

Oracle® Retail Macro Space Planning

Installation Guide

Release 13.3.1

E41868-01

July 2013

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Oracle Retail Macro Space Planning Installation Guide, Release 13.3.1

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Preface

The *Oracle Retail Macro space Planning Installation Guide* describes the requirements and procedures to install this Oracle Retail Product release.

It provides step-by-step instructions to install the Oracle Retail Macro Space Management and In-Store Space Collaboration applications, along with the required server-side components.

Audience

This User Guide is for users and administrators of Oracle Retail Macro Space Planning. This includes merchandisers, buyers, business analysts, and administrative personnel.

Documentation Accessibility

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Related Documents

For more information, see the following documents in the Oracle Retail Macro Space Management Release 13.3.1 documentation set:

- *Oracle Retail Macro Space Management Administration Module User Guide*
- *Oracle Retail Macro Space Management Administration Module Online Help*
- *Oracle Retail Macro Space Management Configuration Module User Guide*
- *Oracle Retail Macro Space Management Configuration Online Help*
- *Oracle Retail Macro Space Management Data Importer User Guide*
- *Oracle Retail Macro Space Management Data Importer Online Help*
- *Oracle Retail Macro Space Management Fixture Studio User Guide*

- *Oracle Retail Macro Space Management Fixture Studio Online Help*
- *Oracle Retail Macro Space Management Store Planning User Guide*
- *Oracle Retail Macro Space Management Store Planning Online Help*
- *Oracle Retail Macro Space Management Report Designer User Guide*
- *Oracle Retail Macro Space Management Report Designer Online Help*
- *Oracle Retail Macro Space Management Release Notes*
- *Oracle Retail Macro Space Planning Licensing Information*
- *Oracle Retail Macro Space Planning Data Model*

For more information on In-Store Space Collaboration see the following documents in the Oracle Retail In-Store Space Collaboration Release 13.3 documentation set:

- *Oracle Retail In-Store Space Collaboration User's Guide*
- *Oracle Retail In-Store Space Collaboration Online Help*
- *Oracle Retail In-Store Space Collaboration Release Notes*

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

Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 13.3) or a later patch release (for example, 13.3.1). If you are installing the base release or additional patches, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch releases can contain critical information related to the base release, as well as information about code changes since the base release.

Oracle Retail Documentation on the Oracle Technology Network

Documentation is packaged with each Oracle Retail product release. Oracle Retail product documentation is also available on the following Web site:

http://www.oracle.com/technology/documentation/oracle_retail.html

(Data Model documents are not available through Oracle Technology Network. These documents are packaged with released code, or you can obtain them through My Oracle Support.)

Documentation should be available on this Web site within a month after a product release.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Getting Started

The Macro Space Planning suite comprises two applications: Macro Space Management (MSM) and In-Store Space Collaboration (ISSC). These 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 *Oracle Retail Macro Space Planning Release Notes* and *Oracle Retail In-Store Space Collaboration 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 (MSP) family consists of two products:

- Macro Space Management
- In-Store Space Collaboration

MSM is the 'core' application and must be installed. ISSC 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 MSM, or both MSM and ISSC. Where there are differences between the two types of installation, alternative instructions have been provided.

Overview of Typical Infrastructures

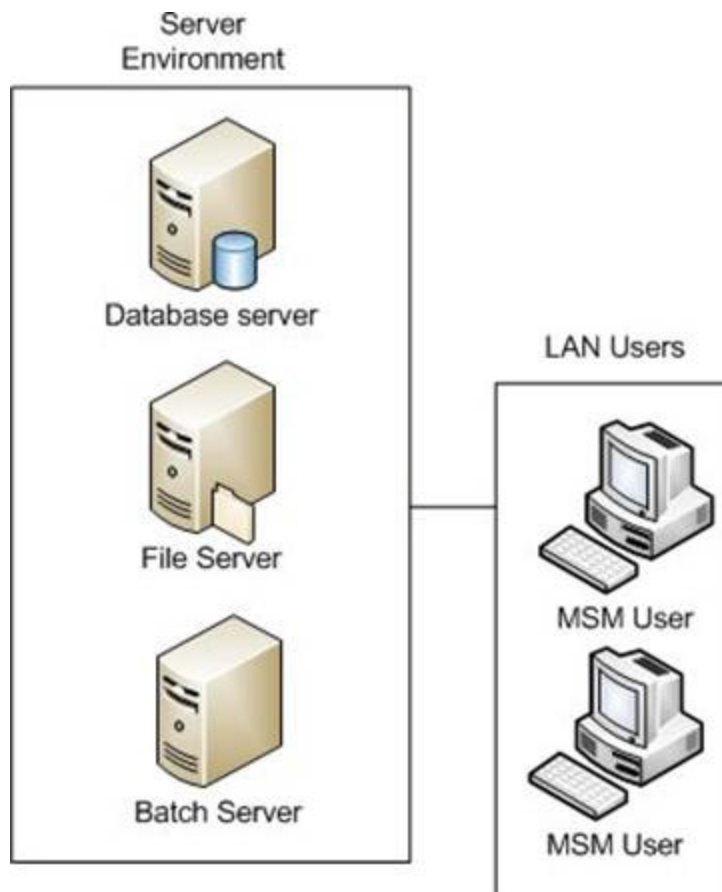
A typical infrastructure may contain several server configurations and multiple user work station environments. The infrastructure required will depend on whether users install just MSM, or whether they install both MSM and ISSC.

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

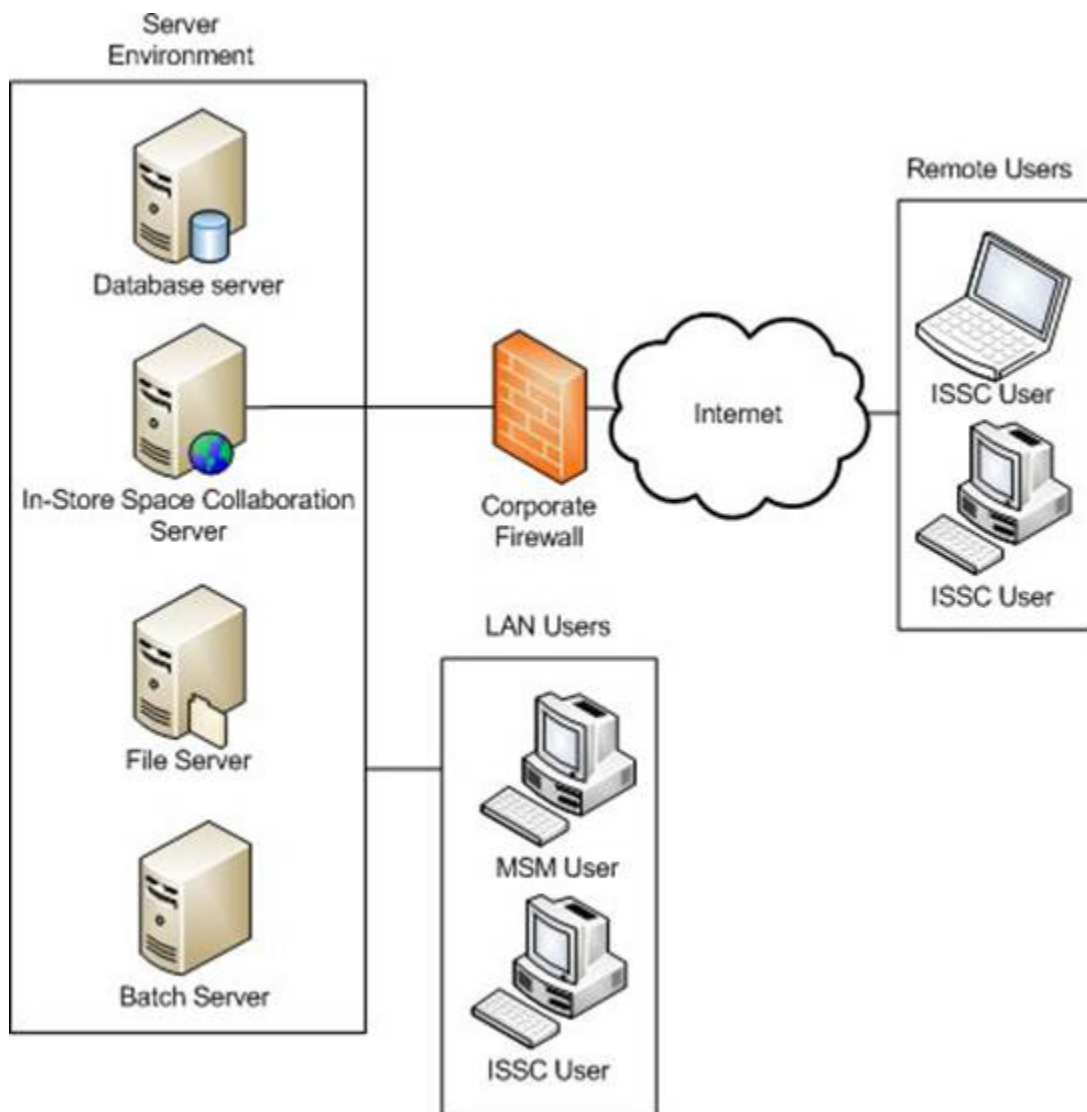
The environment for when both MSM and ISSC are installed is slightly more complex as it contains several server configurations and the multiple user workstation environments needed to support both internal (LAN) and external (internet enabled) clients for ISSC.

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

- Database Server
- ISSC Server
- File Server
- Batch Server
- LAN Client Workstation for both MSM and ISSC
- ISSC Client (Remote User) Workstation

Users may be grouped into two basic user types-LAN and Remote (Web-Enabled) Users. LAN users can be either MSM or ISSC users. The remote users are the ISSC clients.

Figure 1-2 Typical Infrastructure with MSM and ISSC Installed



MSM workstations can only be run over a LAN. ISSC 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 MSM/ISSC server or be located on an existing machine within the existing IT infrastructure.

About Macro Space Management Users

MSM 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.

Access to Macro Space Management is be controlled via MSM's own security system.

About In-Store Space Collaboration Users

ISSC Users may connect to the central application database either via a LAN or remotely via the internet. The client application installed on the workstation is configured to connect to the server application installed on a physical server; the server application controls security and all of the connections to the database.

The ISSC workstation 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 ISSC's own security system.

Note: The ISSC 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 ISSC Server application.

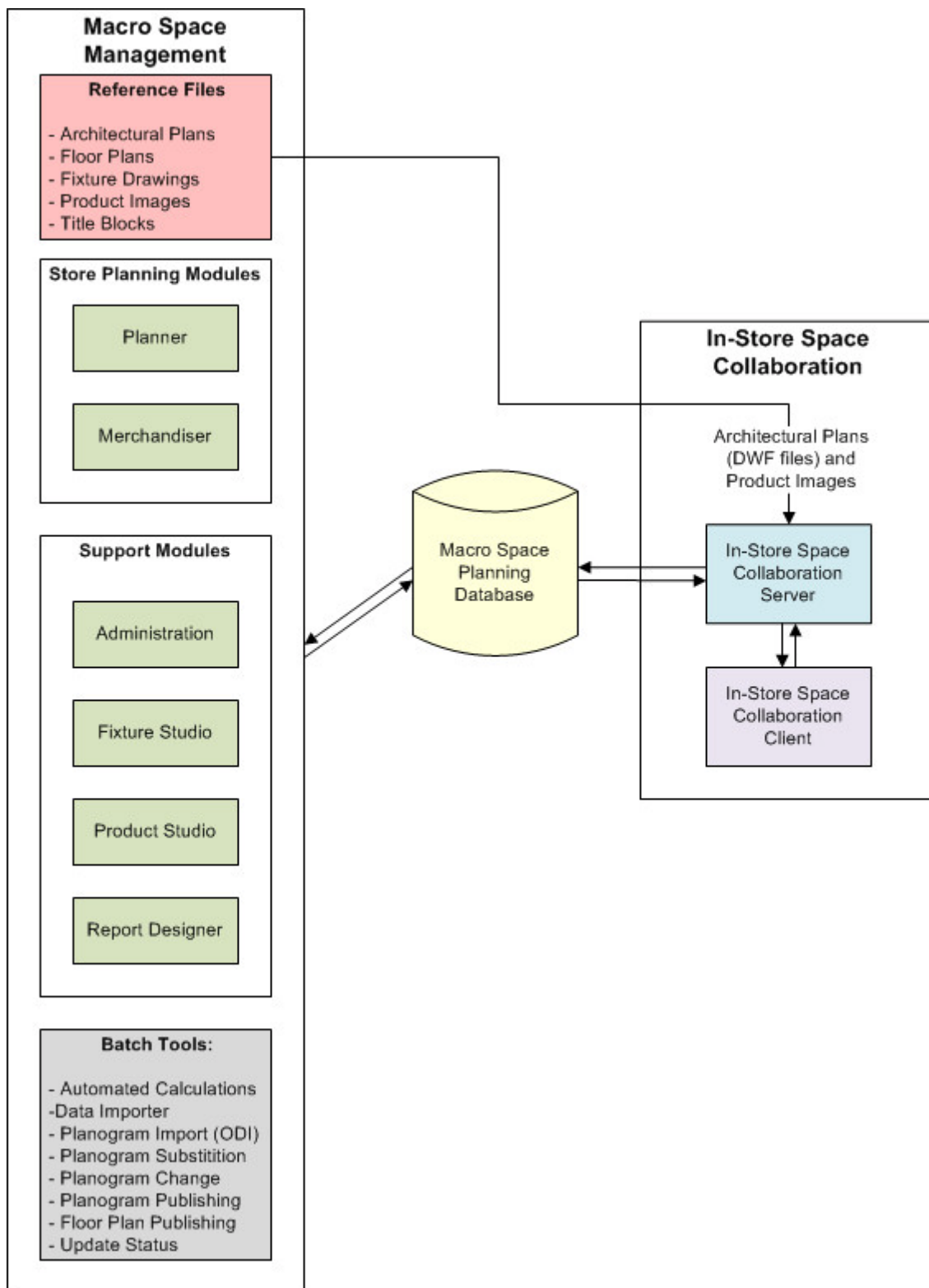
The ISSC and MSM applications share the same database. This allows ISSC users to open, edit and save store plans, with the modified data subsequently available to MSM users.

Software Architecture

The following diagram illustrates the major components of the MSP application suite.

Note: MSM is mandatory. ISSC 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 MSM and ISSC applications. Administration of the reference files is done via the MSM application.

The reference files include:

1. Architectural Plans in the form of DWG and DWF files
2. Floor 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 MSM application. The ISSC application server has an interface which allows it to use DWF files and product images.

Macro Space Management Store Planning Modules

The Planner and Merchandiser modules provide alternative ways to add, edit, delete and manage store plans. (The Planner Module provides an AutoCAD based 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 from and write to the reference files.

Macro Space Management Support Modules

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

- Administration Module — used to configure the global operation of the software
- Fixture Studio — used to maintain the fixtures, fittings and shelves placed in store plans
- Product Studio — used to maintain the product hierarchy

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

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

Macro Space Management Batch Tools

The MSM Batch tools are installed on the Batch Service server. This can be done by installing an instance of the entire MSM application onto 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 MSM system, such as overnight. Batch operations include:

- Import of data from third party databases via the Data Importer module
- Import of planogram information via Oracle Data Integrator (ODI)

- Carrying out planogram substitution and revision change
- Automated publishing of floor plans and planograms
- Updating the statuses of stores and floor plans

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

In-Store Space Collaboration Server Application

The ISSC server application is normally installed on the ISSC server machine. It authenticates ISSC users when they log-in directly with the MSM database.

The server application allows the use of specific types of reference files within ISSC. These are:

- DWF files for Architectural Plans
- Product images for Schematic Previews of Planograms

The server application also allows data to be passed to and from the database when the ISSC client applications open, edit and save store plans.

In-Store Space Collaboration Server Log Information

Log information generated by the ISSC server is stored in the MSP database. If the database is not available messages will be stored in the Windows Event Viewer.

In-Store Space Collaboration Client Application

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

The ISSC application may either be installed on a LAN or may be remote, connecting via the Internet.

Note: The ISSC 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 MSM, 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 MSM for production, you must perform the following tasks in a sequence:

Table 1–1 Steps for Installing Macro Space Management

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.	MSM 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 MSM installation software, set up your installation, and run the installer. For more information, see Installing Macro Space Management .
5.	It is also possible to install part of the MSM application to run batch operations. For more information see Installing MSM Batch Tools .

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

This guide explains how you install and set up MSM and ISSC, 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 MSM and ISSC for production, you must perform the following tasks in a sequence:

Table 1–2 Steps for Installing Macro Space Management and In-Store Space Collaboration

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.	MSM 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 MSM installation software, set up your installation, and run the installer. For more information, see Installing Macro Space Management .
5.	Access the ISSC server installation software and run the installer. For more information, see Installing the ISSC Server .

Table 1–2 (Cont.) Steps for Installing Macro Space Management and In-Store Space Collaboration

Step	Description
6.	Access the ISSC client installation software and run the installer. For more information, see Installing the ISSC Client .
7.	Install the ISSC Online Help. For more information, see Installing the ISSC Help .

Reports

Reporting within the Oracle MSM and ISSC applications is provided in several ways:

- Quick Reports, which generally show information pertinent to the currently open floor plan
- KPI Reports, which use Hot-spotting to color objects within the floor plan
- BI Publisher Reports which are able to display any information within the MSM database.

A set of standard reports are provided for each Quick Reports and KPI Reports. Users are not limited to these reports and can develop their own.

Note: Additional Quick Reports can be configured within the AVTTB_Custom_SQL table. Additional KPI's can be configured by creating new SQL statements or additional Stored Procedures in the database. (See the *Data Model* and *Administration Module User Guide* for more information.)

The BI Publisher application must be installed before the user can make configure BI Publisher reports.

Note: The license for MSM and ISSC does not include a license to run BI Publisher.

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>

Planning Your Installation

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 Planning Performance](#)
- [Supported Configurations and Requirements](#)

Note: The planning process must take into account whether MSM alone is to be installed, or whether both MSM and ISSC are to be installed

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 to be 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 (if required).
- Planning the data security policies.
- Designing the backup and recovery strategies.

Planning for Optimal Macro Space Planning Performance

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

- Determine the business processes required to efficiently run your retail chain. Establish how these can be implemented in MSP to assist in improving the profitability of the retail outlets.
- Determine the metrics required to monitor the performance of the retail chain. Establish how these metrics can be measured and reported.
- Determine where and when the batch processes will operate.
- Determine where and when any data import processes will operate.
- Determine how information (such as floor plans, planogram designs and reports) will be disseminated to store and senior management.

Careful planning of how to best install and use Macro Space Planning will enable users to get the best out of the application.

Supported Configurations and Requirements

This section describes the hardware and network requirements for the MSM and ISSC applications, and includes the following topics:

- AutoCAD Requirements
- Server Requirements
- Macro Space Management User System Requirements
- In-Store Space Collaboration User System Requirements

AutoCAD Requirements

The only versions of AutoCAD fully approved for Macro Space Management are AutoCAD Design Suite Standard 2010 or 2011. Other versions of AutoCAD (for example Map 3D) may work, but this should be verified by the client prior to full roll out of the installation.

Note: Please see the AutoCAD website for the latest installation information and patches.

Server Requirements

The specific server requirements will depend on the results of the Implementation Capacity Planning. For a small implementation, all requirements could be met using a single server. For larger systems, a number of dedicated servers could be used, including Database, ISSC, File and Batch Servers.

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.

The two most critical requirements are for the database and In-Store Space Collaboration servers. Minimum requirements are given below:

Database Server

The Database Server Requirements are as follows:

Table 2–1 Database Server Requirements

	Requirement
Software Requirement	Oracle Database 11g Release 2 (11.2)

ISSC Application Server

The ISSC Application Server requirements are as follows:

Table 2–2 ISSC Application Server Requirements

	Requirement
Operating System Requirement	Windows XP Professional SP3 Windows Server 2003 R2 (32-bit or 64-bit) Windows Server 2008 R2 (32-bit or 64-bit)
Software Requirement	Oracle Database Client 11g Release 2 (11.2) Oracle Data Provider for .NET 11.2

Batch Server

The requirements for the batch server are as follows:

Table 2–3 Macro Space Management User System Requirement

	Requirement
Hardware	Intel® Pentium® 4 or AMD Athlon® dual-core processor, 1.6 GHz or higher with SSE2 technology Minimum 2GB RAM
Operating System Requirement	Windows XP Service Pack 3 Windows Server 2003 R2 Windows Server 2008 R2

Table 2–3 (Cont.) Macro Space Management User System Requirement

	Requirement
General Software requirements	Microsoft .NET Framework 3.5
Database software Requirements (requires one of)	Oracle Database 11g Release 2 Client (11.2) Oracle Data Provider for .NET 11.2 or higher.
Free Space disk Requirements	A minimum of 1 GB is recommended.

Note: Batch processes involving floor plan publishing and floor plan processing can only be carried out on a machine with a full MSM installation.

File Server

The files on the file server must be accessible to the LAN Client Workstation and ISSC Server machine.

LAN Client Workstation Requirements

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

Table 2–4 Macro Space Management User System Requirement

	Requirement
Hardware (These requirements are primarily concerned by the need to operate AutoCAD.)	Intel® Pentium® 4 or AMD Athlon® dual-core processor; 1.6 GHz or higher with SSE2 technology Minimum 2GB RAM 1024 x 768 display resolution with true color 256 Graphics Accelerator card for MSM Merchandiser users
Operating System Requirement	Windows XP Service Pack 3 Windows 7 32-bit Service Pack 1
General Software requirements	Any one of AutoCAD 2010, 2011 Microsoft .NET Framework 3.5 ODI (Required for importing Planograms from third party sources)
Database software Requirements (requires one of)	Oracle Database 11g Release 2 Client (11.2) Oracle Data Provider for .NET 11.2 or higher.
Free Space disk Requirements	A minimum of 1 GB is recommended.

Note: If installing MSM on a Windows 7 32-bit installation, users will require Administrators privileges to run the application.

In-Store Space Collaboration User System Requirements

These are the requirements for a user just running the In-Store Space Collaboration application. These are significantly less than those for the Macro Space Management application.

Table 2–5 In-Store Space Collaboration Requirements

	Requirement
Hardware	Minimum 1.0 GHz processor clock speed Minimum 1 GB RAM 1024 x 768 VGA video display with 256 colors
Operating System Requirements	Windows XP Service Pack 3 Windows 7 (32-bit or 64-bit).
Software Requirements	Microsoft .Net Framework 3.5
Free Disk Space	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.

Setting Up the Database

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

Note: The steps to set up the database are identical irrespective of whether just MSM or both MSM and ISSC are to be installed.

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

User Names and Passwords

When installing the Macro Space Planning application (Macro Space Management and In-Store Space Collaboration) it should be borne in mind that there are two types of user name and password required.

- The User Name and Password required to access the Oracle database.
- The User Name and Password required to access the Macro Space Planning application.

The user name and password required for this section is the User Name and Password for the Oracle database.

Installing the Database Software

The application requires the installation of the following Oracle database version:

- Oracle® 11g Database Release 2 (11.2)

Ensure that the Oracle Database software is installed along with the Natively Compiled Java Libraries. For more information, see the *Oracle Database Installation Guide, 11g Release 2 (11.2)* and *Oracle Database Companion CD Installation Guide, 11g Release 2 (11.2)*

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 Administrators Guide* for the version of the Oracle database installed.

Note: If using an Oracle database then the MSM client machines and the ISSC server must have Oracle Client and the pertinent Oracle Data Provider (ODP) 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 Database Control. This section describes how you 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.

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

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. Two template databases are supplied: metric and imperial. The Metric and Imperial versions of the Template Database have different values for objects such as system variables, tolerances and block parameters.

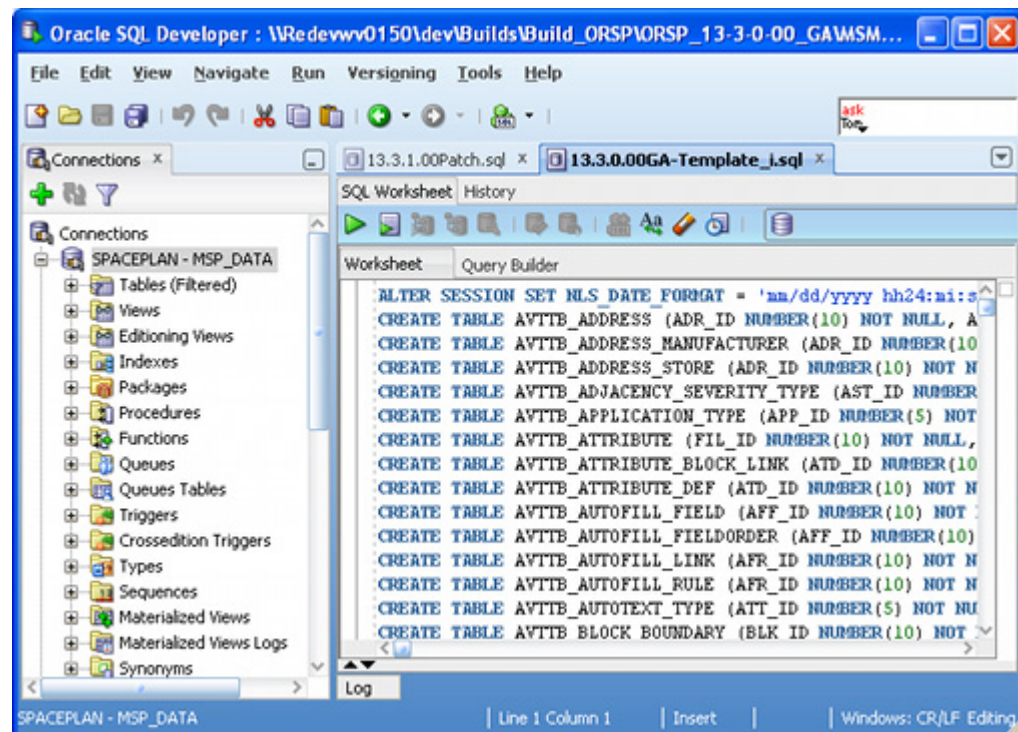
The person tasked with installing the Template Database must select the version appropriate to the installation.

The Template Database is supplied in the form of a 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.

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.

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.

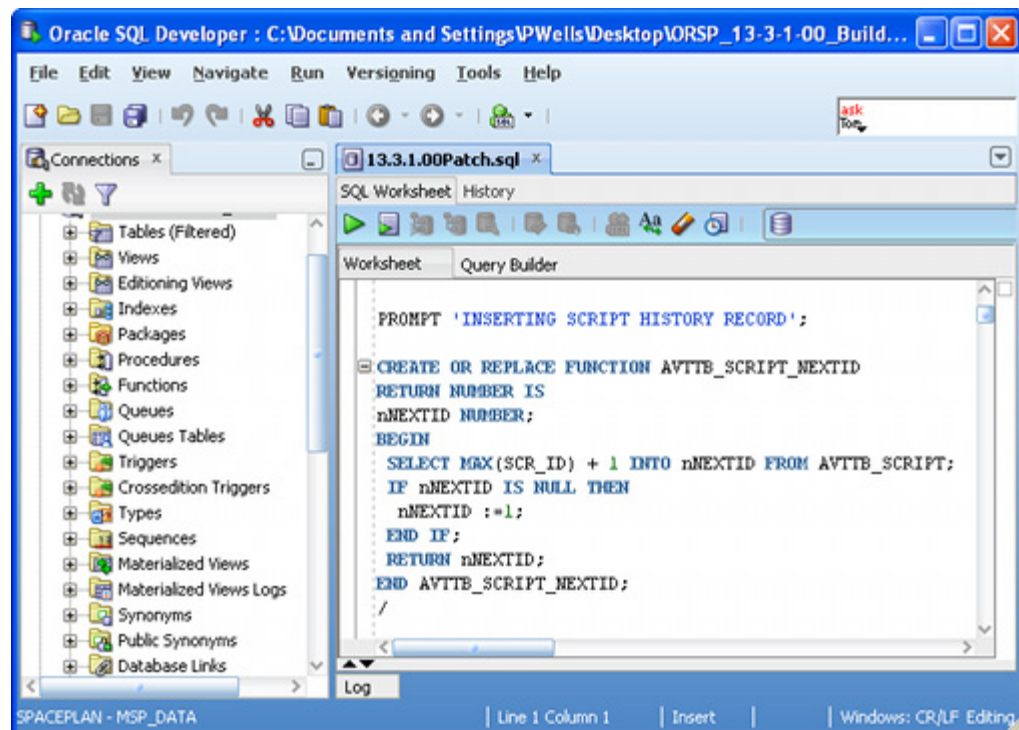
- Some upgrade scripts are specifically marked for either imperial or metric databases. The appropriate type of upgrade script should be selected for the database to be upgraded. These upgrade scripts modify general information in the database and should not affect the subsequent functioning of the application.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

Note: If necessary contact Oracle Technical Support for assistance.

To use the upgrade scripts:

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



Setting Up AutoCAD

MSM 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 MSM. It contains the following sections:

- [Installing AutoCAD](#)
- [Upgrading to Later Versions of AutoCAD](#)
- [Troubleshooting AutoCAD Installation](#)
- [Creating a Registry Entry](#)
- [AutoCAD Error Messages after Macro Space Management has been Installed](#)
- [Autodesk VBA Support](#)
- [AutoCAD Workspaces](#)

Installing AutoCAD

Install the Autodesk AutoCAD referring to the documentation provided by AutoDesk for the version of AutoCAD you have chosen to install. Based on your business requirement, you may choose to install in a standalone or a networked mode.

- If installed in 'standalone' mode, each installation of AutoCAD will require an individual license.
- If installed as a network installation, license information is held on a license server and individual AutoCAD installations may be used up to the limit of the licenses held on the server.

Note: When installing AutoCAD, it is strongly recommended that the installer visit the Autodesk website and install any pertinent service packs. These are issued at intervals and correct known issues.

Considerations for a Network-based Installation

If it is decided to carry out a network install, 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.

Note: See the AutoCAD documentation for full information on installing AutoCAD.

AutoCAD Components

During installation of AutoCAD, it is possible to customize the components that will be installed. The following AutoCAD components are mandatory for MSM to function correctly:

- VBA Support

Note: AutoCAD versions 2010 and 2011 do not include VBA Support in their base installation package. A separate installer package can be obtained directly from AutoDesk for enabling VBA Support. This **MUST** be installed after AutoCAD is installed and before MSM is installed. If VBA Support is not installed, functionality in the Planner module will not operate correctly.

- Reference Manager

The following AutoCAD components are recommended for use with MSM:

- Fonts

None of the remaining AutoCAD components are required by MSM and so can be removed from the AutoCAD installation if desired.

Upgrading to Later Versions of AutoCAD

To upgrade to a later version of AutoCAD:

1. Uninstall Macro Space Management, patch first and then the base version. For more information, see [Removing Previous Versions of the Software](#).
2. Uninstall the old version of AutoCAD.
3. Install the new version of AutoCAD. For more information, see [Installing AutoCAD](#). also ensure that the latest service packs have been downloaded
4. After installing AutoCAD 2010 or later, install VBA Support before you install the MSM application.

Note: Macro Space Management must be removed prior to uninstalling the old version of AutoCAD. If this is not done there will be problems with subsequent Macro Space Management operations.

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:

- Ensure that the registry values in the **HKEY_CURRENT_USER\Software\Autodesk\AutoCAD\R18.0\ACAD-4001:409** sub key (AutoCAD 2010) or **HKEY_CURRENT_USER\Software\Autodesk\AutoCAD\R18.1\ACAD-4001:409** sub key (AutoCAD 2011) 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.

Note: The exact form of the registry value may vary depending on the type of AutoCAD installed. The first entry after *\AutoCAD* indicates the broad version of AutoCAD installed - for example AutoCAD 2011. The second entry identifies the specific form; for example Standard AutoCAD.

- 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 appropriate registry sub key:

HKEY_CURRENT_USER\Software\Autodesk\AutoCAD\R18.0\ACAD-4001:409

HKEY_CURRENT_USER\Software\Autodesk\AutoCAD\R18.1\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 MSM** 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 MSM 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 MSM 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.

Autodesk VBA Support

Autodesk is in the process of changing the AutoCAD application from Visual Basic to .NET. From AutoCAD 2010, the Visual Basic Application is no longer part of the default AutoCAD installation and must be downloaded and installed separately.

As MSP uses Visual Basic Macros, the VBA module must be downloaded and installed from the following location:

<http://www.autodesk.com/vba-download>

AutoCAD Workspaces

The MSM 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 in the workspace toolbar. This will result in AutoCAD displaying the correct toolbars when used within the Planner Module.

For later versions of AutoCAD, it may be necessary to turn menu display on to see the Macro Space Management menus. This is done via the drop down list in the upper left corner of the Planner module.

Removing Previous Versions of the Software

This chapter describes how to remove previous versions of MSM, ISSC Server, ISSC Client and ISSC Help if you are upgrading to a newer version of the software. It contains the following sections:

- [Base Releases and Patches](#)
- [Backing Up Data Folders](#)
- [Removing Previous Versions of Macro Space Planning](#)

Base Releases and Patches

Macro Space Planning can be installed in two slightly different forms:

- The Base (or GA) Release
- Patch Releases

The Base Release is a full implementation of the software containing significant changes to functionality since the previous release. A Patch Release is installed on top of a Base Release. It contains some changes to the functionality and changes some of the code associated with the Base Release.

When updating to a new Base Release, it is necessary to remove all previous Base Releases and Patches. When installing a Patch Release (or installing an updated Patch Release) is generally sufficient to remove any existing Patch Releases.

Updating AutoCAD in parallel with Macro Space Management

Autodesk's AutoCAD software is updated on an annual basis. If it is desired to update AutoCAD in parallel with Macro Space Planning, Macro Space Management should be removed prior to removing the current version of AutoCAD. Similarly, the new version of AutoCAD should be installed prior to installing the new version of Macro Space Management.

Failure to remove applications in the correct sequence may cause subsequent problems.

Note: See Section on installing AutoCAD for more details on how to reinstall AutoCAD.

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 MSM is to be reinstalled on a server containing system data folders.

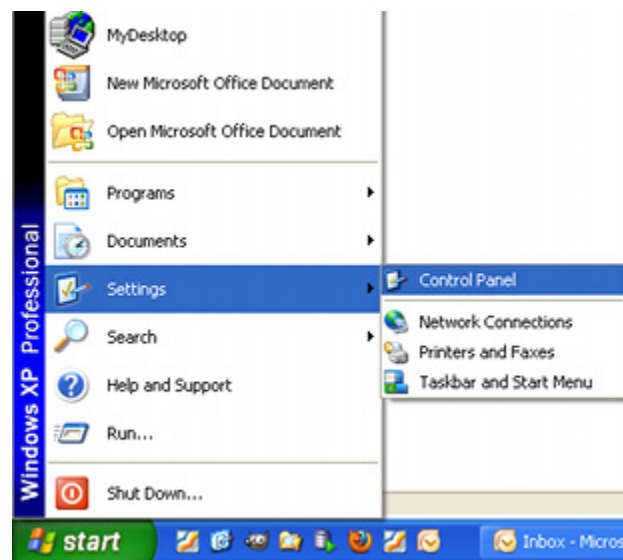
Removing Previous Versions of Macro Space Planning

Before removing previous versions, decide whether a Base Release, a Patch Release or both need to be removed. Remove the software accordingly.

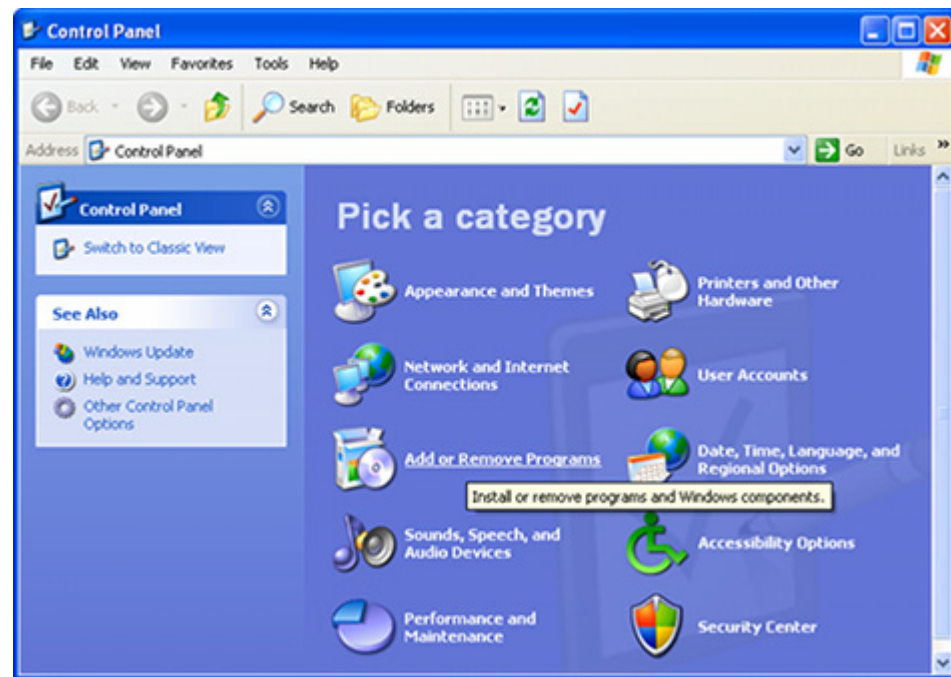
To remove a previous version of the application:

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

Figure 5–1 Start Menu - Control Panel



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

Figure 5–2 Control Panel - Add and Remove Programs

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.

6. It is also good practice to delete the old installation folders. These are typically located at C:\Program Files\Oracle Retail.

Problems with installing a later version of a Patch Release

On rare occasions there may be problems with installing (or reinstalling) a Patch Release on top of a Base Release. In this event remove both the Base Release and any Patch Release. Reinstall the Base Release, then reinstall the Patch Release.

Installing Macro Space Management

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

- [Before You Begin](#)
- [Installing and Updating the Macro Space Management Application](#)

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.

Installing MSM Batch Tools

This section describes installing the full version of Macro Space Management. It is possible to install a more restricted version suitable for running batch applications. See the following chapter for more information: [Installing MSM Batch Tools](#).

System Requirements

The MSM 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 and Requirements](#).

Windows 7 32-bit Operating Systems

If installing MSM on a Windows 7 32-bit operating system, users will require Administrator's privileges to run the application.

Previous Installation

If a previous version of MSM 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.

User Names and Passwords

When installing the Macro Space Planning application (Macro Space Management and In-Store Space Collaboration) it should be borne in mind that there are two types of user name and password required.

- The User Name and Password required to access the Oracle database.
- The User Name and Password required to access the Macro Space Planning application.

Both sets of User Names and Passwords will be required for this section.

- The User Name and Password for the database may be required during the installation process to allow the installer to connect to the previously installed database.
- The User Name and Password for the Macro Space Planning application will be required to log into Macro Space Management to allow user access to be configured.

Installing and Updating the Macro Space Management Application

This part of the Installation Guide deals with installing the Macro Space Management Application itself. The next section of the Installation Guide deals with installing some optional Macro Space Management tools.

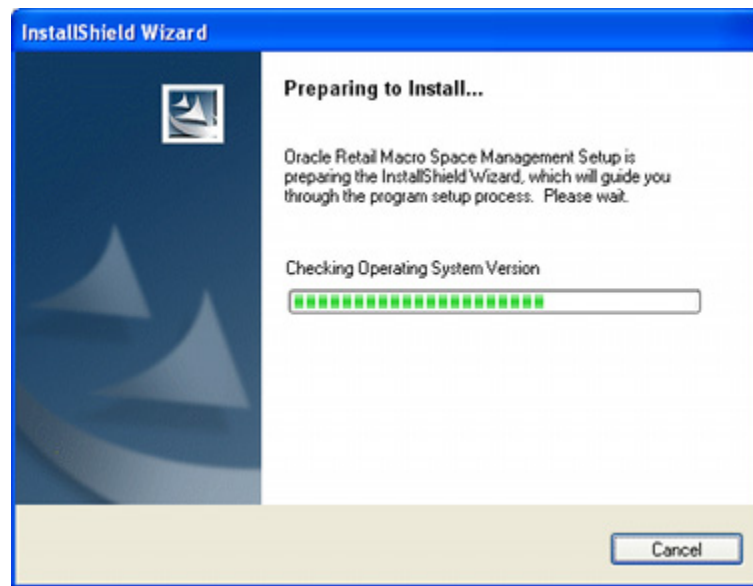
Locations to Install Macro Space Management

It is usual practice to install one copy of MSM on each client work station. In addition, a copy of MSM 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.

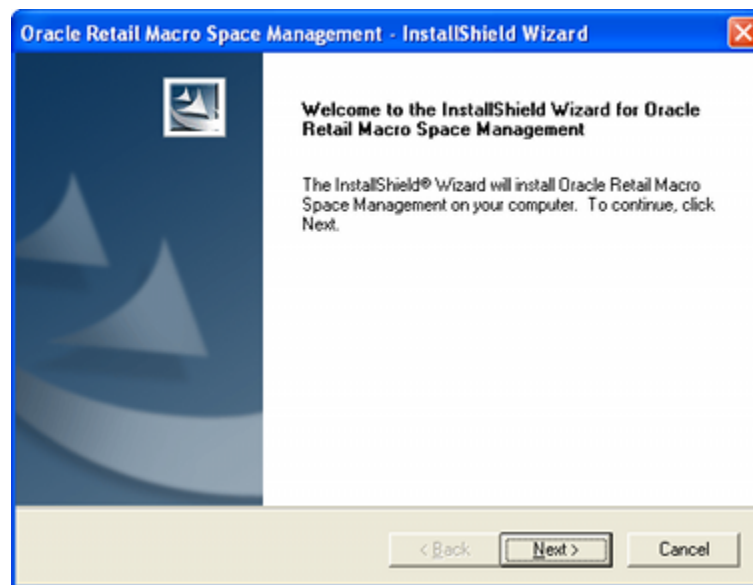
Installation of Macro Space Management Application

To install the MSM 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. The first screen to appear is an initialization screen. This displays while the installer carries out some background operations.

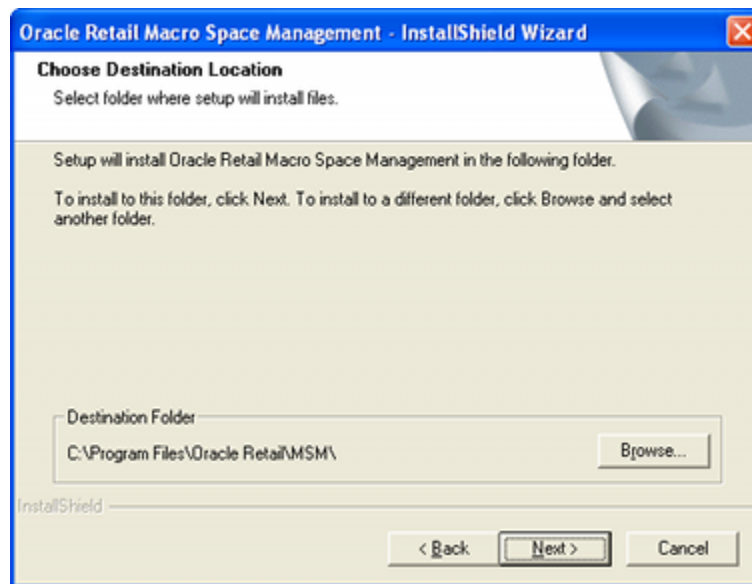
Figure 6–1 Initialization Screen

When the preliminary operations have completed, the Welcome Screen will appear.

Figure 6–2 Welcome Screen

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

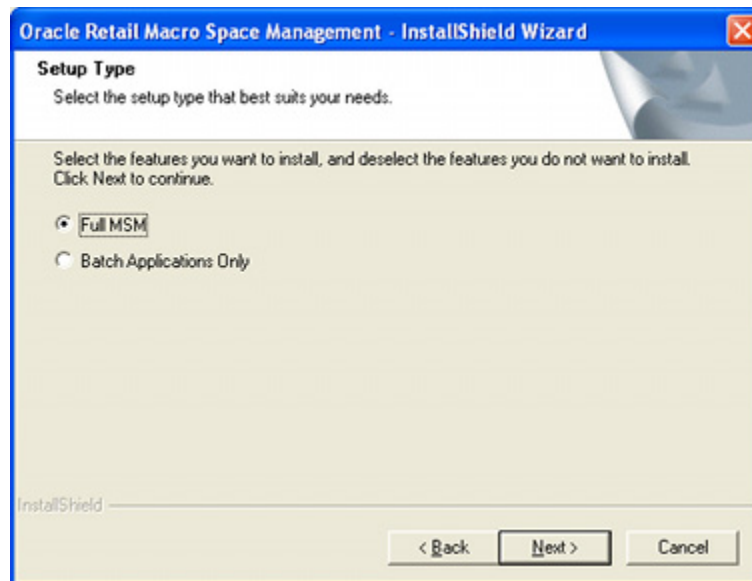
Figure 6–3 Chose Destination Location Screen



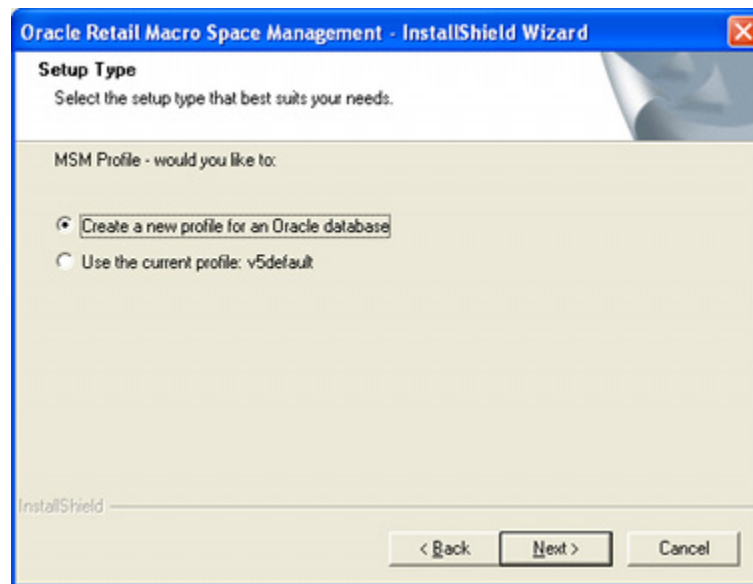
Select an installation location.

4. On the **Chose Destination Location** screen, click **Next**. The **Setup Type** screen appears. To install the complete application, select the Full MSM option.

Figure 6–4 Setup Type Screen



5. Click **Next**. The second **Setup Type** screen appears.

Figure 6–5 Second Setup Type screen

This screen gives two options:

- Create a new profile for an Oracle Database

Use this option if it desired to connect to a different database than the one in use when the previous version of the application was removed.

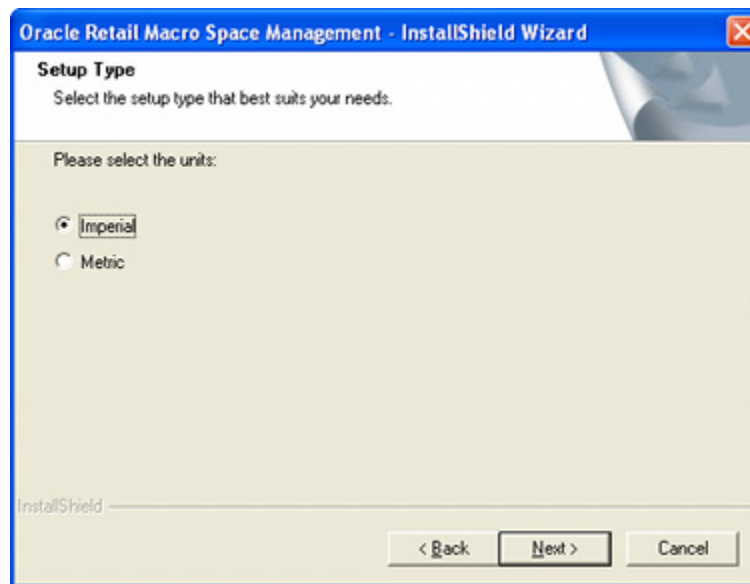
- Use the current profile

Use this option if it is desired to connect to the database in use when the previous version of the application was removed.

If **Use the current profile** is selected, clicking the Next button will take the user to the Set Up Information screen.

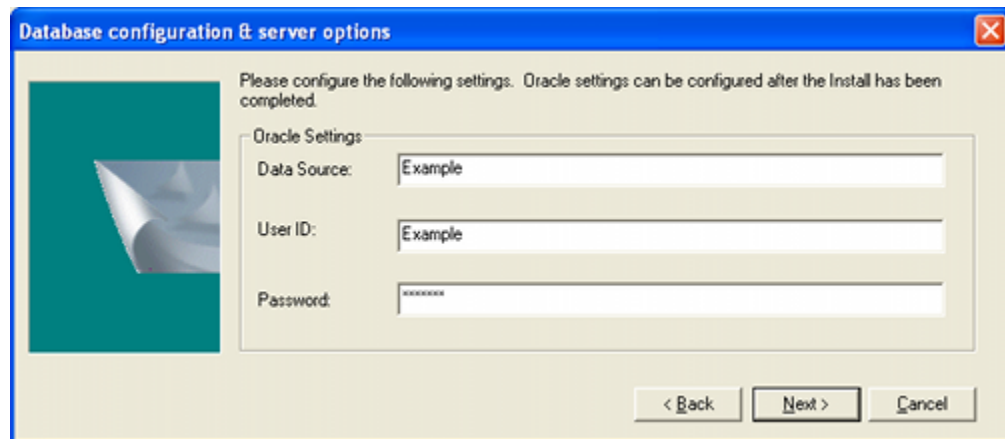
If the Creates new profile for an Oracle database option is used, the **Database configuration & server options** screen appears.

6. Click **Next**. The third **Setup Type** screen appears.

Figure 6–6 Third Setup Type Screen

The radio button allows the user to specify whether that database that will be connected to will use metric or imperial units.

7. Click **Next**. The **Database configuration and server options** screen will appear.

Figure 6–7 Database Configuration Screen

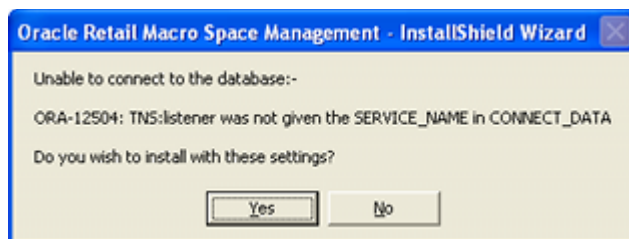
The information that is to be entered is to allow access to the Oracle Macro Space Planning database. (This is a different user name and password to that required to access the Macro Space Planning application.)

- The data source should be one with a valid name in the TNSNAMES.ORA file. (This file is normally located in the ORACLEHOME\NETWORK\ADMIN directory.)
- The User ID should be the User ID associated with the user role within the database that specifies the minimum privileges required to access information in the database.
- The Password should be the one associated with the specified User ID.

Complete the database settings in the **Database configuration and server options** screen and click **Next**.

The installer will then verify that the specified settings allow the installation to connect to a valid database. If the settings are do not allow a connection to be made, a warning dialog box will appear.

Figure 6–8 Database Connection Warning Dialog Box

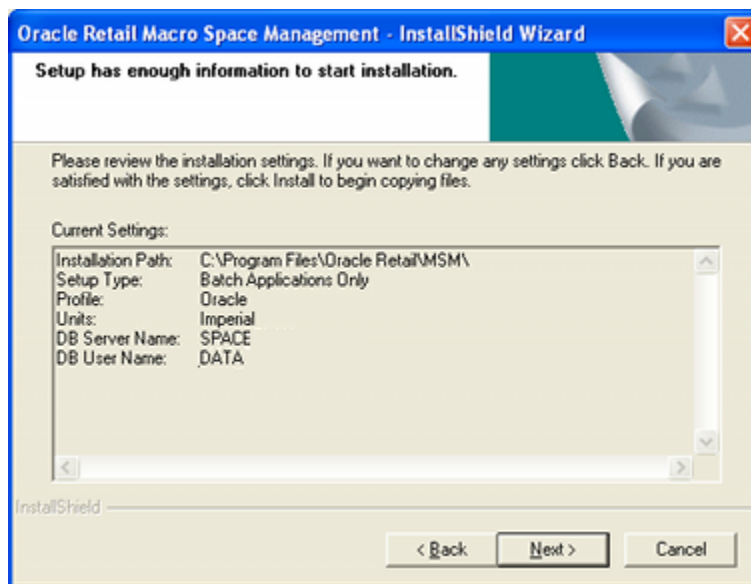


The user then has the option of reverting back to the previous dialog box to modify the database connection or to proceed with the current settings.

If the installer selects **Yes**, the **Setup Information** screen appears with information for the new database connection.

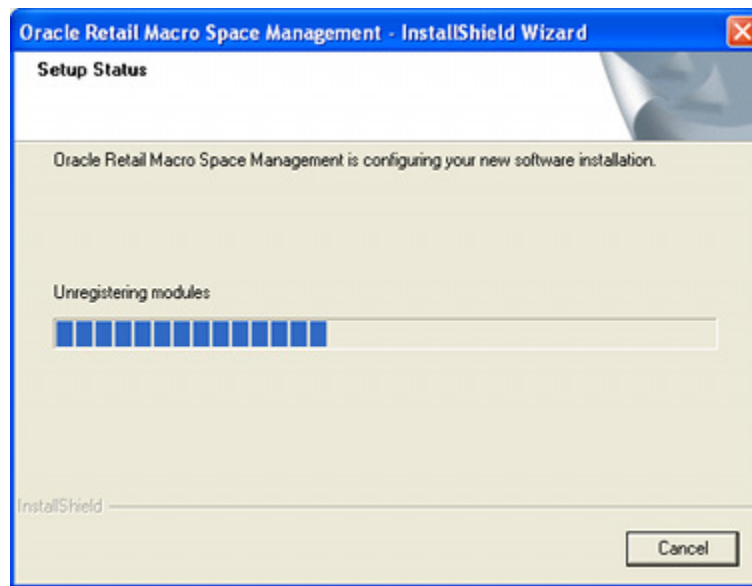
Verify the installation information is correct, then click **Next** to install Macro Space Management.

Figure 6–9 Setup Information Screen



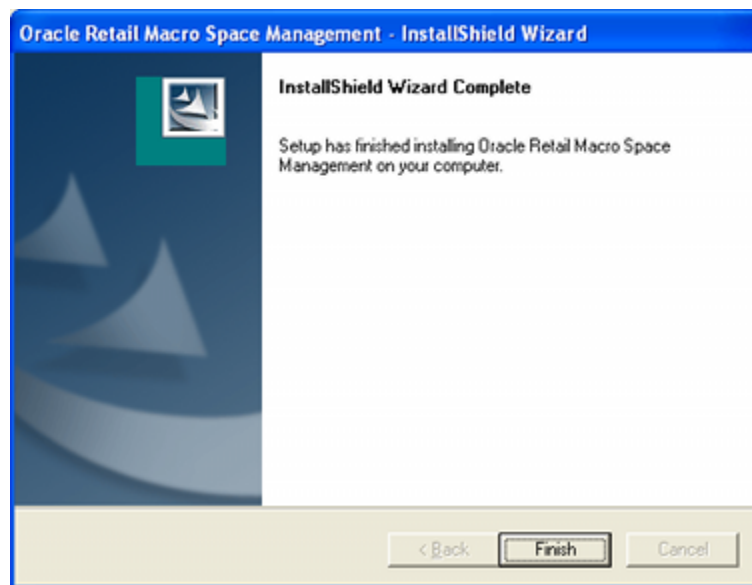
8. After verifying the connection details for a new or existing database, the **Setup Status** screen appears showing the progress of the installation.

Figure 6–10 Setup Status Screen



9. When the installation is complete, the **Installation Wizard Complete** screen appears.

Figure 6–11 Installation Complete Confirmation



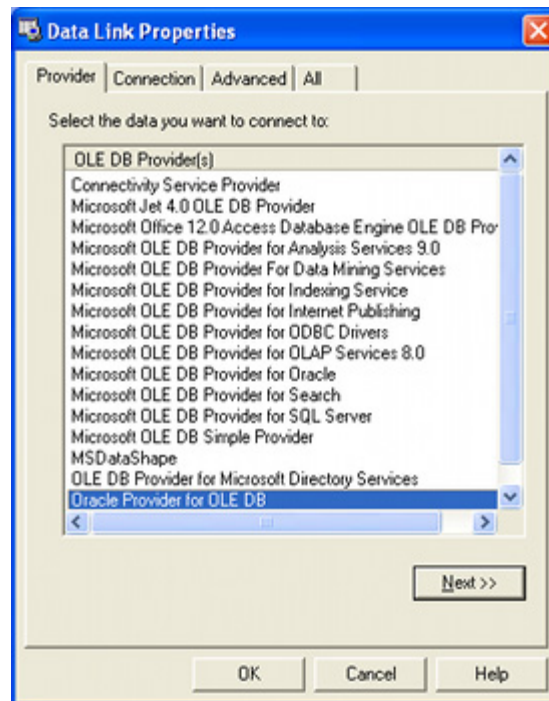
10. Click **Finish** to close the installation wizard. The MSM installation is complete.

Setting up a Connection to the Report Designer Module

In order to use the Report Designer module and the planogram printing or publishing functions in MSM Planner, MSM Merchandiser or In-Store Space Collaboration, a valid connection must be set up. Navigate to the .NET folder (the default location for this is C:\Program Files\Oracle Retail\MSM\Common.Net).

1. If installing the application for the first time:
 - a. Double click **AVT5ReportDesigner.exe** file to run the Report Designer module. An error message appears and a blank AVT5ReportDesigner.udl file is created. Close the error message.
 - b. Highlight the newly created UDL file, right click and select **Properties**. Verify that the file is not **Read Only**.
 - c. Double click the **AVT5ReportDesigner.udl** file and the dialog box appears. Select the Provider tab and chose the **Oracle Provider for OLE DB** option. click the **Next** button.

Figure 6–12 AVT5ReportDesigner UDL dialog box - Provider tab



- d. The Connection tab will open.

Note: The information that is to be entered is to allow access to the Oracle Macro Space Planning database. (This is a different user name and password to that required to access the Macro Space Planning application.)

The data source should be one with a valid name in the TNSNAMES.ORA file. (This file is normally located in the ORACLEHOME\NETWORK\ADMIN directory.)

The User ID should be the User ID associated with the user role within the database that specifies the minimum privileges required to access information in the database.

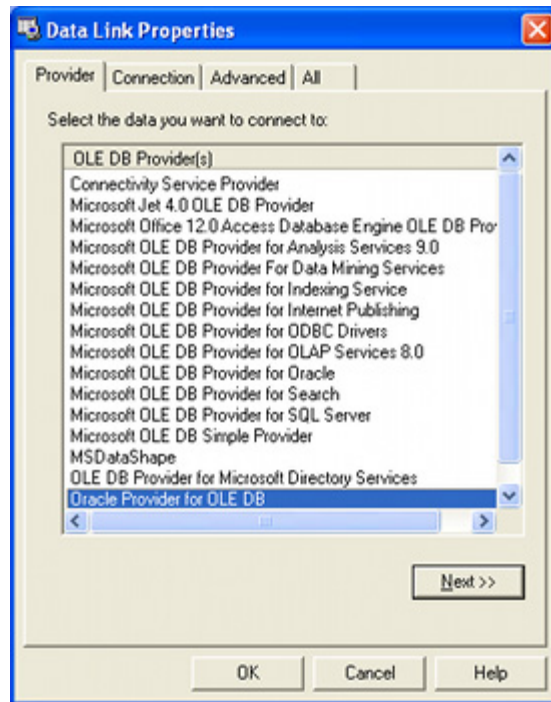
The Password should be the one associated with the specified User ID.

Select the Allow Saving Password option.

Verify the connection is valid by clicking the **Test Connection** button.

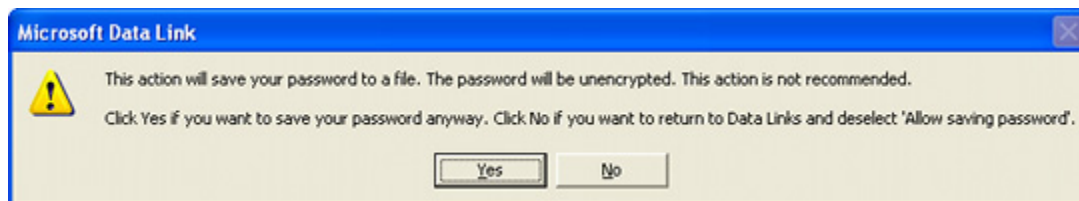
If the connection is correct, click the **OK** button.

Figure 6–13 AVT5ReportDesigner UDL dialog box - Connection tab



- e. On clicking the OK button, a warning dialog box will appear. Click **OK** to save the password.

Figure 6–14 Warning dialog box



- f. A connection to the database has now been established. When starting the Report Designer module, the user will now be presented with a standard log in dialog box. If the user has been assigned the appropriate permissions in the Macro Space Management Administration module they will be able to log in.
2. If installing an upgrade to the application, the **AVT5ReportDesigner.udl** file should still be present. Open it and verify the settings.

Logging in to the Application for the First Time

Note: If upgrading the application from a previous version, refer to the section on Updating Security.

When installing the application for the first time, the first user must log into the Macro Space Management application using the default user provided. This user is:

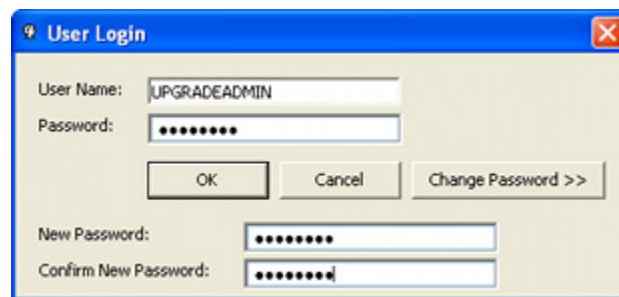
Username: ADMINISTRATOR

Password: ORMSM2011

Logging in may be initiated by opening the Administration module from either the start menu or shortcuts provided. The log in dialog box will then appear.

The default login has been configured to require change the first time a user logs in using it. This is carried out by means of the **Change Password** button on the User Login dialog box.

Figure 6–15 Login dialog box - Change Password



This modified password is the sole means of access for MSM users until additional users are created with Administrator's privileges.

Note: Immediately changing the publicly available password for the UPGRADEADMIN user is necessary to preserve security.

Once logged into the Administration module, it is suggested one or more additional users are created in the Admin User Group (Functional Security option from the Security menu). This will give additional users access to the application and will allow implementation to proceed.

Note: See the *Oralce Retail Macro Space Management Administration Module User Guide* for information on creating new users.

Installing MSM Batch Tools

This section of the installation guide describes how to install the Macros Space Management (MSM) batch tools. It includes the following sections:

- [Overview of MSM Batch Tools](#)
- [Before You Begin](#)
- [Installing and Updating the MSM Batch Tools](#)
- [Installing and Updating the MSM Batch Tools](#)

Overview of MSM Batch Tools

There are certain tasks within MSM are repetitive and take up considerable processing capacity. These have been designed with the option to run unattended as batch processes overnight. MSM batch tools allow the installation of other MSM modules onto a server, allowing the majority of the batch operations to be executed on that server.

The installed components are:

- Administration Module
- Automated Calculations
- BatchRunner
- Data Importer
- Planogram Substitution
- Update Status.

BatchRunner allows the following additional batch process to be run on the batch server:

- Planogram Publishing

Note: Floor plan processing and floor plan publishing can only be run via batchrunner on a machine with the full MSM installation.

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.

Installing Full MSM

This section describes installing a partial set of functionality suitable for batch operations. For information on how to install the full MSM application, see the following chapter: [Installing Macro Space Management](#).

Installing AutoCAD

Unlike the full installation of MSM, installing MSM Batch Tools does not require AutoCAD to be installed.

System Requirements

The MSM database is hosted from a server machine. For more information on the client and server requirements, see [Supported Configurations and Requirements](#).

Previous Installation

If a previous version of the MSM Batch tools 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](#).

User Access Privileges

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

User Names and Passwords

When installing the Macro Space Planning application (Macro Space Management and In-Store Space Collaboration) it should be borne in mind that there are two types of user name and password required.

- The User Name and Password required to access the Oracle database.
- The User Name and Password required to access the Macro Space Planning application.

Both sets of User Names and Passwords will be required for this section.

- The User Name and Password for the database may be required during the installation process to allow the installer to connect to the previously installed database.
- The User Name and Password for the Macro Space Planning application will be required to log into Macro Space Management to allow user access to be configured.

Installing and Updating the MSM Batch Tools

This part of the Installation Guide deals with installing the MSM Batch tools. These will generally be installed on a server for the purpose of running tasks that will either take up a significant part of the capacity of the system or take a long time to execute.

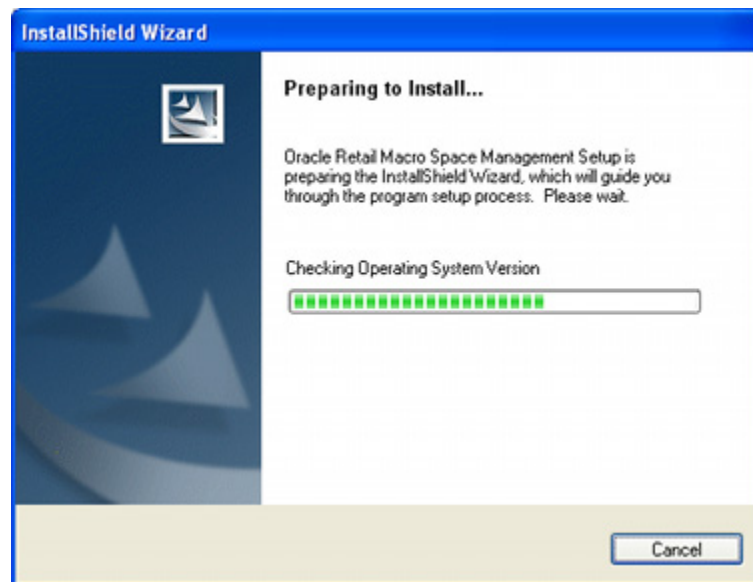
Other sections detail with the installation of the Full Macro Space Management application and with the installation of the MSM Tools.

Installation of Macro Space Management Batch Tools

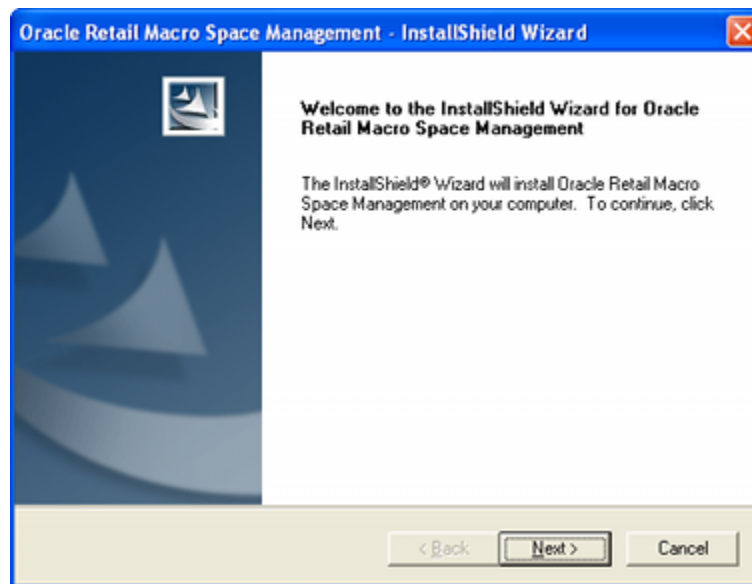
To install the MSM batch tools:

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. The first screen to appear is an initialization screen. This displays while the installer carries out some background operations.

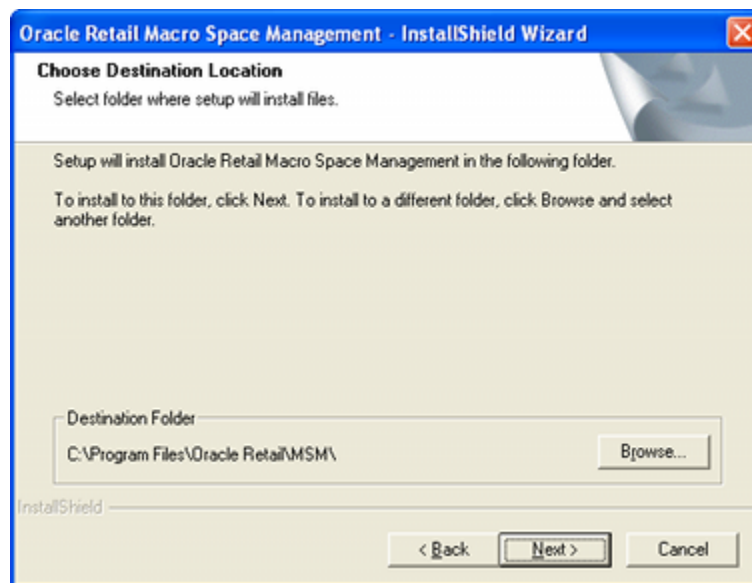
Figure 7-1 Initialization Screen



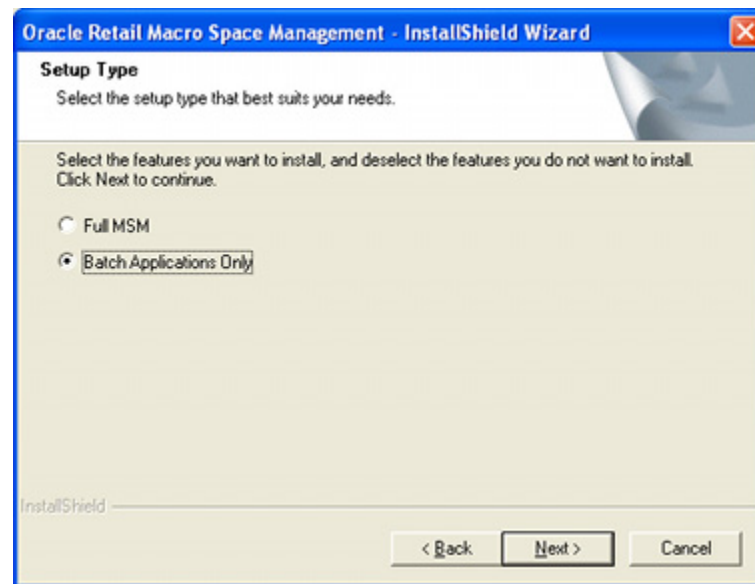
When the preliminary operations have completed, the Welcome Screen will appear.

Figure 7-2 Welcome Screen

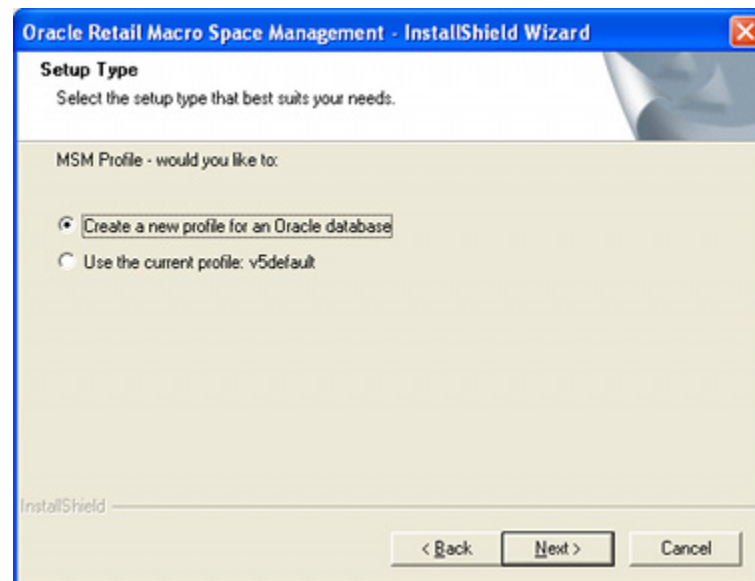
3. On the **Welcome** screen, click **Next**. The **Choose Destination Location** screen appears.

Figure 7-3 Choose Destination Location Screen

4. Click **Next**. The **Setup Type** screen will appear. To install the MSM Batch Tools, select **Batch Application Only**.

Figure 7–4 Setup Type Screen

5. Click **Next**. The second **Setup Type** screen appears.

Figure 7–5 Second Setup Type Screen

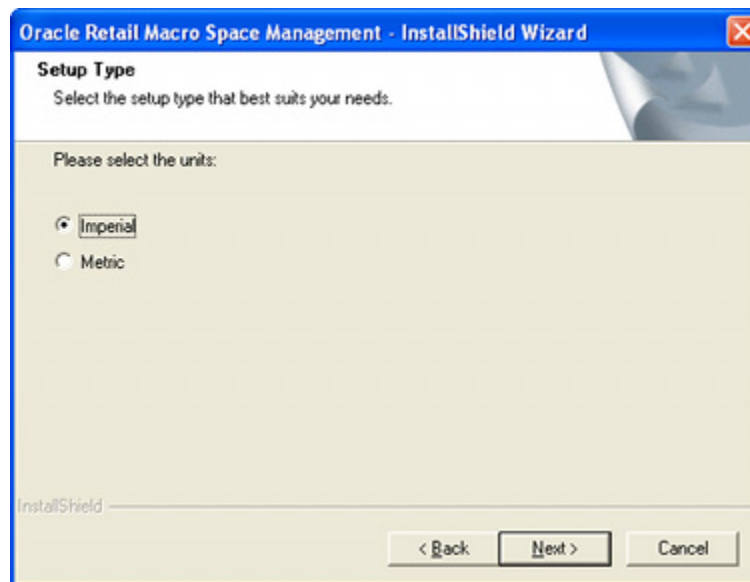
The option selected generally depends on whether the user is installing MSM batch tools as a new installation or whether they are upgrading from a previous installation.

- If installing a new installation, **Create a new profile for an Oracle database** should be selected.
- If upgrading from an earlier installation, **Use current profile** should be selected. This will read the connection details from the registry.

Note: This example will demonstrate the procedure for implementing the batch tools for a new installation. The procedure for updating an existing installation is similar but omits one or two stages.

6. Click **Next**, the third **Setup Type** Screen appears.

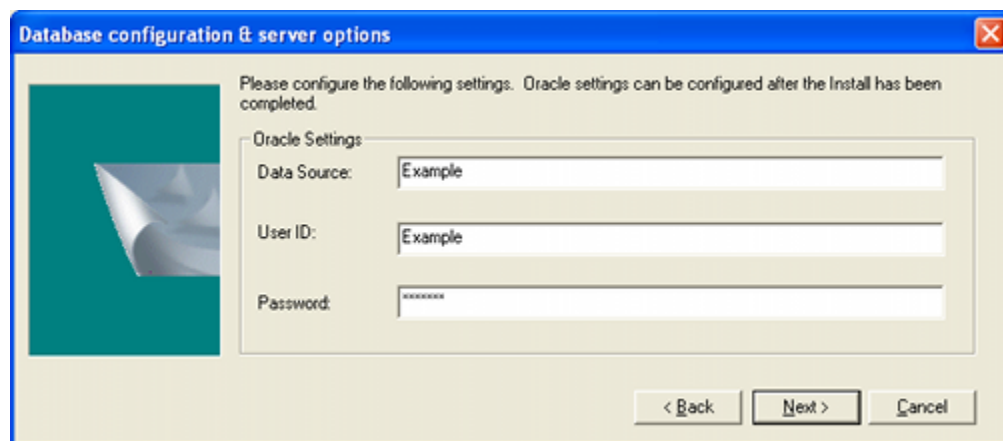
Figure 7-6 Third Setup Type Screen



The radio button allows the installer to specify whether the database that will be connected to contains metric or imperial data.

7. Click **Next**. The **Database configuration & server options** screen will appear.

Figure 7-7 Database Configuration Screen

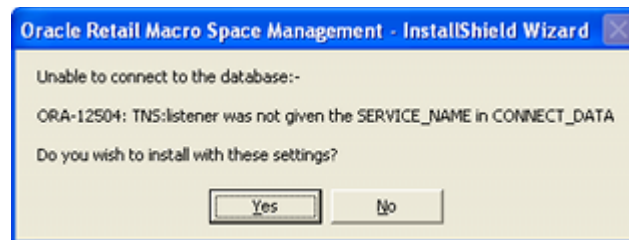


The information that is to be entered is to allow access to the Oracle Macro Space Planning database. (This is a different user name and password to that required to access the Macro Space Planning application.)

- The data source should be one with a valid name in the TNSNAMES.ORA file. (This file is normally located in the ORACLEHOME\NETWORK\ADMIN directory.)
- The User ID should be the User ID associated with the user role within the database that specifies the minimum privileges required to access information in the database.
- The Password should be the one associated with the specified User ID.

The installer will then verify that the specified settings allow the installation to connect to a valid database. If the settings are do not allow a connection to be made, a warning dialog box will appear.

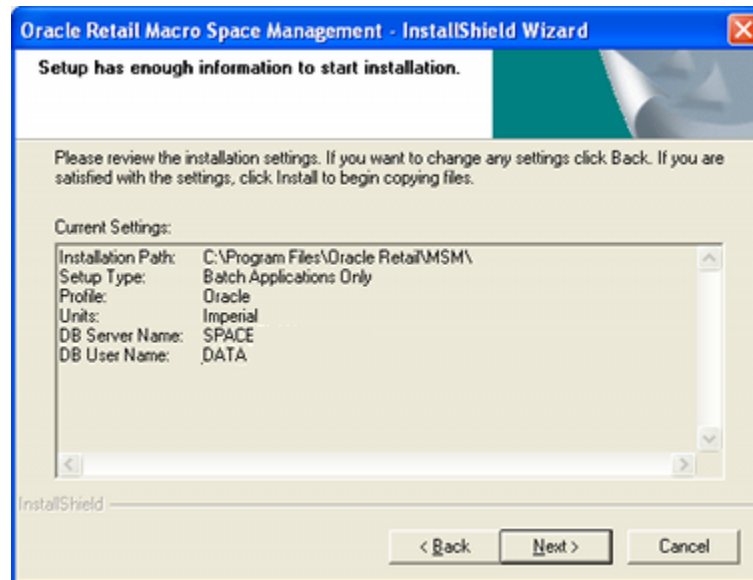
Figure 7–8 Database Connection Warning Dialog Box



The user then has the option of reverting back to the previous dialog box to modify the database connection or to proceed with the current settings.

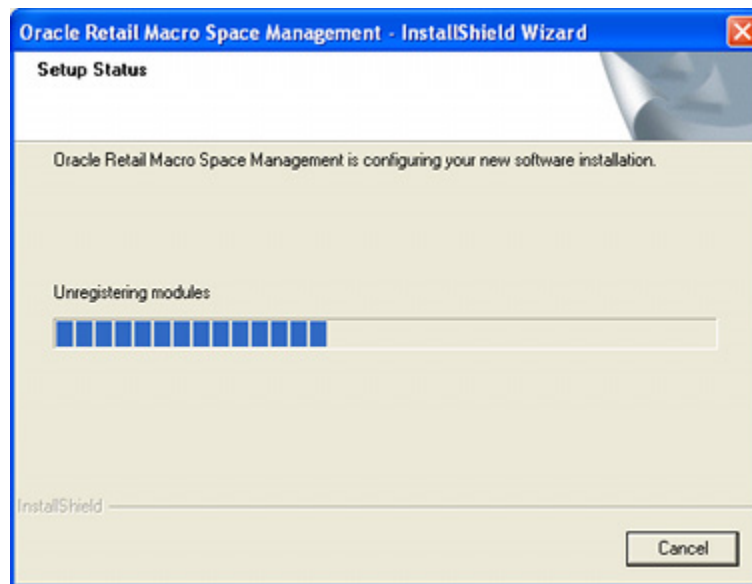
If the installer selects **Yes**, the **Setup Information** screen appears with information for the new database connection.

Figure 7–9 Setup Information Screen



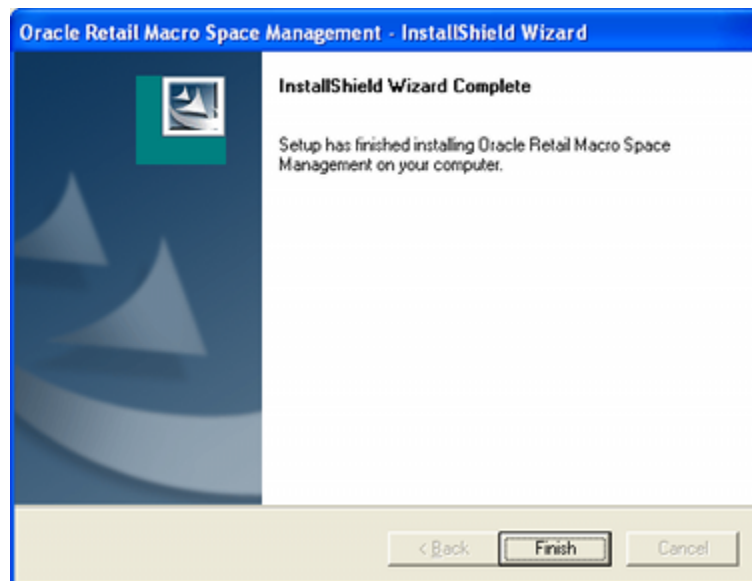
Verify the installation information is correct, then click **Install** to install Macro Space Management. The Setup Status screen appears to show progress.

Figure 7–10 Set-Up Status Screen



When the installation is complete a confirmatory dialog box will appear.

Figure 7–11 Installation Complete Confirmation



Click **Finish** to complete the installation process.

Logging in to the Application for the First Time

Note: If upgrading the application from a previous version, refer to the section on Updating Security.

When installing the application for the first time, the first user must log into the Macro Space Management application using the default user provided. This user is:

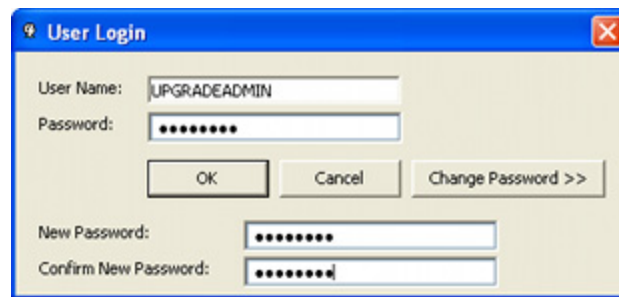
Username: ADMINISTRATOR

Password: ORMSM2011

Logging in may be initiated by opening the Administration module from either the start menu or shortcuts provided. The log in dialog box will then appear.

The default login has been configured to require change the first time a user logs in using it. This is carried out by means of the **Change Password** button on the User Login dialog box.

Figure 7-12 Login dialog box - Change Password



This modified password is the sole means of access for MSM users until additional users are created with Administrator's privileges.

Note: Immediately changing the publicly available password for the UPGRADEADMIN user is necessary to preserve security.

Once logged into the Administration module, it is suggested one or more additional users are created in the Admin User Group (Functional Security option from the Security menu). This will give additional users access to the application and will allow implementation to proceed.

Note: See the *Oralce Retail Macro Space Management Administration Module User Guide* for information on creating new users.

Updating Security

This section of the *Oracle Retail Macro Space Planning Installation Guide* specifies the changes that were made to Security in Macro Space Planning when an existing user upgrades from before build 13.2.4.

Note: See the *Oracle Retail Macro Space Management Administration Module User Guide* for detailed information on the security options.

Effect of Running Upgrade Script

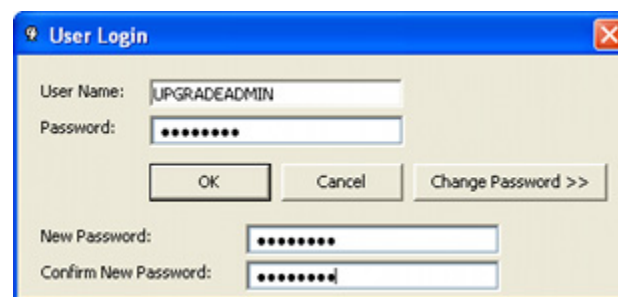
When the upgrade script is run against an existing database, this will prepare Macro Space Planning to work with improved security measures. Because the encryption algorithm has been updated, all existing passwords will be expired, leaving a single user with access to the application. This user is:

Username: UPGRADEADMIN

Password: ORMSM2011

This login has been configured to require change the first time a user logs in using it. This is carried out by means of the **Change Password** button on the User Login dialog box.

Figure 8–1 Login dialog box - Change Password

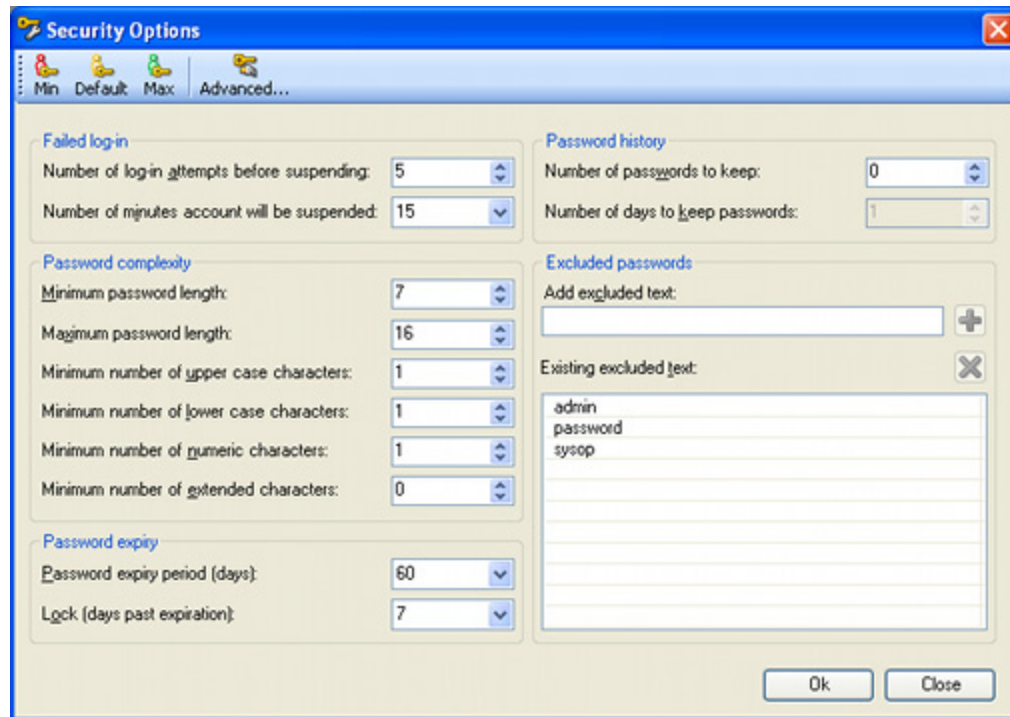


Note: Immediately changing the publicly available password for the UPGRADEADMIN user is necessary to preserve security.

Deciding on the Security Options

The available security options can be specified in the Security Options dialog box accessed from the Security menu in the Administration Module in Macro Space Management.

Figure 8–2 Security Options dialog box



When the upgrade script is run, it will set the values to the default settings. These settings must be reviewed against the security policies required by the retail organization using the application. The available settings are:

- **Password Algorithm Strength**

This can be set by clicking **Advanced** on the toolbar. By default, it is set to SHA-256; the lowest strength.

- **Failed Log-ins**

This options allows an administrator to set the number of failed log in attempts allowed before the account is suspended.

- **Password Complexity**

This option allows an administrator to specify the strength of the password required to log into Macro Space Planning.

- **Password Expiry**

This option enables the time period between mandatory password changes to be specified.

- **Password History**

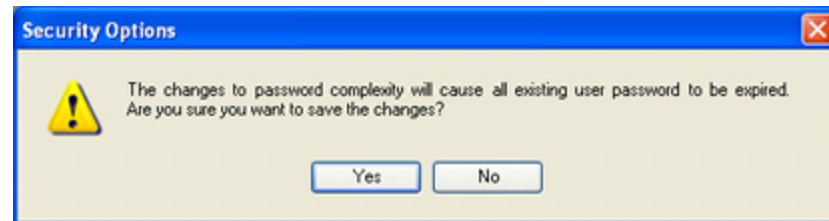
This option determines the number of previous passwords a user will be prevented from using when a mandatory password change is required.

■ Excluded Passwords

This option allows an administrator to exclude common passwords that an authorized user might guess in order to access the application.

The user will be asked for confirmation on saving the changed Security Options.

Figure 8–3 Security Option Change Warning



On clicking **OK**, the changes will be saved. The user making the changes will have the only currently valid access to the application.

Updating Passwords

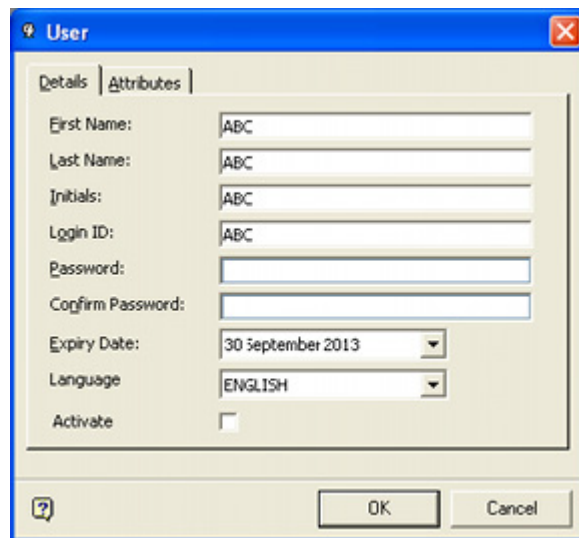
At this point, there is only one valid user for the application, with all other user accounts (if existing) having been expired. Any existing accounts will require reactivation. This is done as follows:

1. In the Administration module, select the Functional Security option from the Security menu. This will bring up the Functional Security dialog box.

Figure 8–4 Functional Security Dialog Box



2. In the Functional Security dialog box, highlight a user then select Edit User from the toolbar. The User dialog box will appear.

Figure 8–5 User dialog boxA screenshot of a Windows-style dialog box titled "User". It has two tabs: "Details" (selected) and "Attributes". The "Details" tab contains several input fields: "First Name:" with "ABC", "Last Name:" with "ABC", "Initials:" with "ABC", "Login ID:" with "ABC", "Password:" (empty), "Confirm Password:" (empty), "Expiry Date:" with a dropdown menu showing "30 September 2013", "Language" with a dropdown menu showing "ENGLISH", and an "Activate" checkbox which is currently unchecked. At the bottom of the dialog are three buttons: a help button (question mark icon), an "OK" button, and a "Cancel" button.

To reactivate the user:

- a. Enter and confirm the new password
- b. Set the Expiry Date to the current date. This will force a password change the first time the user logs in with the new password.
- c. Select the Activate text box to make the user account active.

Each existing user account will have to be manually reactivated.

Installing the ISSC Server

Note: In-Store Space Collaboration cannot be installed without Macro Space Management first being installed.

This chapter describes how you can install and configure the 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 ISSC Server application is the server part of the ISSC 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 MSM database over a LAN, WAN internet or on a local machine.

The ISSC Server application may be installed onto either a local machine or onto a dedicated server. It is more usual to install the ISSC Server application on a dedicated server.

Before You Begin

For the application to run, a MSM 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 ISSC Server.

Many of the actions possible in a store plan opened using the ISSC Server is controlled by settings in the Administration Module of MSM. These include:

- Access rights for Users
- Stores visible to Users
- 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 ISSC.

Note: Details of how to configure the operation of ISSC using the Administration Module of MSM are specified within the User Guide for the *Oracle Retail Macro space Management Administration Module* included with this installation.

Location to Install Files

There are two options for where to install the ISSC Server Service.

- Locally on the same computer as the ISSC Client.
- On a server.

Both options allow ISSC users to connect to the Macro Space Planning database. Installing on a server results in easier maintenance and upgrading as only one instance of the client is required. Installing the Server Service on the same computer as the client requires multiple installations of the Server Service.

Previous Installation

If a previous version of the ISSC 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](#).

Upgrading the Client

When upgrading from a previous GA release, the Client will require updating as well as the Server service. When applying a patch update it is good practice to update the Client as well. See the *Oracle Retail In-Store Space Collaboration Release Notes* for each release for further information.

Security Advisories

The following information should be taken into account when considering security.

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

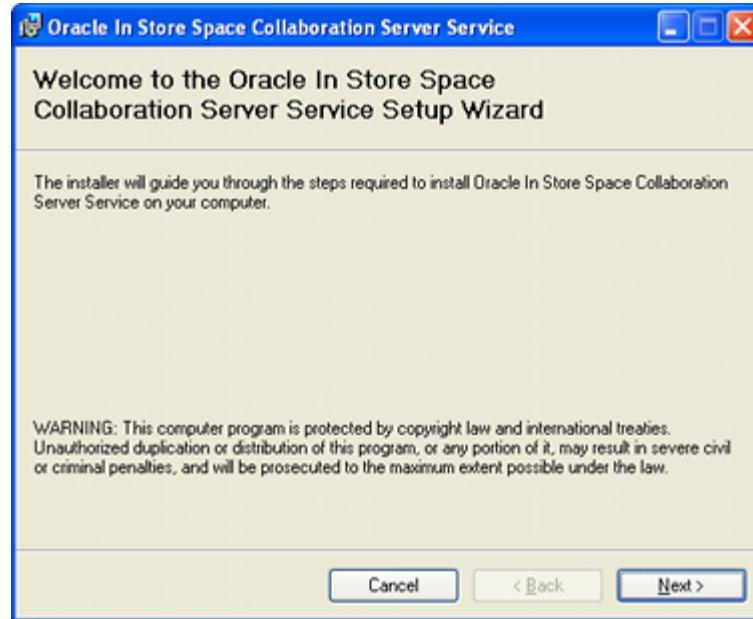
If your computer has a Firewall configured, you may need to set the firewall to allow ISSC to communicate over the Internet. For more information, see your Network Administrator.

Installing the In-Store Space Collaboration Server

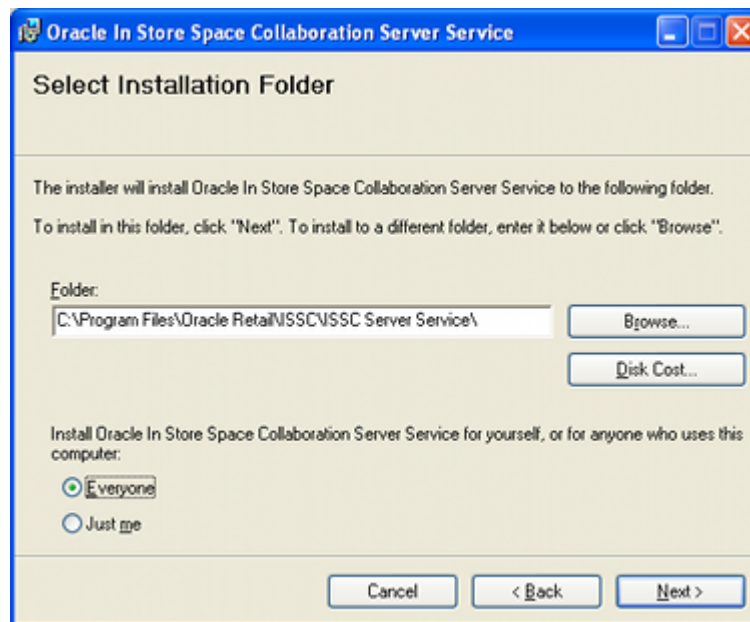
To install the ISSC server:

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 **Setup.exe** file. The installation wizard starts.

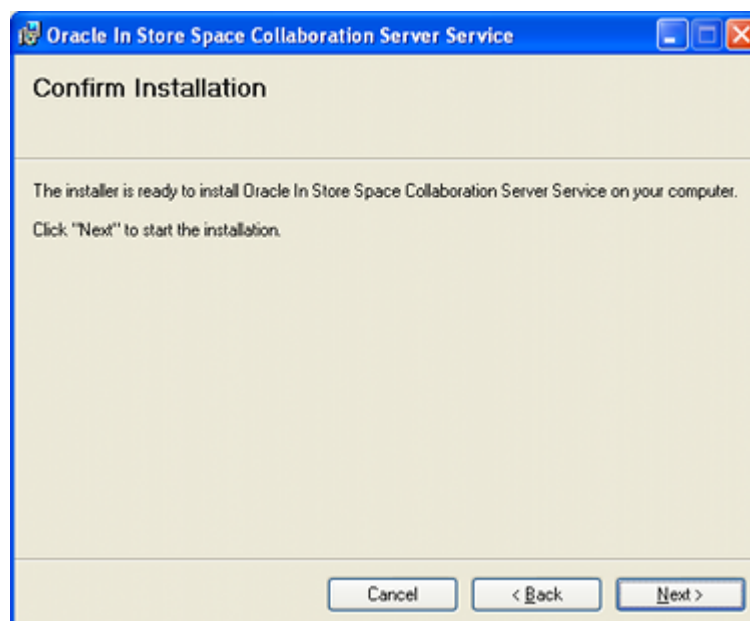
Figure 9–1 *Welcome Screen*



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

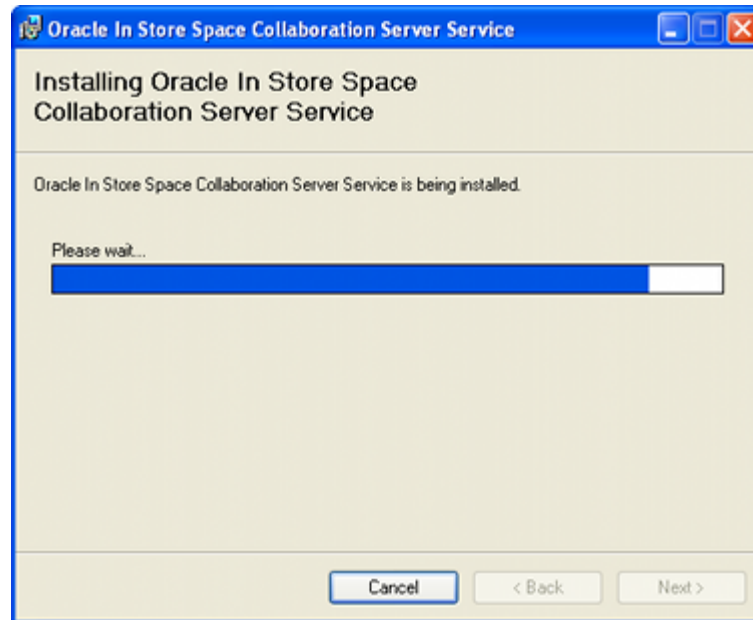
Figure 9–2 Select Installation Folder Screen

- a. Specify the folder the help will be installed.
 - b. Depending on your organization's IT policies, select the **Everyone** or **Just Me** option.
 - c. Click **Next**. The **Confirm Installation** screen appears.
4. 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 9–3 Confirm Installation Screen

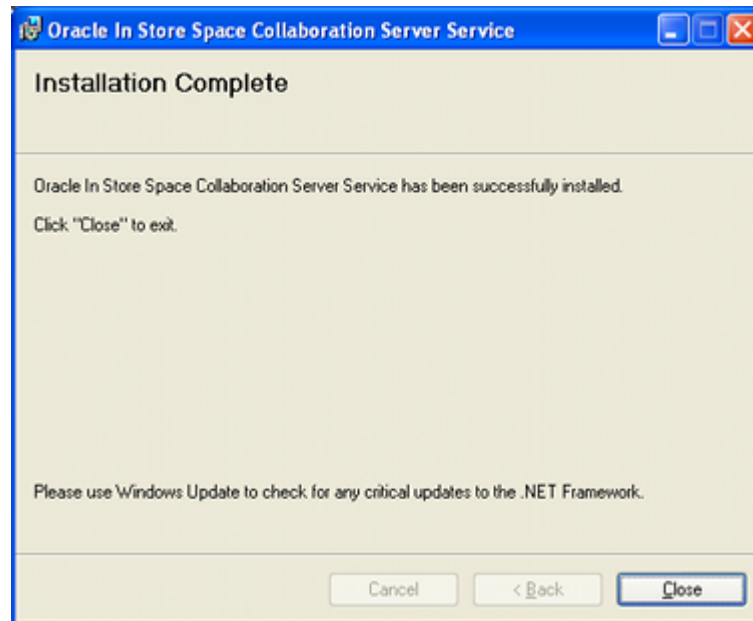
5. On the **Confirm Installation** screen, click **Next** to start the installation. The installation screen appears showing the progress of the installation.

Figure 9–4 *Installation Progress Screen*



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

Figure 9–5 *Installation Complete Screen*



7. 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

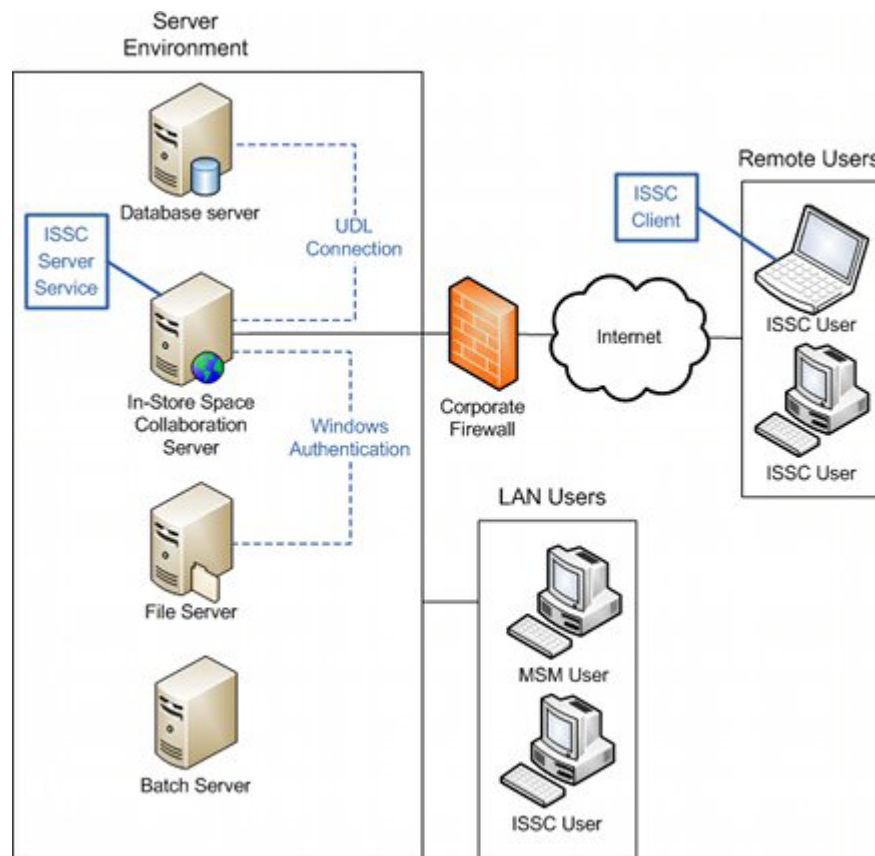
This section includes the following sections:

- Overview of Connections
- Configuration of the Server application's port
- Setting Up the Database Connection
- Configuring the Service

Overview of Connections

The diagram below shows the connections for a generic In-Store Space Collaboration installation. (Details for specific installations may vary slightly.)

Figure 9–6 Connection Details for ISSC Server Service



1. The Client on the each ISSC user's computer communicates to the ISSC Server Service on the In-Store space Collaboration physical server by means of the port specified in the INI file.

Note: In order for this port to be active, the corporate firewall must be configured to allow access to this port.

2. The ISSC Server Service on the In-Store Space Collaboration physical server communicates with the database (which may be on another physical server) by means of the **RF Server.udl** file.
3. The ISSC Server Service on the In-Store Space Collaboration physical server accesses files on the physical file server via Windows Authentication. (For ISSC, files can include image files and DWF files used for architectural plans.)

When these connections have been set up, an ISSC user at a client workstation will be able to connect with the centrally held information necessary to run the application.

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
```

- [CONNECTION] acts as a header in the INI file.
- PORT is the port number required for communication with the server.

Note: This port number must correspond to the port number specified in the INI file associated with the client that is connecting to this instance of the server application.

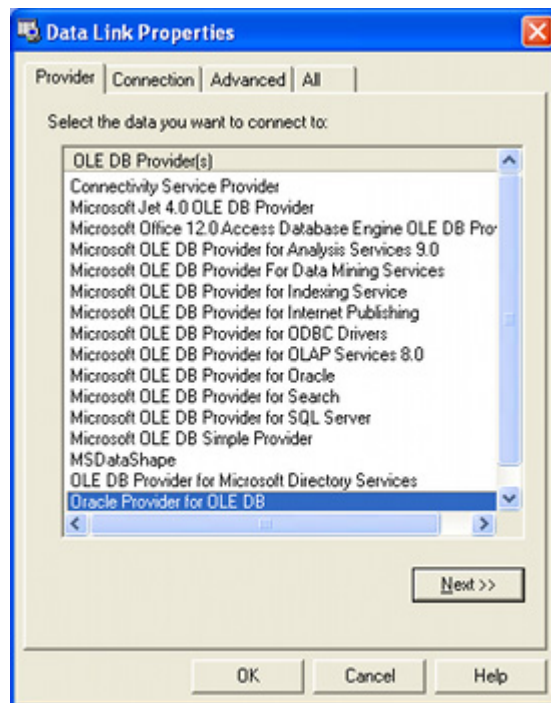
- MONITORPORT is a second port that can be used to allow another application to monitor activity on the server.

For the changes to take effect, you must restart the server application each time this setting is updated.

Setting Up the Database Connection

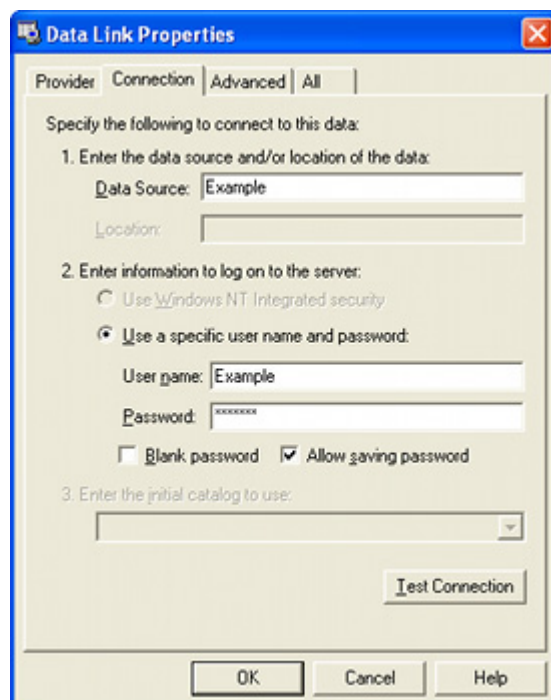
The application uses a UDL file to store the database connection information. This is located in the installation directory. The Server application, by default, will not have this information and will require setup before the server can run. To set up the database connection, follow the instructions 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. Select the Provider tab.

Figure 9–7 Data Link Properties - Provider Tab

Select the database provider for the database you have installed. For an Oracle database this will be **Oracle Provider for OLE DB**. Click **Next**.

2. The Connection tab appears.

Figure 9–8 Data Link Properties - Connection Tab

- The data source should be one with a valid name in the TNSNAMES.ORA file. (This file is normally located in the ORACLEHOME\NETWORK\ADMIN directory.)
- The User ID should be the User ID associated with the user role within the database that specifies the minimum privileges required to access information in the database.
- The Password should be the one associated with the specified User ID.
- Verify the connection is valid by clicking the **Test Connection** button.
- If the connection is valid, click **OK**.

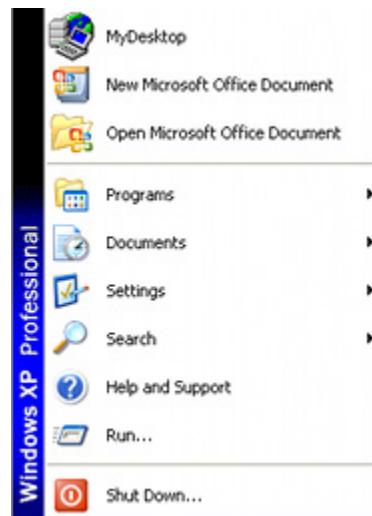
Configuring the Service

The ISSC service, by default, installs with a local system account log on, with automatic start. This is typically used if the data files used by In-Store Space Collaboration resides on the same physical server as the Server Application.

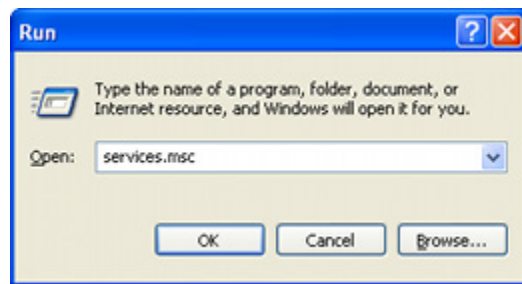
If the data files used by In-Store Space Collaboration reside on another physical server, one method of accessing them is via a domain account. This can be configured by following the steps described in this section. The Service log on should be configured to a domain user account that has permission to connect to the server that holds the application database. To configure this service:

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

Figure 9–9 Start Menu - Run Option

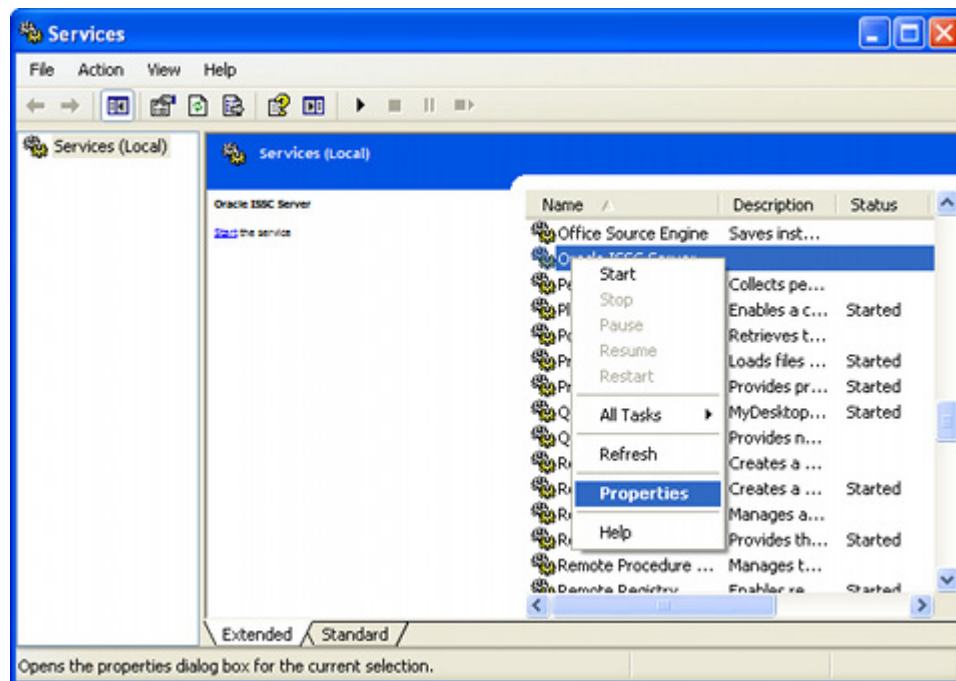


2. Type **services.msc** in the **Run** window and click **OK**.

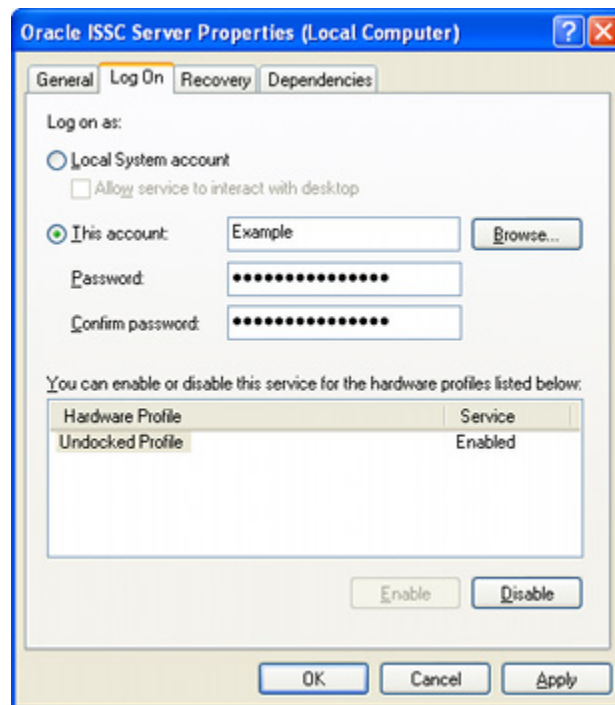
Figure 9–10 Run dialog box

The **Services** window appears.

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

Figure 9–11 Services Dialog Box - Right Click Menu

4. On the **Log On** tab, specify which user will run the service. For example, it might be necessary to provide an account that will allow the service access to network resources. One option is to select the **This account** radio button and enter a domain user name and password. You can also click **Browse** to navigate to a user.

Figure 9–12 Service Properties dialog box - Log On Tab

5. Confirm this configuration and click **OK**.
6. For the changes to take effect, restart the Oracle ISSC Server service. (This can be done in the Services dialog box.)

Installing the ISSC Client

Note: Installation of the ISSC Client is optional. It should only be installed if you are installing the ISSC application. ISSC cannot be used without MSM being installed.

This chapter describes how you can install and configure the ISSC client application. It includes the following sections:

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

Before You Begin

The following information should be taken into account before the ISSC Client is installed.

Previous Installation

If a previous version of ISSC 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](#).

Upgrading the Server Service

When upgrading from a previous GA release, the Server Service will require updating as well as the client. When applying a patch update it is good practice to update the Server Service as well. See the *Oracle Retail In-Store Space Collaboration Release Notes* for each release for further information.

Security Advisories

The following should be taken into account before installing the ISSC Client.

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 ISSC to communicate over the Internet. For more information, see your Network Administrator.

Installing the In-Store Space Collaboration Client

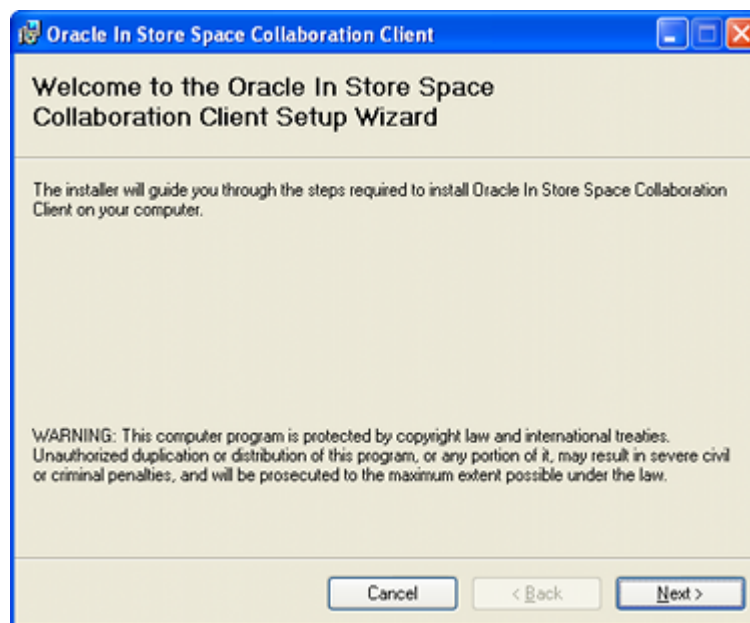
To install the Client application:

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.

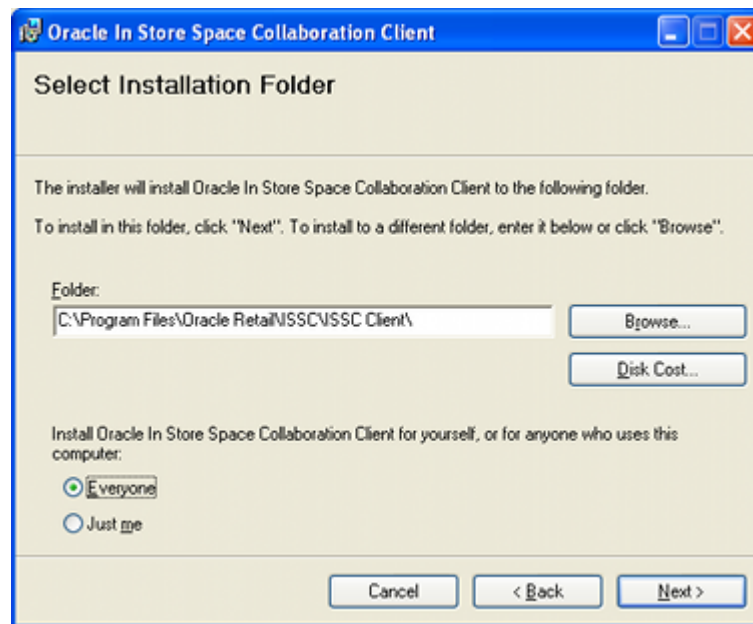
Note: It is recommended that this folder is on a network server machine so that all target Client machines can access the installation files.

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

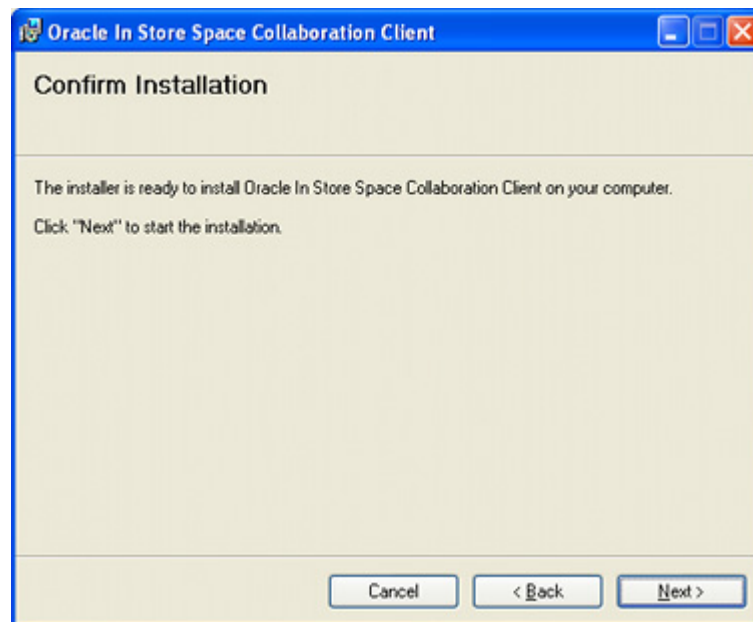
Figure 10–1 ISSC Client Setup Screen



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

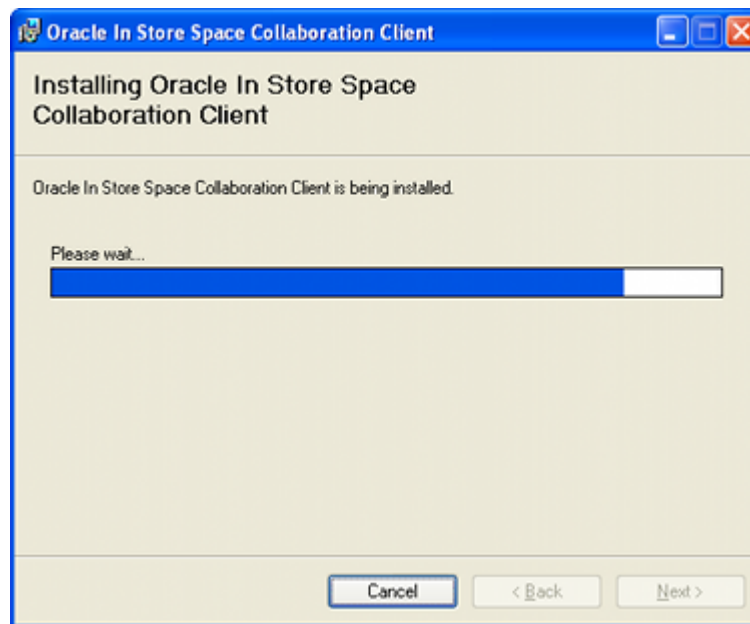
Figure 10–2 Select Installation Folder Screen

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 10–3 Confirm Installation Screen

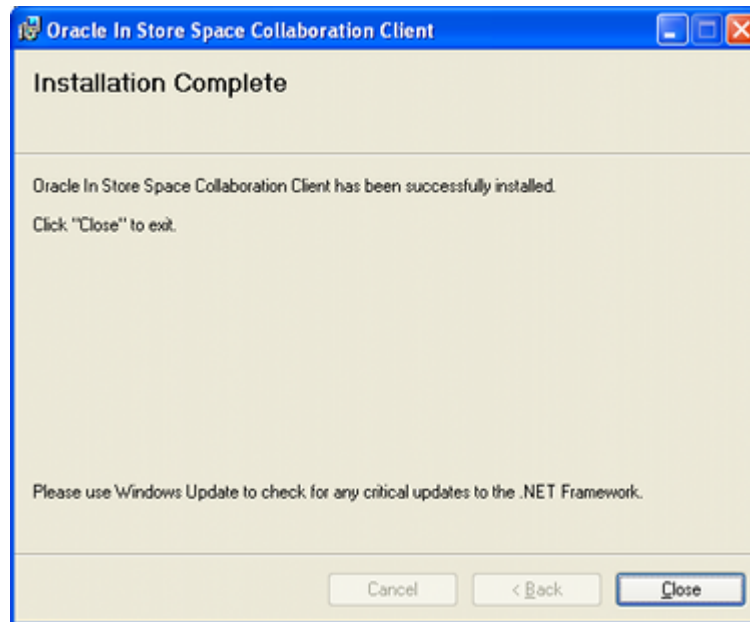
6. On the **Confirm Installation** screen, click **Next** to start the installation. The installation screen appears showing the progress of the installation.

Figure 10–4 Installation Progress Screen



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

Figure 10–5 Installation Complete Screen



Setting Up the ISSC Client

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

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

--STORE=1111
```

IP Address or Machine Name

This information tells the client the host name or IP address of the machine where the Server application is installed followed by a colon and the port number. It is required if the Server application is on a different machine to the Client.

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. Only one option is required and the double hyphens commenting out the selected option must be removed.

Local Port

This option is only used if the Server application and the client share the same machine. The port number must be set to the same number that has been set in the RFServer.INI file.

Monitor

This setting is used for diagnostic purposes during connection. It should not normally be altered.

Store

The store setting gives the option of having the client open a specific store when it is started. It references any assigned store code. These can be seen in the Add/Edit Store dialog box in the store Manager module in Macro space Management.

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. The double hyphens commenting out the store code must also be deleted.

The 'Edit Store' dialog box is shown with the 'General' tab selected. The fields are as follows:

Field	Value
Store ID	31
Store Code	TS-1
Store Name	Example
Directory Name	Example\
Latitude	0
Longitude	0
Status	Open
Opened Date	14/05/2013
Closed Date	31/12/2999
Store Prototype	Medium Prototype Store
Set as Prototype	<input type="checkbox"/>

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 is typically used when ISSC is in use at a specific store - this enables the application to open at that store by defaults - saving time.

For the changes to take effect, you must restart the Client application.

Installing the ISSC Help

Note: In-Store Space Collaboration cannot be installed without Macro space Management first being installed.

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 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](#)
- [Configuring the path to the In-Store Space Collaboration Help](#)

Before You Begin

The Help application installs the ISSC help file catalogue which is called by the ISSC client (the Client application).

Previous Installation

If a previous version of ISSC 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 3.5
- Internet Explorer 8 (configured to accept Active X content)

Security Advisories

Before installing ISSC Help, the following information should be taken into account.

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 ISSC 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.

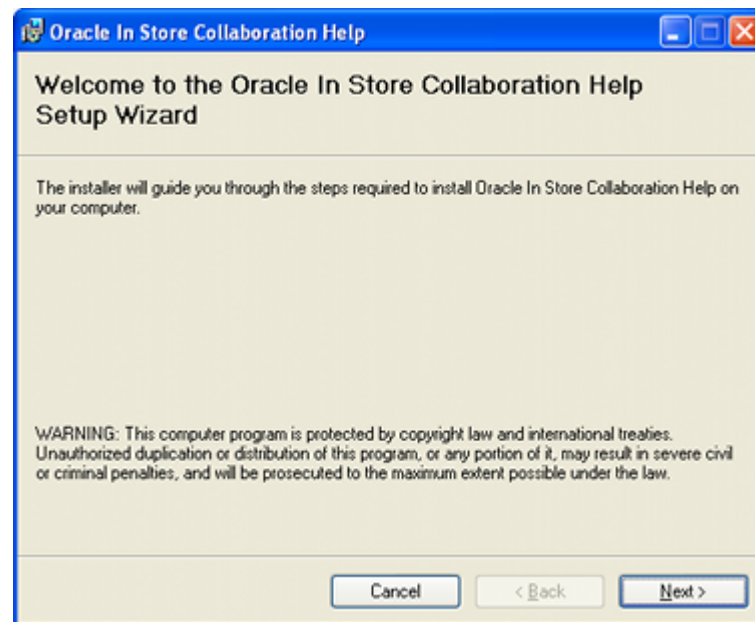
Windows Firewall Consideration

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

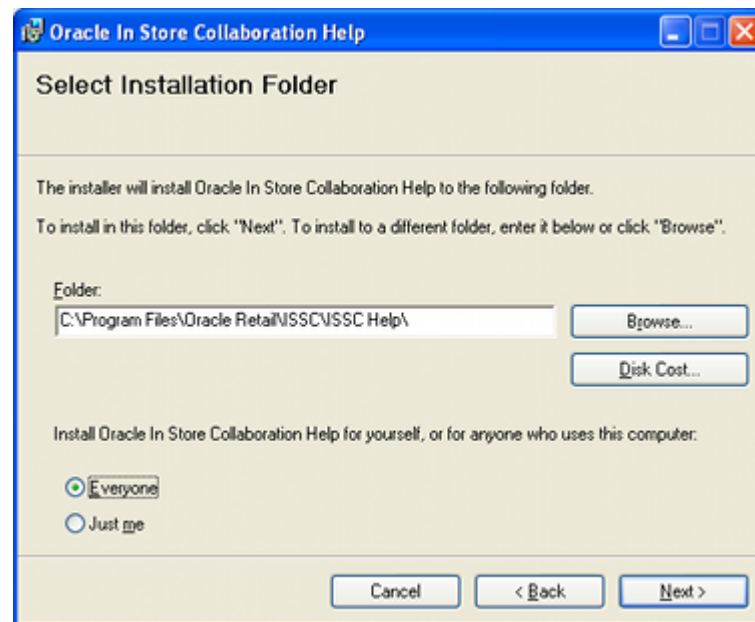
Installing the Online Help

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 **Setup.exe** file. The setup wizard will then start.

Figure 11–1 Setup Wizard Opening Screen

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

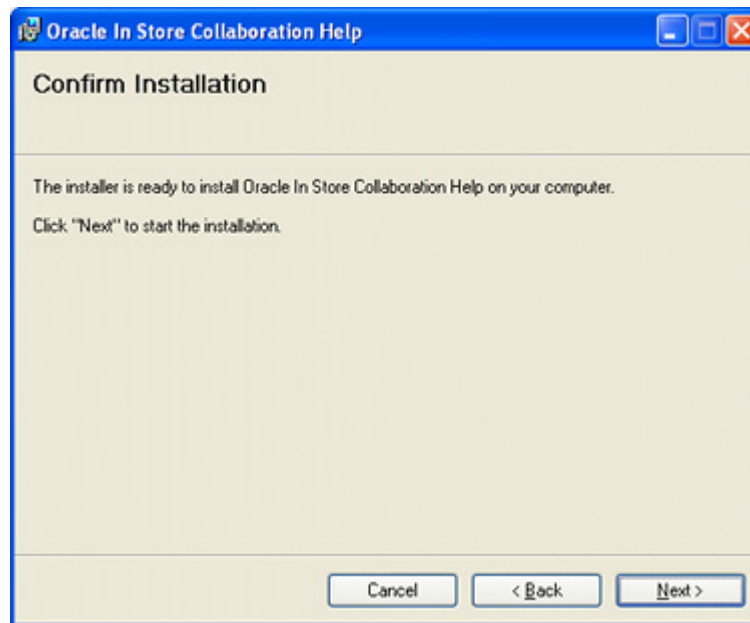
Figure 11–2 Select Installation Folder Screen

5. On the **Select Installation Folder** screen:
 - a. Specify the folder the help will be installed to and note the location.
 - b. Depending on your organization's IT policies, select the **Everyone** or **Just Me** option.

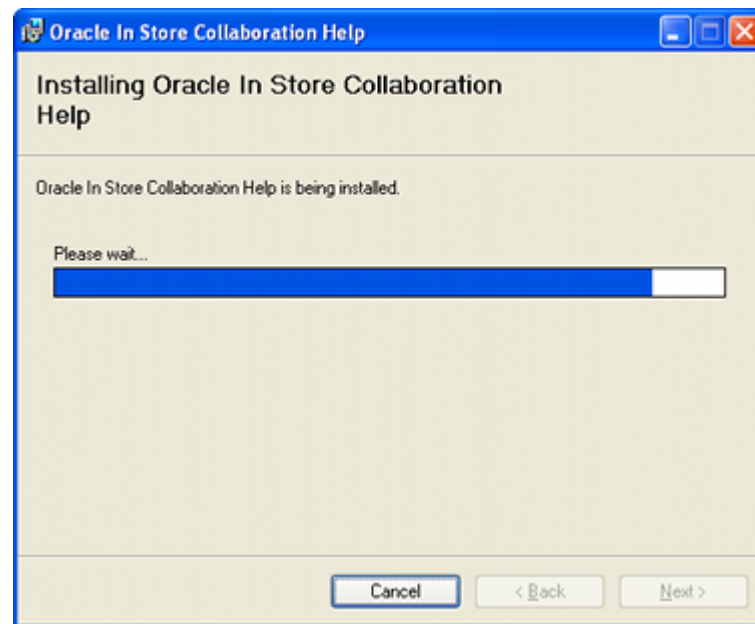
Note: Selecting Everyone or Just Me will not affect who can view the help; just who can subsequently modify or update it.

- c. Click **Next**. The **Confirm Installation** screen appears.
6. On the **Confirm Installation** screen, click **Next** to start the installation.

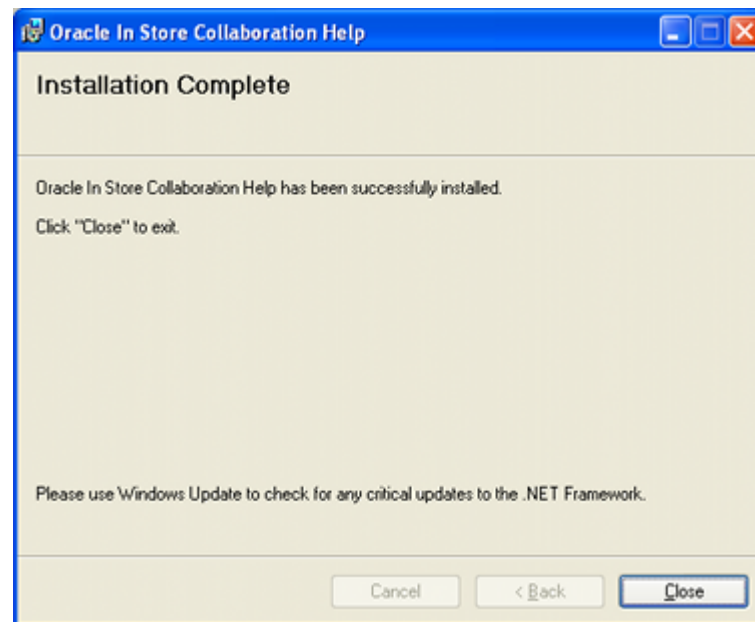
Figure 11–3 *Confirm Installation Screen*



The installation screen appears showing the progress of the installation.

Figure 11–4 Installation Progress Screen

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

Figure 11–5 Installation Complete Screen

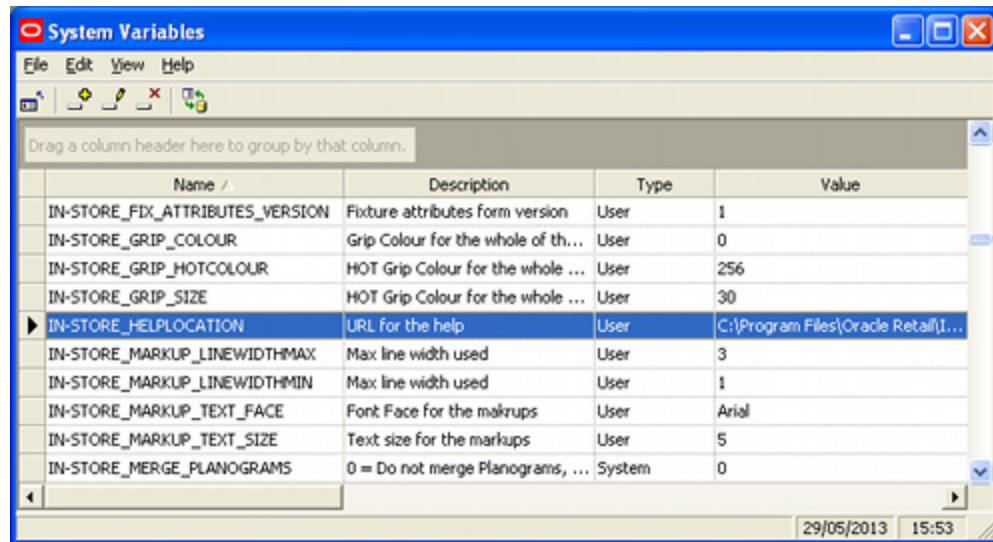
Configuring the path to the In-Store Space Collaboration Help

During installation, the Help application creates a number of sub-folders and files in the target installation directory. (If the default installation path is accepted, this directory will be *C:\Program Files\Oracle Retail\ISSC\ISSC Help*).

The *In-Store_Space_Collaboration.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.

In order for In-Store Space Collaboration Help to be called from the application, the location and file name must be specified as a system variable. This is done by selecting the System Variable option from the General Menu in the Administration Module in Macro Space Planning.

Figure 11–6 System Variable dialog box in MSM Admin Module



The path to and name of the *In-Store_Space_Collaboration.htm* file is then stored in the IN-STORE_HELPLOCATION system variable.

Once the System Variable has been updated, restart the ISSC server for the Client applications to read the new help file path location. This can be achieved as follows:

1. From the **Start** menu, open the Windows Run dialog by selecting **Run...**
2. In the **Run** dialog, type **services.msc**, and press **OK**. The **Services** window appears.
3. Select the **Oracle ISSC Server** entry in the **Services** window and click **Restart**.

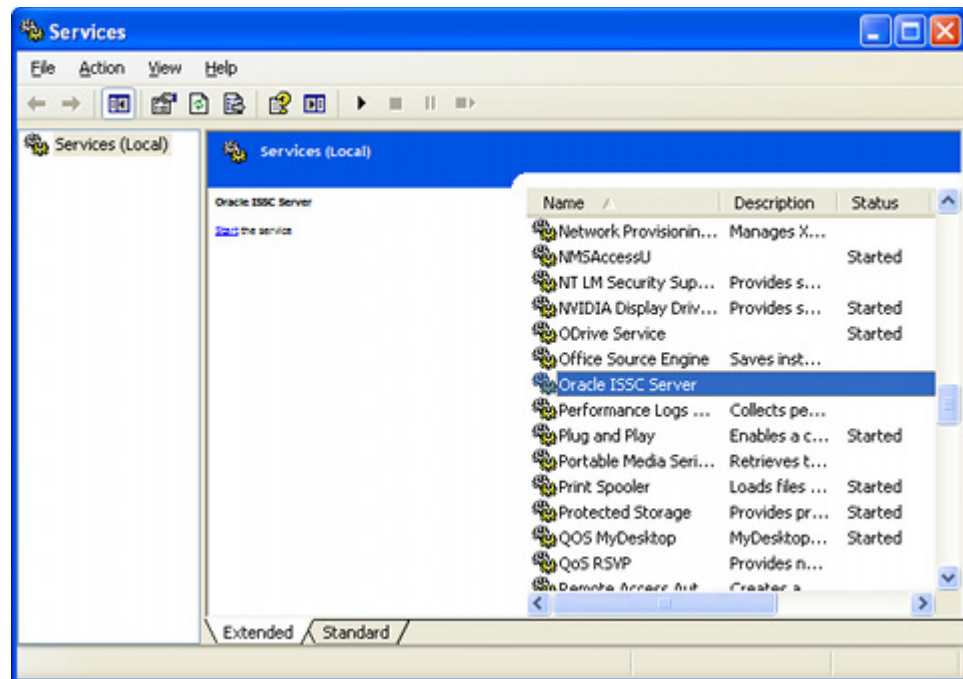
Note: Installation on a server machine is usually the most convenient place than having to install it alongside the Client application on each machine that hosts the Client.

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

1. Once the help file location has been successfully updated, restart the ISSC 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 ISSC Server as described below:
 - a. From the **Start** menu, open the Windows Run dialog by selecting **Run....**
 - b. In the **Run** dialog, type **services.msc**, and press **OK**. The **Services** window appears.

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

Figure 11–7 Services Window with the Oracle ISSC Server Service Highlighted



Opening ISSC for the First Time

This section of the Oracle Retail Macro Space Planning Installation Guide contains information for users installing In-Store Space Collaboration (ISSC) and opening the module for the first time.

Overview of Opening ISSC for the First Time

When In-Store Space Collaboration is opened for the first time after implementing the application, there are constraints on access:

- Only members of the Admin User Group will have access to the ISSC toolbar.
- No access will be available for any stores and floor plans that might have been created.

This section provides a brief introduction to granting access. For more information see the *Oracle Retail Macro Space Management Administration Module User Guide*.

Access to the ISSC Toolbar

Access to the ISSC toolbar is controlled via the AVTTB_MESSAGE_USER_GROUP_LINK table in the database. Only members of the Admin User Group have access when ISSC is first installed. In order to give other user groups access to the ISSC toolbar, the following actions are required:

1. A User Group is created using the Functional Security dialog box accessed from the Security Menu in the Administration Module of Macro Space Management (MSM).
2. The USG_ID (User Group ID) for that User Group is identified in the AVTTB_MESSAGE_USER_GROUP_LINK table in the database.
3. An insert statement is run against the database

```
Insert into AVTTB_MESSAGE_USER_GROUP_LINK
Select [User Group ID], MSC_ID, MUG_PERMISSION_MASK
from AVTTB_MESSAGE_USER_GROUP_LINK where USG_ID = 1
```

where the value of [User Group ID] is the USG_ID identified from the AVTTB_MESSAGE_USER_GROUP table.

Access to Stores and Floor Plans

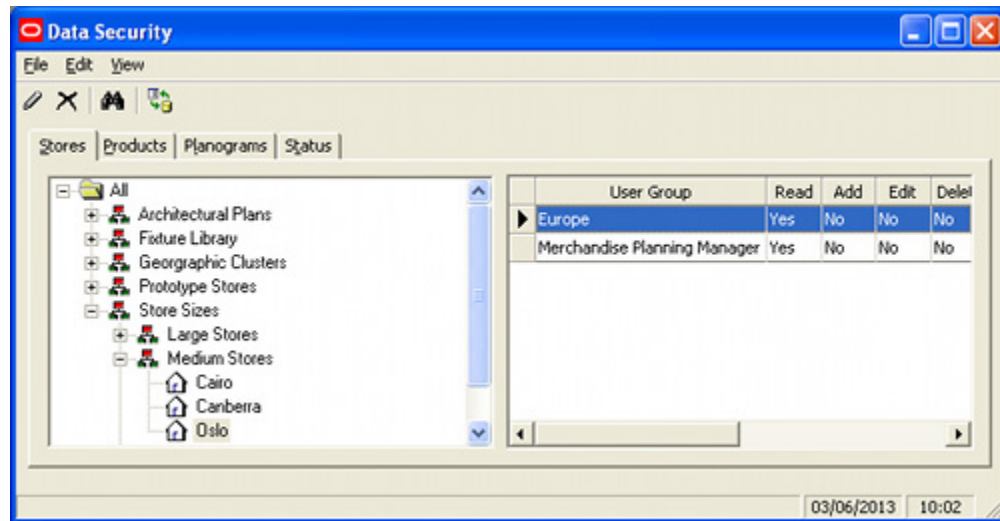
Access to stores and floor plans in ISSC is configured in the Data Security dialog box of the Administration Module of MSM — this is accessed from the Security menu. This

requires permissions to be granted for the stores it is wished to access and the statuses for the stores and floor plans it is wished to view.

Giving Access to Stores

Access to stores is granted in the Stores tab of the Data Security dialog box.

Figure 12–1 Data Security Dialog Box - Stores Tab

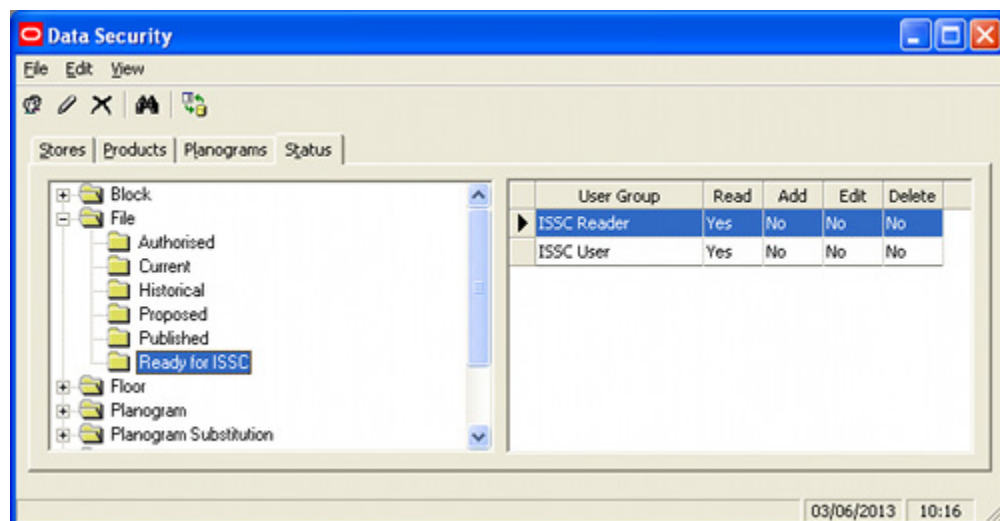


Only User Groups with permissions to view a specific store will be able to view that store in the Select Store dialog box that appears when ISSC is opened.

Giving access to Floor Plans

Access to floor plans is granted in the Status tab of the Data Security dialog box.

Figure 12–2 Data Security Dialog Box - Status Tab



Only User Groups with permissions to see both a store at a specific status and a floor plan (file) at a specific status will be able to see those floor plans when they select a Revision in the Select Store dialog box that appears when ISSC is opened.

