

Template Designer

Installation and Setup Guide

Version: 9.5.x

Date: February 2016

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Overview

Use Template Designer to design templates used in your Publishing Platform. Template Designer runs locally using a Microsoft Access database (MDB) and/or an SQL Server database.

Prepare to install

To perform a Template Designer installation, your system must meet the following minimum requirements. You can also find a complete listing of these requirements in the *Publishing Platform for Retail Technical Specifications 9.5.x* document.

Note You must uninstall any previous versions of Template Designer prior to installing version 9.5.

Windows Server 2008 and Windows 7 prerequisites

Refer to the following list for prerequisites for installing on a Windows Server 2008 or Windows 7 operating system.

Install Microsoft .NET Framework 4

You must install Microsoft .NET Framework 4 prior to installing Template Designer. For installation instructions and to download each product, refer to the Microsoft Download Center website.

Install SQL Server Native Client 10 or 11

You must install SQL Server Native Client 10 or SQL Server Native Client 11 prior to installing Template Designer. For installation instructions and to download the product, refer to the Microsoft Download Center website.

Note Although the application uses a 32-bit driver, you can install the 64-bit SQL Native Client if you are installing on a computer with a 64-bit operating system. The 64-bit installer installs a 32-bit driver.

Licensing Requirements

You can install or upgrade using the Template Designer installation program. However, clients are bound by the terms of the license agreement to only install and use those components for which licenses have been purchased.

By default, Template Designer installs with a demonstration license file. You can replace the demonstration license with your live production license. To change the license file, copy a valid license file into the installed program directory. Unless you specified another location during installation, license files are kept in the [drive:]\Program Files\AccessVia\PublishingPlatform_9_5\Program or the [drive:]\Program Files (x86)\AccessVia\PublishingPlatform_9_5\Program directory.

Template Designer installation

The following steps outline the procedures that you need to perform to install Template Designer.

Install Template Designer

Complete the following steps to install.

1. Right-click the downloaded executable and select **Run as Administrator**.
2. In the **Publishing Platform for Retail – InstallShield Wizard** dialog box, select your preferred language and click **OK**.
3. In the **Publishing Platform Installation** page, click **Next**.
4. In the **License Agreement** page, read the License Agreement, scroll to the bottom of the agreements, select **I accept the terms of the license agreement**, and then click **Next**.
5. In the **Customer Information** page, in the **User Name** box, type your name and, in the **Company Name** box, type the name of the company for which you work.
6. In the **Setup Type** page, clear the **Central Publisher**, **In-Aisle Publisher**, **Publishing Manager**, **Platform Administrator**, and the **In-Store Publisher** check boxes.
7. Ensure the **Template Designer** check box is selected and click **Next**.
8. In the **Publishing Platform database setup** page, select one of the following options and then click **Next**.
 - **Install SQL Server Express 2005 and attach demo database.** Installs a free version of Microsoft SQL Server and configures the application to run with the demonstration database.
 - **Attach demo database to existing local SQL Server instance.** Allows you to install the demonstration database to your existing SQL Server database. You need the database password to continue the installation.
 - **Configure connection to existing SQL Server database.** Does not install the demonstration database but points the installation to an existing database. You need the database password to continue the installation.
 - **Skip database configuration step.** Skips the database configuration step while installing. You need to configure your database manually after installation.
9. In the **Select Database Server** page, in the **Database Server** box, type your server name or click **Browse** to browse for a server, and then click **Next**.
10. In the **Database Server Login** page, in the **Login ID** box, type your login ID for your server and in the **Password** box, type the password for your server and then click **Next**.
11. In the **Publishing Platform File Directory** page, verify the installation directory for Template Designer and database files, or click **Browse** to change the destination folder, and then click **Next**.
12. In the **Select Program Folder** page, in the **Program Folder** box, verify the folder name where the installation adds program icons, type a new folder name, or select an existing folder from the **Existing Folder** list, and then click **Next**.
13. In the **Ready to Install the Program** page, click **Install**.
14. When installation completes, restart your computer.

ODBC connection

You must set up a connection to a data source before you can work with data-driven templates in Template Designer. The following steps outline the procedures that you need to perform to create a new Open Database Connectivity (ODBC) connection.

Set up a new ODBC connection

1. In **Template Designer**, close all templates.
2. On the **Data** menu, click **Connections**.
3. In the **Connection Manager** dialog box, under **Choose the database source and security settings**, in the list, select **New connection**.
4. In the **Select Data Source** dialog box, select the **Machine data source** tab, and click **New**.
5. In the **Create New Data Source** dialog box, select **System Data Source**, and click **Next**. Selecting this option enables the new data source for anyone who logs on to the computer.
6. Select a driver for which you want to set up a data source and click **Next**.
7. Review the summary information and click **Finish**.
8. In the **Data Source Name** box, type a data source name and description, and then complete one of the following procedures.
 - For an MDB database, click **Select** to browse for the database, and then click **OK**.
 - For an SQL database, select a server and click **Next**.
9. Type the user name and password and click **Next**.
10. Select the **Change the default database to** and browse for the appropriate database.
11. Click **Next** and **Finish**.