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Security Options
Encryption Process
Citrix XenApp Client Installation / Update

Overview
The Citrix XenApp client installed on your local workstation is used to attach your workstation to our Datacenter. The client is provided free of charge from SBS if you are subscribing to our hosted services. This client is compatible with Windows XP and Windows 7 workstations. The configuration and installation below is generic and will require specific login information to complete the installation or upgrade. You will obtain the required workstation name and user login information from SBS.

This chapter covers installing the Citrix XenApp version 11.x client on a Windows XP or Windows 7 workstation. It does not apply to installation on a "Thin Client". Consult your thin client documentation or vendor for information regarding thin client updates.

Obtaining XenApp Client
Download the Client and font pack from http://install.spotpos.com/Citrix/Citrix4.5/XenPppHosted11000+Fonts.zip and expand the zip file. You will find the installation file “XenAppHosted11000.msi” within the zip file.

New Client / Workstation Installation Instructions
To install the client double click on the XenAppHosted11000.msi and follow the steps below during the client install.

Step 1 - Welcome Screen – Select “Next”

Step 2 – Accept the License Agreement by selecting the “I Accept” option and select “Next”
Step 3 – Configure the components to install. **DO NOT SELECT THE DEFAULTS!** Notice below the “Program Neighborhood Agent” option has a small hard disk with a yellow number “1” next to it. This is the configuration you need to install. To obtain the yellow number one select the hard disk next to the “Program Neighborhood Agent” and choose “Feature will be installed when required” from the pull down from the selection list. Select “Next”.

Step 4 - Use the default “Program Folder” provided for installation. Select “Next”
Step 5 - **Do not select** the “Use machine name as client name” check mark. This will cause unwanted results when connecting the server farm. Enter the provided “Client Name” in field as noted below. Each workstation will have a unique client name. Verify the spelling of the client name as provided by SBS. Select “Next”.

Step 6 - Select “No”, the default, when prompted to “Use Local Name and Password”. Select “Next”
Step 7 – Program Neighborhood Options, Select “Next”

Step 8 – Installation Summary. Select “Next”
Step 9 – Open the “Citrix Program Neighborhood” from the desktop or from Start > Program Files > Citrix > Program Neighborhood. You will be taken to the default connection screen. Press the “Up” icon on the top left of your screen until you see the screen displayed below. Select the “Find New Application Set” icon from this screen.

Step 10 – Select “Wide Area Network” from the pull down option. Select “Next”

Step 11 – Enter “SPOT” as the “Description” and select the “Server Location” button.
Step 12 – Select the “Add” button from the “Locate New Application Set” window.

Step 13 – Enter “ica1.spotpos.com” and Select “OK”.

Step 14 – Repeat Step 13 and include

ica2.spotpos.com
ica3.spotpos.com

You will now see the following in the “address list” field.
Step 15 – Select the “Firewall” button from the previous screen and place a checkmark in the “Use alternate address for firewall connection”. Select “OK”.

Step 16 – You are now returned to the “Locate New Application Set” window. Select “OK”
Step 17 – You are returned to the “Find New Application Set” window and will not use the pull down option on the “Click below to locate the Application Set to add” window and select “SPOT”. Select “Next”.

Step 18 – Remove the Check Mark on the "Use Server Default" to enable the pull down for Window Colors. Change this default from 256 to “High Color (16 bit)”. Select “Next”.

Step 19 – Setup is now complete. Select “Finish”
Step 20 – You will now see the “SPOT” application set in the “Citrix Program Neighborhood” window as shown below.

Step 21 – Double Click on the “SPOT” application set and you will be prompted to login to our servers. Please enter the information as it is provided from SBS in these fields. Each station will have its own credentials so please take care in entering this information correctly. Username and Domain are not case sensitive but the password is. Select the “Save Password” check box to enable future use of the typed password. Select “OK”

Step 22 – Once the application set has been configured you will now see an icon for SPOT in the application set window. This is the new icon you will use to run SPOT. This Icon will be named by your Company and not SPOT as shown below. Exit this program and you should notice the same Icon on your desktop. This icon will be used to login to SPOT.
Internet Connectivity

Overview

The internet is a one of kind invention created back in 1969. It currently helps so many people and businesses that is it hard to believe we could have gone as long as we did without its presence and availability. SBS was on the internet back in 1995 and has seen many things change. WSI used the internet in the operations and updates of SPOT along with general office usages including hosting services, deployment of SPOT updates, internet access, mail services, tech support and training among others.

With all that is good with the Internet it has also brought a whole new series of problems to the world and IT management. As you know viruses and computer security have now been pushed to the front of everyone’s mind that uses the internet. A lot of talented people are creating rouge and destructive / disruptive programs that are causing major issues today on the internet. We currently have plenty of technology to assist in the management of the internet and these disruptive programs. Unfortunately it costs money and it takes time to manage these technologies. The time and money are a requirement for anyone wanting to be on the internet.

No matter how you connect to the internet it is still the internet. The same virus that a high end T1 Connection user downloads is the same virus a dialup user can receive. The type of connection does not matter when it comes to the internet. If you choose not to use the minimum security checks using virus protection and a firewall as described in this document you will at some point have a problem with your machine, machines or network. The current flurry of viruses and security breaches are indented not to cause harm but just to cause major disruptions. Not to say there are not harmful or destructive viruses but most of them are just disruptive.

Please review the basic requirements and tools as available at the time of the documents update. These are only guidelines and not the only way to protect you on the internet. It is suggested that you talk to a local provider of security products to assist you in the configuration, testing and implementation of a security policy.

Virus Protection

Virus protection providers are constantly updating software to detect and stop virus’s real time. Each provider uses its own mechanism to keep you updated. Virus protection looks at known and suspected patterns within a file. These patterns are updated on a daily basis by most providers. The most popular updates are scheduled updates that occur during off hours and check a provider’s central servers for any virus pattern updates.

Most users of SPOT will require at a minimum workstation level virus protection. This means that each station connected to the network will have virus protection software installed. If you are company that has a mail server and remote sites you may also want to look into the virus protection of these devices.

Listed below are the providers that SBS uses to manage virus protection. These are not the only providers of virus protection software but the ones that SBS has chosen to partner with.

Symantec Corporation       www.Symantec.com
McAfee Security       www.McAfee.com
Microsoft.com       www.Microsoft.com

Software is available to protect a single station, entire network of computers, mail servers etc. You will want to consult a local provider or the software provider directly for a configuration that will fit your needs and budget.

Get a Fire Wall

A user on the internet is just another number on the internet. The idea is to be an unlisted number on the internet and deny all calls from the internet. This is a simple thing to explain and sometimes a bit more complicated to deploy. Most business grade services provided by your ISP will include a router with a built in firewall. Most devices supplied by your ISP limit the incoming traffic and allow standard operating ports for outgoing traffic. This configuration works well and do not require modifications if you are using a basic SPOT configuration. If you are using any of SPOT’s automation processes you will need to modify your firewall configuration.
You will want to ask your provider if a firewall and management services are part of your contract. If you are not provided with a firewall you will want to deploy one ASAP. The firewalls job is to keep the bad guys out. Without a firewall a user may be able to attach to your network and gain access to your computer or computers, this is known as “hacking”. A firewall will not allow anyone to your network and denies access at the firewall level.

Firewalls may be in the form of software or supplied by you ISP as a router with a built in firewall. Depending on your network and access type you may be best to use a purchased or ISP supplied router/firewall combination. Other more sophisticated configurations may need to use a standalone firewall for optimum security. Below are several vendors that supply a quality firewall that are currently in use by SBS and SBS customers.

Checkpoint System www.Checkpoint.com
Netscreen Systems www.Netscreen.com
Cisco www.Cisco.com
Linksys www.Linksys.com
Symantec Corporation www.Symantec.com
Microsoft www.Microsoft.com

Firewalls based on hardware and software is available to protect a single station, entire network of computers, mail servers etc. You will want to consult a local provider or the software provider directly for a configuration that will fit your needs and budget.

Ports for firewall

When managing a firewall with rules for incoming and outgoing traffic you will need to follow the following port configuration in order for SPOT to operate properly. It is also suggested that if you are limiting port access on the firewall you verify what is being used in your business before you limit traffic.

These ports are required for incoming traffic in order for SPOT to operate properly and to allow interactive user authorized access with SPOT Business Systems Customer Care team.

<table>
<thead>
<tr>
<th>IP Address</th>
<th>Port(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Operations, Utilities, Customer Care Access (All Customers)</td>
<td></td>
</tr>
<tr>
<td>Help.spotpos.com</td>
<td>80/443</td>
</tr>
<tr>
<td><a href="http://www.Gotoassist.com">www.Gotoassist.com</a></td>
<td>80/443</td>
</tr>
<tr>
<td><a href="http://www.Gotomeeting.com">www.Gotomeeting.com</a></td>
<td>80/443</td>
</tr>
<tr>
<td><a href="http://www.SPOTpos.com">www.SPOTpos.com</a></td>
<td>80/443</td>
</tr>
<tr>
<td>Install.SPOTpos.com</td>
<td>80/443</td>
</tr>
<tr>
<td>Mail.SPOTpos.com</td>
<td>80/443/110/993/143</td>
</tr>
<tr>
<td>Mail.Westgatesoftware.com</td>
<td>80/443/110/993/143</td>
</tr>
<tr>
<td><a href="http://www.MyDrycleaner.com">www.MyDrycleaner.com</a></td>
<td>80/443</td>
</tr>
<tr>
<td>* .microsoft.com</td>
<td>80/443</td>
</tr>
<tr>
<td>Hosted Customers Using Citrix ICA Client Access</td>
<td></td>
</tr>
<tr>
<td>Ica1.spotpos.com</td>
<td>80/443/1494/2598/1604/ICMP (ping)</td>
</tr>
<tr>
<td>Ica2.spotpos.com</td>
<td>80/443/1494/2598/1604/ICMP (ping)</td>
</tr>
<tr>
<td>Ica3.spotpos.com</td>
<td>80/443/1494/2598/1604/ICMP (ping)</td>
</tr>
<tr>
<td>64.90.196.64 - 95</td>
<td>80/443/1494/2598/1604</td>
</tr>
<tr>
<td>64.90.201.1 - 30</td>
<td>80/443/1494/2598/1604</td>
</tr>
<tr>
<td>64.58.224.161 - 191</td>
<td>80/443/1494/2598/1604</td>
</tr>
<tr>
<td>64.58.227.12 - 14</td>
<td>80/443/1494/2598/1604</td>
</tr>
<tr>
<td>Hosted Customers Using Automation / ProductionTrac</td>
<td></td>
</tr>
<tr>
<td>Conveyor1.SPOTpos.com</td>
<td>4701-4714</td>
</tr>
<tr>
<td>Conveyor2.SPOTpos.com</td>
<td>4701-4714</td>
</tr>
<tr>
<td>svchost1.spotpos.com</td>
<td>4701-4716</td>
</tr>
<tr>
<td>Hosted Customers Using Print Servers</td>
<td></td>
</tr>
<tr>
<td>Incoming ports as required</td>
<td>8990-8995,9100-9105</td>
</tr>
<tr>
<td>Tsys Credit Card Processing</td>
<td></td>
</tr>
<tr>
<td>204.8.249.125</td>
<td>443/5003/9020</td>
</tr>
<tr>
<td>208.224.248.192</td>
<td>443/5003/9020</td>
</tr>
</tbody>
</table>
Enable Access for SPOT Tech Support

In order for our technical support group to access your system in a timely and efficient way we require internet access for your stores. When you allow internet access via a browser you open the company and machine up to abuse by the staff. You will want to limit the web sites available for browsing by your clerks. This can be done by a firewall or by using the browsers Trusted Contact list. Internet Explorer supports a feature called “Content Advisor”. With Content Advisor enabled your staff is limited to surfing to an approved list of sites.

This feature can be turned on and modified in Internet Explorer by using the Tools > Options > Content section in IE 6.0 and higher. The following is a list of suggested sites to be included in your content advisor. The listed sites are used for support and SPOT educational tools.

www.gotoassist.com
www.SPOTpos.com
www.westgatesoftware.com
www.help.westgatesoftware.com
www.help.SPOTpos.com
www.install.westgatesoftware.com
www.install.spotpos.com
media.SPOTpos.com
*.SPOTpos.com
*.westgatesoftware.com
*.gotoassist.com
https://*.gotoassist.com

Trouble Shooting Connectivity Issues using WSIPing.exe

WSIPing.exe is a SBS tool that allows you to verify connectivity between your location and our data center. The tool will record any connectivity issues in your internet connection. This utility needs to run for a minimum of 72 hours to verify your connectivity. To use the WSIPing utility please follow these steps.

1. Create the directory c:\WSIPing on your local hard drive
2. Download the WSIPing.exe utility from http://install.spotpos.com/Utilities/ and copy to the directory created in step 1
3. Open WSIPing.exe and navigate to File > Setup
4. Enter “5” in Ping intervals (Utility will send a ping request every 5 seconds)
5. Enter the directory you created in step along with a file name. (Example C:\wsiping\logs.txt) The file logs.txt file will be used to store response history generated by the tool.
6. Enter “185” in the Trace Route Threshold
7. Select “OK” on the setup screen
8. Enter “ica1.spotpos.com” in the “Target” field

9. Select Start and verify you are receiving responses in the “Target Response” screen as shown above
10. Select the “View Log” button and verify logs are being written to the log file
11. After the utility has run for 48 hours please send the log file to support@SPOTpos.com for review
Startup Option – You have the option of creating a shortcut of “C:\WSIPing\wsiping.exe /startup” in the Windows Startup Group to ensure the utility is running every time a user logs into this station.
Data Base Backup

Overview

Your customers are the most valuable asset in your business. The second most valuable asset is the customer data stored in SPOT data bases. The data has to be guarded in case of loss. If you are running SPOT in a standalone or self hosted model please take the time to read these notes on maintaining a proper backup. If you are hosted customer sit back and relax, we process your backups on an hourly basis so you don’t have to worry about this task.

Your SPOT production data needs to be backed up at least once a day, preferably every couple of hours. You are required to maintain at least one copy of your SPOT production data to be safe guarded against computer failure, natural disaster, theft or even a disgruntled employee. SPOT data is stored in two data bases on your server. The first data base is the ESMRoot as it stores configuration data, the second data base is the SPOT2000 data base. The SPOT2000 data base stores your production data for customers, orders etc. Both data bases are needed in order to operate SPOT and are reliant on each other. You can’t operate with just one of these data bases. Both of these data bases must be backed up in a timely fashion in order to restore a functional SPOT system in the event of a failure, disaster or theft.

By default systems purchased and supplied by SBS will have an automatic backup process created and enabled. This scheduler will automatically back up SPOT data to either the local hard disk, another workstation hard disk or to an external device if purchased. Just because it is enabled does not mean that the backup is processing normally. It is the responsibility of the customer to verify that this backup process or processes like it are running and processing on a daily basis. SBS has provided the following software options to assist in the monitoring and maintenance of your backups. Please take the time to configure and take advantage of these software options.

Verify Backup Completion

Navigate to Setup > Workstation Settings > Backup Settings. The following setting can be configured to produce a Backup Warning at the time your staff returns to the home screen. This may be configured on any number of workstations to ensure you entire operation knows this is occurring.

- **Backup Path:** This is the local or network path and directory that contain your .bak backup files. You will need to contact your network administrator to verify this path.

- **Days between Backup:** This number is used when displaying a warning to your staff that the backup has not been completed in X days. If you select 1 for this field you will receive a warning after 1 day of missed backups. You will receive this warning every time the workstation returns to the home screen or until a backup is completed.

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Automate a Backup with Scripts

You may automate the backup process using the Windows Task Scheduler, SQL Server Agent or any other reliable scheduler that has the ability to process SQL scripts. Please contact SBS support at 801-208-2210 to receive the latest backup and maintenance scripts to automate your backup process.

Contact Support with Questions

Please feel free to contact our support department if you have any questions on configuring or your backup procedures. They can be reached at 801-208-2210 or by email at support@SPOTpos.com.

SPOT Disaster Recovery

Overview

There are many aspects of “Disaster Recovery” when it comes to computers and the operations of SPOT. This document is intended to be a guideline for recovering your SPOT system after a disaster and is not a replacement for backups or standard maintenance of your system. This document assumes you have valid daily backups available to restore and recover the SPOT database server.

WSI assumes you have the following items

1. Current backup of both the ESMRoot and SPOT database that is accessible on your replacement hardware.
2. If running in a central / hosted model a current backup of the Citrix Meta store.
3. Optional “Clone” or “Ghost” copy of the failed server.
8. Installation CD’s and licensing for SPOT, operating system and any other third party software needed to operate your current configuration.

Scenario #1 (Standalone or local server)

SPOT server crashes, the server are unavailable due to hardware destruction, the server is stolen, or any other reason the server is not available for use.
1. Replace server with equivalent hardware of crashed or missing server with a base installation of Windows XP / 7 / 2003 / 2008 and most recent service packs.

2. Locate the most recent backup files for the ESMRoot and SPOT2000 database and make them available on the server.

3. Install the most recent version of SPOT from our installation CD or manual installation method and verify the system is operational.

4. Restore the ESMRoot and the SPOT database from backup files.

5. Make changes to ESMROOT Data Store and ESMConnectinString entries if server name and login information has changed for the new server.

6. Run SPOT and verify that the server is operational.

7. If you have made changes to the server name you will be required to run SPOT on each workstation and use the new server name when logging in. You will also need to update the ESMConnectionString on each workstation.

**Scenario #2 (Hosted / Central database server)**

The SPOT database server crashes, the server is unavailable due to hardware destruction, the server is stolen or any other reason the server is not available for use.

1. Replace server with equivalent hardware of crashed or missing server with a base installation of Windows 2003 server or Windows 2008 server and most recent service packs.

2. Install SQL DB software with most recent service packs.

3. Locate the most recent backup files for the ESMRoot and SPOT database and make them available on the server.

4. Install the most recent version of SPOT from our installation CD or manual installation method and verify the system is operational.

5. Restore the ESMRoot and the SPOT database from backup files.

6. Make changes to ESMROOT Data Store entries if server name and login information has changed for the new server.

7. Run SPOT and verify that the server is operational. If you receive an error that versions of software different from the database run the “Server Setup” operation to update the database. (See Server Farm Update and Installation Notes.doc for more details).

8. If you have made changes to the server name you will be required to run SPOT on each application server and use the new server name when logging in.

**Scenario #3 (Hosted / Central App server)**

The SPOT application server crashes, the server is unavailable due to hardware destruction, the server is stolen, or any other reason the server is not available for use.

1. Disable logins to app server via the Citrix management console.

2. Replace server with equivalent hardware of crashed or missing server with a base installation of Windows 2003 server or Windows 2008 server and most recent service packs. Other options would be to recover from a “cloned” or “ghost” copy of the server.

3. Install Citrix software with most recent service packs.
4. Install the most recent version of SPOT from our installation CD or manual installation following the “Installation-Updating SPOT Centralized.doc” and verify the app server is operational. If you have made changes to the database server name, you will be required to run SPOT on each application server and use the new server name when logging in.

Verify SPOT, printer drivers and other peripherals are installed and operational on server. Use the “Server Farm Update and Installation Notes.doc” as a guideline for recreation, building and updates to servers.
Peripheral Configuration

Overview

Star SP500 Tag Printer

This printer is certified by SBS to print tags on a 3" wide wet strength paper. This printer requires the use of both wet strength paper and a special indelible ink cartridge available from SBS. Use of other supplies and their performance will not be guaranteed by SBS.

Workstation > Tag Printer Configuration

Company Settings > Tagging Settings > Tag Printing Profile
These settings may differ on your system depending on what size of tag you are printing. You may use either 8 or 9 lines per inch and as many lines per tag as required for tag information.
System Settings > Hardware Settings > Tag Printing Definitions (ESC / Epson Mode) These settings assume you have the printer configuration DIP switches set to 1 and 3 on, 2 and 4 off. See printer manual for location and configuration of DIP switches.

Printer Self-Test

To verify you printer is configured properly and dip switches are set correctly you can perform a printer self test. Follow these steps and verify dip switched and emulation mode is correct.

1. Turn off the Printer
2. While the printer is off, hold down the feed button and while still holding the feed button down, turn the printer back on.
3. Let go of the feet button.
4. Test page should print for your review.
Upgrading Your SPOT Installation

Overview
This chapter is intended to show the requirements and the options that can be used when installing and updating your servers. There are two distinct installation types when running SPOT. The first is the installation and operations of SPOT on a local server and SPOT running on local PC’s. The second is the use of Windows terminal servers and Citrix to run your installation. These terminal servers are called application servers and run SPOT in a Centralized environment. Before you attempt to update your current installation using this document please verify your environment with SBS tech support.

Before attempting to update your environment please have a complete backup of your data bases. Verify you are using the most current SPOTInstaller.exe that supports many of the options noted below. You can obtain the latest version of SPOTInstaller.exe from tech support.

Stand alone Environment

Centralized Environment
This document covers the required advanced setup features and the Upgrade of SPOT working in a Hosted Environment. It assumes you are running Microsoft Windows 2003/2008 Server with Terminal Services in Application mode along with Citrix XenApp 4.5 or higher. In most cases you will have a separate Data Base server and separate App servers. If you only have one server running dual purpose DB server and App Server you will need to follow Step 1 and you will need to run the Windows installation utility “change user /Install” from the command prompt before you begin the following installation process.

Make sure you have a current backup of your ESMRoot and SPOT2000 catalog’s before starting any type of upgrade.

Data base Server Upgrade
The data base server needs to be updated before any other server in your environment. Login to the server as Administrator or equivalent. The DB server contains the SPOT catalogs that need to be updated in order for the App server to operate correctly. You will need to verify that all users have exited SPOT before the upgrade begins. If users are attached to the App servers you can do the DB update but it is “Strongly” suggested you have everyone exit SPOT and log off any sessions on the App servers before the Upgrade begins.

/DBPrompt – This is an optional command line switch. The upgrade process will prompt you to rebuild your ESMRoot and SPOT data base Indexes. This rebuild is not needed if you are running a weekly index rebuild and could save hours of time during the upgrade process. Depending on your server and amount of data you will save a lot of time not rebuilding indexes

This shortcut will install / upgrade SPOT and allow for an attended server install / upgrade that will prompt for re-indexing databases. This is suggested for larger installations that are running DB maintenance plans that rebuild indexes on a weekly basis. The /DBPrompt switch saves time on the upgrade by prompting you to update the data base and rebuild indexes or to update the data base and do not rebuild. A current dual processor server with 5-10 GB of data will take approx 30-90 minutes to complete the upgrade with index rebuilds. It will take less than 15 minutes to upgrade your data base server if you choose not to rebuild your indexes during the upgrade process.

After launching the SPOTInstaller.exe with the command lines above you will be walked through the following screens.

This Screen is a banner to show what version you upgrading from
From this screen select “Server/Standalone”. This instructs the installer to do Data base updates required in the upgrade. Select “Next”

This screen is just a test to verify you have SQL Installed on the machine that is required for the update. Select “Next”
This screen is a progress window. You will see that Components, System, SPOT 2000 and the MetaSpace Browser are downloaded before they are installed. This screen will clear and move on after all installation packages have been downloaded.

This screen is another progress screen. You will see Green Check marks next to all the processes that have been completed. The install first starts working on Meta data and ESMRoot data base. Once the new Meta settings are updated it will prompt you to update indexes on ESMRoot (as the next screen shows). After this you will see this screen updated with as it moves to the SPOT2000 data base and prompts for index rebuilds.
If you used the /DBPrompt option this screen requires interaction. It is requesting you to either “Update (with Index)” or “Update (No Index)” for your ESMRoot data base. The option to choose “Continue” is available but do not use this button. Make the choice of either “Update (with Index)” or “Update (No Index)” and the upgrade process will continue. If you have a DB maintenance plan in place you can choose “Update (No Index) and save time on the upgrade. If you do not have a DB maintenance plan that includes rebuilding of indexes use the “Update (With Index)” option and then implement a DB maintenance plan for scheduled Index rebuilds.

This is a view of your Data Base update showing each data base table and what is being updated.
After the ESMRoot database is updated you will move to the following screen as it starts working on the SPOT2000 data base.

If you used the /DBPrompt option this screen requires interaction. It is requesting you to either “Update (with Index)” or “Update (No Index)” for your SPOT2000 data base. The option to choose “Continue” is available but do not use this button. Make the choice of either “Update (with Index)” or “Update (No Index)” and the upgrade process will continue. If you have a DB maintenance plan in place you can choose “Update (No Index) and save time on the upgrade. If you do not have a DB maintenance plan that includes rebuilding of indexes use the “Update (With Index)” option and then implement a DB maintenance plan for scheduled Index rebuilds.

You may also use the /DBUDATENOINDEX as a command line switch and there is no interaction required in the following screen.
This is a view of your Data Base update showing each data base table and what is being updated.

<table>
<thead>
<tr>
<th>Table</th>
<th>Index Result</th>
<th>Update Result</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>BillingGroup</td>
<td>BG</td>
<td>00</td>
<td></td>
</tr>
<tr>
<td>CashDisbursement</td>
<td>2042</td>
<td>00</td>
<td></td>
</tr>
<tr>
<td>CashDisbursement</td>
<td>2042</td>
<td>00</td>
<td></td>
</tr>
<tr>
<td>CCCBalance</td>
<td>12210</td>
<td>00</td>
<td></td>
</tr>
<tr>
<td>CCCEnrollSeg</td>
<td>00</td>
<td>00</td>
<td></td>
</tr>
<tr>
<td>ClientAccount</td>
<td>61000</td>
<td>00</td>
<td></td>
</tr>
<tr>
<td>ClientAccountAddress</td>
<td>12210</td>
<td>00</td>
<td></td>
</tr>
<tr>
<td>ClientAccountCredit</td>
<td>50</td>
<td>00</td>
<td></td>
</tr>
<tr>
<td>ClientAccountDiscountGroup</td>
<td>101</td>
<td>00</td>
<td></td>
</tr>
<tr>
<td>ClientAccountEmail</td>
<td>2042</td>
<td>00</td>
<td></td>
</tr>
<tr>
<td>ClientAccountFrequentBuyer</td>
<td>014</td>
<td>00</td>
<td></td>
</tr>
<tr>
<td>ClientAccountID</td>
<td>01</td>
<td>00</td>
<td></td>
</tr>
<tr>
<td>ClientAccountLinkup</td>
<td>012</td>
<td>00</td>
<td></td>
</tr>
<tr>
<td>ClientAccountPreference</td>
<td>010</td>
<td>00</td>
<td></td>
</tr>
<tr>
<td>ClientAccountReservation</td>
<td>016</td>
<td>00</td>
<td></td>
</tr>
<tr>
<td>ClientAccountReservationGroup</td>
<td>014</td>
<td>00</td>
<td></td>
</tr>
<tr>
<td>ClientAccountReservationUsage</td>
<td>012</td>
<td>00</td>
<td></td>
</tr>
<tr>
<td>ClientAccountRoleInfo</td>
<td>010</td>
<td>00</td>
<td></td>
</tr>
<tr>
<td>ClientAccountRoleInfoExclusions</td>
<td>00</td>
<td>00</td>
<td></td>
</tr>
<tr>
<td>ClientAccountSubdivision</td>
<td>016</td>
<td>00</td>
<td></td>
</tr>
<tr>
<td>ConsolidatedInvoice</td>
<td>014</td>
<td>00</td>
<td></td>
</tr>
<tr>
<td>DiscountGroupProfile</td>
<td>016</td>
<td>00</td>
<td></td>
</tr>
<tr>
<td>DiscontinuedProperty</td>
<td>014</td>
<td>00</td>
<td></td>
</tr>
<tr>
<td>ExpirationDistance</td>
<td>014</td>
<td>00</td>
<td></td>
</tr>
<tr>
<td>Formula</td>
<td>014</td>
<td>00</td>
<td></td>
</tr>
</tbody>
</table>

After the Data Base updates you should see the following “SPOT Setup Complete” Dialog. This indicates you are now ready to move on to your App servers and/or Utility boxes for updates.
Application Server Upgrade

These setup options assume you are running Windows Terminal services with XenApp 4.5 or higher on the server.

Login to the application server as administrator or equivalent. Verify you have no active connections to the server from remote workstations. If you have any one running SPOT in a session the upgrade will not complete. It is suggested that you log off all current connections to the app server.

At a CMD prompt execute the "Change User /Install" before you start the upgrade process. If you are running a Citrix XenApp server and you do not do this you could possibly cause damage to the SPOT installation on the server that could be UN repairable.

If you have remapped your Citrix servers drives from the Default C: to M: and have installed SPOT to any drive other than C: or M: you will need to use the switch /Prompt for this installation. The /Prompt is similar to the /DBPrompt on the DB server installation. It will prompt you for the location that SPOT will be installed. If you have used any other drive that C: or M: this will be required. By default the SPOTInstaller.exe utility installs SPOT to the Windows %System drive. If you have re-mapped your drives or are using an installation other than the %System (C: or M :) drives you will need to use the customer option at install to change the location of your application installation when prompted. You will need to set each installation package to install to perform a "Custom" install option during the install. You will install SPOT System, SPOT Meta Space Browser and then SPOT Enterprise with the SPOTInstaller.exe installation utility.

After launching SPOTInstaller.exe with any of the command lines above you will be walked thought the following screens.

This Screen is a banner to show what version you upgrading from
From this screen select “Workstation” option. Even though you are on an App Server you still choose the “Workstation” option. Select “Next”.

From this Screen you will select “Local Server”. With this option the install utility will connect to your DB server and install the current version of SPOT that is running and auto install all 3 installation packages as needed.
Enter in your Data Base servers Name or IP Address

This screen is a progress window. You will see Components, System, SPOT 2000 and the MetaSpace Browser as they are copied from the data base server before they are installed. This screen will clear and move on after all installation packages are copied.
If you have used the /Prompt command line switch will see the following sequence of windows for your installation. If you have not included the /Prompt switch you will just see SPOT installing all 3 installation packages. Please proceed as you would with any other standard installation making sure you use the “custom” setting when asked for location information.

Select “Next”
Accept the license agreement and select "Next"

Always select the “Custom” option if your application is not installed on the %System drive (C: or m: if drives are remapped). Select “Next”
After selecting custom replaces the default installation drive with the drive you wish to install SPOT and select “Next”.

Accept the installation location by selecting “Next”.

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This window is a final verification that you want to install this package. Select “Install” to complete the installation of this package.

As you do the workstation upgrade and it completes SPOT will automatically run on the desktop. You will need to exit SPOT immediately at this time and go to your CMD prompt and run “change user /execute” before you logoff and run another copy of SPOT on the server. Failing to do this step may cause harm to your application configuration.

Follow this installation process on every one of you app servers in the farm and you are ready to run.

**Advanced SPOTInstaller.exe Switches**

/Prompt This allows each installation package to be an interactive installation just like any standard Windows installation. Without the prompt SPOTInstaller.exe will auto execute and install all three installation packages in an unattended mode.
/DBPrompt: Prompts to update database with an “Index Rebuild” or “No Index Rebuild”. This will save time when doing the update. You must have a data base maintenance plan in effect to use this switch. If you do not have a maintenance plan for rebuilding indexes do not use this switch.

/FilePath: The default install for SPOT is the %SYSTEM\Program files\WSI directory. This switch will enable you to direct your installation to your drive of choice without the use of the “Custom” installation option. (Example: /FilePath:N:\Program Files\SBS will install SPOT to the N: drive on the machine)

Advanced SPOT.exe Operational and Installation Switches

/Runonce: This switch is to enable only one copy of SPOT to be running on a single machine. If SPOT is currently running on the local machine and this switch is used it will close the current running version of SPOT and then start a new session of SPOT. This switch is used by default for SBS installations so that clerks do not get more than one copy of SPOT running on a machine.

/NOBMP: By default a SPOT installation has this switch enabled. If you remove this you will see a sand paper background to the desktop instead of the steel grey. If you are running in a hosted environment or with PC Anywhere you will want to use this switch. Performance is enhanced with this switch.

/AutoSetup: Using this configuration option you will run SPOT using the setup utility that will automatically update the EMSRoot and SPOT2000 data bases to run with the currently installed version of software. If you have a 4.10.0035 data base and install 4.50.0001 software this switch will update the data bases with current meta settings and data base fields, indexes and reports. You will see a program option under Programs > WSI > “SPOT Server Setup” that uses this command line switch. Only run this option if instructed by SBS support. This can also be used with the /DBPrompt command line as discussed earlier in this chapter.

/DBUDATENOINDEX: Using this switch will allow for an unattended server setup with the option of not rebuilding indexes during a server setup. This switch is used in place of the /DBPrompt option as noted above.

/SELECTACCOUNT: Switch will present a list of accounts in the DB that you would like to update. It only runs the server setup and index operations on the specified account.

This switch is automatically run from the use of spotinstaller.exe and can be run from the command line for updates after a failed installation.

Advanced Registry Settings

NOTE: Editing your registry entries could result in permanently disabling your operating system. Before editing the registry you should first backup the registry files. Only make changes to registry if instructed by SBS technical support.

Daily operations

ESMConnectionString Location and connection information used by SPOT to connect to DB server

ESMMasterServerAddress Location that the default internet installation will look for installation files. Can be overrode by the /ESMServer SPOTInstaller switch

LocalESMConnectionString Location and conection information used by SPOT to connect to DB server

ActivityDistributionPath Location that the workstation will copy and retrieve SPOT installation files

LastServerName The last server this workstation logged in to.

SPOTInstallerPath Location for SPOT installer files

SPOTUninstallerPath Location for SPOT un-installer files

ETHandler Used by SPOTSinc devices

Advanced Settings
LogItems
Disables AutoMaxMemoryUsage option in SPOT.
DisableSPOTsyncCheck
SPOTScanLogFile
GenerateScriptFiles
Can be used to create script files during DB update.
LogDataBase
SpecificMACAddress
This forces SPOT to use the identified mac address for licensing purposes
DisableSQLQueryWriter
Disables the use of customer SQL Based report modifications
DisableAutoMaxMemoryUsage
This will disable the automatic allocation during installation of 40% of the server memory to SQL Server memory.

Telephony Options
PauseOnAnswer 250 value in ms for the delay before starting to play the wav file on an answering machine
PauseBeforeSilence 50 value in ms for the delay before silence detection is activated after a phone call is connected
TelephonyVolume 65 Volume the wav file is played at
TelephonyPauseMS 3000 Pause in ms after line is activated before phone call is placed

Workstation / Printer replacement Tokens
You may use any of the following tokens in the Workstation > Printer or Report Printer > Windows Printer Path when running under a Terminal Services or Citrix Environment. These tokens will make it simpler to administer your workstation printer settings. With these tokens we assume you have the same printer and printer name on each of your workstations. If you have the same name defined for each printer on your network these tokens will make administering printing with roaming stations a breeze.

Citrix Session - %CLIENTID (Example: From within a Citrix client and Workstation setup you will find the windows printer path as "Client\MDC01Counter1#\EPSON". You may use the %CLIENTID as a replacement in this setting "Client\%CLIENTID#\EPSON". This will allow you to use this printer configuration on any station that has a printer named "Epson" defined.)

Terminal Services Session - %SESSION
Store Configuration / Understanding the MetaSpace Browser

Overview
The MetaSpace Browser is a utility that is used by management when running SPOT with multiple companies and stores. This utility is available to you if you are running a standalone or self hosted environment. This utility is not available if you are using SPOT via SBS Hosting services.

Warning
Improper use of this utility may cause unwanted results in the operation of your SPOT system. Changes made in this utility will affect your current SPOT environment and feature set.

Basic Use
You will need to be familiar with the MetaSpace browser in order to create a new store and workstations. The MetaSpace browser is only available via the system account. You will go to "logoff" and then you will login to SPOT using the following account and user information.

Server Name: (Existing Server)
Account: System
Workstation: System
User: SPOTadmin
Password: spot

MetaSpace Browser
This is the Heart of SPOT when running in an Enterprise Model. Company, Store, Workstation and security settings can be accessed from the MetaSpace browser. You must be careful when using this tool in that you may make what looks like a simple change to the system that ends up being a major operational issue. (Please use this utility at your own risk) You may use these guide lines in creating stores and workstations in your SPOT system.
In the view above you can see that we are attached to a server called MARK-Laptop2. You can see SPOT’s configuration hierarchy from this view. The only items you need to be concerned with at this time are the “Accounts” section of this screen. If you select the “+” next to the “Accounts” you will expose the company or account settings for this configuration.

Notice in the screen above that you have Accounts / My Drycleaner / My Drycleaner #1 and #2 below it. This is called the “Account” and the “Account Nodes” or the Company and Stores in Setup / Program Configuration from the Home Screen. Notice that in the example above the “My Drycleaner” is the company and the “My Drycleaner #1” and My Drycleaner #2” are the stores.

**General Tab** - By selecting the My Drycleaner account as noted you will see Company or Account specific information. This information is generally only changed at the time the account is created and never needs to be modified.

**Users Tab** – You have the option to use this area to create or modify users. We will not be discussing this location at this time.
Groups – You have the option to use this area to create or modify groups. We will not be discussing this location at this time.

Messages – This group allows you to create a message that will be displayed on all workstations on the system. This will not be discussed at this time.

Activities – Not used at this time

Store / Account Node

The Store or Account Node tab is used for configuration of each individual store in the enterprise. This is the “Store” specific information needed to individualize and customize each stores setting. This will configure address information, workstation information and data store information used by the system.

Account ID: Unique Id given to the store for internal spot use only. Has to be a unique Id for each store / account node.

Node Number: Unique Number This number is only 4 digits long and will need to be unique across all stores and is usually the physical store number. This must be an all numeric ID.

Node Name: This is the name of the store as you will see on report selections, report printing and on invoices.

Mnemonic: This is a unique ID given to each store for tracking orders with Barcodes. An example of the Mnemonic is store #1 is “AA” and store #2 is “AB”. When you look at store #1’s invoice barcode there is an “AA” preamble to the barcode. This verifies that anything being scanned for Store #1 has the “AA”. If not the clerk is notified this is an invalid invoice for the store. DO NOT CHANGE the Mnemonic after you have created invoices for the store. This will cause any existing printed invoices to give an invalid status after the change. If you decide to change Mnemonics after production has started you will need to reprint all invoices currently in inventory.

Email Address: This is the email address that the mail merge "Manager" field will use when generating marketing materials.

Activity Log Path: This will be set by your system admin. This should be a shared location on the network that will allow temporary files to be created for activity log entries. This should be the same for all stores and will need to be a shared location available to all users on the system. If you do not set this to a share that is available you will see a decrease in performance of SPOT until this is corrected.
Log Activity Events: Enable this check mark if you want to use the activity log feature. This is enabled by default.

Use Batch Posting: Enable this if you would like to have activity logs posted in batch and not in real time as with the “Log Activity Events”. WSI suggest you never enable this setting unless instructed by SBS support.

Node Type: In most instances this will be set to “Store”. If you choose to use any other setting than “Store” please contact WSI for instructions and usage.

Parent Node: In all most all instances this will be set to “Store”. If you choose to use any other setting than “None” please contact WSI for instructions and usage.

Locality: This is to be configured to the City that the store is located. By default this City will be used when a new customer is created.

Comments: This is a general comments area for storing generic notes about the store.

Addresses - Use this tab to set the stores local address information. The only address that is required is the “Physical Address”

Workstations – This is the area that you will create and modify a workstation. If you select a workstation from the list you will see the following details.
Name: Physical name of the workstation. Use this name to identify your workstations. SBS suggests using a store numbering sequence that will allow you to quickly understand the workstations role by the name of the station. An example of the sample above is STO01Counter1. This is Store #1’s first counter station. The second counter station would be STO01Counter2 etc. As a manager of the network this will be invaluable when assisting users in configuration questions.

This name will be either the local machine name when running SPOT on a LAN or it will be the ICA client name when running in a Centralized model.

Account Node: This is the account node or store that this workstation will be associated with. By default a newly created workstation will default to the station it was created in. If you want to move a workstation from store to store you would use this setting. Once you use this to move the workstation it will be removed from the previous screen and will only be available from the store you assigned it to.

Type: Only use Workstation unless otherwise instructed by SBS support staff.

Role: Only use Workstation unless otherwise instructed by SBS support staff.

Physical Address: This will be either the MAC address of a machine running on a LAN or the Citrix client ID when running in a centralized model. If you are using just Terminal Services it will be the TS client name.

Billing Amount: Is not used at this time.

Login as other Station: This will allow a user who has security rights to login to this machine from another workstation. This would be used if you want to be in store 1 and want to be able to quickly login into a workstation at store #2.

Data Store – This tab is only used in the original Account Node and should only be used when instructed by SBS technical support.

Groups - This tab is only used in the original Account Node and should only be used when instructed by SBS technical support.

Messages - This tab is only used in the original Account Node and should only be used when instructed by SBS technical support.

Activities –
SPOT2000 Enterprise – this is the heart and soul of the configuration within SPOT. The previous items talked about the creation and organization of your Company, Stores and Workstations settings now we are in the configuration of each these items.

General – Do not modify or change any of these items on the screen.

Permissions – Do not modify or change any of the items on this screen unless otherwise instructed by SBS technical staff.

Rights – If you have a full understanding of using Security and Rights you may use this screen to manage rights established by a group. If you do not understand Security and Rights as it pertains to SPOT do not attempt to use this screen.

Data Store – This must be set for each store / account node. As mentioned in earlier sections SBS suggests using only the data store settings for the first store configured in your operation. The data store will point an individual store to its assigned data store or data base. As in the screen below notice that all stores for the account MDC are pointing to the same data store as defined earlier.
Account: Select the name of the account you are going to work with.

Environment: Select the environment you are working with. In most cases "Active" or "Production" will be the environment being used. You may also have a "Training" environment that can also be used to separate training data from production or active store data.

Account Node Listing – Once you have selected the Account and Environment each store will be displayed with options for “Activity log” and “Primary”. This setting will point the data to these data bases as created in earlier Store / Account Node settings. In most cases you will duplicate the “First” store that was created and all stores listed should display the same connection information.

Meta Stores – This is the same configuration information you have from the home screen with Setup / Program Configuration with the exception you have the option to modify all Company, Store and workstation settings from one list. This eliminates the need to login and out of stores, and workstations for changes.

Account Settings – This is the same information you have when using the Home Screen / Setup / Program Configuration / Company Settings
Site Settings - This is the same information you have when using the Home Screen / Setup / Program Configuration / Store Settings

Workstation Settings - This is the same information you have when using the Home Screen / Setup / Program Configuration / Workstation Settings

Users - This is the same information you have when using the Home Screen / Setup / Users, Groups, Rights.

Groups - This is the same information you have when using the Home Screen / Setup / Users, Groups, Rights.

Creating a new Store and Workstation

Please follow these instructions step by step or you “will” have errors during the process. If you get any type of error when creating your new store please exit SPOT and attempt the process as noted below.
1. Open MetaSpace browser and select the account you are going to add the new store working with. The example below shows using the MyDrycleaner account creating a new store #3.

![MetaSpace Browser Screenshot](image1)

2. Right Mouse clicks on the “My Drycleaner” account and select “Create New Account Node”. You will then be presented with a blank Store / Account Node configuration screen.

![MetaSpace Browser Screenshot](image2)

3. These Store settings have been noted in an earlier chapter of this document and must be filled out accordingly. Once you have completed the information on this screen you “Must” use the “Save” button and “Exit” SPOT before you move on. If you do not do this you will generate an error in SPOT and loose all of the information you just created.

4. Once the configuration is saved and you exit SPOT, log back into the MetaSpace Browser and you will now have My Drycleaner #3 available for configuration as shown below.

![MetaSpace Browser Screenshot](image3)

5. Move to the “Workstation” tab and create a new workstation. This is an option that will allow you to manually create a workstation or you can use the “Register” workstation option to create the workstation for you. If you
choose to “Add Workstation” remember to use the Name as the display name and the Physical address will be either the MAC address on a LAN or the Citrix / Terminal Services Client ID in centralized installation. The Physical Address is what SPOT uses to license the system so this has to be manually entered or the workstation has to be registered the first time it is used.

6. Move to Activities / SPOT2000 Enterprise and make the change to your “Data Stores” settings as described earlier in this document.

7. You are now ready to login and configure Store settings and Workstation settings for this installation. If you are looking to Clone or Copy this store or workstations configuration from an existing store or workstation please review the “Cloning Store, Workstation Settings” section of this document.
Cloning Store, Workstation settings

In the MetaSpace browser you have the ability to copy a master or default store and workstation to a newly created stores or workstation for quick deployment and installation. Remember that when you copy a store or workstation setting it will overwrite “ALL” existing settings that have been created and there is no recovering these setting short of a restore from backup. This section will illustrate the process to copy/clone an existing store or workstation setting to a new store or workstation.

Once you have selected the Activities / SPOT2000 Enterprise / MetaStores / Account and Environment you will see the following screen. You will notice the “Copy Button” at the bottom of the center pane. This button will allow the copy of Company, Store and Workstation settings.

Once this screen is displayed you will notice that you have a “From” and “To” side of the screen. This is a simple way of looking at what you are coping “From” and are going to copy “To”. As displayed below if you select a check mark next to the Store settings of “My Drycleaner #1” on the “From” side and a check mark by the “My Drycleaner #2” on the “To” side as show below you will duplicate “My Drycleaner #1” settings to My Drycleaner #2.

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Above you will see that workstations settings "From" “STO01Counter1” will be copied “To” “STO02Counter1” and “STO02Counter2” all at the same time. You can use this functionality to create a master “Counter” station and a master “Managers” station that can be copied for a master configuration. This “Master” approach can be used with both Stores and Workstations.

To perform the “Copy” of the Meta settings simply select the “Copy” button at the bottom of the screen. You will be prompted to confirm the copy. Once the copy is complete login to the Store / Workstation and make any final configuration changes needed from to the newly created Store or Workstation.

**New Store Configuration Check List**

**Overview**

These settings must be set in order for a new store to operate properly. If you have cloned settings from an existing store verify and set these setting for the newly created store. Improper settings of the store will cause serious issues with improper invoice number generation and tax calculations.

**System Tab**
- New Tax entity if required

**Company Tab**
- None

**Store Tab**
- Invoice Settings
  - Invoice sponsor (Set to itself or to processing plant)
  - Initial invoice number (Set to 1 or other customer invoice number)
  - Tax entity
  - Alteration Tax entity
- Markin Settings
  - Default price table
  - Promised Date Assignments
  - Department Settings
  - Visit Association
  - Route Settings
  - Remove Routes
- Site Defaults
  - Default Area Code – Local Store ID
  - Default City – Not Used
Default Postal Code – Not used

Workstation Setting Tab
  Printer – Update local printer setting and test
  Report Printer – Update local printer settings and test
  System Menu Settings – Recent Transactions screen for counter workstations

Location information Tab
  Mnemonic
  Contact / Managers Name
  Email Address:
  Locality – Use local city
  Activity Log Path
  Physical Address
  Mappoint Address
New Price Table
  Company Settings
    Markin Settings
      Create Price Table
      Update Discount Groups
  Store Settings
    Markin Settings
      Default Price Table
      Department Settings
        Tags
        Rush Tags
Setup SPOTScan

Connect SPOTScan to com port and document.

Workstation Setting – SPOTScan
   Baud Rate: 9600
   Com Port: 3 or 4

SPOTScan Device:
   Set Mnemonic to Store
   Set Baud Rate to 9600
   Change Store Name
   Enable “Auto Racking”
MetalProgetti Settings

Overview
This guide is intended as an outline to the configuration of MetalProgetti devices. These options are only used if you have a MP auto sorting, racking, staging or 24 hour valet device in operation. Do not modify these setting if you do not have these optional features running in your operations.

Any modifications of these setting in production may have short and long term effects on the processing of orders in SPOT and the interactions between SPOT and the Metal Progetti equipment. Please proceed with caution and with the instructions of SBS Metal Progetti Specialist only.

Settings
MetaSpace Browser->Account->Activities
- Click “Register MetaStore”
- Specify the “AccountSpecific_MetalProgettiSettings.mes” file
- The password is “MetalCactus” (case-sensitive)

System Settings->Operations Settings->Process Interceptors
- MetalProgetti
  - ProgID = SPMPLib.Handler
  - Invoke After Saving Target = UNCHECKED!!!
- MP Post
  - ProgID = SPMPLib.Handler
  - Invoke After Saving Target = CHECKED!!!

Company Settings->Workflow Settings
- Split Process Interceptors
  - Check “MetalProgetti”
- Redo Process Interceptors
  - Check “MetalProgetti”
- Void Process Interceptors
  - Check “MP Post”

Company Settings->Workflow Settings->Bagging Step
- Handler = “Scan - Allow Item Scan”
- Internal Status = “In Process”
- Location Type = “All Account Nodes”
- Process Interceptors - Check “MP Post”
- Post-Interceptor Construction String - Type “ASSEMBLYDELETE”

Company Settings->Workflow Settings->Detail Step
- Process Interceptors - Check “MetalProgetti”
- Post-Interceptor Construction String - Type “ASSEMBLYONLY”

Company Settings->Workflow Settings->Item Processing Steps
- On A
- Off A

Company Settings->Workflow Settings->Lot Manager workflow steps
- On A
  - after creating press edit button for item processing place machining check “On A”
- Off A
  - after creating press edit button for item processing place machining check “Off A”
- Ready
Company Settings->Tagging Settings
- Set possible lot colors/descriptors
- Set tag ranges in Tag Colors

Store Settings->ItemTrac Settings
- ID Generation Method = Predefined (for chips)
- Require ItemTrac = CHECKED
- Use HSL when available = CHECKED when using HSL and chips.

Store Settings->Markin Settings
- Use Conveyor Context = CHECKED
- Lot Mode - Set to “Use Lot Manager”
- Enforce ItemID ranges = CHECKED

MetalProgetti Settings
- Admin user must have rights to the MetaSpace Browser
- Login as Admin user to the MetaSpace browser
- Browse to Activities->SPOT2000 Enterprise->MetaStores
- Select specified account and store where the MetalProgetti conveyor located.
- Double-click on “MetalProgetti Settings”
- Click on second “MetalProgetti Settings”
  o Transfer server address - leave blank (we will specify in the override per conveyor)
  o Transfer server filepath - for local installs, specify “c:\spotmp”. For hosted installs, see Craig.
  o SPOT file path - \servername\c\spotmp. The share must have full read/write capabilities
    ▪ Name = Assembly
    ▪ Abbreviation = “A”
    ▪ Conveyor Number = usually 1. Ask MetalProgetti installers or check the running MAP program if unsure.
    ▪ Conveyor Type = “Assembly”
    ▪ IP Address Override = IP address of MAP computer. Ensure that port 4698 is open and accessible to the MAP computer.
  o ItemTrac profile (set this AFTER creating conveyors) - connect Item processing steps to conveyor events.
    If no events appear, log out and log back in (the settings must be refreshed from the original
  o Item Key Storage Mode - set to “Retain Key on Storage Loading”
Credit Card Configuration

Credit Cards Settings

Several options are available for the use of credit cards. The first thing required is a processor who understands and can communicate with SPOT i.e., PPI. Sample of a setup using the PPI Gateway.

Credit Card Settings - Determines which batch payments are submitted with the "CC Batch Validate" function. The default setting is By Company.

By Company = All batch payments will be sent, regardless of the store of origin. The payments will be processed through the merchant account of the store the user is logged in to.

By Store = Only the payments for the logged-in store will be sent. This will ensure that payments from other stores will not be processed through the wrong merchant account.

This information will be filled in with the setup information received from your processor. It includes types of cards accepted, path to the processor, etc.
It is also possible to have separate processors and bank accounts for each store.

Here you define the processing method. Never batch means an immediate request to the processor for each invoice. (If at pickup, SPOT will have a total of all invoices and will submit this amount) Batch … means the individual invoice amounts will be placed in a batch and submitted later as a total for a given customer. If the charges are to applied at dropoff or rack/ready, then you should set the processing type to batch. This will collect all the orders for a given customer, and submit one charge for the total amount.

At the Store level, several options are defined also.

The 1st is when the credit card on file is to be charged, both for counter customers and route customers. The default is at pickup (Counter) and post (Route).

Dropoff = The card on file will be charged when the orders are detailed. The card will be charged one time for the total of all orders detailed in the same markin session.

Rack = The card will be charged when the orders are racked. The card will be charged separately for each order (unless credit card batching is in effect).
Also at the Store level will define the default precedence for using a credit card on file for a customers who is also an account customer.

Determines the default "Payment Precedence" setting that will be used when new customers are added. The setting determines how the A/R account and the credit card on file (CCOF) interact for the customer if both are present.

Credit Card - Orders are normally charged on the CCOF. The account is only used for route customers if the CCOF is declined.

A/R (CC pays monthly balance) - Orders are normally charged on account. The CCOF can be used to make payments on account, including using the "CCOF Payments" option. When using "CCOF Payments", the card will be charged for the total account balance.

A/R (CC pays overdue balance) - Orders are normally charged on account. The CCOF can be used to make payments on account, including using the "CCOF Payments" option. When using "CCOF Payments", the card will be charged only for the portion of the account balance that is overdue.
These default settings can be over-ridden by customer, if the customer has specific needs. This is done at the customer information screen, AR – CC Tab. Simply select the correct field, use the pull down arrow on the right side, and choose the appropriate entry.

**CC Exceptions**

The Home Page has the ability to display CC Exceptions and PMT Exceptions, by workstation and additionally by user. By default, the workstation setting is off. These screens are also available from Menu F3 > Payment column
The workstation setting is activated by choosing Setup > Program Configuration > Workstation > System Menu Settings. The Alert for CC Exceptions has the ability to define the current store only or all stores. Payment Exceptions is a Yes/No option.

Additionally, user permissions define whether a particular user has the rights to see these screens or not. This is defined by choosing Setup > Users, Groups, and Rights. Select Activity Rights, highlight the appropriate Group and located under the Cashier section is a filed which says “Use Payment/CC Exceptions Screens”.
CC Exceptions

CC Exceptions are defined as transactions that did not complete correctly. Typical reasons are (a) The processor didn’t respond after a transaction was submitted, (b) The response wasn’t intelligible, (c) SPOT was closed before the transaction could be completed, (d) SPOT had reason to believe the transaction may have produced other errors or irregularities.

These exceptions should each be researched and closed only after evaluating and resolving the issue. To close an entry, click to place a check mark in the “Closed” column.
Payment Exceptions

PMT Exceptions are those CCOF payments for AR customers which were submitted through the AR Create Statements or CCOF Payments screen, and were declined or received no response from the processor.
**Credit Card Reporting**

SPOT has many reports which assist you in the management of credit cards in your business. These are found by choosing Reports tab on the left side and going to reports gallery.

The Credit Card Transactions report will show you every credit card that was taken during a User defined date range. It will show a list of all Transaction #, and status. Those **Authorized** have gone through and you can expect payment. Those that have a status of **Pending** need to be submitted to the processor. (Discussed later) Those that report **Declined** need to be resolved because no payment will be received. **Declined Historical** means that the order was declined, but has since been resolved by another means.
Pending Status

There are two ways for a CC transaction to be flagged “Pending”.

1) If they have batching enabled, every qualifying transaction will be placed into that category.
2) If they do a “Post Route Orders” to CC, and the transaction fails (declined, or any failure in the process) to authorize, the order then goes into the “Payment Exceptions” screen. From there the user may tell the system to “Resubmit” that transaction, and the status becomes “Pending”.

Note that any order(s) related to a “Pending” transaction will show as paid.

These “Pending Authorization” transactions are just that – pending. They aren’t authorized, so the processor will have no knowledge of these. They are waiting for the SPOT user to “Submit Batch for Authorization”.

Don’t confuse this with “Settling” a batch – this is a different batch. The batch to be authorized is owned by SPOT, while the batch to be settled is owned by the processor.

Once this batch is submitted for authorization, those transactions that authorize will update the order payment information to reflect the new payment information. Those transactions that fail to authorize (decline) will reflect that declined payment, and the order(s) will now, again, show a balance due. Those payments will also be transferred to the payment exceptions screen, where they may be flagged to resubmit or just closed. Alternative payment types (including another credit card) may be taken by going into Order Pickup, where the orders will be treated as PNP.

Submit the batch

Go to Menu F3 and choose the option to Submit CC Batch from the center column.
**Issuing a credit/refund**

Go to Menu F3 and choose the option ‘CC Adjustment’. Find the correct customer, enter the amount, choose the correct option, whether it is a credit or charge to their card. As a security measure, if it is a credit, SPOT will ask for the initial transaction number. This will be found on the Credit Card Transaction report for the date of the original transaction.

**Settlement**

Depending upon your processor, you may be required to manually settle your batch before payment can be made. This will be achieved by going to Menu F3 and choose the options Submit CC Batch, Reprint CC Batch Report, and CC Settlement as necessary.

**Encrypting Credit Card Data**

**Key management process**

The key management process is used to maintain PCI compliance in your SPOT system when using credit cards on file. The encryption keys require a manager to start the encryption and key creation process and two persons to create key’s used in the process. This will ensure that no one person will hold the encryption key to your data.

**Creating keys**

Select and enter the menu options using the “F3- Menu” button located on the top left of the home screen and select the “CC Encryption” option as shown below. This will start the encryption wizard and walk you through each step required to complete the credit encryption process.
Step 1: The wizard will display directions and text explaining the process. Once you have read, understand and agree to the information contained on this screen press the “Next” button.

Step 2: Read and understand the second screen of the wizard and select the “Next” button

Step 3: Clear the room of everyone except “Key Manager 1” that will be entering the first key. Key Manager 1 then enters there SPOT PIN number and enters a 16 character encryption key in the “CC Key Part 1” field. You with then retype the key to confirm the key values in the “Retype Entry” Field. Remember this key is to be known only by you and no other persons.
Step 4: Read and understand the second screen of the wizard and select the “Next” button

Step 5: Clear the room of everyone except “Key Manager 2” that will be entering the second key. Key Manager 2 then enters their SPOT PIN number and enters a 16 character encryption key in the “CC Key Part 1” field. You will then retype the key to confirm the key values in the “Retype Entry” Field. Remember this key is to be known only by you and no other persons.

Step 6: This is a confirmation screen that keys have been entered properly and by whom they had been entered. Pressing the “Finish” button will accept the displayed encryption key information.
Step 7: Once the keys have been entered and accepted the credit card data will need to be updated. To update the credit card data with the configured encryption press the “Reset Encryption Key – Start Process”. This will count the total number of customers, payments and transactions that are being encrypted with the new keys.

Once this screen display “Completed” the process is complete.
Debit Card Configuration

Overview
Debit card processing allows you to take a PIN based debit card at order pickup. The big reason merchants want to take a PIN based debit card transaction is that they feel the cost of the transaction is cheaper than the cost of a credit card transaction. In some cases this may be true but others it is not. You will need to contact your PPI representative for current rate information on Debit card transactions. You are also required to purchase and install a PIN pad on each workstation that will be processing PIN based debit cards.

At pickup your staff will be required to ask the customer if the current transaction will be a credit or debit card transaction. They will have the option to select either the “Credit Card” or the “Debit Card” transaction type from the pickup screen. Your staff will need to select this tender option prior to the swipe of a card. If they select the PIN based debit card the transaction will require the customer to enter a valid PIN on the attached PIN pad to complete the transaction.

This service does not allow cash back for a PIN based transaction.

*Current configuration options support the PPI Paymover 2 interface and the “Verifone 1000SE” device attached via serial interface at 9600 baud.

Configuration

Configuration of Debit cards is very similar to the configuration of Credit Cards. You will require a tender type and a debit card processing profile in configuration. This configuration will be generated and provided by PPI. Along with the configuration information you will also need a PIN pad attached to each workstation that will be transacting PIN based debit cards. This device connects to the workstation via a serial port. **When connecting the PIN pad it is required that you power off the computer before attaching the device. If the PIN pad is connected with the power on the computer it is possible that you will damage the PIN pad device. This will not be covered under warranty and new device will need to be purchased.

Company Settings – Navigate to Company Settings > Invoice Settings > Tender types and create a tender type called “Debit Card”. This must be called exactly as shown below, and is case sensitive.

| Property Name                | Value             
|------------------------------|-------------------
| Name                         | Debit Card        
| AllowCashBack                | ✅                
| CountAs                      | Other             
| GL Account                   | Cash              
| MaximumCashBackAmount        | $50.00            
| OpenCashDrawer               |                  
| PrintReceipt                 | ✅                
| Refund using                 | Cash              
| RequireDetailInfo            | ✅                
| TenderDetailInfo             | Debit Card/PIN    

Navigate to Company Settings > Debit Card Setting and create a new debit card profile as shown below. The name of profile may be any name you would like. Most configurations will use the store name and number in that each store will have a separate profile created. The contents of the fields will be provided by PPI as this sample information is just an example.
**Workstation Settings** – Navigate to Workstation Settings > Debit Card Settings and select the correct debit card profile to be used by the workstations. Each workstation will require a device to process these transactions.

**Special Notes**

*Current configuration options support the PPI Paymover 2 interface and the "Verifone 1000SE" with a serial interface at 9600 baud.*

**When connecting the PIN pad it is required that you power off the computer before attaching the device. If the PIN pad is connected with the power on the computer it is possible that you will damage the PIN pad device. This will not be covered under warranty and new device will need to be purchased.*
Installing and Using SPOT Report Queue

Overview
Report Queue will allow you to automate the generation and emailing of the following reports to any valid email address at any time you configure. You are required to have SPOT version 4.50.0193 or higher in order to use the automated process of report queue. The following reports are supported at this time.

Incoming Detail – RQ
Incoming Summary – RQ
Outgoing Detail – RQ
Outgoing Summary – RQ
Incoming Summary – Enterprise
Outgoing Summary - Enterprise
Change in Inventory - New
Credit Card Transactions

This list of reports supported by the Report Queue will increase in the future. Any report found in the Reports Gallery with the sign are valid report queue reports and can be assigned to your profile for emailed reports.

Requirements
We assume you have knowledge of Windows services, SPOT reporting and configuration knowledge to complete this installation. Installation of SPOT version 4.50.0199 and higher is required to continue with the installation and configuration of report queue.

Setup Reports / Date and Time to Send
Go to Setup > Location Information > Company > and verify the status of the “Report Queue Enabled” button. If this does not show “Enabled” select the button and this update the report queue configuration for SPOT.

Using Setup > SPOTQuery > Add, create a “Profile” with a descriptive name and include the description of the profile. You will want to group reports by the groups you are sending them, the day you run them or even the type of reports being processed.

Select the Company from the company list that this profile will be used and press OK.
Select and include any reports you want to have available to the report queue utility. The only reports that will work with the queue are those that have the “Red” graph symbols as shown below.
Once you have a Profile(s) created and saved press “Close”. Now you have report profiles created you will now create a job in the Scheduler that will define the date and time the reports will be emailed, reporting parameters including store, date and time ranges, email address information and other parameters.

Enter Scheduled Tasks by Setup > Scheduled Tasks. Choose the “Add” button to create a scheduled task that will email the configured profile of reports to specified users.
Complete Scheduled task details.

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nightly Reports</td>
<td>Nightly Reports emailed to store managers each evening.</td>
</tr>
<tr>
<td>w/SOCOUNTER2</td>
<td>SPOTQuery Presentation</td>
</tr>
</tbody>
</table>

**Task Run Dates**
- End: 1/1/2020
- At: 12:00:00 AM
- Run Always

**Days to Run**
- All Days of the Week
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

**Other Details**
- Profile: Nightly Reports
- Send To: E-mail Address
As shown in the image above you have 5 areas that need to be completed.

2. Name and description of task that you are scheduling. This example shows “nightly Reports” being sent to all managers.

3. Type of item being scheduled. You will always use the SPOTQuery Presentation for report Queue and select any workstation you would like to run these reports.

4. Configure the dates and times that will be used for this report queue process. This included the first time it will run and the ending date it will run. The example above shows you will run this report from 9-11-06 to 1/1/2020 at 11:00 PM Monday – Saturday.

5. Profile and send to data allows you to specify what “Profile” of reports to send and to whom they will be emailed.

Profile Settings

Store – Select the Store you want this report queue profile to include.

Start Date – Select the Starting Date range of the report for this profile. You have many options for report start dates. The example below will give you a start date of “Today” as the beginning date range for the report. The example report profile is running at 11:00 PM so this will give you today’s data when the report queue profile runs. If you select the Current Date and set the offset to -1 this will give you yesterday’s date as a starting date range as the beginning date for the report.
Start Time – Select the starting time range for this report profile. This is used in conjunction with the start date option to configure the start date and time and what data will be included in this report. The example below assumes Today at the time the report runs. This examples profile is scheduled to run at 11:00 PM.

End Date – This uses the same logic for date ranges. This will use today as the ending date of the report.
End Time – Same logic as Start Time and will use midnight of today for the ending time range for the report.

Completed Profile selection criteria – You can see this profile will run with the following parameters

- Stores 1, 2 and 3 will included
- Starting date selection for report is “Today” (time is determined by the date and time the profile actually is initialized.
- Start time range for the report is 12:00 am
- Ending date selection for report is “Today” (time is determined by the date and time the profile actually is initialized.
- End time range for the report is 11:59:59 PM

Send To – This setting allows you to configure who this report will be emailed. Enter any valid email address that you want to receive this report queue job. If you have selected multiple reports in your profile the customer will receive multiple emails with a single report per email.
Save your setting.
Once these items are completed and your profile is save you will begin to receive your report queue profile reports at the date and times you have specified. As shown below you now have a single item created in the scheduler that will run the “Nightly Reports”. You may have a profile and schedule for several different type of reports and destinations.
System Configuration/Setup for Standalone Customers

You will need to follow the steps below to enable the Report Queue system controls. This will require the installation and configuration of the SPOT Scheduler service on your server. This service is used to generate the report, package the report and send the report via email.

Requirements for Installing Service

- Microsoft .Net 2.0 framework installed
- Access to a SMTP mail server for email relay processes
- User name and password running service must be enabled to use the SMTP relay service on your mail server
- Understanding of Windows Service management
- Understanding of SMTP mail relay services

1. With a text editor update/modify your SPOTSchedulerService.exe.config file with the following keys and esmroot connection information as noted. You must place the user name, password and server of your current SPOT database server. This file is located in your \Program files\WSI\SPOTSystem Directory. These keys need to be applied between the <appSettings> and </appSettings> tag.

**SPOT Configuration**

```xml
<add key="SPOT_Report_Path" value="C:\Program Files\WSI\SPOT2000\Reports\" />
<add key="SPOT_ESM_ConnectionString" value="Provider=SQLOLEDB;UID=sa;PWD=spot;Server=YOURSQLSERVER;Initial Catalog=ESMRoot;" />
<add key="SPOT_Application_Path" value="C:\Program Files\WSI\SPOT2000" />
<add key="Watch_Interval" value="60" /> --- Value is in seconds ---
```

**Email Configuration**

```xml
<add key="SMTP_Server" value="Mail ServerName or IP Address"/>
<add key="Email_Sender" value="Name@YourEmailAddress.com"/>
```
2. Install the spotschedulerservice.exe located in c:\Program Files\WSI\SPOTSystem using the Microsoft .Net Installutil.exe program. Use your windows search utility and find the most recent copy of the file on your machine and copy it to your c:\Program Files\WSI\SPOTSystem directory.

3. From a command prompt at C:\Program Files\WSI\SPOTSystem run this command "Installutil spotschedulerservice.exe", after running the command line you will be requested to using your local admin user name and password. You must use the machine name\username when entering the user name. (example: You server name is RHServer, you would type RHServer\administrator on the user name line of this utility.

Once this utility runs you should see a message showing a completed installation. Close the DOS prompt.

4. Verify that the “SPOT Scheduler” service is started and set to start automatically. You will use the services MMC interface to verify this. To use the utility Right Mouse Click on My Computer > Manage > Services > SPOT Scheduler. Select the properties of the item and change the “Startup Type” to Automatic. Once this is set save and Start the service.

5. Modify the “Log On” user for the service. By default the service will be created to using the windows “Local System Account”. The user running the service will be used to communicate and authenticate to your SMTP mail delivery server.
Exit the MMC and you should receive reports as configured in SPOT. If you do not receive the email and report please contact SPOT technical support for further information.

**System Configuration/Setup for Hosted Customers**

This configuration information will be completed by SBS.
Data Base Archiving

Overview
Currently SPOT support the archiving of both invoice data and activity log data. This document will guide you in configuration of both of these record archiving options. Data base archiving will allow you to maintain years of history for reporting and still maintain a fast and efficient production data base. Enabling archiving will take knowledge in the use of Microsoft SQL server management tools for the setup and maintenance when using archiving.

Archiving will automatically move Sold orders to the archive tables as configured in SPOT. You have the option to configure the number of days to maintain “active” data in your production data base. The word “active” implies that these invoice or activity log records are not archived. The archive has been designed to not only move invoice or activity log entries that are older than the date specified and reduce the number of records in the production data base but to also reduce the amount of disk space used by the archived records. To reduce the disk space used by archived records archiving removes many of the production data base indexes. These indexes assist in the performance of the reports and also require very large amounts of disk space. Once an invoice is archived it will not be allowed to be modified or moved back to the production data base.

One thing to remember when configuring the archiving feature is the number of days to use for archiving. When you run a report and use a date greater than the days configured for archiving SPOT will warn that you are about to use archived data. When you use archived data in reporting for both activity logs and general reporting the process will take substantially longer to complete.

An example of active and archived data is as follows. Invoice and invoice item details are kept in tables called Invoice and InvoiceItem in your production data base. Archived invoice data is stored in History_Invoice and History_InvoiceItem tables. These tables may be located in your current production data base or they may be placed in a separate catalog / database. The advantages of using your current production data base or to use a separate data base /catalog for archived data are as follows:

- Use Production Data Base for Archived data
  - Faster archiving process
  - Faster record retrieval for reporting
  - Production data base backup will backup archived data
  - Single Job for data base maintenance and index maintenance

- Use a Separate data base / catalog for Archived data
  - Slower archiving process
  - Slower record retrieval for reporting
  - Separate backup required for archived and production data base. Backup your archived data once per week and your production data daily making for faster and more efficient production backups
  - Separate job for data base maintenance and index maintenance allowing for faster production maintenance jobs
  - Smaller working production data base because archive data is contained in a separate data base.
  - Faster production data base backups.

Using the guidelines above will assist in your decision to archive data to your production data base or to a separate archive data base.

Configuration

*Before configuring your system for archiving you must create a new backup of both the SPOT production and ESMRoot catalog. Use and understanding of SQL management tools is required to configure this option along with knowledge and access of the SPOT MetaSpace browser.*

1. Login to the MSB and select the “SPOT2000 Enterprise” node and then select the “Extended Properties” tab. You will have several options required for the configuration of archiving.
Archive Catalog – Physical catalog that your archive data will be stored. In most cases this will be your SPOT2000 catalog.

Archive Event Log Days – Number of days you will retain active activity log entries in production tables. Any activity log entries older than this number will be moved to archive tables. You will generally set this to be 45-60 days. The minimum days is 45 days.

Archive Invoice Days – Number of days you will retain active invoices in production tables. Any invoices older than this number will be moved to archive tables. It is suggested you start with 430 days or more and make changes if you need to archive newer than 14 months worth.

Archive Password – Enter your SQL server password. By default this should be your SA user password.

Archive Server – Enter the server name that is holding your archive databases. By default this will be your SPOT production database.

Archive Username – Enter your SQL server username that will process the archiving procedures. By default this should be your SQL server user SA unless you have configured a specific SQL user to process archiving jobs.

2- Save your settings and minimize the MSB
3- Open up your SQL management console and run the following script in a new query window

Use ESMRoot  
go  
Select InstanceID, AccountID, Name from SPAccount  
go

4- After running the Query you will see results similar to the information below. Find the line item that has your store name and Find the InstanceID column for that row. This number will be used in archiving and you will need to copy the InstanceID column to your clipboard for later use.
8. Clear your Query windows and type the following query and pasting your InstanceID from your clipboard as noted with ‘YourInstanceID’

   Use SPOT2000
   exec archive_setupjobs 'YourInstanceID'

   Example:
   Use SPOT2000
   exec archive_setupjobs 'e8b3f900-6a58-41c4-958a-cbc14c958b92'

10. Drop all ALL_* Views. (Contact Technical Support).
12. Look at an All_ view to make sure it unions to the newly made database.

For SQL Express Edition:
13. Modify ArchiveEventLog.bat and ArchiveInvoice.bat. Replace username, password if necessary. Replace “NULL” with a running time in minutes. Replace ‘(guid)’ with their SPAccountID. Examples:
   osql -Usa -Pspot -dSPOT2000 -Q"exec ARCHIVE_EventLog 50, '{4B8B772F-4AA7-4D90-B249-B130D78CC85B}"
   osql -Usa -Pspot -dSPOT2000 -Q"exec ARCHIVE_Invoice 50, '{4B8B772F-4AA7-4D90-B249-B130D78CC85B}""
14. Schedule separate Windows Task Scheduler jobs for each batch script, set it to run in the wee early morning hours. This can be done weekly, daily, whatever, just don’t allow it to overlap into production time.

For all others that use SQL Agent:
16. Verify both “SPOT2000 EventLog Archiving” and “SPOT2000 Invoice Archiving” jobs were created and have the correct SPAccountID in the step. By default it will run every hour between 2 and 5am every day and each run will be only 50 minutes.
17. Run on SPOT2000 catalog: "UPDATE ESM_SPWorkstation SET PhysicalAddress = '' WHERE LexicalKey = 'System'".
18. Test and verify data was transferred. Either method used above, I usually change the 50 to 1 so it is quick. I would avoid running this during peak hours. Actually go in and look at the data in the tables to make sure things were moved! Remember to change it back after verifying.
19. Allow it to run a day on its own. Verify Job history and data again.
20. Using your SQL Agent console will see a job for both Invoice and ActivityLog archiving. Verify the jobs are enabled and modify the schedule for processsing as required to work around business hours, data base back up schedule or any other DB maintainance you have have scheduled. It is suggest that you run the archive jobs after your evening backup and not during business hours.
5- Once you initialize your first archive it will take several days or even several weeks to move all of your archive eligible data. Many data bases will have in excess of 700,000 rows of data to move.

Notes: If you have configured archiving to use a separate database other than your SPOT2000 data base or you are moving the archive data base base to a separate server you will need to run a server setup to configure the stored procedures. To speed up the process use the /NOINDEX option to update the tables and stored procedures using in archiving without updating indexes. If you do not use the local SPOT2000 database do not run this process your archive jobs will not function properly.

Once you configure and enable archiving please verify that the jobs are working on daily or weekly basis as configured in your archive schedule.
Data Base Maintenance

Overview
Some simple data base maintenance can go along way in keeping your SPOT data base running efficiently. If you are not familiar with the use of SQL tools please do not proceed with these processes. Improper use of SQL tools and scripts can / will cause irreparable damage to your system. The following scripts are currently configured for SPOT version 4.50.xxxx. If you have any other version than 4.50 please contact support for updated scripts.

The following configuration can be used to replace the manual processes found in Menu > General > Purge Data. When configured the job will remove the following data from your data base

Configuration
*Before configuring your system for archiving you must create a new backup of both the SPOT production and ESMRoot catalog. Use and understanding of SQL management tools is required to configure this option.

1- Open your SQL query analyzer and run the following script.
2- Create Job for deleting production records
3- Create job for running index, rebuild and shrinks
4-

Notes: Running the following processes on a weekly basis will insure that your data base is in proper working order. You will either need to enable alerts for job status or manually review the job stats to verify that you have jobs that are completing. Just setting up a job does not guarantee the jobs will run every time they process.

Include DB indexing
Db shrinks
Remove records
Archiving
Backup
Configuration and Operating SPOTLink / TT5

Overview
SPOTLink will allow you to use a ComputerWise ET214 device to either rack or use process steps. The ET214 is a remote device that has a 4 x 40 LCD display. It is used for Racking or Process Steps. If you choose process steps you will be prompted for what process step to use on the device. This device requires the following be met before installation:

- SPOT version 3.50 or higher
- Access to SPOT Meta Space Browser
- Administrator access to setup the Windows environment
- SPOTLink / ET214 device with Grounded power connection

Configuring the SPOTLink device
SBS has supplied the following menu for your SPOTLink device. If you review the setup guide in the ComputerWise manual you will see a little bit different template. All documentation has been based around the use of this template.

To enter setup mode on the device you will need to have the power attached to the device and plugged in and the network cable removed. When you first power on the device you will see the following on the display:

ET210 VER 1.00
OFFLINE

Keyboard Usage

Default Layout

<p>| | | | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
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Default Alpha/Numeric Mode

- F1: "'
- F2: ()
- F3: #: $:
- F4: ;
- F5: = @
- F6: *
- F7: `-`
- F8: \ /
You will be using the “S1” and “S2” items on the keypad to access features on the keypad. As an example for using the keyboard if you want to use the “I” key you will need to use the “S1” and “4” to get the “I” to be entered. To get a letter “D” that would be the “S2” and “8”.

With this keyboard knowledge you will use the

S1 & S2 + F1 = Enter Configuration Mode
S1 & S2 + F2 = Enter network Configuration
S1 & S2 + F8 = Reboot terminal

These items must be set before you attach the network cable

The network configuration mode is used to configure the ET214 communications parameters. The parameter must be set “Before” the terminal is installed on the network. Holding down the “S1” & “S2” shift keys and pressing the “F1” key will start this mode. A menu will be displayed as follows

Default =1 Modify = 2

Pressing the “2” key will allow access to the network parameters. The display will present a series of configuration parameters and their current values. A value can be changed using the keypad. You will need to use the backspace key to remove any configuration changes that are incorrect. Once the changes are complete on the setup line, press the “Enter” key to move to the next item. After the last parameter is entered the values are saved in memory and the menu is display again.

The following item will be presented and require configuration in “Network Configuration Mode”.

MYIP  Defines the unique network address of this terminal. The value must be set BEFORE installing the device on a network. The default value will most likely not be a valid network address. Enter the correct address including the “.”. (Example: 192.18.1.1) Please see your network administrator for proper configuration of this parameter.
NETMASK  Defines the network mask for the IP address. This value must be set BEFORE installing the device on a network. The default value will most likely not be a valid network address. Enter the correct address including the ".". (Example: 255.255.255.0) Please see your network administrator for proper configuration of this parameter.

GATEWAY  Will be set to the address of your router or computer providing the routing services for the network segment.

TCP_PORT  Defines the primary TP/IP port number used for this terminal. You will need to set this to 4699 for SPOT to use this device.

SERVER  Define a TCP/IP address of the machine configured earlier that is running the SPOTLink service.

AUXPORT  This is only used if you are connecting a barcode reader to the ET214. If you are connecting a scanner to the port use the following settings

- Baud = 9600
- Parity = 0 (none)
- Data bits = 8
- Stop bits = 1
- Xoff = 0 (disabled)

MODE  If using the terminal as a SPOTLink terminal set this to 1 (VTC Mode)

After these settings have been set you will be prompted with

NETWORK CONFIGURATION
1=DEFAULTS, 2=MODIFY

Press the "ENTER" key on the keypad and you will see

Reset (7=Yes)

If you have made changes to the configuration you will need to use the "7" to reset the device.

After the restart of the device you should see the SPOTLink Menu prompting for either a PIN number if configured for Racking or a selection of what Process step to use if configured for process steps.

You will need to reset the device by using the "7" key from this menu.

Now attach your network connection and move on to configure SPOT to use the device.

**Configure SPOT**

You need to have a workstation configured to work at a SPOTLink workstation. This is done in the Meta Space Browser. You will need to login to the Meta Space Browser with your SBS provided credentials. Create a workstation in the store that SPOTLink will be operating and modify the workstation settings as noted.
Name: Physical name of the SPOTLink Device (with newer TT5’s the name must match the physical address)

Account Node: Select the store / account will the SPOTLink device be logged into

Type: Workstation

Role: TT5

Physical Address: IP address of the device

Billing Amount: Not Applicable

Login As Other Workstation: Enabled

Select the “Edit Setting” button on this screen and open the configuration options for SPOTLink (TT5).

Select the User “Select User (Account) button.

This will display a list of current users available for the SPOTLink to login with and then select “OK”. I would suggest that you use the “Clerk” as the login user. You may choose any user in the list but you will need to grant the selected user the “Use SPOTLink” activity right.
Select the Activity "Select Activity" button
This will display all current activities installed on your system. Place a check mark next to “SPOT2000 Enterprise” and then select “OK”.

Select the Environment “Select Environment” button
This will display all current Environments configured for your store. Place a check mark next to the “Production” environment and select “OK”. (If you see more than just Production here you will need to contact SBS support to make the correct selection).

Select the OK button to save these settings.

Select the “Defaults” child of the browser. You will see the following options:

Initial Activity – This is the activity / service that this SPOTLink device will operate under. The currently supported choices are Rack, Quick and Process Steps. Select the required activity you are going to be using with this SPOTLink device.

Auto Logout User – This is the amount of minutes you want SPOTLink to be in operational mode. If you select 5 as default then SPOTLink will be on line for 5 minutes of no activity and then logoff to the home screen. After SPOTLink logs off you will need to supply a user PIN number to get back to the activity defined on the device. (0 entered here means that the device will never logoff and prompt for a users PIN).

Logout Between Sessions – This setting works with the “Auto Logout User” setting.

Select the “OK” button and save your “Defaults” settings.

This will take you back to the workstation details screen. Make notes as to the Name and the IP address of the device.

Press the “Save” button to update all changes made to the workstation configuration. You may exit the “Meta Space Browser” and go back into SPOT.

**Installing SPOTLink Service**

Go to your \Program Files\WSI\SPOTSystem directory via a command prompt and follow these steps.

1. Type spotlink /service. This will register the service with Windows.
2. Now go to your “Services” MMC and select the SPOTLink Service. You can get to the “Services” MMC several different ways.
   a. Go to the desktop “My Computer” icon and select your right mouse button, select “Manage”. Go to the “services and Applications” and expand and select “Services”. This will sort the list of services in alphabetical order.
   b. Go to Start / Settings / Control Panel / Administrative Tools / Services /
3. Select the SPOTLink service and select your right mouse button and choose “Properties”

4. Select the “Log On” tab
5. Change the “Log on as” from “Local system account” to “This account”. You will need to use your “Administrator” login name and password on this screen. We must change this setting only if you are attempting to print from the SPOTLink device. If you are not planning on printing from the device you will not need to make this change.
6. Select the “OK” button from this screen.
7. From the “Services” screen select the “SPOTLink” service and select the “Start” option fro the menu list. You will now see that the SPOTLink service is now started.
8. Close the Services MMC

For detailed information on the configuration of the ET214 you can review the ET214Def.pdf file located on your installation CD from Computer Wise.

**Trouble Shooting Issues**

Issues of the TT5 not working are varied. The most common issue is either the network cable is not plugged in or the SPOTLink.exe service is hung. The issue with the SPOTLink service stems from the service not responding and needs to be reinstalled. The service is a native windows service that can be managed from the services MMC. Follow these steps if you are having issues connecting the TT5 to your server.

Go to Task Manager and "end" the spservicehandler process.

From the \program files\wsi\spotsystem directory run spotlink /service to unregister the service.

Once unregistered reregister the service by running spotlink /service to re-install the service.
(you will normally need to reboot the computer before re-registering the service)

Do a net start spotlink to restart the service.

This should resolve the issue of connecting to the TT5.

**Updating / Version Compatibility**

Before you install or update your SPOTLink device you should verify what type of units you are connecting to your system. Currently we support the ET204 and ET214 Devices. To verify what device you are currently using review the label located on the back of the device, this will display either et204 or et214.

Depending on what devices you have you will need to use a specific version of spotlink.exe and spotservicehandlers.exe.

Et204 requires the spotlink.exe dated 1/8/2003 and spotservicehandlers.exe files dated 12/10/2003

ET214 requires the spotlink.exe dated 7-16-08 and spotservicehandlers.exe file dated 7/16/08

Updating your system

1 - Before performing an update copy the wsi\spotsystem\spotlink.exe (or SBS\spotlink.exe) and wsi\spot2000\spotservicehandlers.exe (or SBS\spotservicehandlers.exe) into another folder or make sure you have the
proper version of the spotlink.exe and spotservicehandlers.exe file as noted above. These files are available from the SPOT Customer Care team.

2 - Once the update finishes, copy these files into their respective folders.

3 – spotlink /service to remove the service
    spotservicehandlers /service to remove the service

4 - Run the com explorer application (screen shot and application source below) and remove all SPOTServiceHandlers by right clicking and left clicking on remove from registry.

5 – Re-start computer

6 - spotlink /service to install the service
    spotservicehandlers /service to install the service

7 - Set the above services to log in with an administrative user: Properties – Logon Tab – This account – supply administrator username & password

8 – net start spotservicehandlers
    net start spotlink

9 – Remove / re-apply power to the TT5 device(s)
Document History
2/26/2012 – Updated Archive setup and configuration