

**Oracle® Retail XBR Loss Prevention and Store  
Analytics**  
User Installation Guide  
Release 7.0

August 2015

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# TABLE OF CONTENTS

Overview . . . . .	1
Audience. . . . .	1
Prerequisites . . . . .	1
XBR Version 7.0 Supported Platforms. . . . .	2
Upgrading. . . . .	2
Pre-Installation Checks . . . . .	3
Distributed Installations . . . . .	3
Centralized Installations . . . . .	3
Settings Information for XBR Installation: dtvcustom.ini. . . . .	3
Installing From a Network Drive . . . . .	3
Installing the XBR Desktop Application . . . . .	4



## OVERVIEW

**Note:** The rebranding for the latest version of this documentation set is in development as part of post MICROS acquisition activities. References to former MICROS product names may exist throughout this existing documentation set.

**XBR** is the loss prevention and store data analysis tool and uses exception based reporting methods to easily identify, track, and respond to store events.

Table Editor is an additional component that can be installed.

**Table Editor** is designed to let you maintain supplemental files (i.e. non point-of-sale files) that are used with your XBR software. For example, it is an efficient means to organize and edit existing master files. Data can be managed through basic functionality like sorting, filtering, printing and exporting. Table Editor allows the flexibility of modifying multiple fields in a master file by utilizing spreadsheet or data form formats, radio buttons and drop down lists in conjunction with existing functionality.

This Installation Guide describes the installation and configuration of MICROS-Retail XBR® Desktop application.

## **Audience**

This document is intended for anyone who wants to install the Desktop version of XBR. This person should be familiar with basic Windows operations. This person also should know who to contact to get the information (server names, port numbers, IP addresses, etc.)

## **Prerequisites**

This guide assumes:

- You know the name of the LDAP server, and the connection port value (if you use LDAP).
- You know the database server name and other parameters that may be required to connect XBR to it.
- You know the gateway IP address for email.
- You know the server name and database name that will be used for offline reports, if it is different from the main database.

You know the org code that was used in the database setup.

## XBR Version 7.0 Supported Platforms

### Database

- Microsoft SQL 2005/2008
- Oracle 10g/11g

### Operating System

#### Client

- Windows XP
- Windows 7 (64-bit)



*The XBR Desktop application can only be deployed on Windows operating system environments.*

## Upgrading

The installation is a complete installation. In other words, this application, when installed, does not overwrite or add components to previous versions.

If you would like to remove the previous version, use the installation CD for that version and follow the instructions in the Implementation Guide on using the "Remove" option. An alternate procedure would be to use the Windows Add/Remove Programs.



## PRE-INSTALLATION CHECKS

Read this section before you install the XBR Desktop application at a user workstation.

### Distributed Installations

Distribute a copy of the XBR CD to all users who will run a local copy of the XBR client software at their PC. You can make copies of the CD that has been supplied to you or you may distribute the CD files over your network.

### Centralized Installations

If you are installing XBR from a centralized network drive, it is not necessary to distribute the CD to individual users. Individual products (including the XBR Desktop client software) are stored in subdirectories under a main product directory.



*Regardless of whether you are installing from the network or by distributing the CD to individual users, be sure that you have a network connection to your database servers. XBR uses several .DLL files from those servers.*

### Settings Information for XBR Installation: dtvcustom.ini

XBR can use a file called `dtvcustom.ini`, if provided, that may be used during installation for customers who:

- Use more than one video vendor.
- Want to provide database settings to their users who are installing 7.0.
- Want to provide a default company email address.

The InstallShield application that prompts you through the installation by using the contents of `dtvcustom.ini` as defaults for some of the parameter settings in the customer's .ini files.

### Installing From a Network Drive

If you are installing XBR from a network drive and the file `dtvcustom.ini` is on your installation CD, make sure the `dtvcustom.ini` file is in the same directory as the `setup.exe` file for XBR 7.0. If it isn't in the same directory, its settings are not used during installation.



*If you wish to install the XBR Desktop application in more than one location, you must run the installation program for each location. Do not copy the installed XBR Desktop application from one location to another.*

## INSTALLING THE XBR DESKTOP APPLICATION



*This installation procedure will install the XBR 7.0 Desktop Application with a basic configuration. If you wish to perform a more detailed configuration, refer to the XBR Implementation Guide.*

1. Insert the XBR installation CD into the CD drive. The installation program should start automatically.

If the CD doesn't start automatically, or if you are running the CD off the network:



- At the Windows desktop, click the **Start** button, then select Run.
- In the "Run" window, click the **Browse** button and select the drive where the installation CD is located.
- Find the file `setup.exe`, select it and click **OK**. It is located in the \Desktop folder on the installation CD.
- In the "Run" window, click **OK**. The InstallShield program runs, and displays the following Welcome screen window.

2. Click **Next** to continue with the installation process.

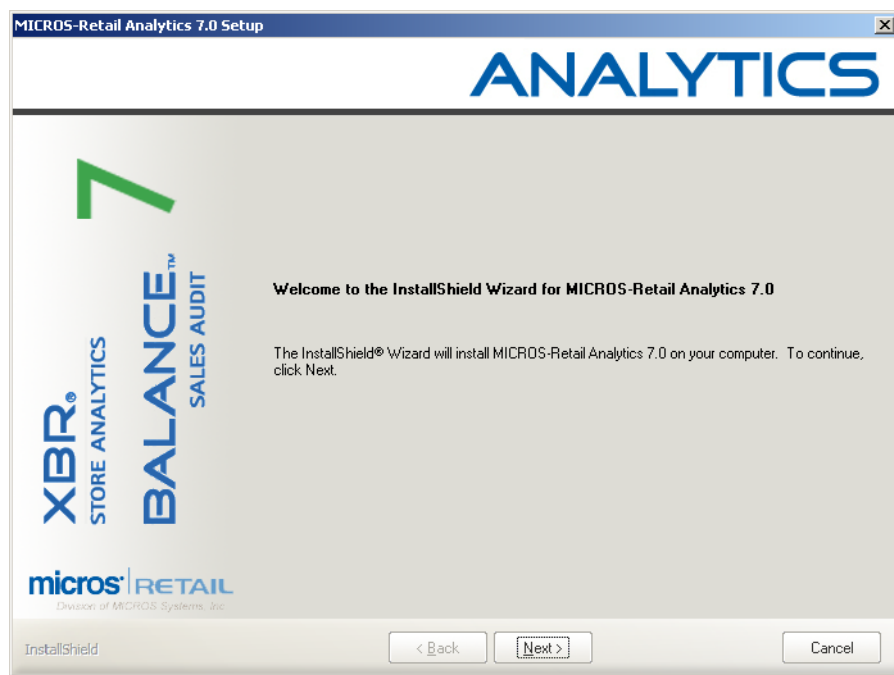


Figure 2-1: Welcome Screen for Install Wizard

3. Click **Next** to accept the default destination directory:

**C:\MICROS-Retail\_Analytics\_7.0.**

Although you can change the drive letter, it is best to use MICROS-Retail\_Analytics\_7.0 as the directory name. However, if you need to change the directory, click the **Browse** button, type in or navigate to and select the new directory, and click **OK**.

Click **Next**.

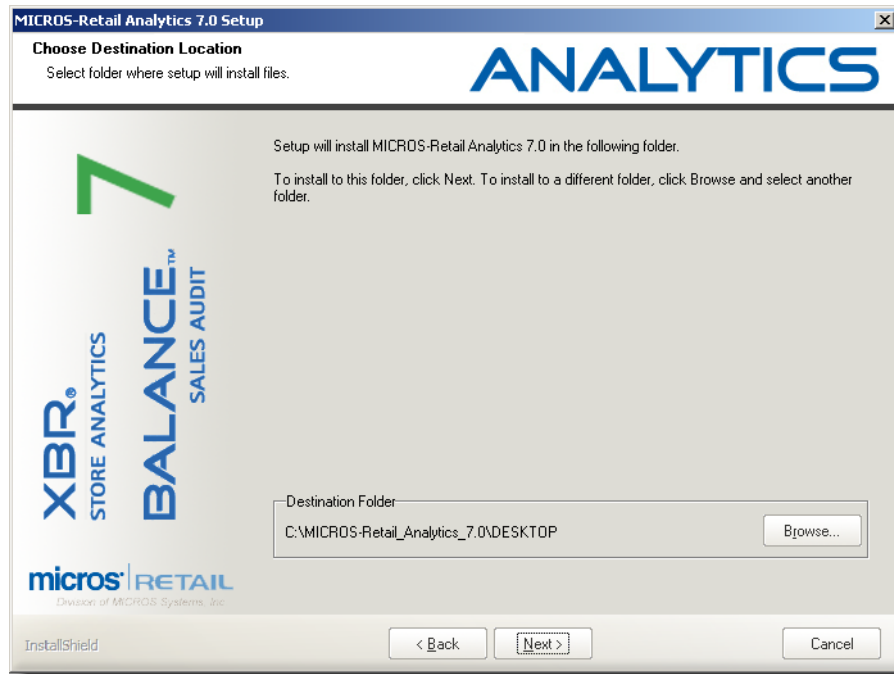


Figure 2-2: Destination Location for XBR

4. You are prompted to choose the type of installation you want to perform.
- A **Typical** installation installs the components of the XBR client (XBR, Query Viewer, and Table Editor) and creates the directories shown in the table below.

Subdirectory	Files
XBR	XBR program files.
Help	On-line help files.
Picts	Quick Run icon picture files
Table_Editor	Table Editor files.
Query_Viewer	Query Viewer files.

Subdirectory	Files
PDF	Installation files for the driver that allows reports to be exported in PDF format.

- A **Compact** installation only installs XBR.
- A **Custom** installation allows you to pick the components that you want to install.

If the “Table Editor” module is installed, its configuration file `dtveditor.ini` is set up with the same database connection attributes as the file `dtvanalytics.ini`.

Select **Typical** to install all components of the XBR client. Click **Next**.

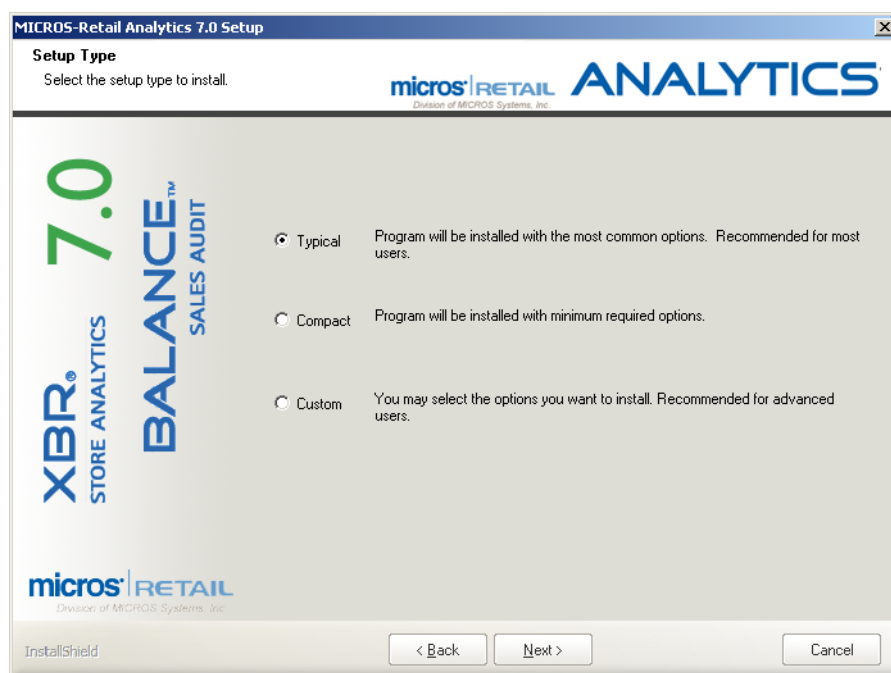


Figure 2-3: Installation Type

5. By default, the installation CD creates a program folder called MICROS-Retail Analytics 7.0 with desktop shortcut icons for the applications being installed. To change the default folder, enter a different name or select another existing folder and click **Next**.

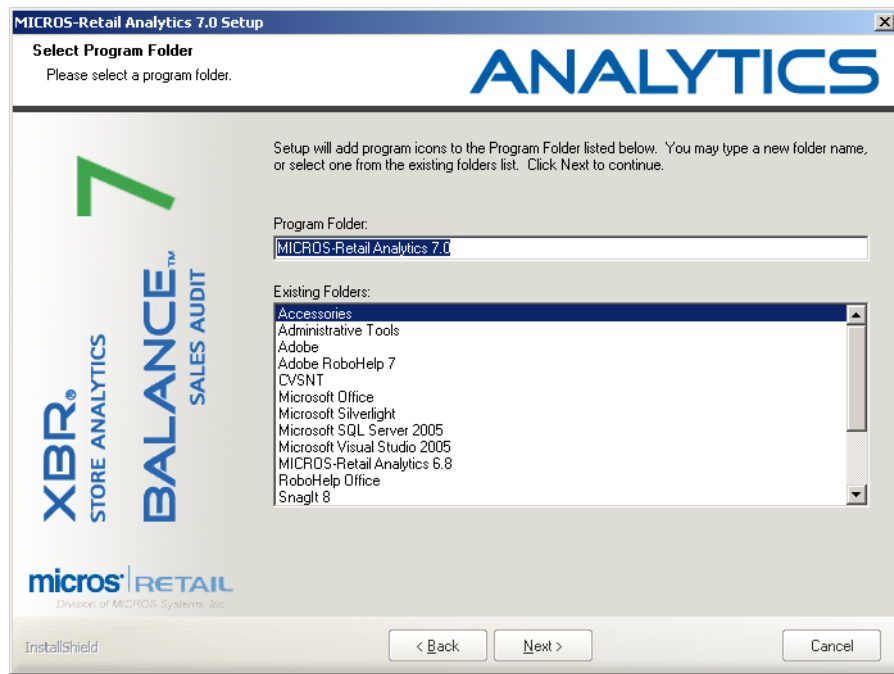


Figure 2-4: Program Folder

6. If necessary, you may change the settings you have selected by clicking **Back** to return to previous screens and make changes. If you believe that your settings are correct, click **Next** to begin the installation. The status of the installation is displayed as it occurs.

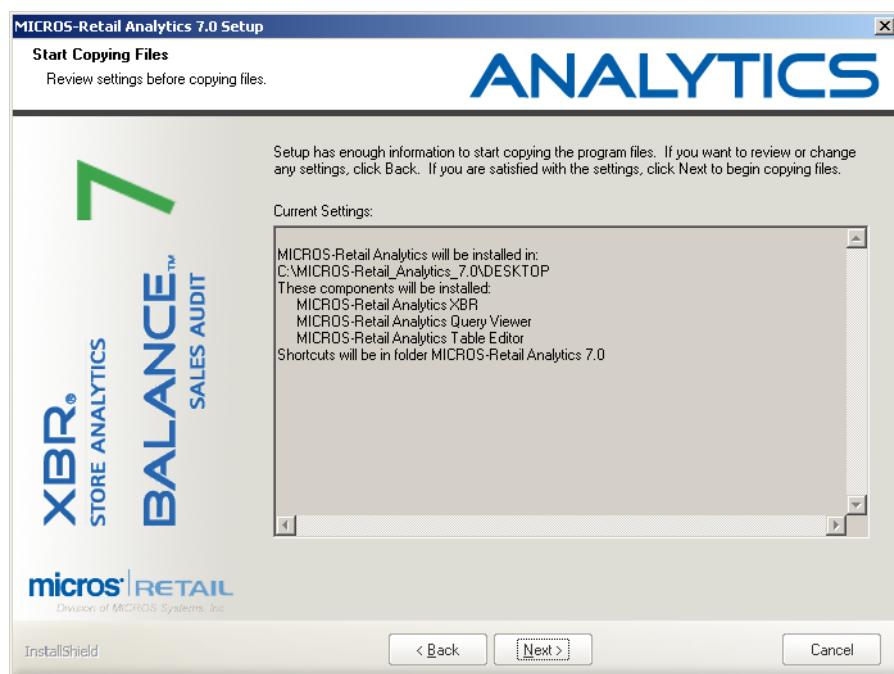


Figure 2-5: Current Settings



*The Organization Code that you enter in the next step **MUST** match the Company Code that is in the database.*

7. Once the installation has finished, enter your company name and organization code. Click **Next**.

*Figure 2-6: Company Name and Organization Code*

8. If you are installing the XBR Desktop on a server that will be accessed via Terminal Services or Citrix, select **Yes**; otherwise, select **No**.

Click **Next**, after selecting an option.

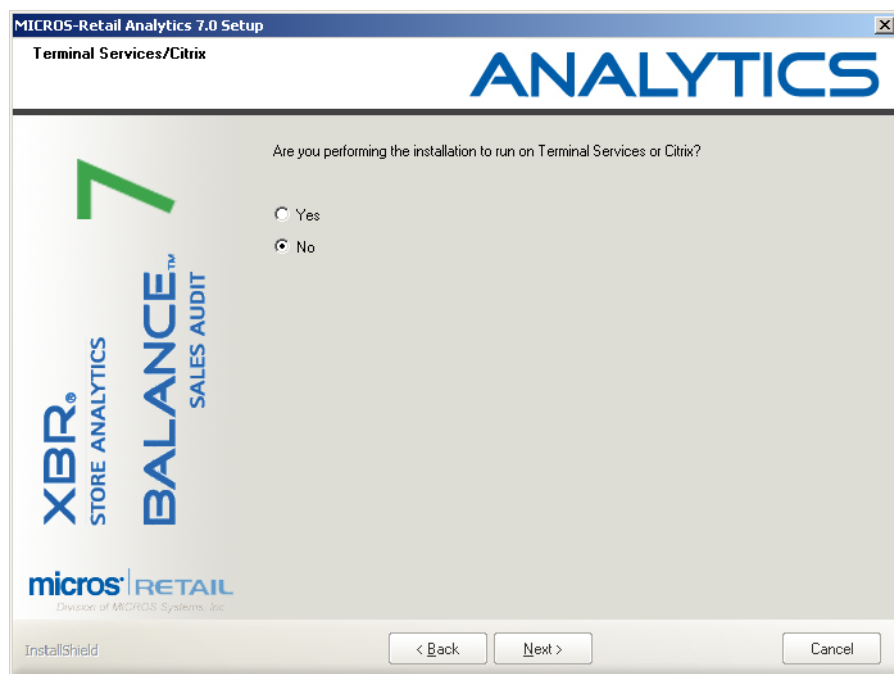


Figure 2-7: Terminal Services



9. If you use LDAP, select **Yes**, click **Next**, and continue with the next step.  
If you do *not* use LDAP, select **No**, click **Next**, and go to step 10.

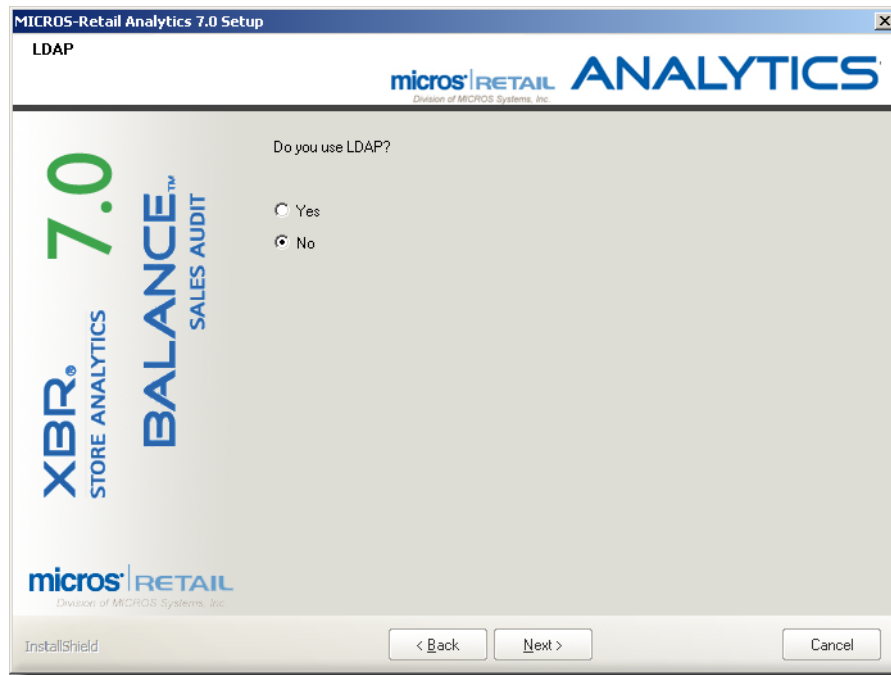


Figure 2-8: LDAP Option



LDAP means Lightweight Directory Access Protocol, an internet protocol used by email and other programs to look up information from a server.

- a. If you use Active Directory as the LDAP service, select **Yes**; otherwise, select **No**. Click **Next** after selecting an option.

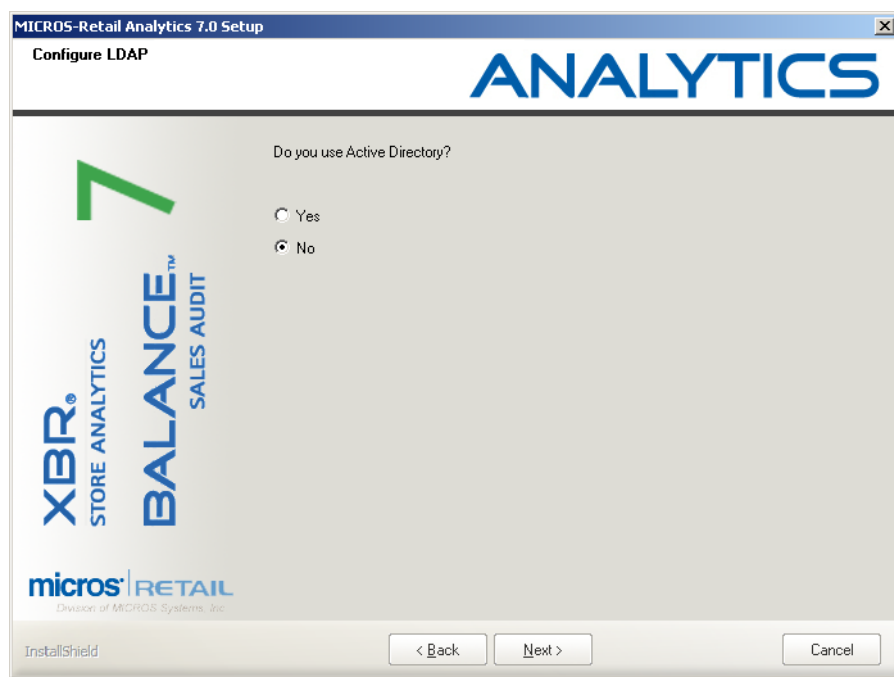


Figure 2-9: Active Directory

- b. If you run LDAP over SSL (Secure Socket Layer), select **Yes**; otherwise, select **No**. Click **Next** after selecting an option.

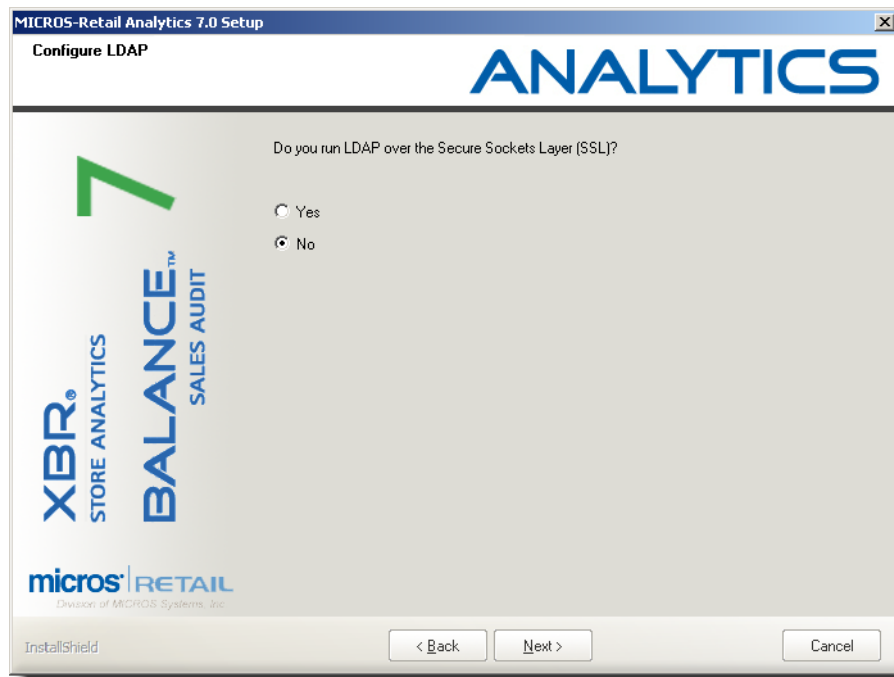


Figure 2-10: LDAP Over SSL



*If you selected **Yes** you may need to install an SSL certificate. This type of installation is not part of the current process and has to be done separately. Please refer to “Installing an SSL Certificate” in the XBR Implementation Guide for more information.*

- c. Depending on your response to the previous screen, you will see one of the following screens. Enter the SSL or Clear Port number and click **Next** to continue.

If you responded **Yes**, enter a name for the LDAP Server and a number for the SSL Port (default port value is "636").

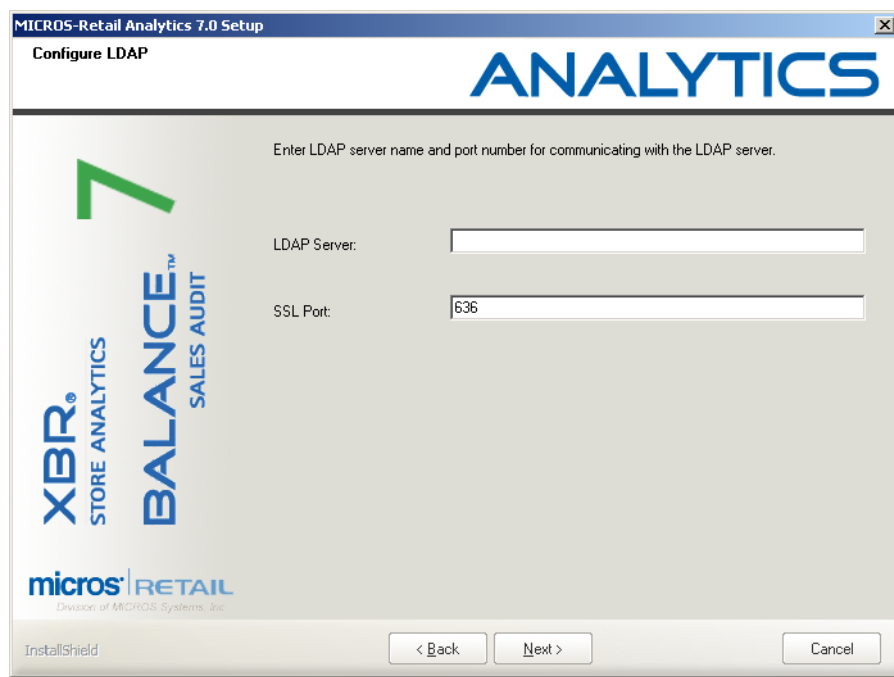


Figure 2-11: LDAP Server and SSL Port

If you responded **No**, enter a name for the LDAP Server and a number for the Clear Port (default port value is "389").

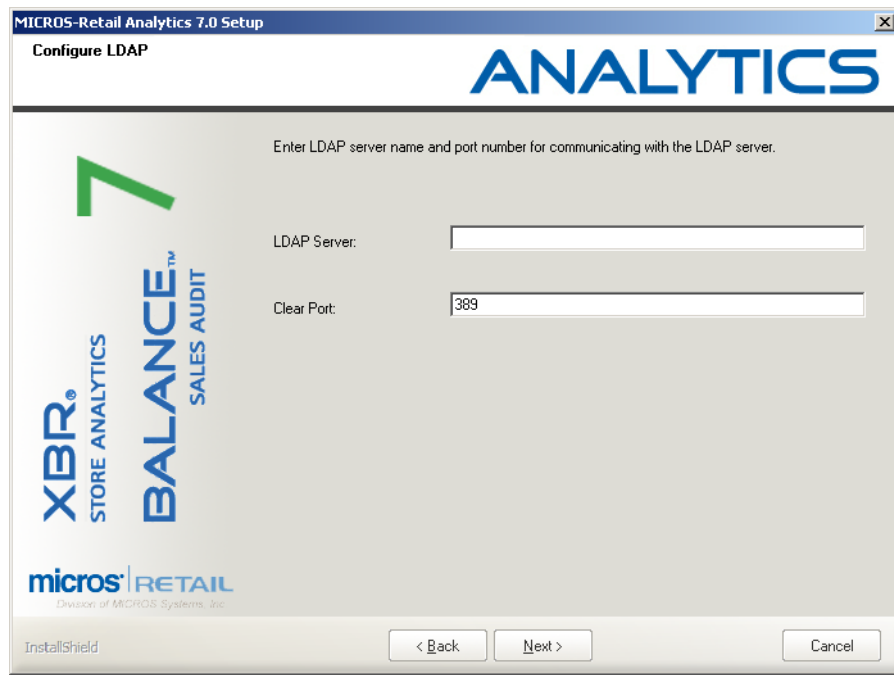


Figure 2-12: LDAP Server and Clear Port

- d. This screen allows you to identify a base distinguished name (top level) of the LDAP directory. Enter a distinguished name and click **Next**.



The format of the entry at this screen is LDAP-dependent. If you are not familiar with the LDAP format, consult your LDAP specialist. The distinguished name is a unique identifier for an entry in the LDAP directory hierarchy. It is used to find, delete, modify, or insert an entry in the directory. The name is used as the starting point for the search. In the figure below, o = organization and ou = the organizational unit.

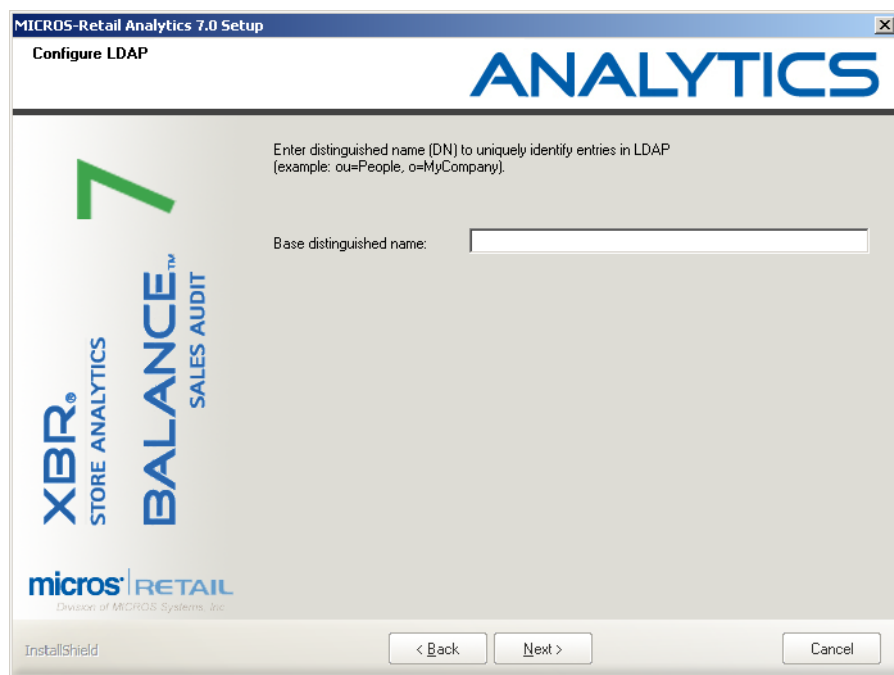


Figure 2-13: Distinguished Name For LDAP

- e. If your company manages the user application security level through LDAP (rather than by using the internal XBR application security levels), you should enter the pattern which designates the role of the user at this workstation.



The “pattern” defines the format that is followed for specifying different user roles and is related to the user’s security level. The pattern is “XBR-USER-” and the role follows the right-most hyphen.

For example, established role names include XBR-USER-SYSADMIN (System Administrator), XBR-USER-SYSMGR (System Manager), XBR-USER-LP (Analyst), and XBR-USER-RO (Read-Only).

If your organization uses a different approach for specifying user roles, the entry “IGNORE” should be made in the “User Role” field.

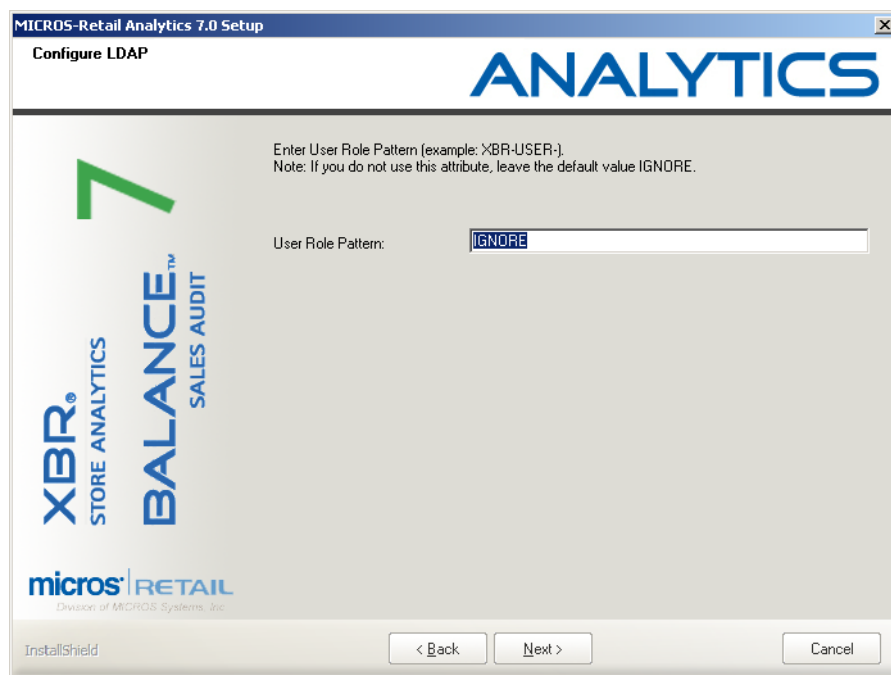


Figure 2-14: User Role Pattern

10. If you are using Oracle as your database type, select Oracle, click **Next**, and continue with the next step.

If you are using SQL Server as you database type, select Microsoft SQL Server, click **Next**, and go to step 14.

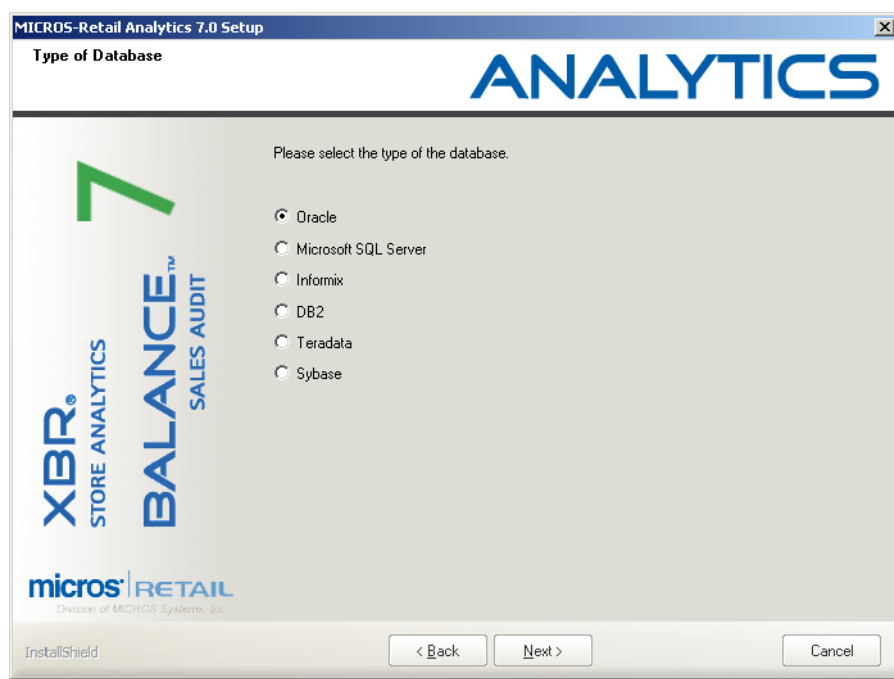


Figure 2-15: Database Type



11. Select how you will access the Oracle database:
- Select PowerBuilder Native Drivers, click **Next**, and continue with the next step, or
  - Select ODBC, click **Next**, and go to step 16.

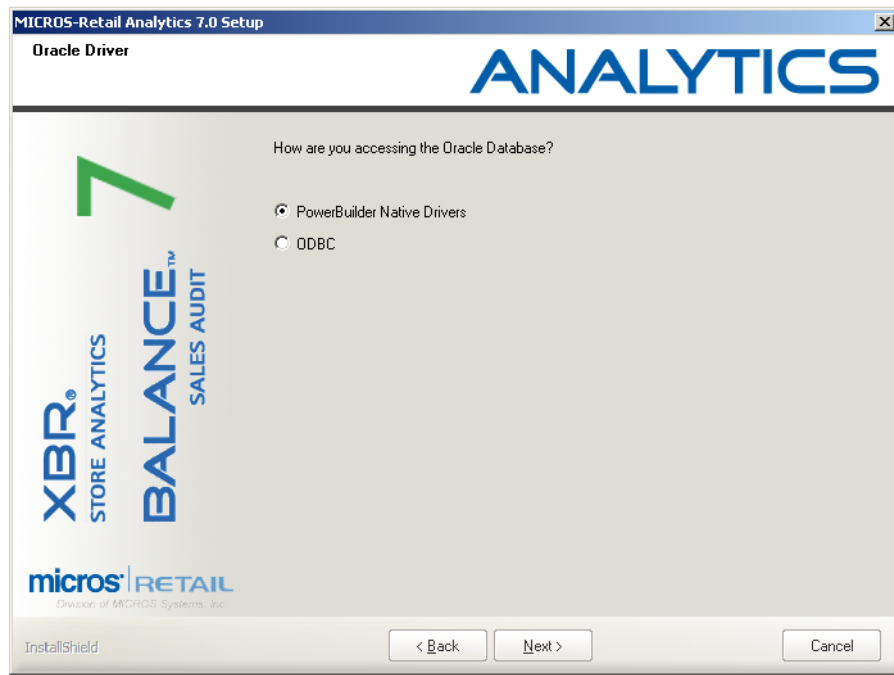


Figure 2-16: Access the Oracle Database

12. Select the version of Oracle (10g or 11g) you are using.

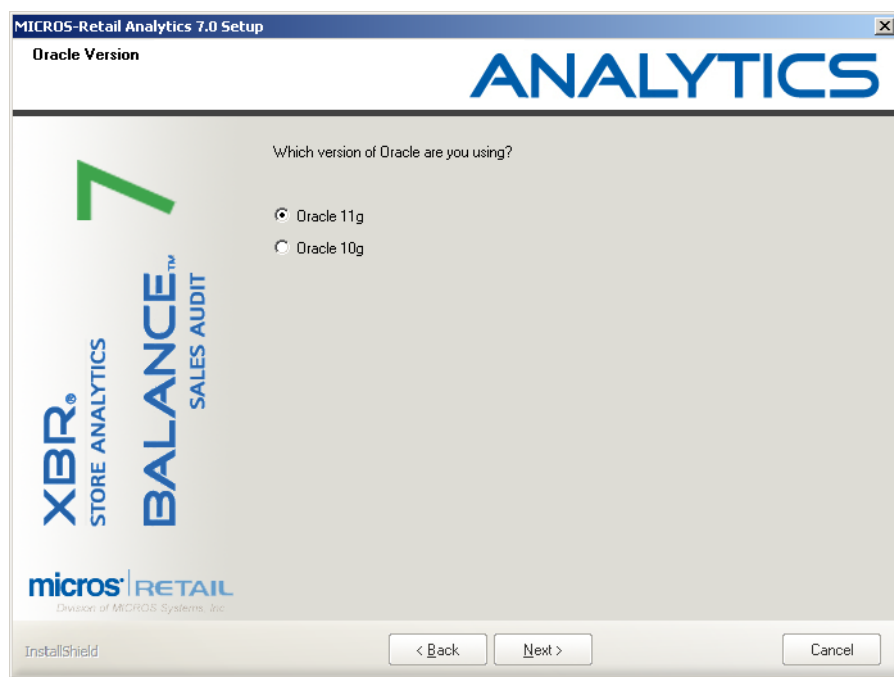


Figure 2-17: Oracle Version

13. Skip to step 16.

14. After you select the database type, you are prompted for the database name to which you want to connect. Enter the database name and click **Next**.

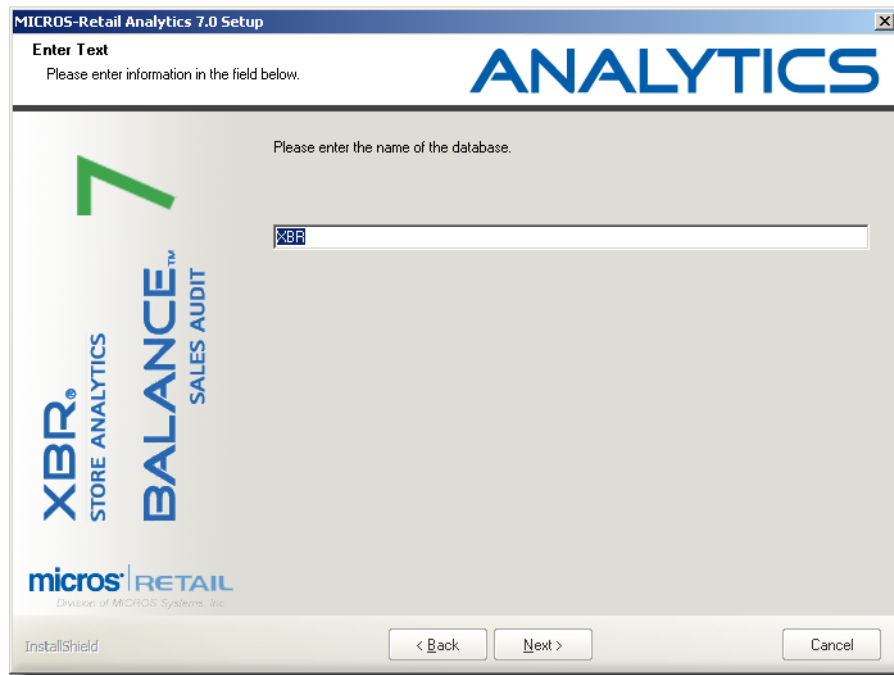


Figure 2-18: SQL Server Database Name

15. If your company uses NT Authentication, select **Yes** to indicate authentication is present. The default option "IntegratedSecurity='SSPI'" is added to a parameter string in the next step.

If your company does not use NT Authentication, select **No**.

Click **Next**.

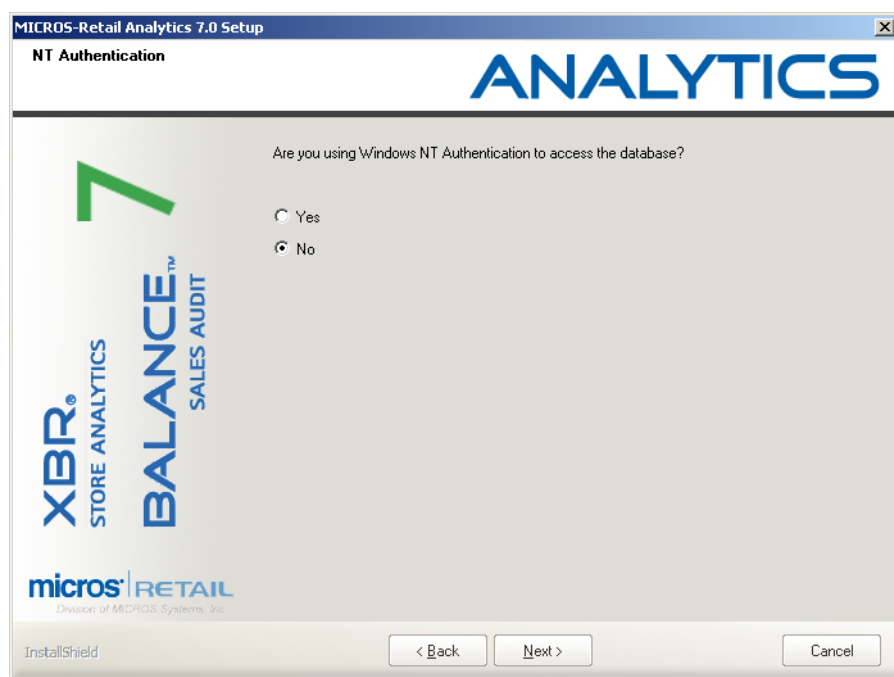


Figure 2-19: NT Authentication

16. Enter the Database Server, Parameters and Connection information on the screen and click **Next**.

MICRO5-Retail Analytics 7.0 Setup

Please enter remaining connection parameters.

ANALYTICS

Please enter server name, database parameters, and connection options.

7

XBR® STORE ANALYTICS

BALANCE™ SALES AUDIT

micro5 | RETAIL  
Division of MICRO5 Systems, Inc.

InstallShield

Server

Parameters Staticbind = 1, PwDialog = 1

Connect

< Back Next > Cancel

Figure 2-20: DB Server, Parameters, Connection Information

17. Offline reports are stored in the database. The database may be either the main database (as shown in the previous screen) or any other database, regardless of whether or not it is on the same server.

This screen allows you to specify if the same database connection attributes (server name and database name) are used for offline reports. Make a selection and click **Next**.

If you use the same database: select **Yes**, click **Next**, and go to step 18.

If you are going to use a different database: select **No**, click **Next**, and continue below.

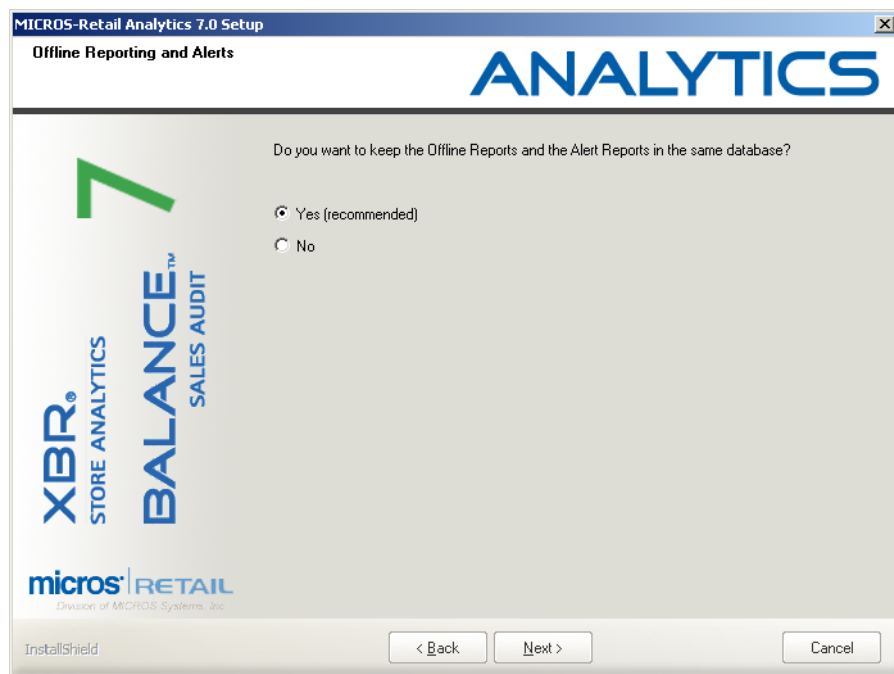


Figure 2-21: Offline Reports and Alerts

- a. Provide the database type.

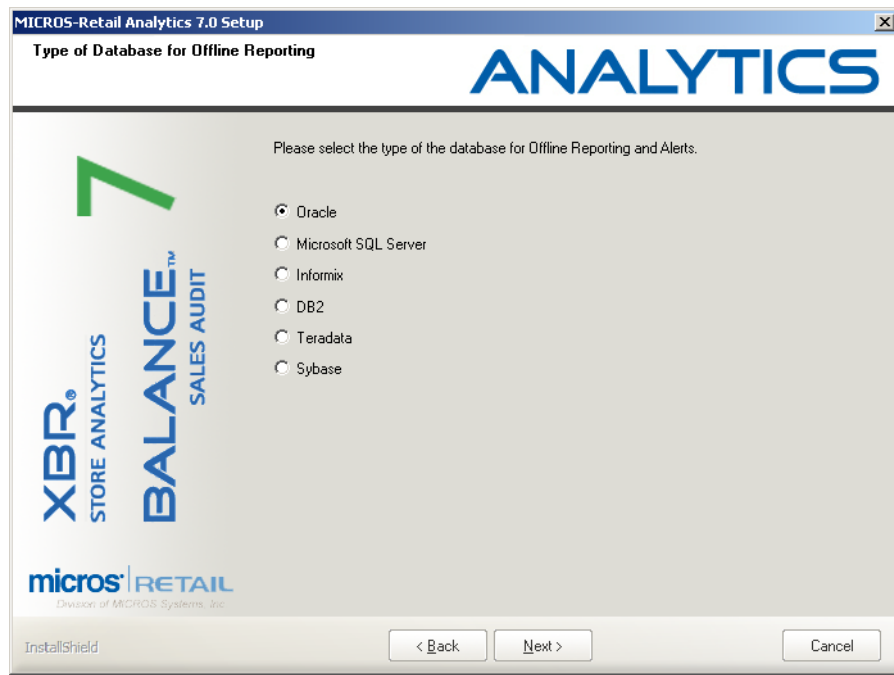


Figure 2-22: Database Type for Offline Reports



Depending on which database, Oracle or Microsoft SQL Server you selected, you will see one of the following screens.

- b. If you selected Oracle: provide a server name, click **Next**, and continue with the next step.

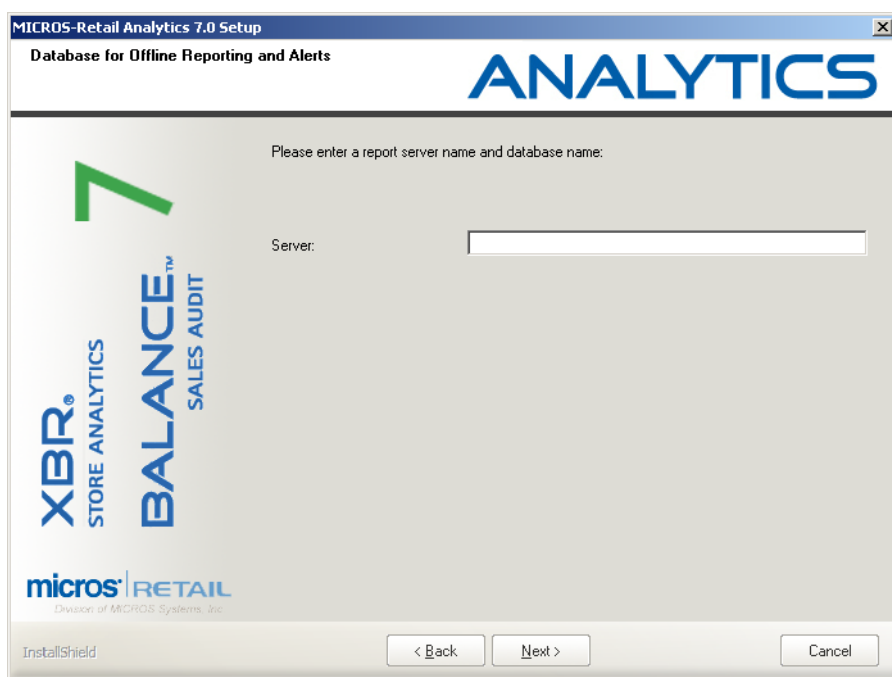


Figure 2-23: Offline Reports Oracle - Server Name



- c. If you selected Microsoft SQL Server, provide a server name and database name, click **Next**, and continue with the next step.

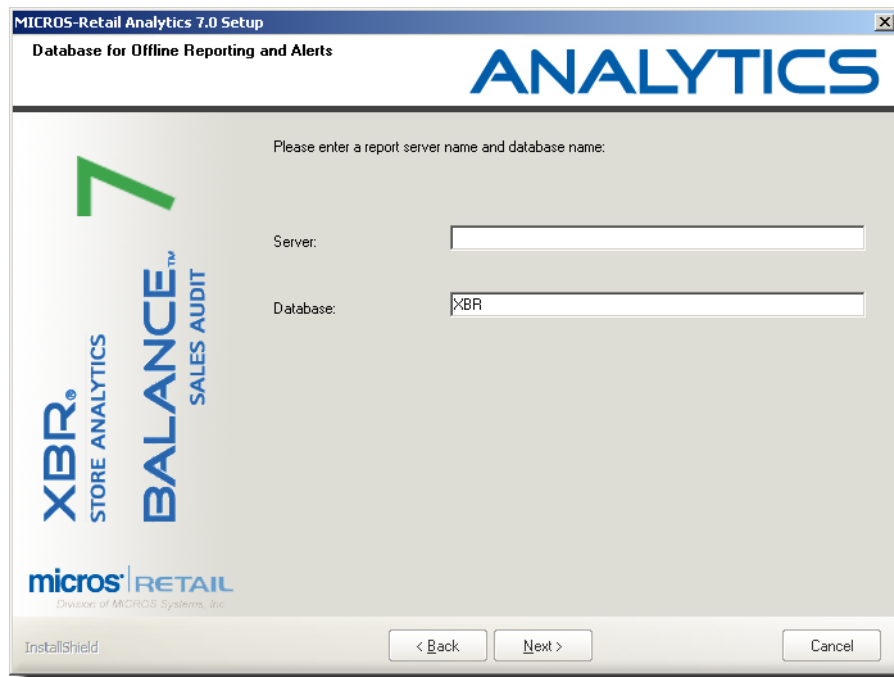


Figure 2-24: Offline Reports SQL Server - Server Name and Database Name

18. At the Mail gateway address window, enter the IP address or name of your SMTP relay (your email server). Click **Next**.

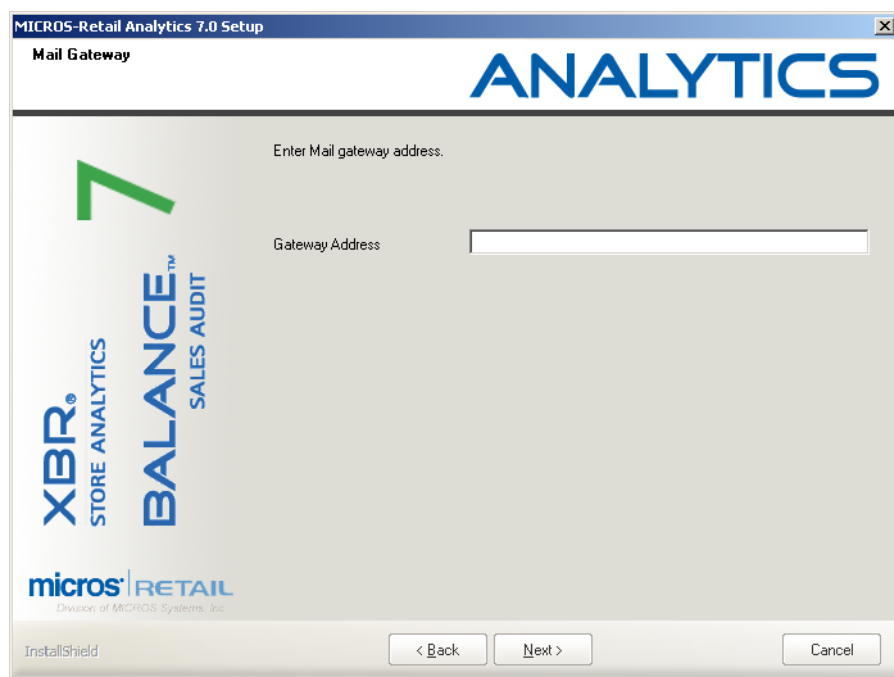


Figure 2-25: IP Address or Email Server Name



If there is no default entry or you don't know the name of your SMTP relay, leave the field blank and complete the install. Refer to "Email Configuration Settings" in the XBR Implementation Guide for information about how to enter the mail gateway address.

19. Enter the email address to be used by default for the sender. Enter your own email address here, for example, "myemail@company.com". Click **Next**.

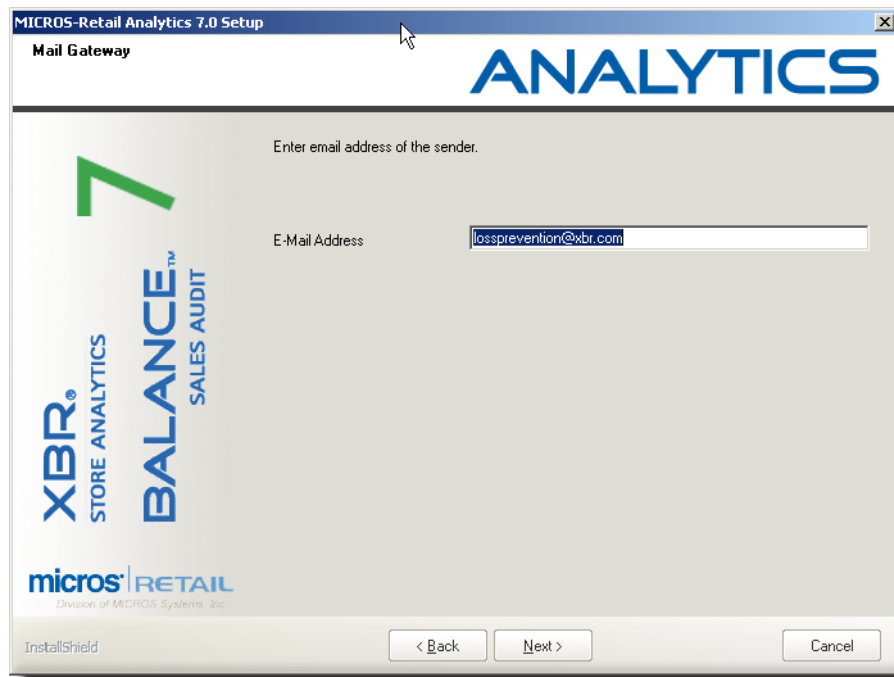


Figure 2-26: Sender's Email Address

20. This screen allows you to specify if you use video. If you do, select **Yes**, click **Next**, and continue with the next step.

If you do *not* use video, select **No**, click **Next**, and go to step 22.

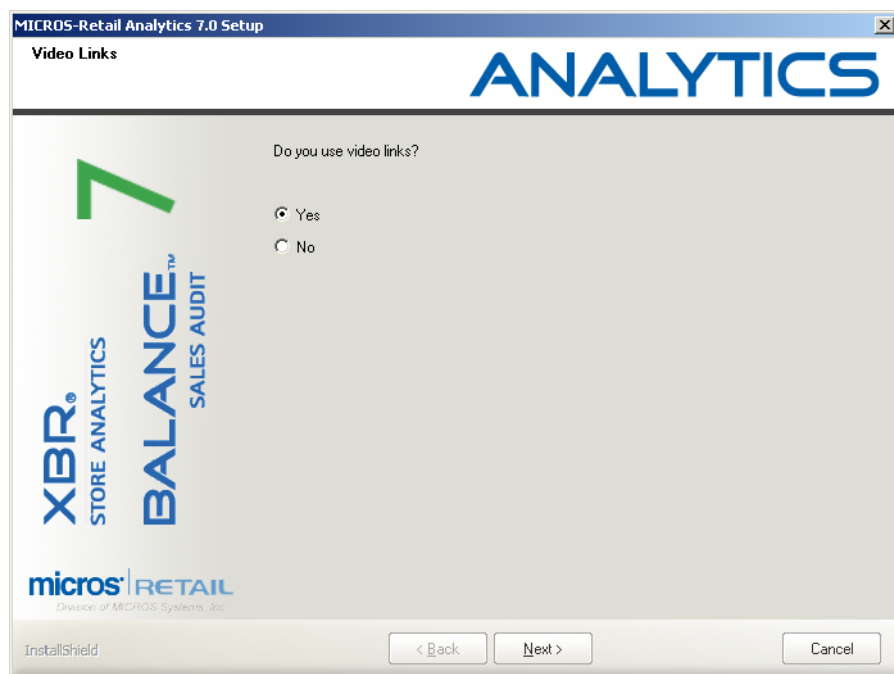


Figure 2-27: Video Links

21. If you selected **Yes**, you are prompted to navigate to the directory (either on the network or on your local hard drive) and select the default executable file that runs your video.

If your company uses only one video vendor, the following entry is written to the file `dtvanalytics.ini`:

```
VideoDir= line
```

After you select the default video executable file, click **Open**.

However, if your company uses more than one video vendor, refer to the XBR Implementation Guide for more information.

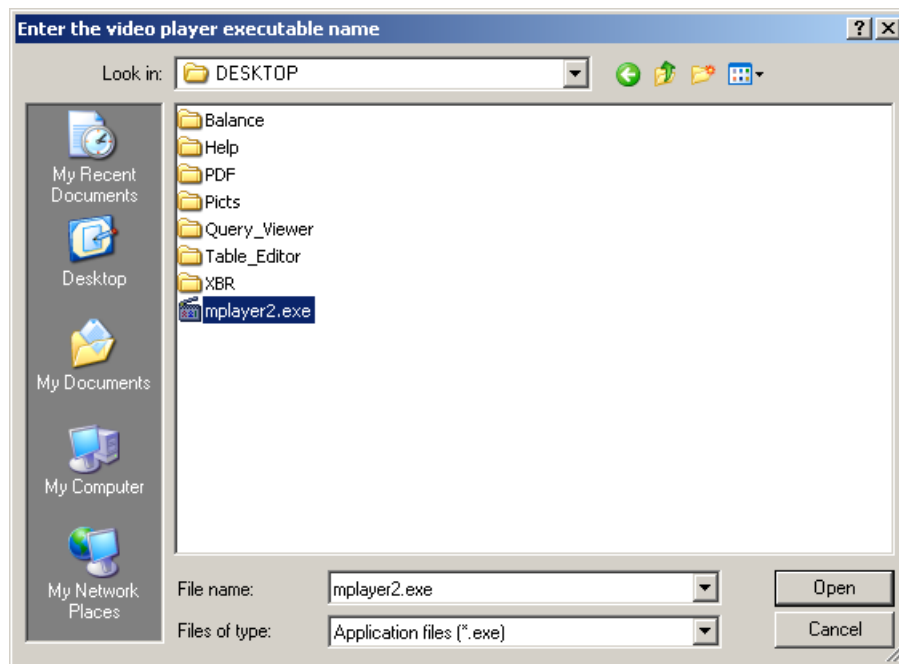


Figure 2-28: Video Player Executable

If you don't know where a video vendor's executable file resides, select **Cancel**.

22. After the "Installation Complete" screen displays, click **Finish** to complete the installation.

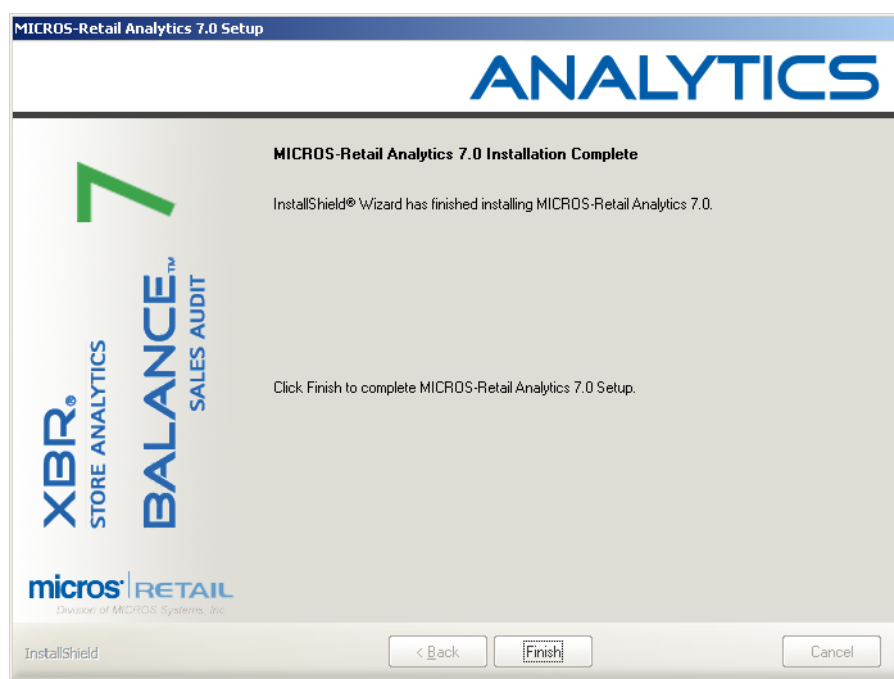


Figure 2-29: Installation Complete





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