Previous Installation

If a previous version of the In-Store Space Collaboration Server exists on the target machine, you must back up the data and uninstall the application before installing the current version. For more information, see [Removing Previous Versions of the Software](#).

## Security Advisories

### TCP/IP

The server will need a communications (TCP/IP) port to be configured to allow the server and clients to communicate. This port is configurable. If the Server or any of the client machines have firewalls installed, these will need to be configured to allow access for the specified port number. See your network administrators on how this can be set up.

### User access rights

When installing the Server application the user must have administrative rights for the local machine.

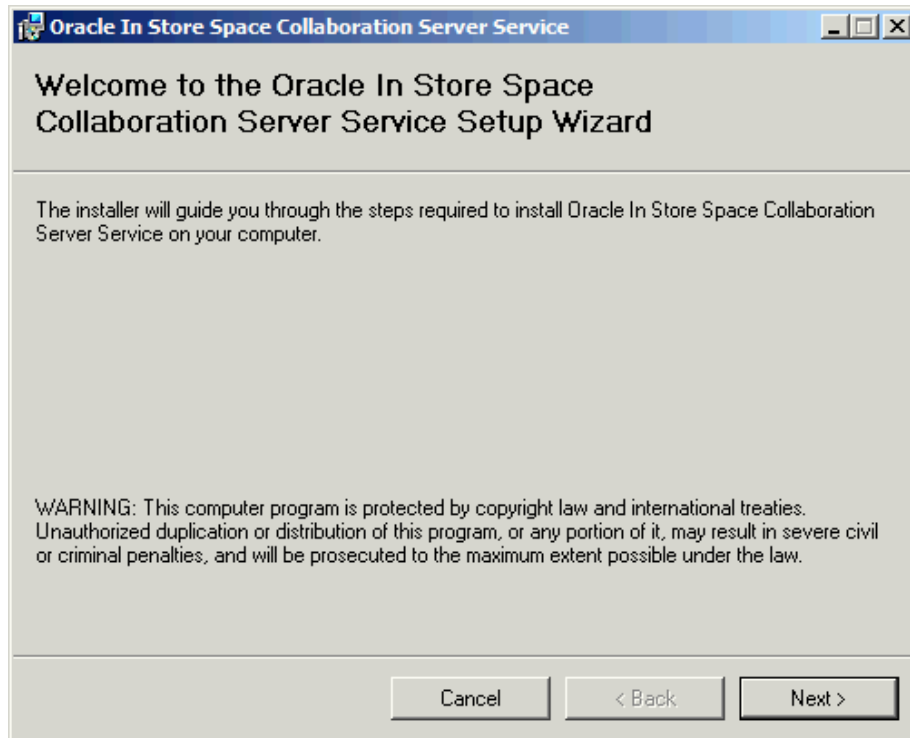
## Windows Firewall Consideration

If your computer has a Firewall configured, you may need to set the firewall to allow In-Store Space Collaboration to communicate over the Internet. For more information, see your Network Administrator.

## Installing the In-Store Space Collaboration Server

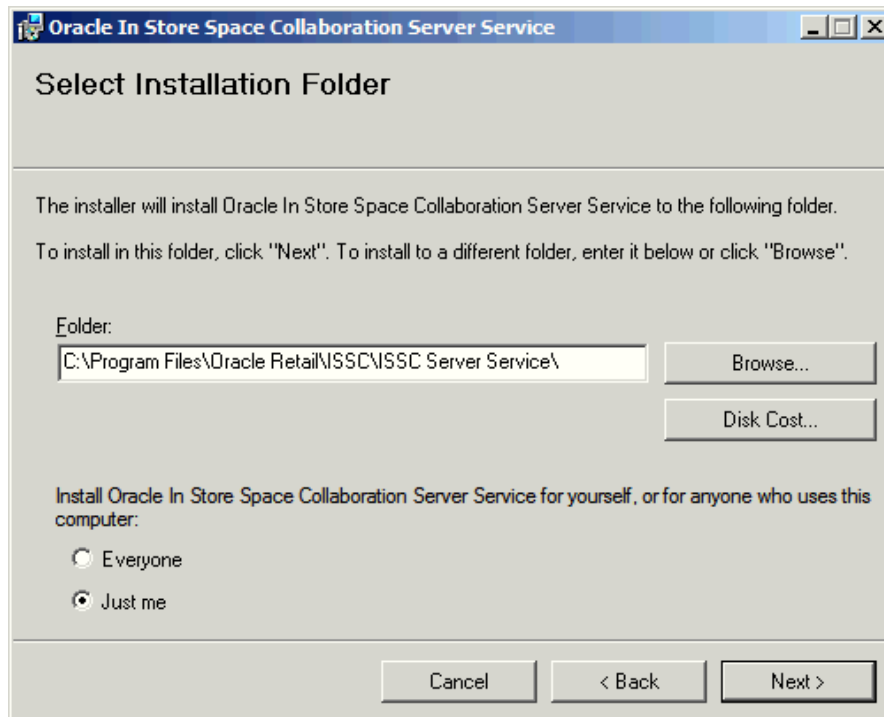
To install the In-Store Space Collaboration server:

1. If the Server application has been delivered in a compressed file format, for example, WinZip, extract the installation files to a temporary folder that can be accessed by the user.
2. Navigate to the location where the installation files are located and double click the **AVT.RFServerService.Setup.msi** setup file. The installation wizard starts.



**Figure 7-1: Welcome Screen**

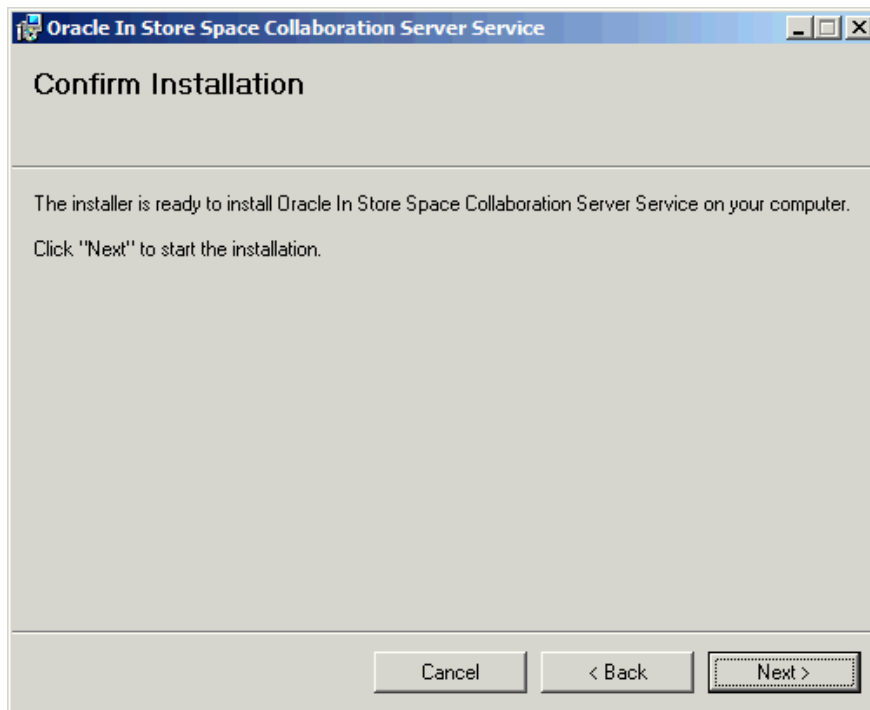
3. On the **Welcome** screen, click **Next**. The **Select Installation Folder** screen appears.



**Figure 7-2: Select Installation Folder Screen**

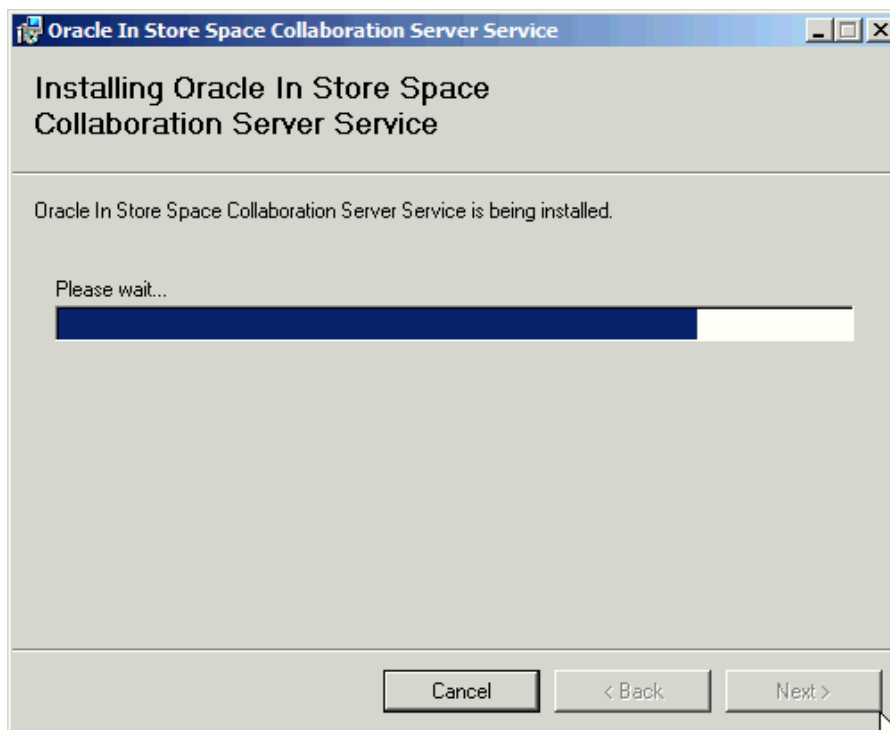
4. On the **Select Installation Folder** screen, select the installation location.

5. If you are logged into the workstation as an administrator and you want other users to be allowed to use the Server application, select the **Everyone** option, and then click **Next**. The **Confirm Installation** screen appears.



**Figure 7-3: Confirm Installation Screen**

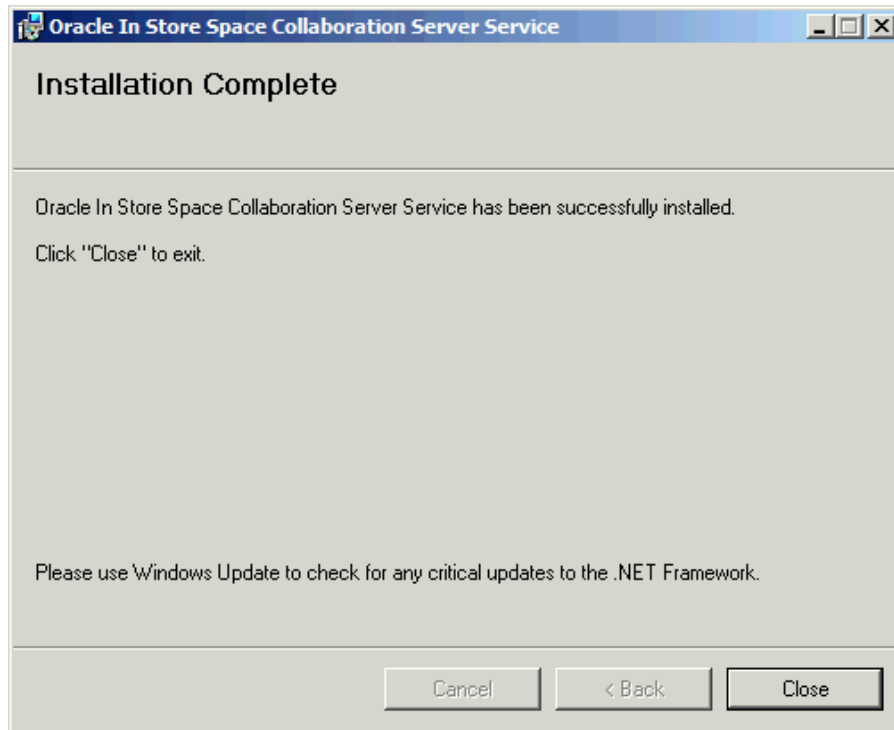
6. On the **Confirm Installation** screen, click **Next** to start the installation. The installation screen appears showing the progress of the installation.



**Figure 7-4: Installation Progress**



7. Once the installation has finished the **Installation Complete** window appears. Click **Close**.



**Figure 7-5: Installation Complete Screen**

8. Restart the system and once the system is restarted, proceed with the configuration. For more information, see [Setting Up the In-Store Space Collaboration Server](#).

## Setting Up the In-Store Space Collaboration Server

This section includes the following sections:

- [Configuration of the Server application's port](#)
- [Setting Up the Database Connection](#)
- [Configuring the Service](#)

### Configuration of the Server application's port

The configuration of the Server application is controlled by a file with a file extension of INI in the installation directory. Navigate to the installation directory (for example, *C:\Program Files\Oracle Retail\ISSC\ISSC Server Service* if the default installation path was selected) and open the *RFServer.INI* file using a text editor such as Notepad. The following is an example of the file.

```
[CONNECTION]
PORT=1234
MONITORPORT=9100
```

If a specific port is installed for the Server, alter the **PORT** parameter to the port number that you would like the server to use while running. For the changes to take effect, you must restart the server application each time this setting is updated.

Alter the **MONITORPORT** value to allow the Monitor application to communicate with the server. This port will be used to transfer information back and forth between the server and the Monitor application.

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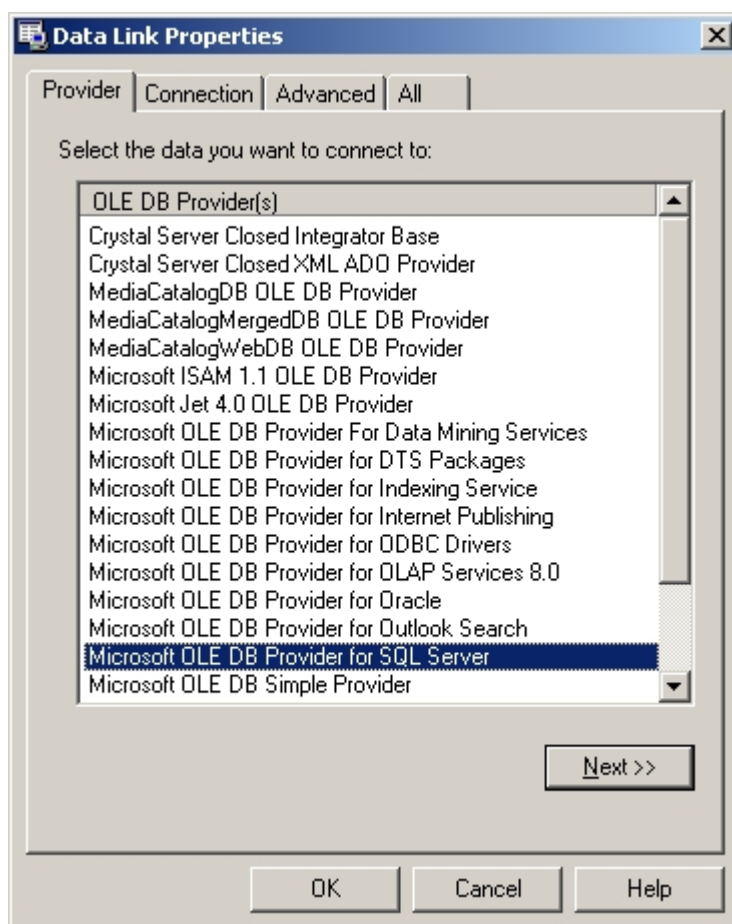
**Note:** You can run multiple Server applications on one physical server, but the port numbers must be unique for each instance.

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## Setting Up the Database Connection

The application uses a Universal Definition Language (UDL) file to store the database connection information. This is located in the applications installation directory. The Server application, by default, will not have this information and will require setup before the server can run. To set up the database connection, follow the instructions below:

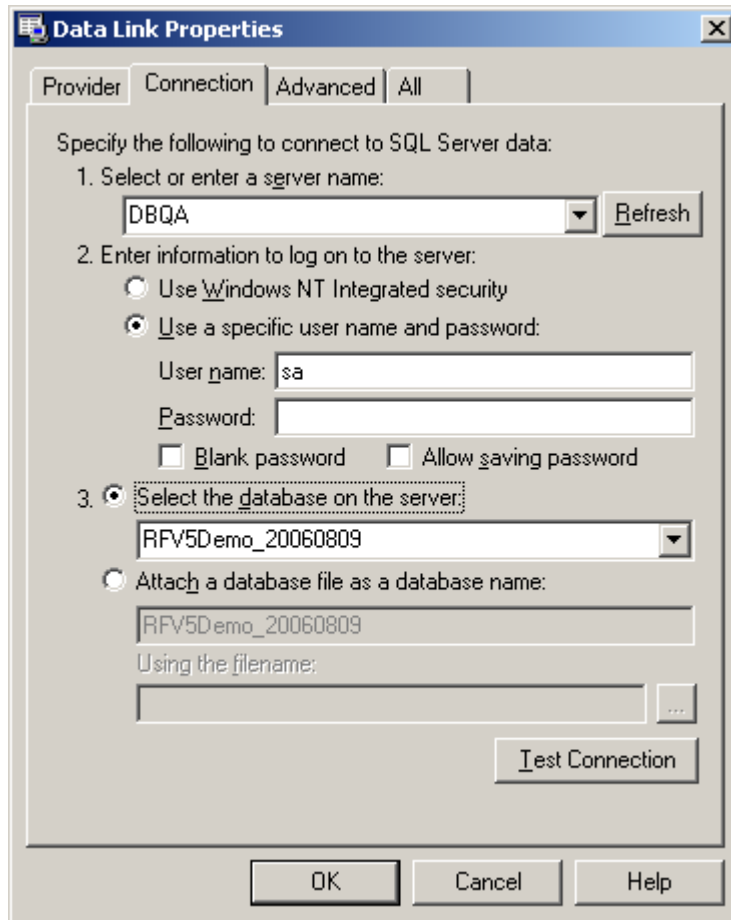
1. Navigate to the Server installation folder (for example, *C:\Program Files\Oracle Retail\ISSC\ISSC Server Service*) and double click on the *RFServer.udl* file. The **Data Link Properties** window appears.
2. Select the database provider for the database you have installed.
  - a. For an Oracle database this will be **Oracle Provider for OLE D**. Click **Next**. The **Connection** tab appears.
  - b. For a SQL database this will be **Microsoft OLE DB Provider for SQL Server**. Click **Next**. The **Connection** tab appears.



**Figure 7-6: Connection Tab on the Provider Window**

3. Click **Next**.
4. On the **Connection** tab, set the following:

- a. In **Select or enter a server name** field, select or type the database server ID as the data source name.
- b. In the **Enter information to log on to the server** section,
  - Select the **Use Windows NT Integrated security** option, if you are using Windows security privileges
  - Select the **Use a specific user name and password** option and enter the relevant user name and password, if you are using the database server security privileges.
- c. Select the database on the server, and click **Test Connection**.  
If database connection was successful, a “Test Connection Succeeded” message appears. In the event of failure check the credentials and connection settings with your database administrator.



**Figure 7-7: Connection Tab on the Data Link Properties Window**

5. To complete the setup, click **OK**.

## Configuring the Service

The In-Store Space Collaboration service, by default, installs with a local system account log on, with automatic start. If a domain user account is preferable, this can be configured by following the steps described in this section. Before you proceed, you must configure the UDL (see [Setting Up the Database Connection](#)) to use Windows NT Integrated security. The Service log on **must** be configured to a domain user account that

has permission to connect to the server that holds the application database. To configure this service:

1. From the **Start** menu, select **Run**.

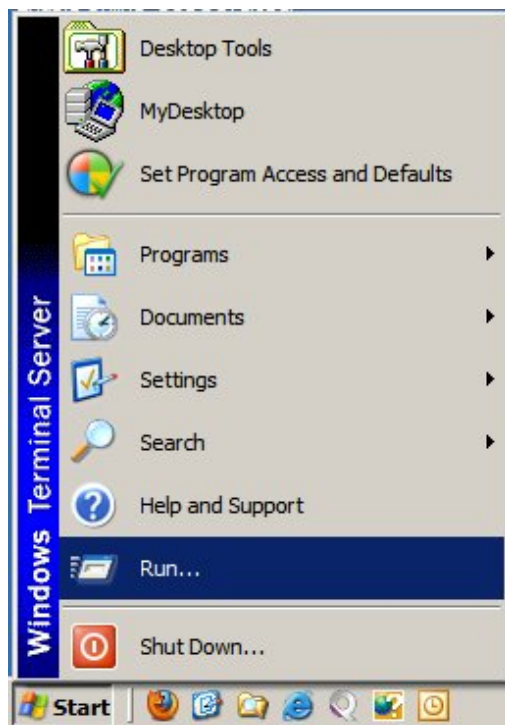


Figure 7-8: Run Option from the Start Menu

2. Type **services.msc** in the **Run** window and click **OK**. The **Services** window appears.

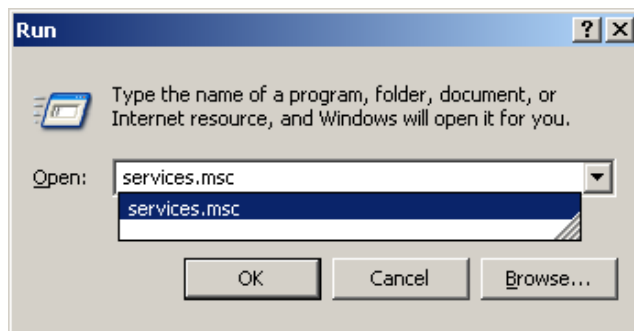
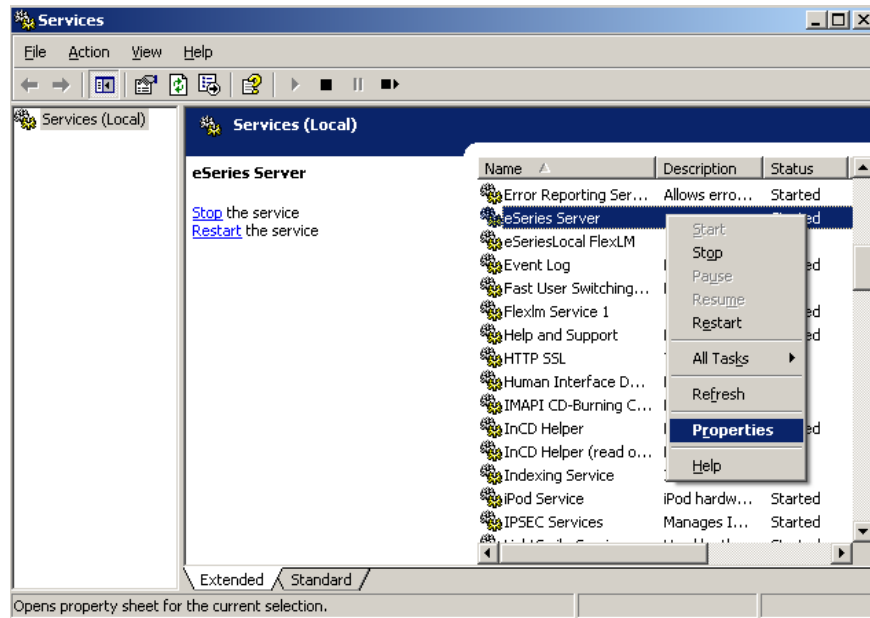


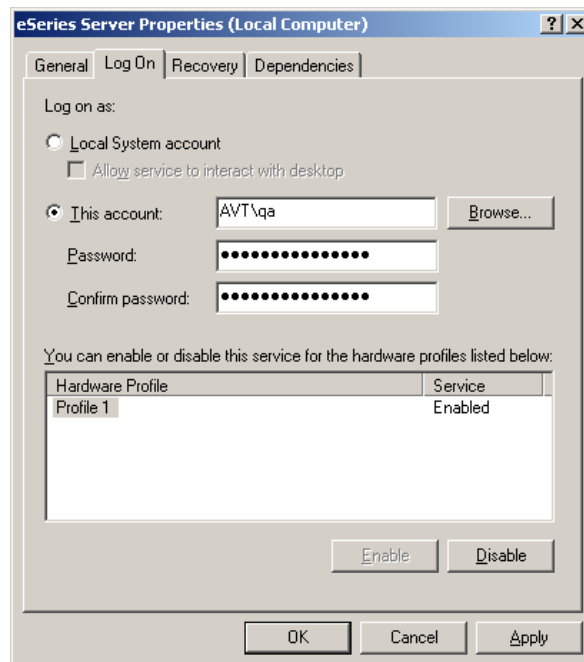
Figure 7-9: Run Window

3. Locate **eSeries Server** in the list of services and select **Properties** from the right-click menu.



**Figure 7-10: Properties Option in the Services Window**

4. On the **Log On** tab, select the **This account** radio button & enter a domain user name & password. You can also click **Browse** to navigate to a user.



**Figure 7-11: Log On Tab**

5. Confirm this configuration and click **OK**.
6. For the changes to take effect, restart the service.

If a Local System account log on is required at a later stage, repeat these steps selecting the **Local System account** option on the **Log On** tab.



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# Installing the In-Store Space Collaboration Client

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**Note:** Installation of the In-Store Space Collaboration (ISSC) Client is optional. It should only be installed if you are installing the In-Store Space Collaboration (ISSC) application. In-Store Space Collaboration (ISSC) cannot be used without Macro Space Management being installed.

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This chapter describes how you can install and configure the In-Store Space Collaboration client application. It includes the following sections:

- [Before You Begin](#)
- [Firewall Considerations](#)
- [Installing the In-Store Space Collaboration Client](#)
- [Setting Up the In-Store Space Collaboration Client](#)

## Before You Begin

### Previous Installation

If a previous version of In-Store Space Collaboration Client exists on the target machine, you must back up the data and uninstall the application before installing the current version. For more information, see [Removing Previous Versions of the Software](#).

### Security Advisories

#### TCP/IP

The client will need a communications (TCP/IP) port to be configured to allow the Client application to communicate to the Server application. This port is configurable, see [Configuration of the Server application's port](#). If the Server or any of the client machines have firewalls installed these will need to be configured to allow access for the specified port number. See your network administrators for advice on doing this.

#### User access rights

When installing the Client application the user must have Administration rights for the local machine.

### Firewall Considerations

If your computer has a Firewall configured, you may need to set the firewall to allow In-Store Space Collaboration to communicate over the Internet. For more information, see your Network Administrator.

## Installing the In-Store Space Collaboration Client

To install the Client application:

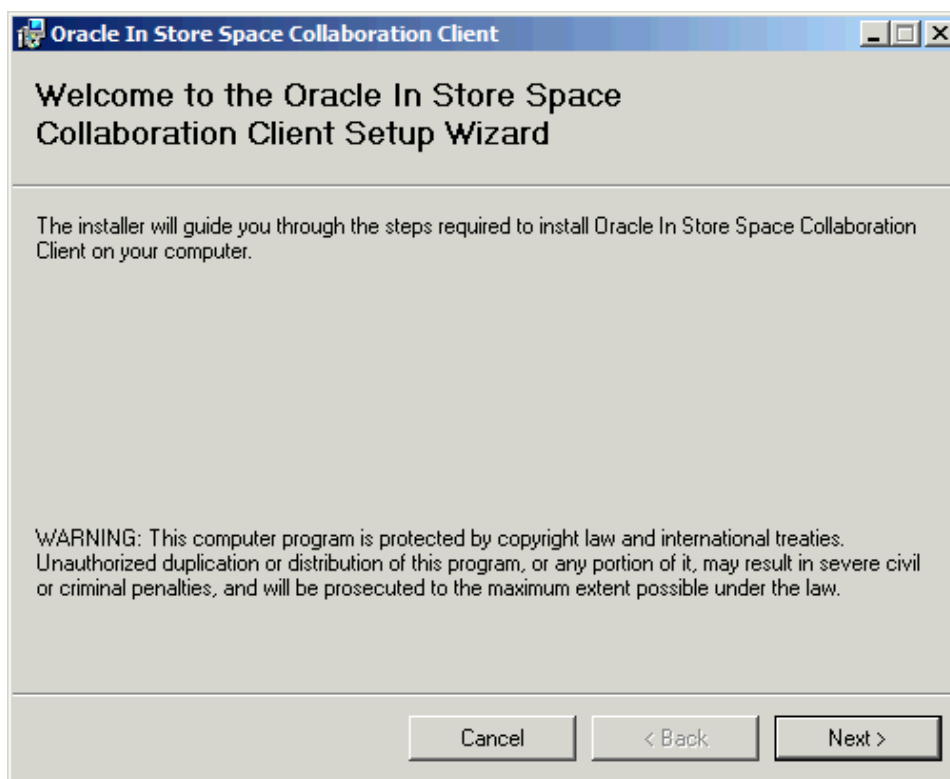
1. If the Client application has been delivered in a compressed file format, for example, WinZip, extract the installation files to a temporary folder that can be accessed by the user.

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**Note:** It is recommended that this folder is on a network server machine so that all target Client machines can access the installation files.

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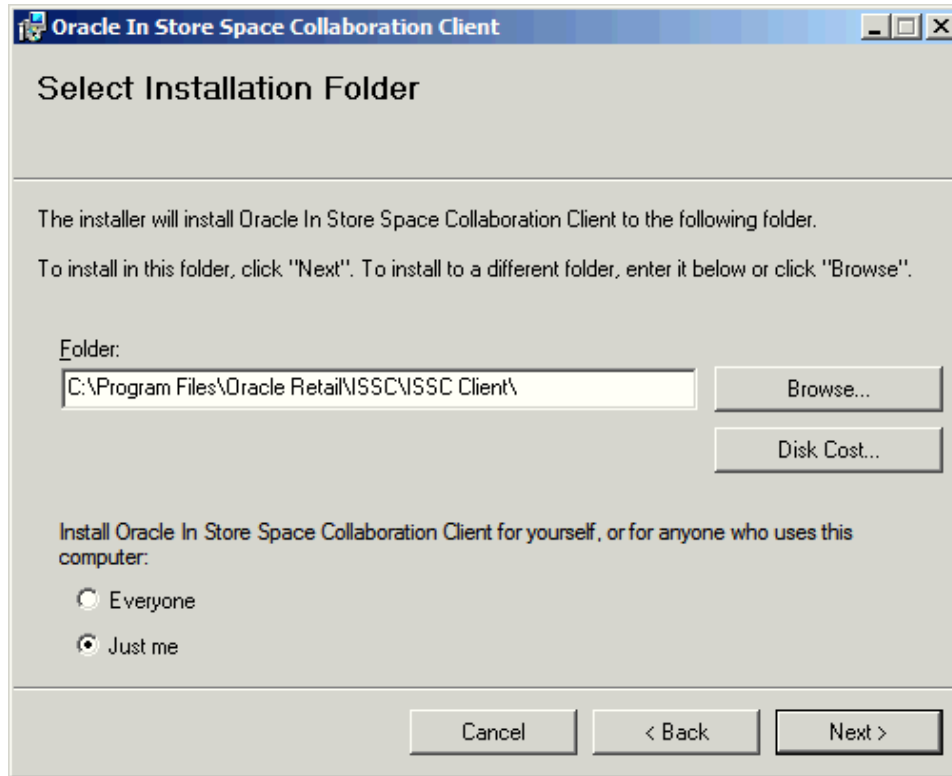
2. Navigate to the location where the installation files are located and double-click the **AVT.Setup.ClientSetup.msi** file. The installation wizard starts.



**Figure 8-1: Welcome Screen**

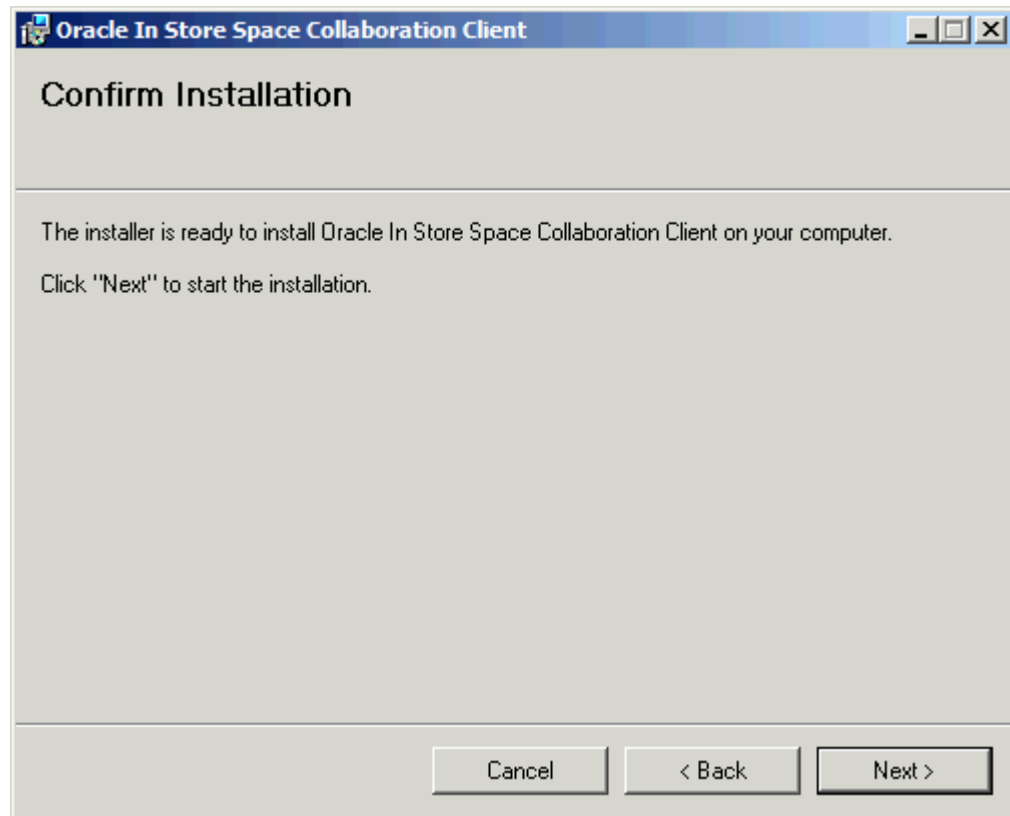
3. On the **Welcome** screen, click **Next**. The **Select Installation Folder** screen appears.





**Figure 8-2: Select Installation Folder Screen**

4. On the **Select Installation Folder** screen, select the installation location.
5. If you are logged into the workstation as an administrator and you want other users to be allowed to use the application, select the **Everyone** option, and then click **Next**. The **Confirm Installation** screen appears.



**Figure 8-3: Confirm Installation Screen**

6. On the **Confirm Installation** screen, click **Next** to start the installation. The installation screen appears showing the progress of the installation.

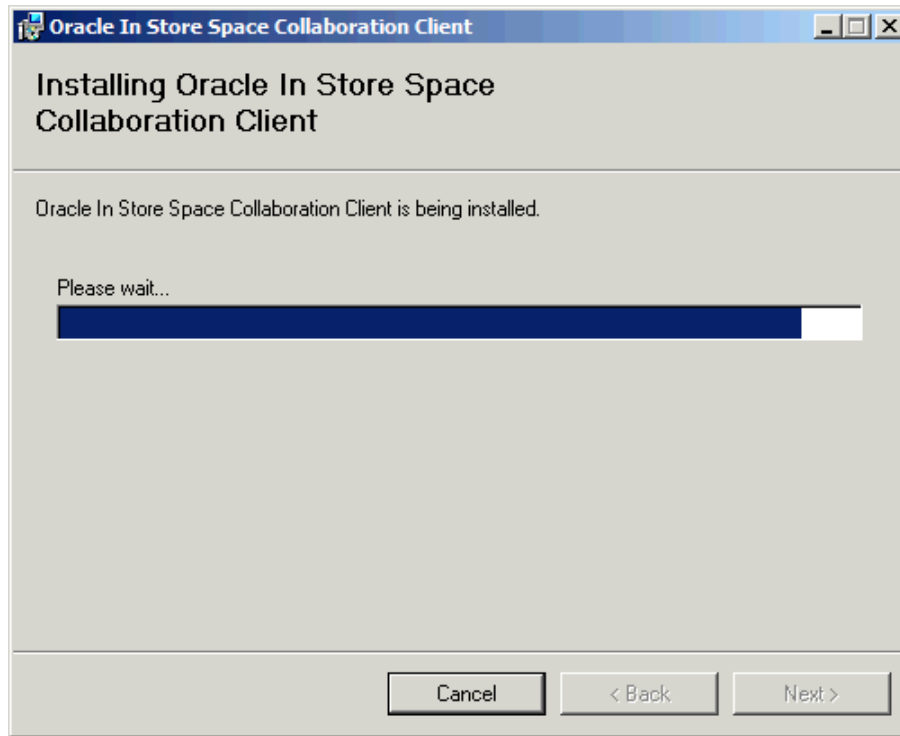


Figure 8-4: Installing Oracle In-Store Space Collaboration Client Screen

7. Once the installation has finished the **Installation Complete** window appears. Click **Close**.

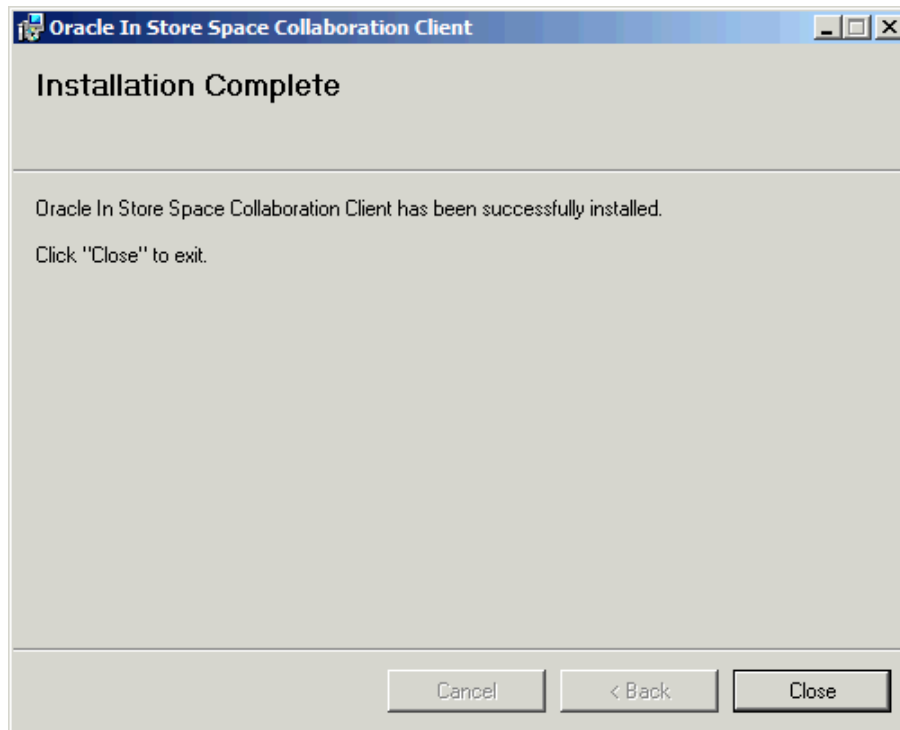


Figure 8-5: Installation Complete Screen

## Setting Up the In-Store Space Collaboration Client

The configuration of the client application is controlled by a file with the file extension INI in the installation folder. Navigate to the installation folder and open the RFClient.INI file, using a text editor such as Notepad.exe. The following is an example of the contents of the file:

```
[CONNECTION]
IPADDR=192.168.10.73:1234
--IPADDR=MACHINENAME:PORTNUMBER
LOCALPORT=1234
MONITOR=9100

[SETTINGS]
--STORE=1111
```

Update the *IPADDR* parameter to point to the host name or IP address of the machine where the Server application is installed followed by a colon and the port number. The port number must be set to the same number that has been set in the RFServer.INI file on the machine where the Server application is installed.

In the [SETTINGS] section, the *STORE* parameter is the default store number in the store hierarchical tree that opens when the Client application is launched. This can be set to any Store Number in an existing store hierarchy, but cannot be configured at this stage if the application is being installed for the first time.

---

**Note:** For existing store hierarchies, other stores can still be accessed. By specifying a particular store in the RFClient.INI file, the store hierarchy will open by default at this store. This saves time that is otherwise spent navigating to its location in a large store hierarchy

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For the changes to take effect, you must restart the Client application each time these settings are changed.

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# Installing the In-Store Space Collaboration Help

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**Note:** Installation of the In-Store Space Collaboration (ISSC) Help is optional. It should only be installed if you are installing the In-Store Space Collaboration application. In-Store Space Collaboration cannot be used without Macro Space Management being installed.

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This chapter describes how you can install and configure the Online Help. The Help application contains a set of help files that can be installed either locally or remotely to the In-Store Space Collaboration (ISSC) client, with the client itself calling the file when the user clicks the Help button.

This chapter includes the following sections:

- [Before You Begin](#)
- [Windows Firewall Consideration](#)
- [Installing the Online Help](#)
- [Setting Up the In-Store Space Collaboration Help](#)

## Before You Begin

The Help application installs the In-Store Space Collaboration help file catalogue which is called by the In-Store Space Collaboration client (the Client application).

## Previous Installation

If a previous version of In-Store Space Collaboration Help exists on the target machine, you must back up the data and uninstall the application before installing the current version. For more information, see [Removing Previous Versions of the Software](#).

## Third Party Software Requirements

The application requires the following applications to run as expected.

- .Net Framework 2.0
- Internet Explorer 6 or above (configured to accept Active X content)

## Security Advisories

### User Access Rights

When installing the Help application you must have administrative rights for the local machine. If installing on a central networked machine, the In-Store Space Collaboration folder that the Help application creates when installing, must be configured to allow access from all client systems. For example, if the Help is installed on a server machine and the default installation path (*C:\Program Files\Oracle Retail\ISSC\ISSC Help*) was accepted; the folder will need to be shared on the server machine with read permissions. This ensures that every client system can access the help file in this folder.

## Database Permissions

If the Help application is installed on a networked machine, it will be necessary to update the path where the Client application searches for the help file in the application database. Database read/write permissions will therefore be required to update the table where this path is stored to be able to achieve this.

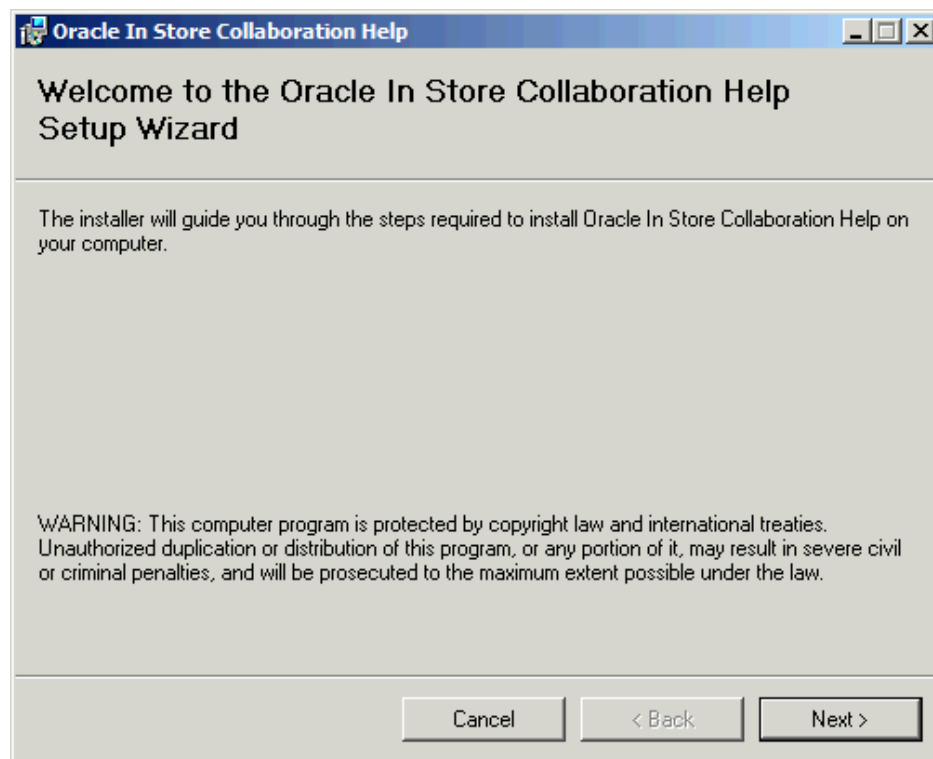
## Windows Firewall Consideration

If your computer has a Windows Firewall configured, you may need to set the firewall to allow In-Store Space Collaboration. For more information, see your Network Administrator.

## Installing the Online Help

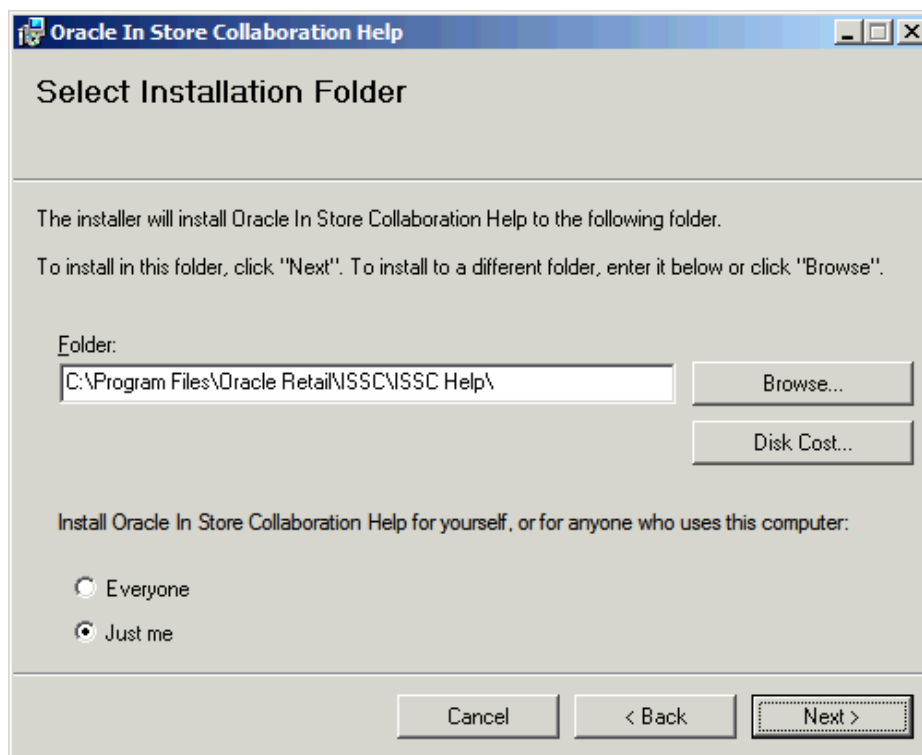
To install the Help application:

1. If upgrading from a previous version, you must remove the Help application from the system. For more information, see [Removing Previous Versions of the Software](#).
2. If the Help application has been delivered in a compressed file format, for example, WinZip, extract the installation files to a temporary folder that can be accessed by the user.
3. Navigate to the location where the installation file is located and double click the **AVT.Setup.eSeriesHelp.msi** setup file. The installation wizard will then start.



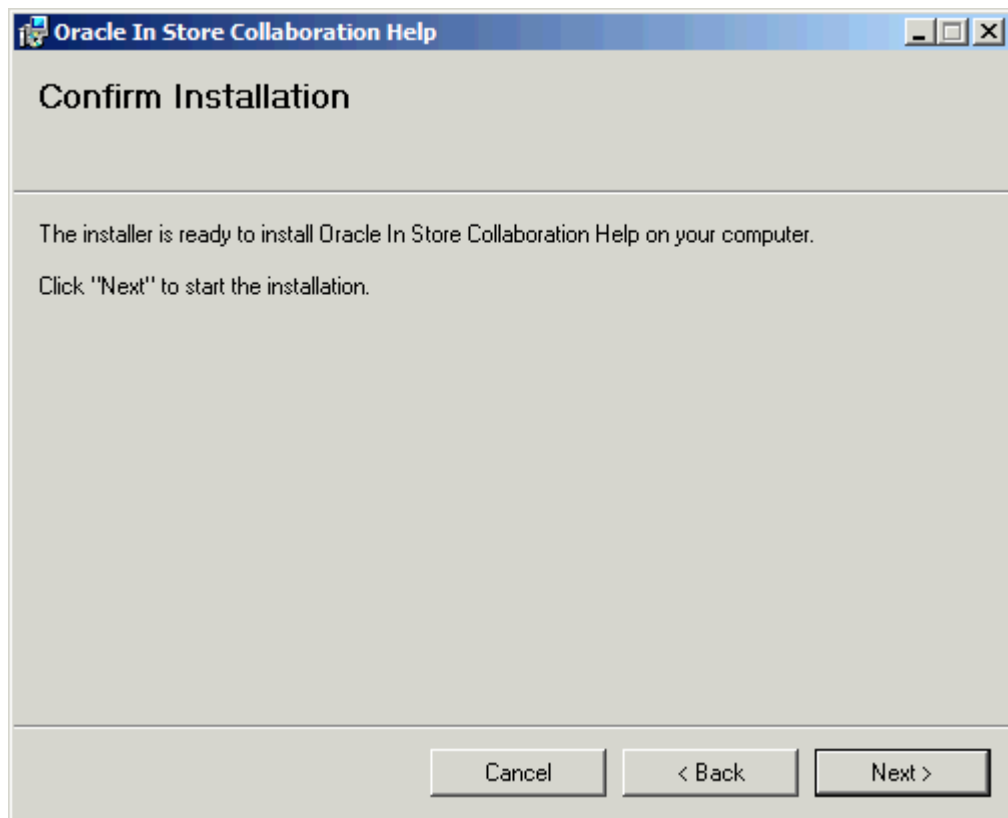
**Figure 9-1: Welcome Screen**

4. On the **Welcome** screen, click **Next**. The **Select Installation Folder** window appears.



**Figure 9-2: Select Installation Folder Screen**

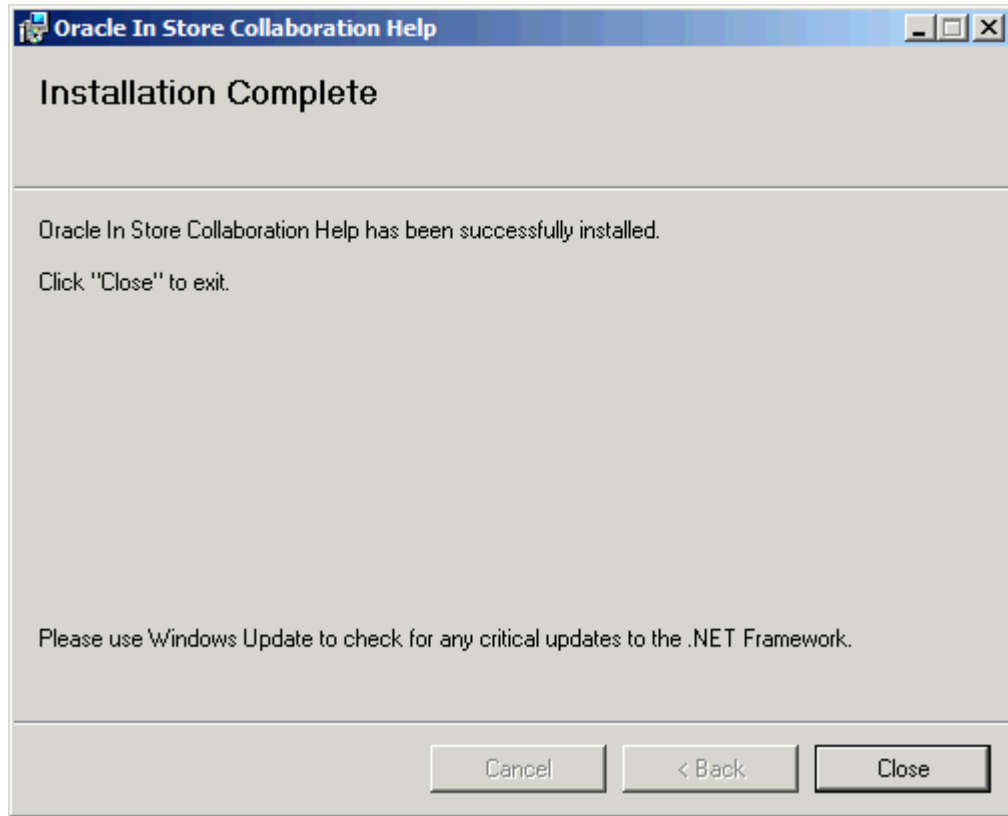
5. On the **Select Installation Folder** screen, select the installation location. Note the path to the location.
6. If you are logged into the workstation as an administrator and you want other users to be allowed to use the application, select the **Everyone** option, and then click **Next**. The **Confirm Installation** screen appears.



**Figure 9-3: Confirm Installation Screen**

7. On the **Confirm Installation** screen, click **Next** to start the installation. The installation screen appears showing the progress of the installation.
8. Once the installation has finished the **Installation Complete** window appears. Click **Close**.





**Figure 9-4: Installation Complete Screen**

9. Restart the system and proceed with configuring the Macro Space Management database.

## Setting Up the In-Store Space Collaboration Help

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**Note:** This section is appropriate for the Help Files installed from Patch 8806758: Oracle Retail In-Store Space Collaboration: Patch Service Pack 1 downloadable from My Oracle Support - <https://support.oracle.com>

---

Once installed, the Help application creates a number of sub-folders and files in the installation directory (if the default installation path is accepted, this path will be *C:\Program Files\Oracle Retail\ISSC\ISSC Help*). The *ISSC\_Help\_File.htm* file in the root of the installation path acts as an index to the entire help system. This is the file that the Client application calls when the help button is pressed on In-Store Collaboration toolbar.

The location of the *ISSC\_Help\_File.htm* file is stored in the Macro Space Management database and by default is assumed to be that of the default installation path (*C:\Program Files\Oracle Retail\ISSC\ISSC Help*). In case the help is installed on location other than the default path, the default database settings must be changed to reflect the new location.

---

**Note:** Installation on a server machine is usually the most convenient place than having to install it alongside the Client application on each machine that hosts the Client.

---

Changing the help file path can be achieved as outlined in the steps below:

1. Locate the Macro Space Management database that the Server application UDL is pointing to, and connect to this database using a SQL editor. For more information on the UDL, see [Setting Up the Database Connection](#).
2. Run the following SQL query on the Macro Space Management database to show the current path that the Client application calls when the Help button is pressed:

```
SELECT SVR_VALUE FROM AVTTB_SYSTEM_VARIABLE
WHERE SVR_NAME = 'IN-STORE_HELPLOCATION';
```

3. Now, run the SQL query below to update the IN-STORE\_HELPLOCATION value to reflect that of the new help file path, but substitute the SVR\_VALUE of *C:\Program Files\Oracle Retail\ISSC\ISSC Help\ISSC\_Help\_File.htm* for that of the path where the *ISSC\_Help\_File.htm* has been installed. Note that if the help file location exists on a remote machine to the Client application then both UNC paths or a mapped drives are supported as part of the valid path name:

```
UPDATE AVTTB_SYSTEM_VARIABLE
SET SVR_VALUE = '\\Server\Path\Path\ISSC Help\ISSC_Help_File.htm'
WHERE SVR_NAME = 'IN-STORE_HELPLOCATION';
```

4. Run the SQL query shown in Step 2 again to verify that the IN-STORE\_HELPLOCATION system variable has been successfully updated
5. Once the help file location has been successfully updated, restart the In-Store Space Collaboration server for the Client applications to read the new *ISSC\_Help\_File.htm* path. This can be achieved by restarting the machine that holds the Server application or by restarting the In-Store Space Collaboration Server as described below:

- a. From the **Start** menu, open the Windows Run dialog by selecting **Run....**

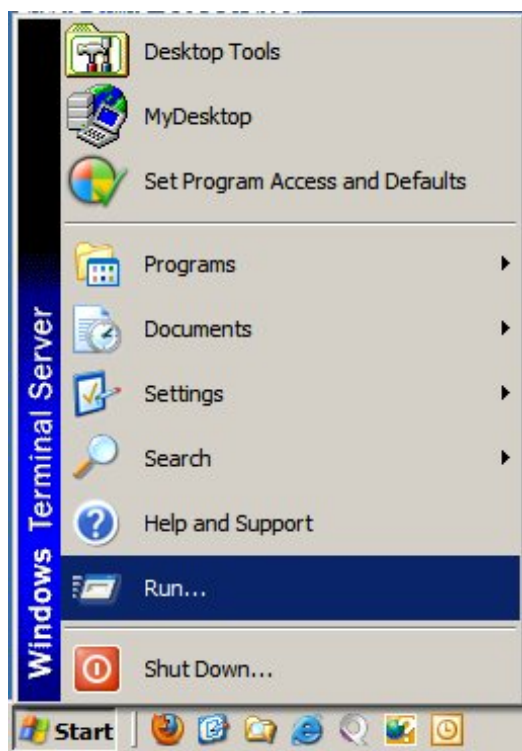


Figure 9-5: Windows Start Menu

- b. In the **Run** dialog, type **services.msc**, and press **OK**. The **Services** window appears.

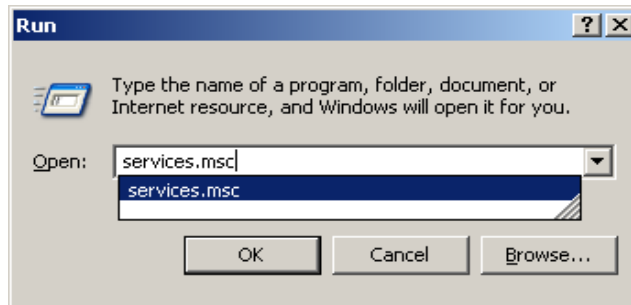


Figure 9-6: Run Window

- c. Select the **eSeries Server** entry in the **Services** window and click **Restart**.

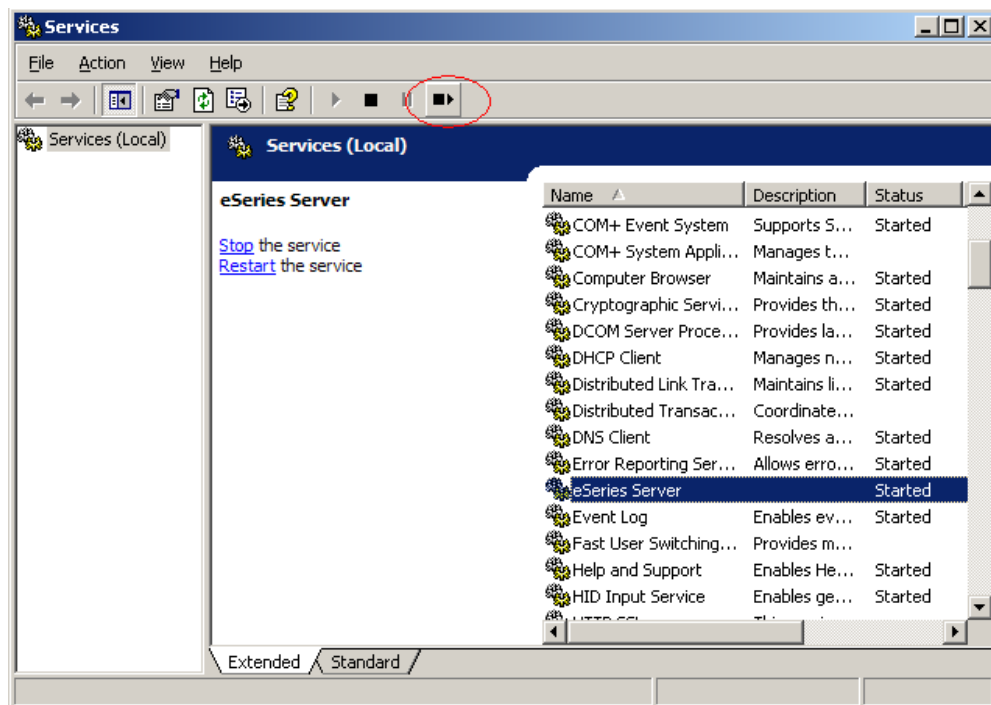


Figure 9-7: Services Window with the Restart Button Highlighted