Publishing Platform for Retail

Version 10.4

Installation Guide

September 2021 **www.lexmark.com**

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Change history

June 2021

- Initial draft.
- Consolidated the *Installation Guide* for all PPR components.
- Modified .Net Framework version to 4.8 for Publishing Platform Manager, as recommended pre-requisite.

September 2021

- Added information on the following:
  - Upgrading database
  - Installing Publishing Authenticator

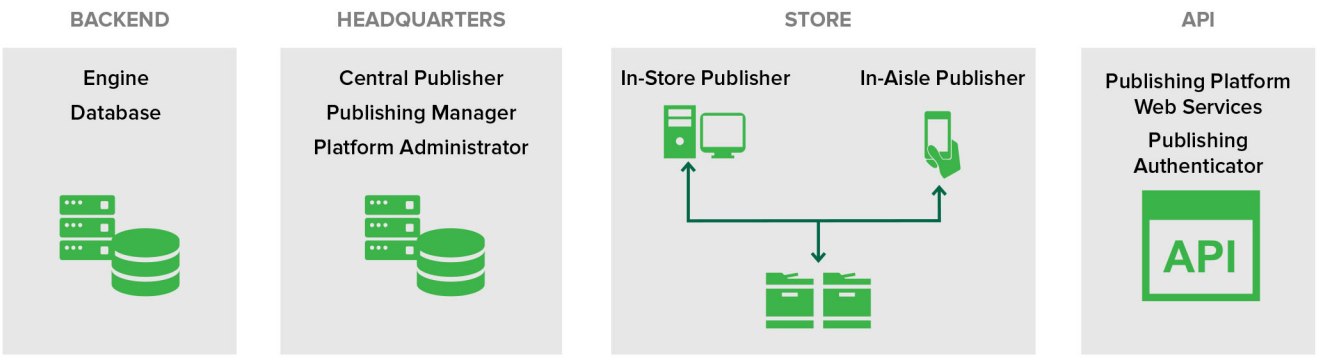
Overview

Publishing Platform for Retail (PPR) is a solution that lets you create, manage, and print shelf-edge signages, labels, tags, and electronic shelf signs for retail stores.

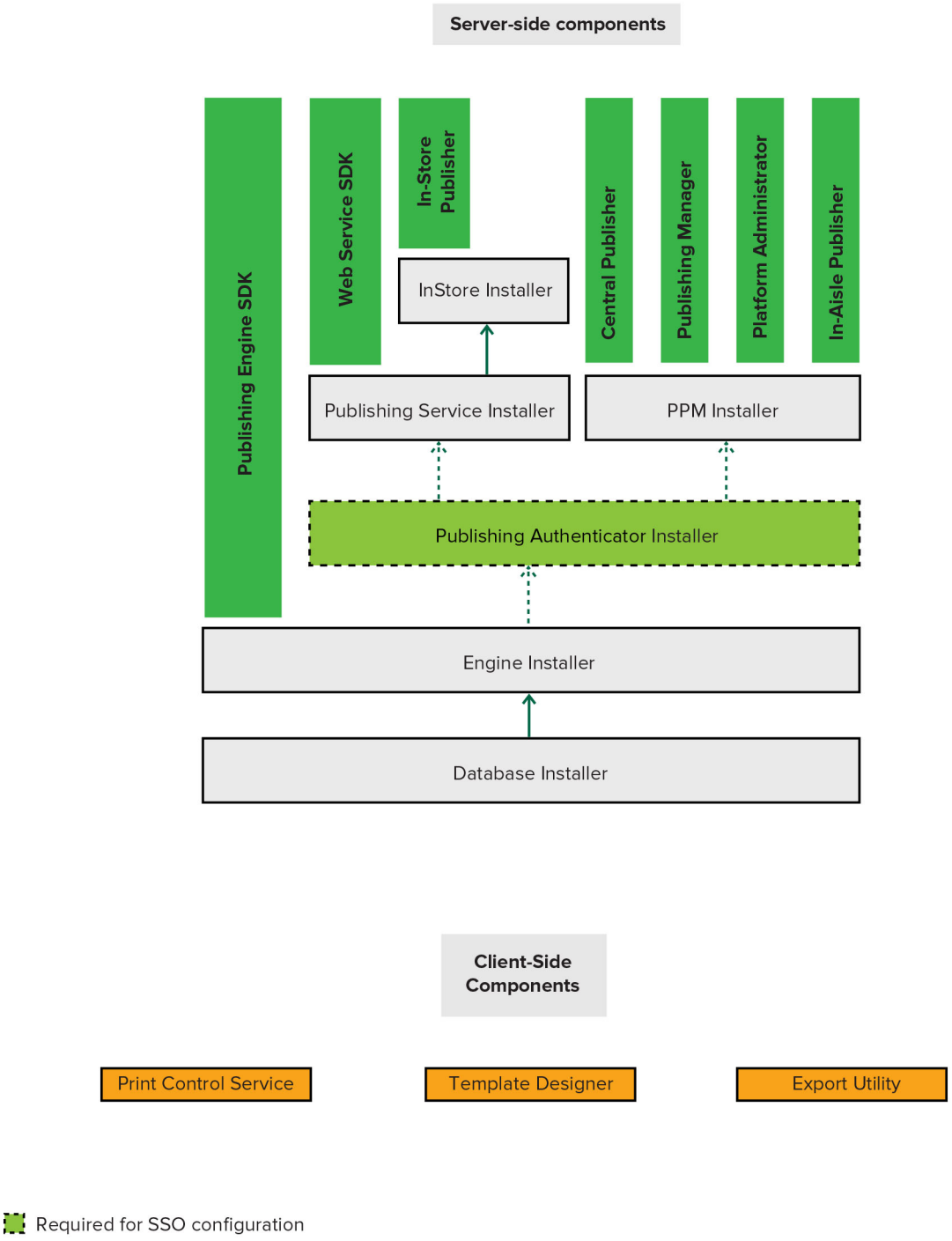
This document provides instructions on how to install the following PPR components:

- **Database**
- **Engine**
- **Publishing Authenticator**
- **Publishing Platform Manager**
- **Publishing Platform Web Services**
- **In-Store Publisher**
- **Template Designer**
- **Export Utility**
- **Print Control Service**

The following illustration shows a representation of different PPR components:



The following workflow shows the installation process in a server and in a client environment:



Database

This section shows how to install a PPR database.

Deployment readiness checklist

You can install the PPR database on a supported Microsoft SQL Server that runs on any of the following operating systems:

- Windows Server 2019
- Windows Server 2016
- Windows Server 2012

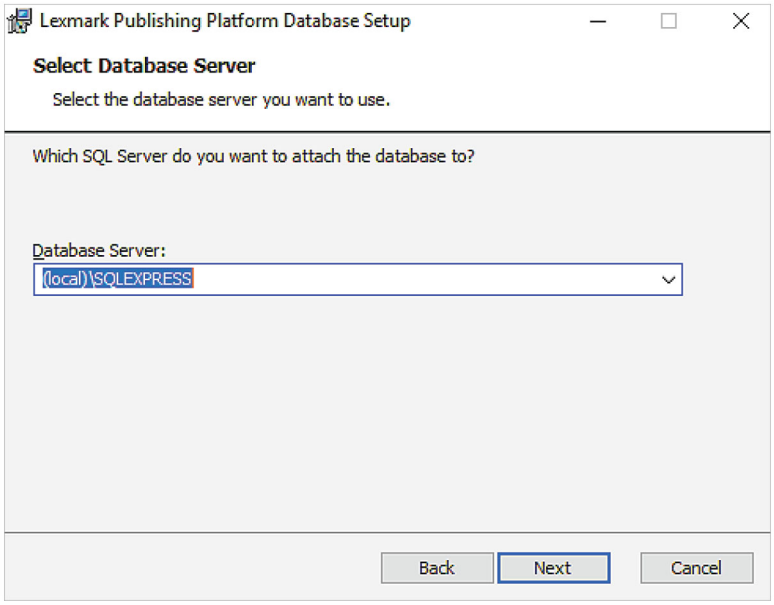
Before you begin, make sure that the following applications are installed on the server:

- Microsoft SQL Server 2012 or later
- Microsoft ODBC Driver 17 for SQL Server
- Microsoft Visual C++ 2017 Redistributable

Installing the database

1. Obtain the Database installer.
2. Run the DatabaseInstall.exe file as an administrator.
3. Read and accept the *End-User License Agreement (EULA)*, and then click **Install**.
4. Provide the fully qualified domain name (FQDN) or IP address of the SQL database server.

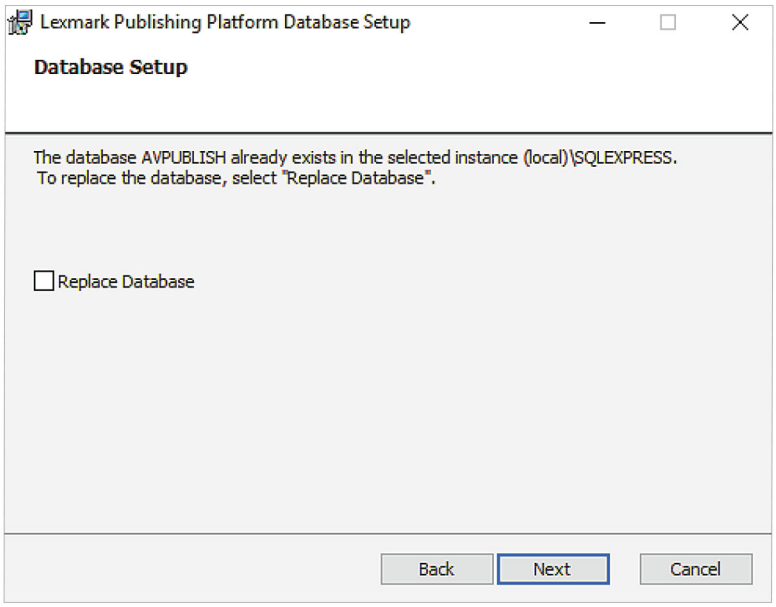
   Note: If the database is running on a non-default instance name and non-default port, then provide the instance name.



5 Provide the database server login ID and password.

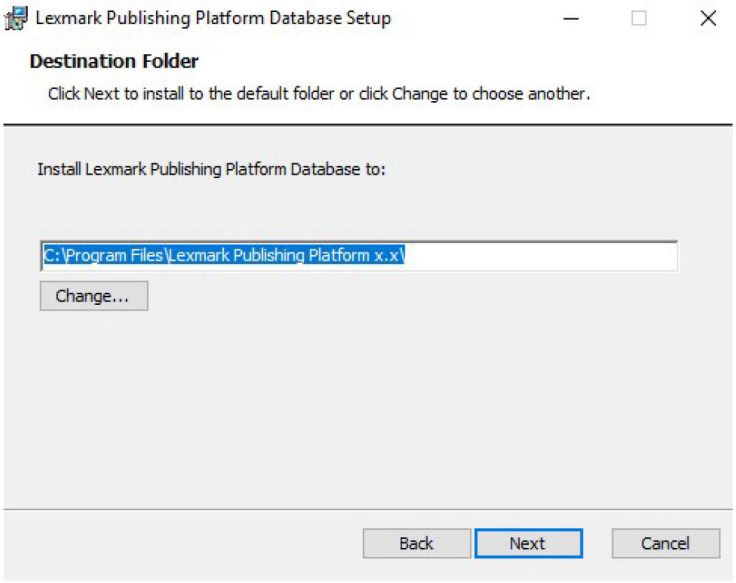
6 If the installer detects a previously installed AVPUBLISH database, do either of the following:

- To overwrite the database, select **Replace Database** check box, and then click **Next**.
- If you do not want to replace the existing database, then click **Next**.



7 Browse to the folder where you want to save the database files.

Note: We recommend keeping the default directory.

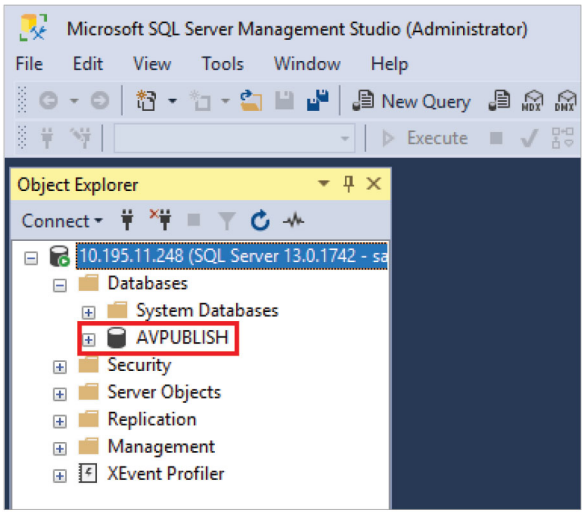


8 Install the database.

Notes:

Make sure that the database is installed successfully.

The AVPUBLISH database must be available when you view it from the SQL Server Management Studio.



Upgrading Database

If you want to upgrade the database instead of installing the later version, see the following section.

Prerequisites

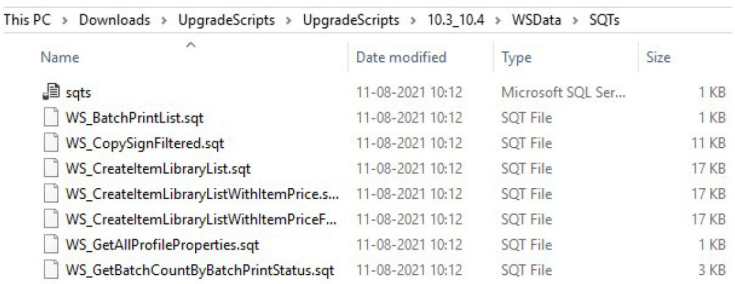
To upgrade to PPR Database 10.4, make sure that the existing database version is 10.3.

Note: If the database version is earlier than 10.3, then upgrade it manually by running the SQL files in the **Upgrade Script** folder in the following order:

- 10.1_10.2
- 10.2_10.3

Upgrading the database

1. From the database installer package, extract the **UpgradeScripts.zip** file.
2. From the **UpgradeScripts/10.3_10.4/WSData/SQTs** folder, validate each SQT file.



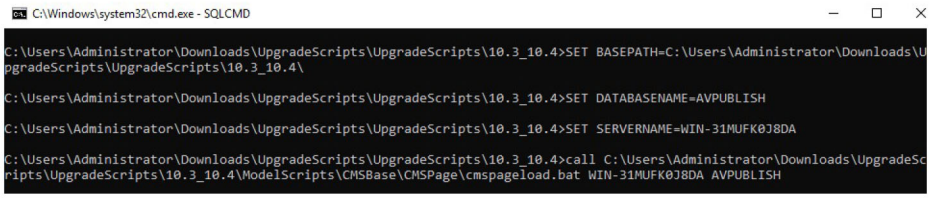
3 If any customization is required, then update the SQT files manually.

4 Merge the updated files with the existing SQT files.

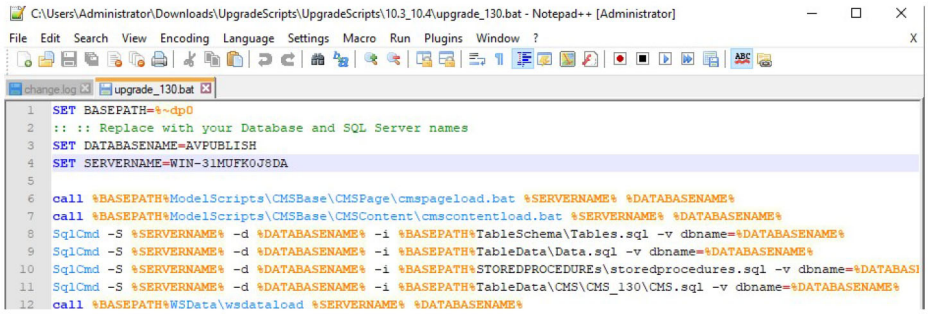
5 From the **UpgradeScripts/10.3_10.4** folder, do the following:

SQL Server 2016 or later (supports compatibility level 130 or above)

a Open the **upgrade_130.bat** file.



b If necessary, edit the database and server names.



Notes:

- The default database name is **<AVPUBLISH>**.
- The default server name is **<.>**.

c At the command prompt, navigate to the **UpgradeScripts/10.3_10.4** folder.

d Run the command **upgrade_130**.

SQL Server 2014 or earlier (does not support compatibility level 130 or above)

a Open the upgrade_80.bat file.

b If necessary, edit the Database and Server names.

Notes:

- Default Database name = **<AVPUBLISH>**
- Default Server name =**<.>**

c Open the command prompt and navigate to the **UpgradeScripts/10.3_10.4** folder.

d Run the **upgrade_80** command.

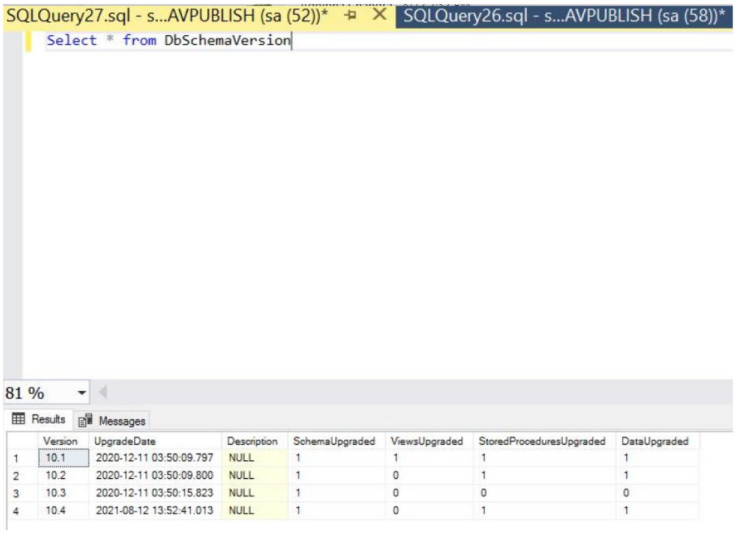
Notes:

- For SQL Server 2014 or earlier, you must update the CMSContent and CMSPage tables manually.
- For more information, see the **CMSUpgradeGuide.txt** file in the **UpgradeScripts\10.3_10.4** folder.

Verifying a successful upgrade

After you upgrade the database, the installed database version appears as the previous version only (version 10.3 in this scenario).

To confirm if you have successfully upgraded the database, do the following:



1. Go to Microsoft SQL Server Management Studio.
2. Run the query **`Select * From DbSchemaVersion`**.

If the upgrade is successful, then one row of the DbSchemaVersion table shows the following information:

- Version=10.4
- DataUpgraded=1

Engine

The PPR Engine installer installs the required software to render signs. It also installs a sample database containing templates and images.

This section shows how to install this component.

Deployment readiness checklist

You can install the PPR Engine on a supported Microsoft SQL Server that runs on any of the following operating systems:

- Windows Server 2019
- Windows Server 2016
- Windows Server 2012

Before you begin, make sure that the following applications are installed on the server:

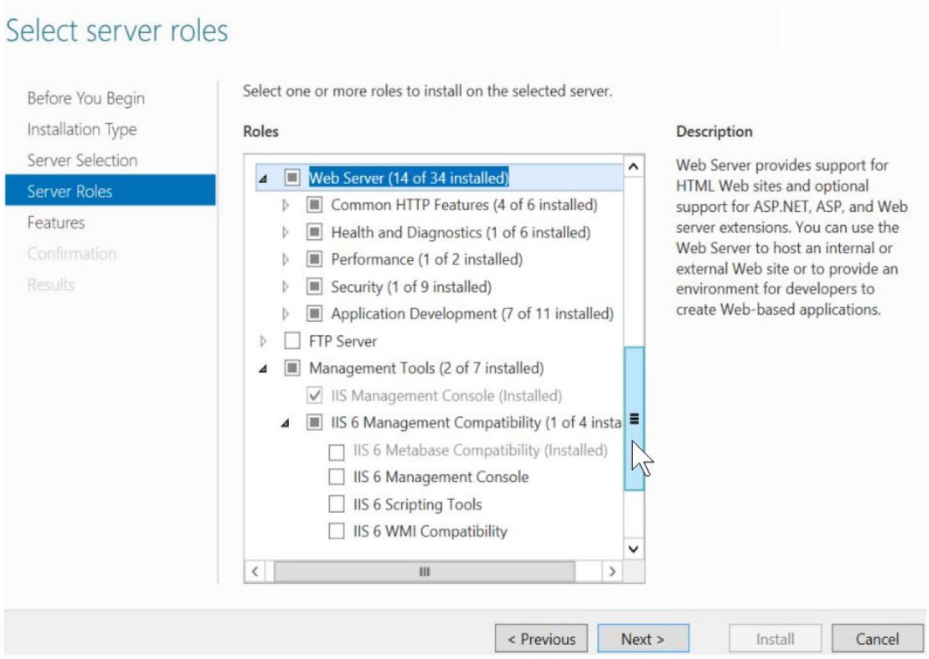
- Microsoft .NET Framework 4.5 or higher
- Microsoft Visual C++ 2017 Redistributable

Setting up IIS

Make sure that the required server roles and features are installed or enabled.

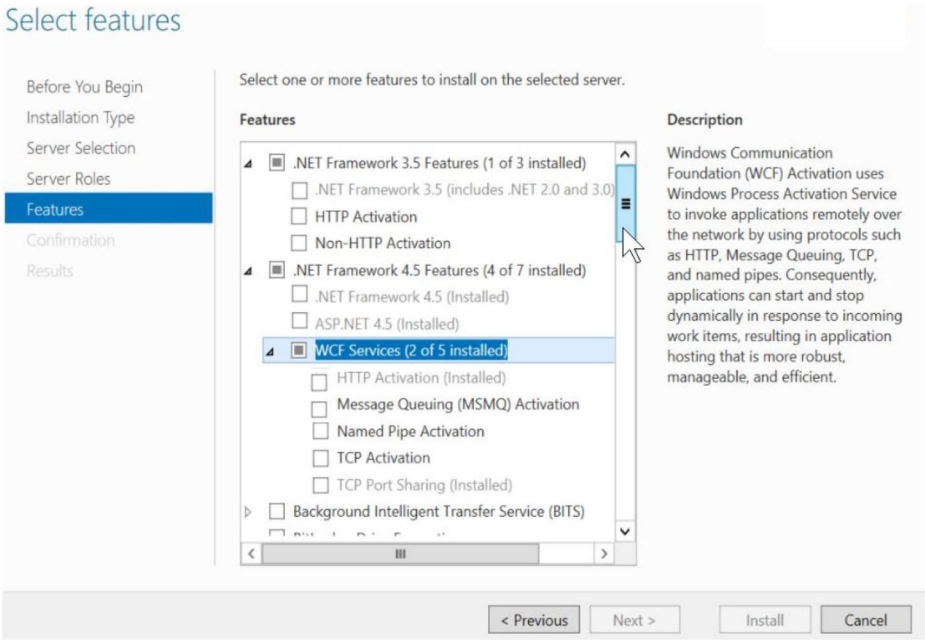
- From the Server Manager dashboard, click **Add roles and features**, and then click **Next**.
- From the Installation Type section, select **Role-based or feature-based installation**, and then click **Next**.
- Select a server, and then click **Next**.

- From the Server Roles section, expand **Web Server (IIS)**.
  - From the Web Server section, do the following:



    - Expand **Common HTTP Features**, and then enable **Default Document**, **Directory Browsing**, **HTTP Errors**, and **Static Content**.
    - Expand **Health and Diagnostics**, and then enable **HTTP Logging** and **Request Monitor**.
    - Expand **Performance**, and then enable **Static Content Compression**.
    - Expand **Security**, and then enable **Request Filtering**.
    - Expand **Application Development**, and then enable all options.
  - From the Management Tools section, do either of the following:
    - Enable **IIS Management Console**.
    - Expand **IIS 6 Management Compatibility**, and then enable all options.

- From the Features section, enable the following features:

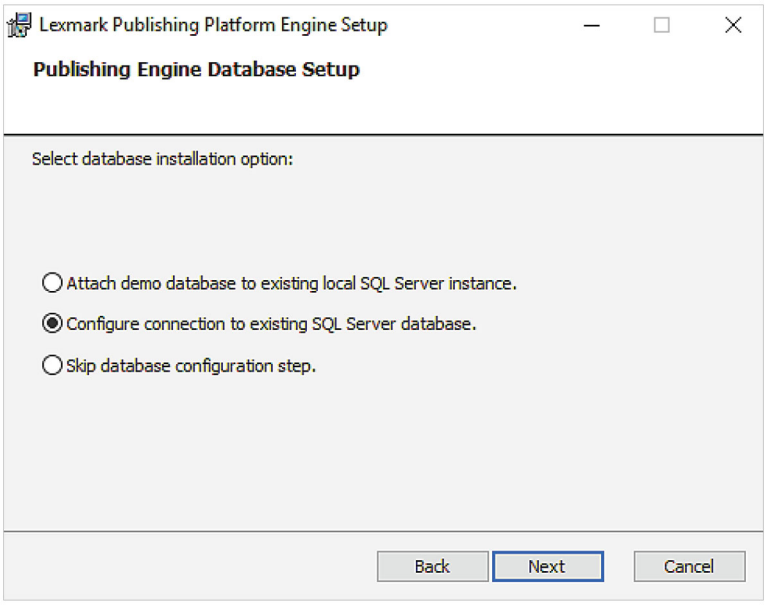


  - .NET Framework 3.5
  - .NET Framework 4.5 or higher

Installing the engine

1. Obtain the PPR engine installer.
2. Run the EngineInstall.exe file as an administrator.
3. Read and accept the *End-User License Agreement (EULA)*, and then click **Install**.
4. Select a Publishing Engine Database Setup option.

   Note: We recommend selecting the **Configure connection to existing SQL Server database** option.



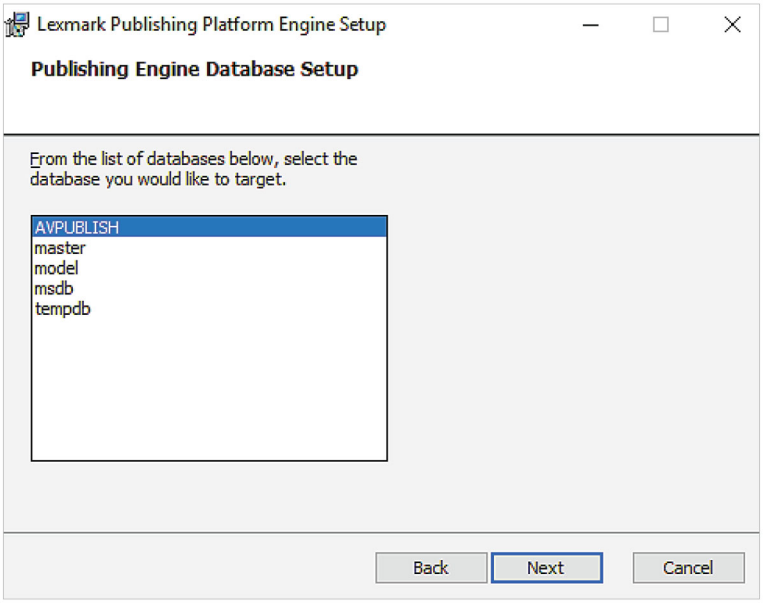
5 Provide the fully qualified domain name (FQDN) or IP address of the SQL database server.

Note: If the database is running on a non-default instance name and non-default port, then provide the instance name.

6 Provide the database server login ID and password.

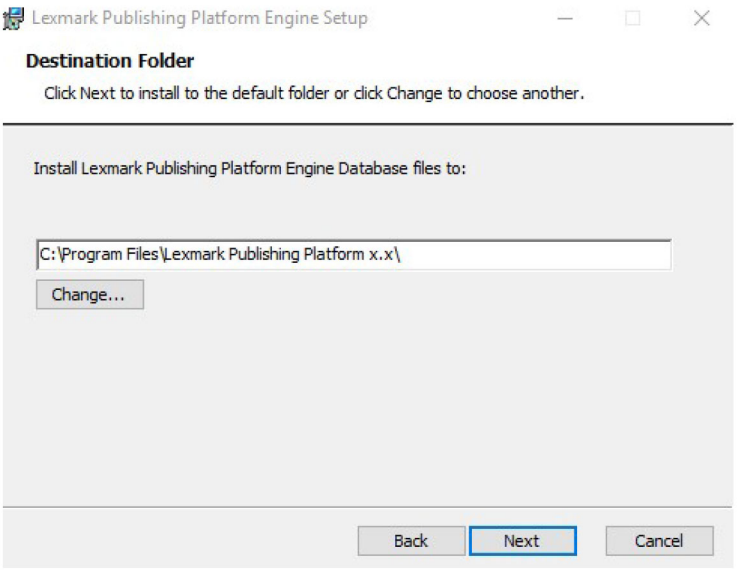
7 Select a database.

Note: By default, it points to the existing **AVPUBLISH** database which is created during database installation.



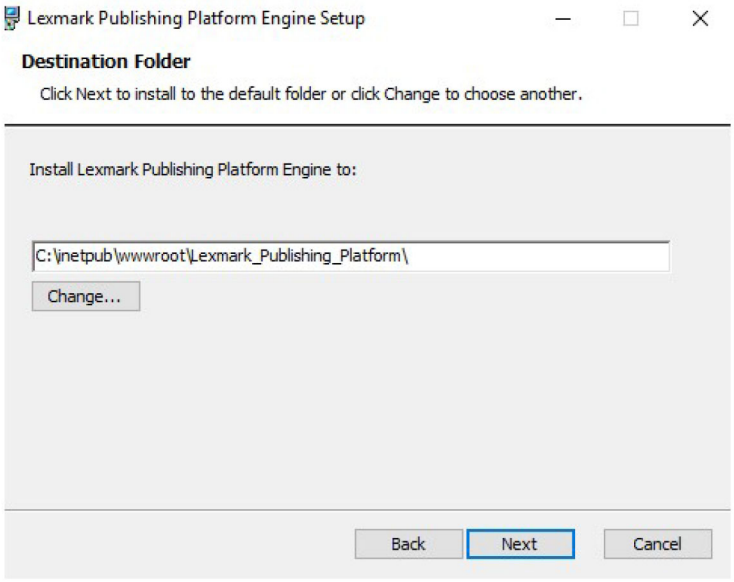
8 Browse to a folder where you want to save the database files.

Note: We recommend keeping the default directory.



9 Browse to a folder where you want to save the engine files.

Note: We recommend keeping the default directory.



10 Install the PPR engine.

Notes:

- From a web browser, type **`http://<hostname>/LexmarkPublishing/promos.poc`**, where **`<hostname>`** is the fully qualified domain name (FQDN) or IP address of the Publishing Platform Engine server.
- If the web browser shows the Publishing Platform for Retail version, then the installation is successful.

Publishing Platform Manager

Headquarter users primarily use Publishing Platform Manager (PPM) to perform various administrative and configuration tasks, such as, batch creation, portfolio configuration, and central printing. PPM also installs the following customer products, which store users use to perform their tasks:

- In-Aisle Publisher: Create and print batches of signs and labels from the mobile devices.
- Central Publisher: Manage central printing and central automated publishing for printed and digital signs and labels.
- Publishing Manager: Manage and create batches, and distribute signs and labels to stores.
- Platform Administrator: Configure tasks such as portfolio configuration, edit form configuration, and application configuration settings.

This section shows how to install PPM.

Deployment readiness checklist

You can install PPM on a supported Microsoft SQL Server that runs on any of the following operating systems:

- Windows Server 2019
- Windows Server 2016
- Windows Server 2012

Before you begin, make sure that the following applications are installed on the server:

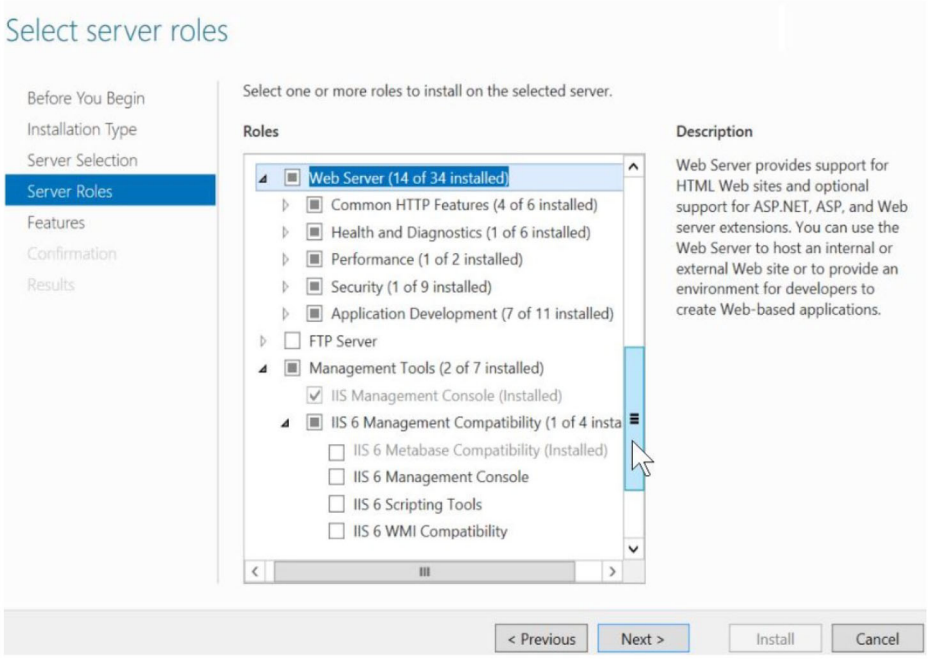
- Microsoft .NET Framework 4.8 or later
- Microsoft ODBC Driver 17 for SQL Server
- Microsoft Visual C++ 2017 Redistributable

Setting up IIS

Make sure that the required server roles and features are installed or enabled.

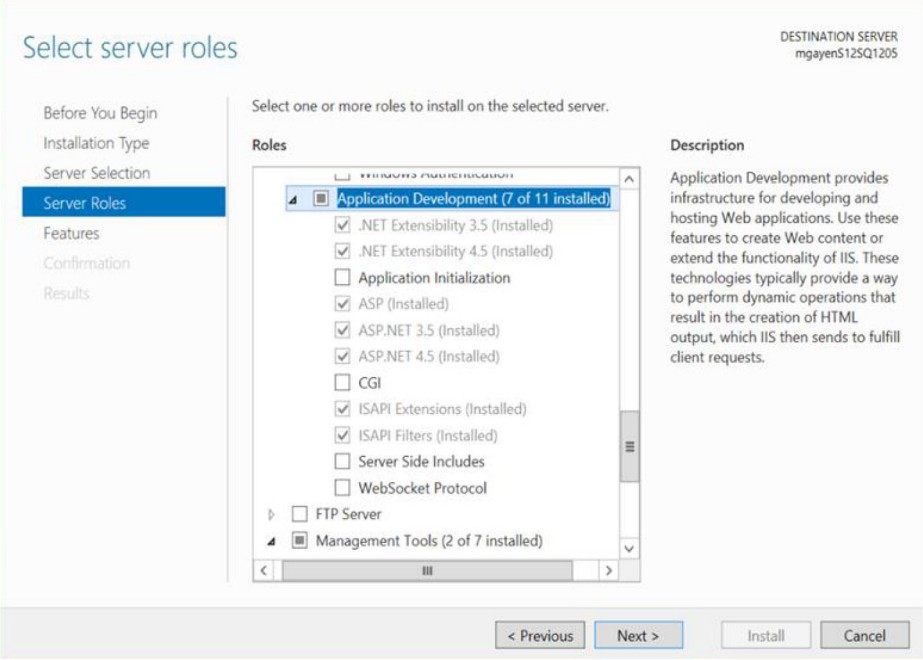
- From the Server Manager dashboard, click **Add roles and features**, and then click **Next**.
- From the Installation Type section, select **Role-based or feature-based installation**, and then click **Next**.
- Select a server, and then click **Next**.

- From the Server Roles section, expand **Web Server (IIS)**.
  - From the Web Server section, do the following:

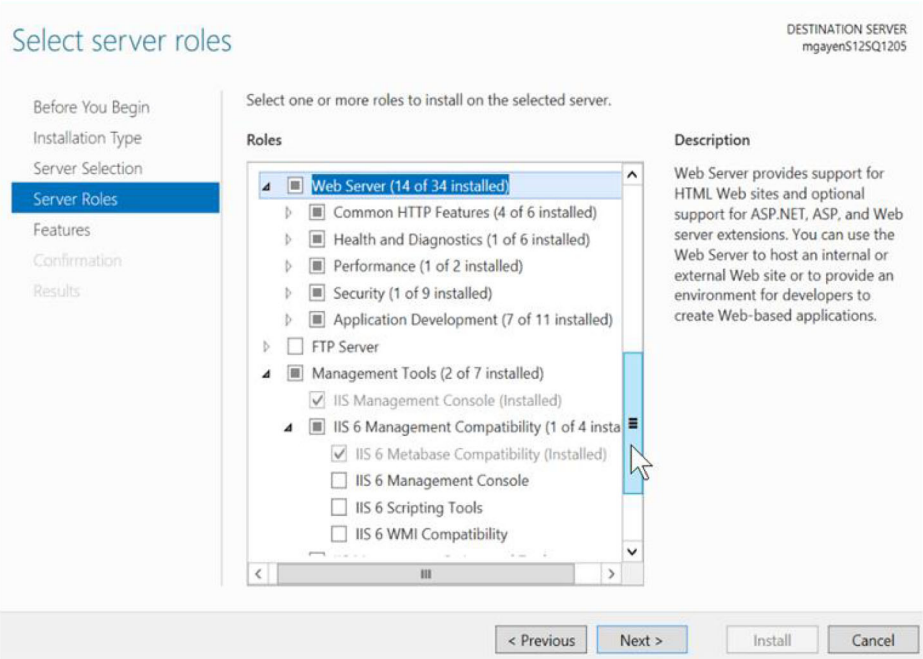


  - Expand **Common HTTP Features**, and then enable **Default Document**, **Directory Browsing**, **HTTP Errors**, and **Static Content**.
  - Expand **Health and Diagnostics**, and then enable **HTTP Logging** and **Request Monitor**.
  - Expand **Performance**, and then enable **Static Content Compression**.
  - Expand **Security**, and then enable **Request Filtering**.

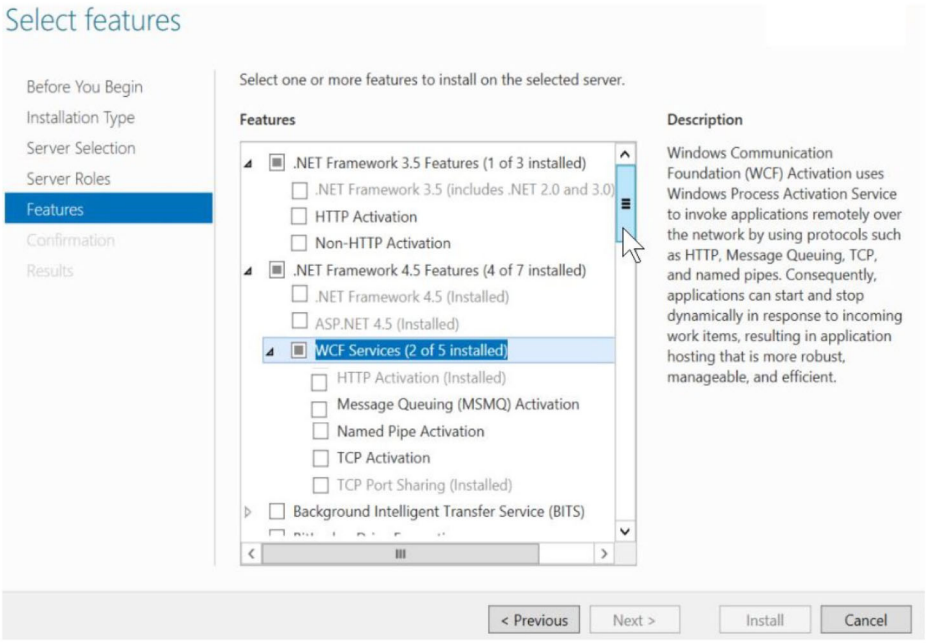
- Expand **Application Development**, and then enable the following options.



– From the Management Tools section, do either of the following:
  - Enable **IIS Management Console**.
  - Expand **IIS 6 Management Compatibility**, and then enable the following option:



- From the Features section, enable **.NET Framework 4.x**.



Note: The specific .Net Framework 4.x version varies per machine. For this installation, users must install version 4.6 or later.

Installing Publishing Platform Manager

1. Obtain the PPM installer.

   Note: We recommend installing the Publishing Platform Manager on the same server where the Publishing Platform Engine is installed.

2. Run the PPMInstall.exe file as an administrator.

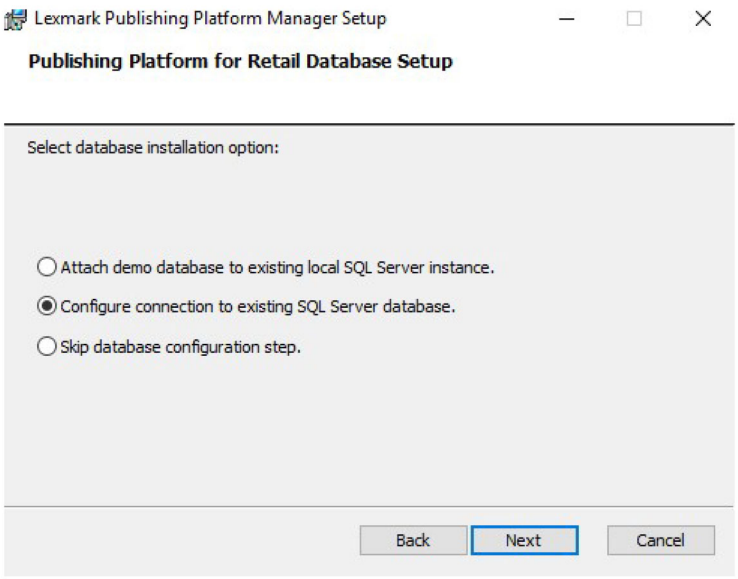
3. Read and accept the *End-User License Agreement (EULA)*, and then click **Install**.

4. Provide the link to the Publishing Platform Engine installation.

   Note: Type **`http://<hostname>/LexmarkPublishing/promos.poc`**, where **`<hostname>`** is the fully qualified domain name (FQDN) or IP address of the Publishing Platform Engine server.

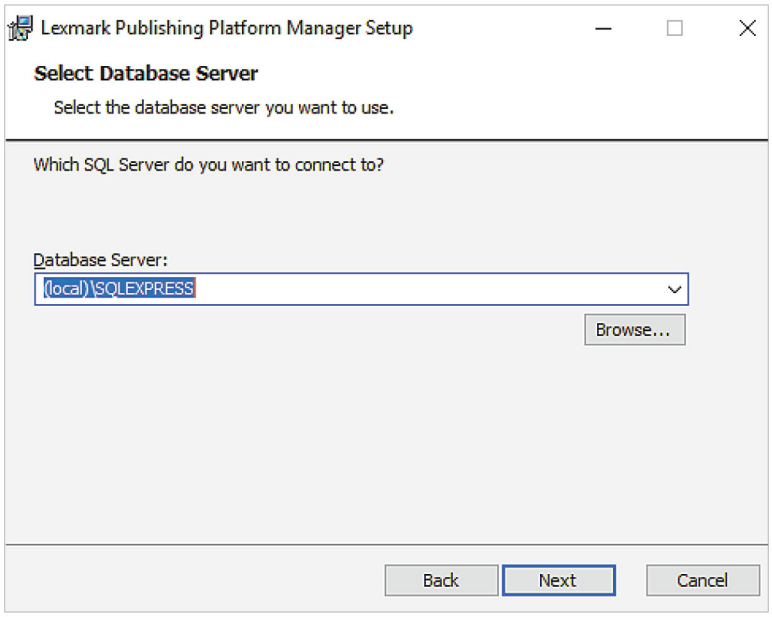
5. Select a Publishing Engine Database Setup option.

   Note: We recommend selecting the **Configure connection to existing SQL Server database** option.



6 Provide the fully qualified domain name (FQDN) or IP address of the SQL database server.

Note: If the database is running on a non-default instance name and non-default port, then provide the instance name.

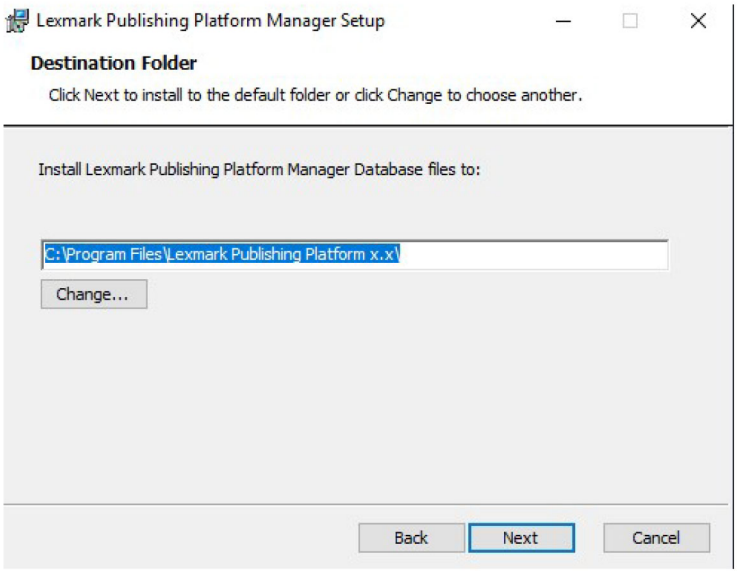


7 Provide the database server login ID and password.

8 Select a database.

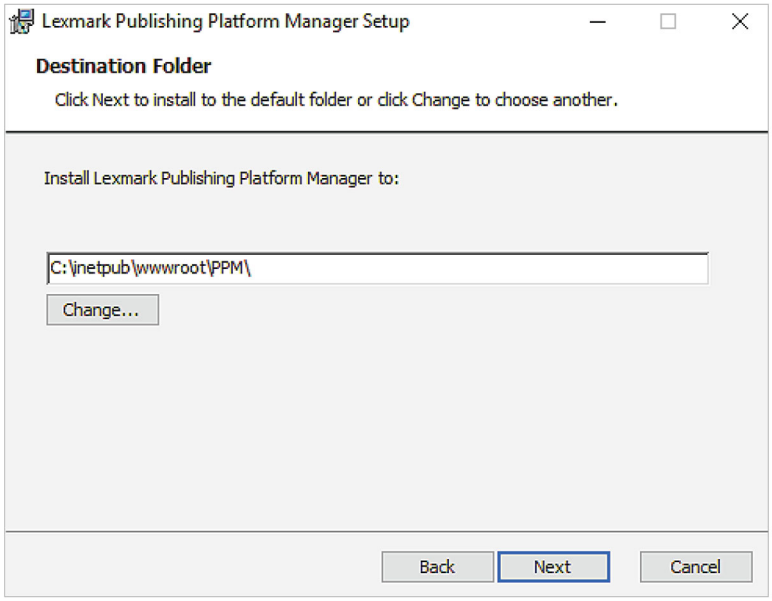
9 Browse to a folder where you want to save the database files.

Note: We recommend keeping the default directory.



10 Browse to a folder where you want to save the PPM files.

Note: We recommend keeping the default directory.



11 Install PPM.

Notes:

- From a web browser, type **`http://<hostname>/ppm`**, where **`<hostname>`** is the fully qualified domain name (FQDN) or IP address of the PPM server.
- If the web browser shows the Publishing Platform portal login screen, then the installation is successful.

Publishing Platform Web Services

Publishing Platform Web Services or Lexmark Publishing Services helps to render signs, batches, and labels by communicating with the PPR engine and database. It can also store and extract data from the PPR database.

This section illustrates how to install this component.

Deployment readiness checklist

You can install the Publishing Platform Web Services on a supported Microsoft SQL Server that runs on any of the following operating systems:

- Windows Server 2019
- Windows Server 2016
- Windows Server 2012

Before you begin, make sure that the following applications are installed on the server:

- Microsoft .NET Framework 4.8 or later
- Microsoft SQL Server
- SQL Server Native Client 11 or later

Note: You must bind the site to all unassigned IP addresses in the site binding configuration.

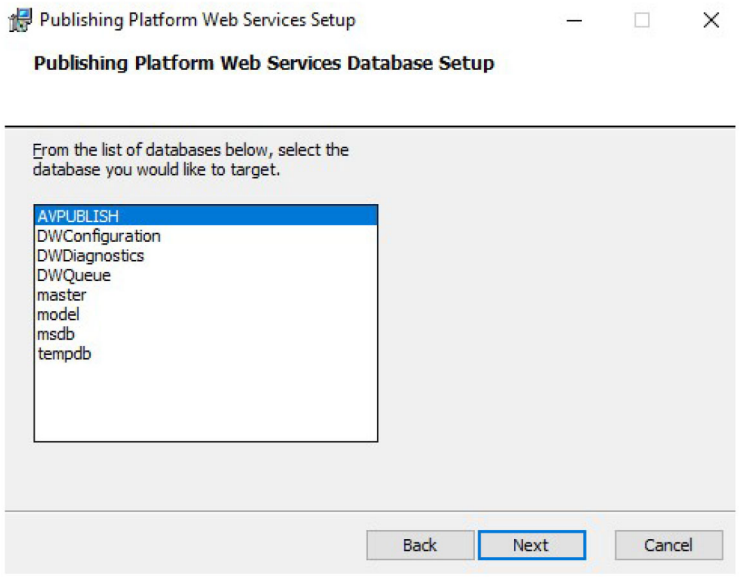
Installing Publishing Platform Web Services

1. Obtain the Publishing Platform Web Services installer.

   Note: We recommend installing the Publishing Platform Web Services on the same server where the Publishing Platform Engine and Publishing Platform Manager are installed.

2. Run the LexmarkPublishingServices.exe file as an administrator.
3. Read and accept the *End-User License Agreement (EULA)*, and then click **Install**.
4. Provide the fully qualified domain name (FQDN) or IP address of the web services server.
5. Provide the database server name with the instance.
6. Provide the database server login ID and password.

7 Select a database.

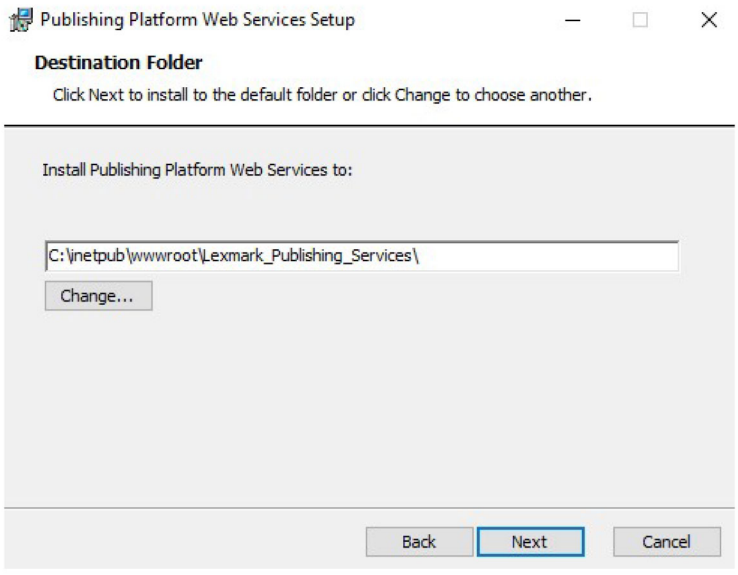


8 Provide the link to the Publishing Platform Engine installation.

Note: Type **`http://<hostname>/lexmarkpublishing/promos.poc`**, where **`<hostname>`** is the fully qualified domain name (FQDN) or IP address of the engine server.

9 Browse to a folder where you want to save the web services files.

Note: We recommend keeping the default directory.



10 If you use a Redis load-balancing setup, then enable **Use Redis**.

Notes:

- Make sure that the Publishing Platform Web Service is installed successfully.
- From a web browser, type **`http://<hostname>/LexmarkPublishingServices`**, where **`<hostname>`** is the fully qualified domain name (FQDN) or IP address of the Publishing Platform Web Service server.
- If the web browser shows the WebServices portal login screen, then the installation is successful.

FAQ

1. How to print a large number of sign copies?
   a. Open the **App.Config** file located at C:\inetpub\wwwroot\Lexmark_Publishing_Services.
   b. Adjust the value of the timeout of the POC Engine call depending on size of the sign copies
2. How to enable the SWAGGER document page?
   a. Open the **App.Config** file located at C:\inetpub\wwwroot\Lexmark_Publishing_Services.
   b. Set the value of the EnableSwaggerUI as **true**.
3. How to change the database connection strings after installation?

   Database connection strings are stored in encrypted form in the **Web.Config** file located at C:\inetpub \wwwroot\Lexmark_Publishing_Services

   a. Decrypt the connection strings, modify as required, and then encrypt it back in the **Web.Config** file.
   b. Type the following commands respectively to decrypt and encrypt the connection strings:
      - **`C:\Windows\Microsoft.NET\Framework\v4.0.30319\aspnet_regiis.exe -pd "connectionStrings" -app "/LexmarkPublishingServices"`**
      - **`C:\Windows\Microsoft.NET\Framework\v4.0.30319\aspnet_regiis.exe -pe "connectionStrings" -app "/LexmarkPublishingServices"`**

In-Store Publisher

Lexmark In-store Publisher (ISP) helps to create signs, batches, and labels, using the item data and templates.

This section shows how to install PPR ISP.

Deployment readiness checklist

You can install ISP on a supported Microsoft SQL Server that runs on any of the following operating systems:

- Windows Server 2019
- Windows Server 2016
- Windows Server 2012

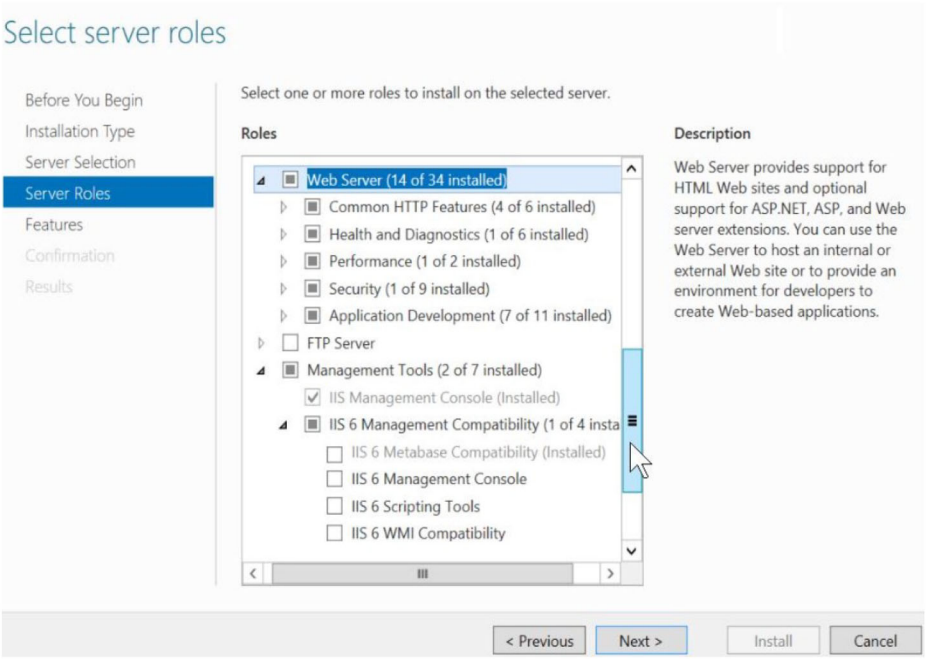
Before you begin, make sure that the following applications are installed on the server:

- Microsoft .NET Framework 4.5 or later
- Microsoft .NET Framework 3.5

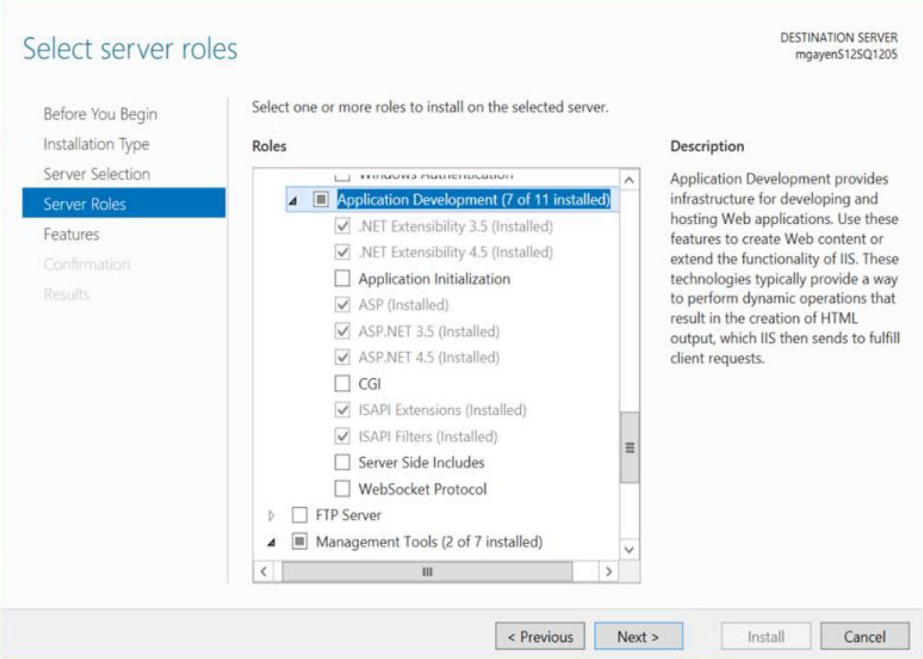
Setting up IIS

Make sure that the required server roles and features are installed or enabled.

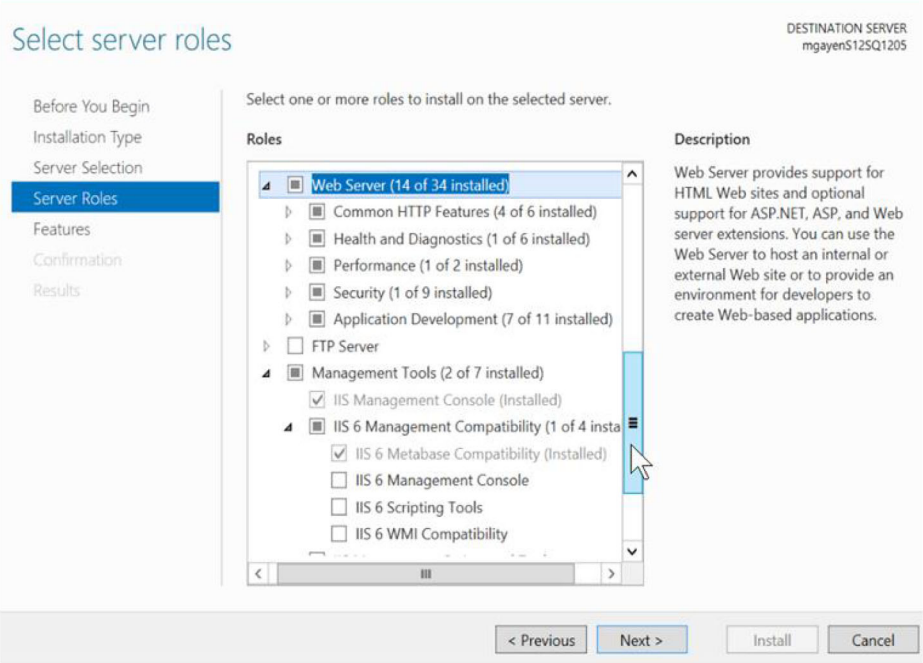
- From the Server Manager dashboard, click **Add roles and features**, and then click **Next**.
- From the Installation Type section, select **Role-based or feature-based installation**, and then click **Next**.
- Select a server, and then click **Next**.
- From the Server Roles section, expand **Web Server (IIS)**.
  - From the Web Server section, do the following:



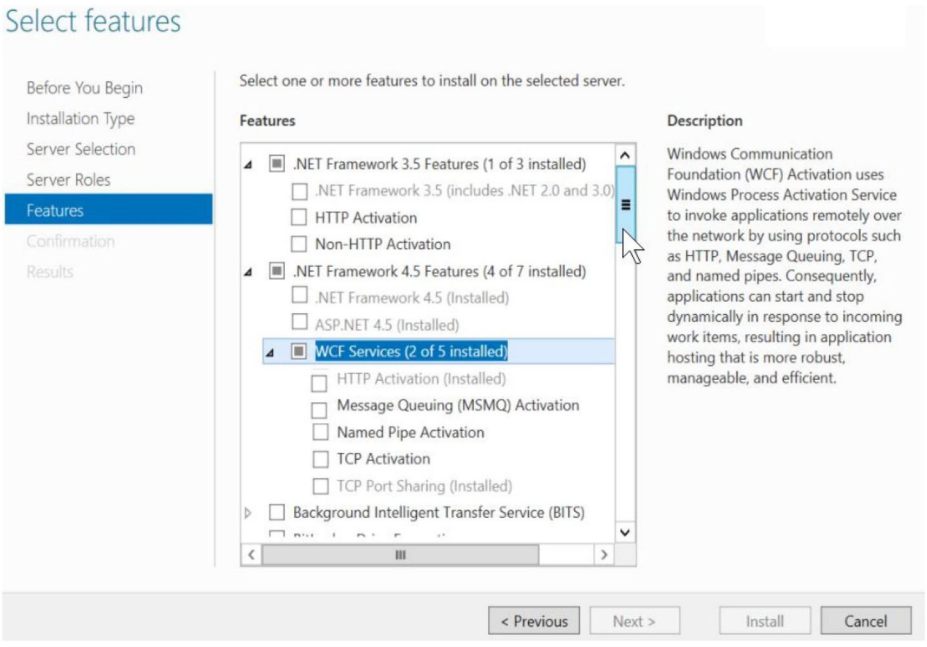
- Expand **Common HTTP Features**, and then enable **Default Document**, **Directory Browsing**, **HTTP Errors**, and **Static Content**.
- Expand **Health and Diagnostics**, and then enable **HTTP Logging** and **Request Monitor**.
- Expand **Performance**, and then enable **Static Content Compression**.
- Expand **Security**, and then enable **Request Filtering**.
- Expand **Application Development**, and then enable the following options.



- From the Management Tools section, do either of the following:
  - Enable **IIS Management Console**.
  - Expand **IIS 6 Management Compatibility**, and then enable the following option:



- From the Features section, enable **.NET Framework 4.x**.



Note: The specific .Net Framework 4.x version varies per machine. For this installation, users must install version 4.6 or later.

Installing In-Store Publisher

1. Obtain In-Store Publisher installer.

   Note: We recommend installing the In-Store Publisher on the same server where the Publishing Platform Web Services is installed.

2. Run the LexmarkPublishingInstoreInstaller.exe file as an administrator.

3. Read and accept the *End-User License Agreement (EULA)*, and then click **Install**.

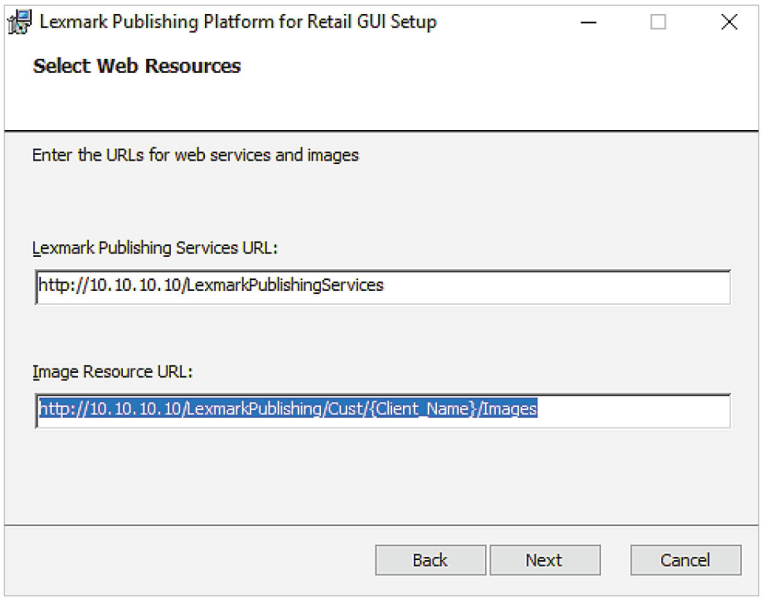
4. Provide the link to the Lexmark Publishing Services installation.

   Note: Type **`http://<hostname>/LexmarkPublishingServices`**, where **`<hostname>`** is the fully qualified domain name (FQDN) or IP address of the engine server.

5. Provide the Image Resource URL.

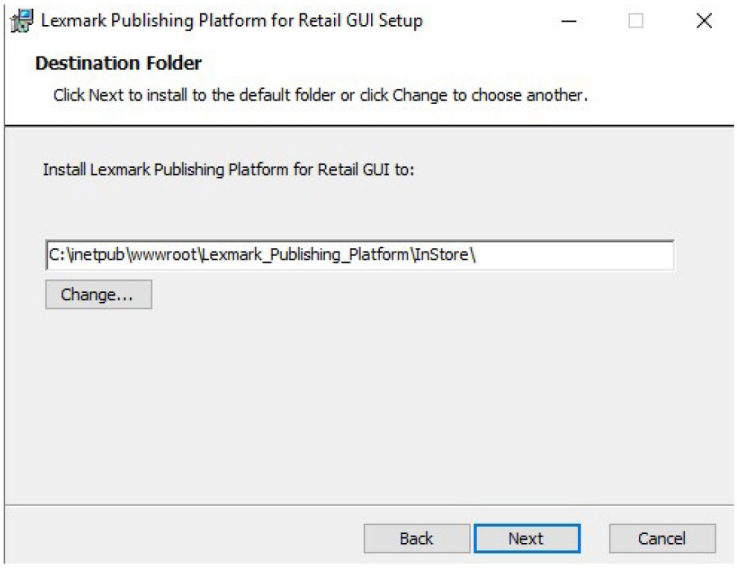
   Notes:

   - For example, **`http://<hostname>/LexmarkPublishing/Cust/{Client_Name}/Images`**, where **`<hostname>`** is the fully qualified domain name (FQDN) or IP address of the Publishing Platform Web Services server.
   - Images that are used in the In-Store Publisher are stored in the Image Resource server.



6. Browse to a folder where you want to save the PPR In-Store Publisher files.

   Note: We recommend keeping the default directory.



7 Install In-Store Publisher.

Notes:

- Make sure that the In-Store Publisher is installed successfully.
- From a web browser, type **`http://<hostname>/LexmarkPublishingInstore`**, where **`<hostname>`** is the fully qualified domain name (FQDN) or IP address of the PPR In-Store Publisher server.
- If the web browser shows the In-Store Publisher login screen, then the installation is successful.

Template Designer

The Template Designer is a desktop application that lets you create templates for your store labels and signages.

The following section shows how to install this component.

Deployment readiness checklist

You can install the Template Designer on a supported Microsoft SQL Server that runs on any of the following operating systems:

- Windows Server 2019
- Windows Server 2016
- Windows Server 2012

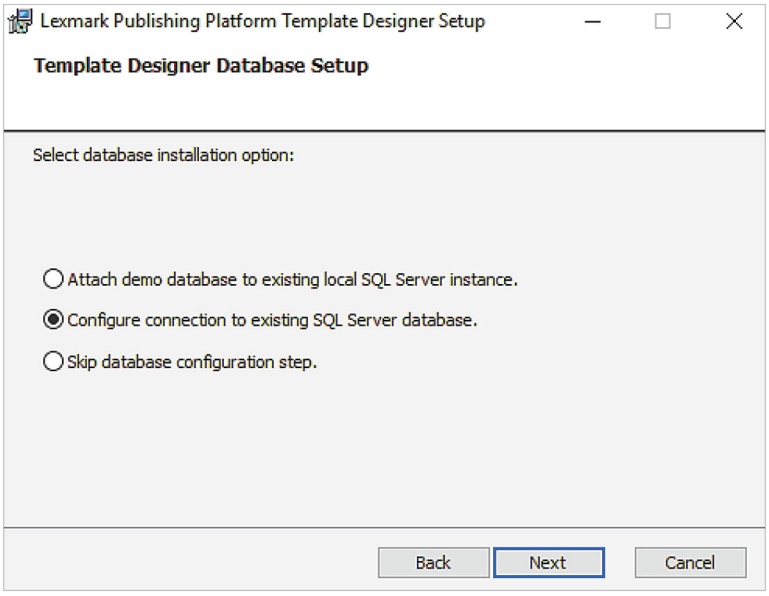
Before you begin, make sure that the following applications are installed on the server:

- Microsoft .NET Framework 4.5 or later
- Microsoft ODBC Driver 17 for SQL Server
- Microsoft Visual C++ 2017 Redistributable

Installing the Template Designer

1. Obtain the Template Designer installer.
2. Run the TemplateDesignerInstall.exe file as an administrator.
3. Read and accept the *End-User License Agreement (EULA)*, and then click **Install**.
4. Select a Template Designer Database Setup option.

   Note: We recommend selecting the **Configure connection to existing SQL Server database** option.



5 Provide the fully qualified domain name (FQDN) or IP address of the SQL database server.

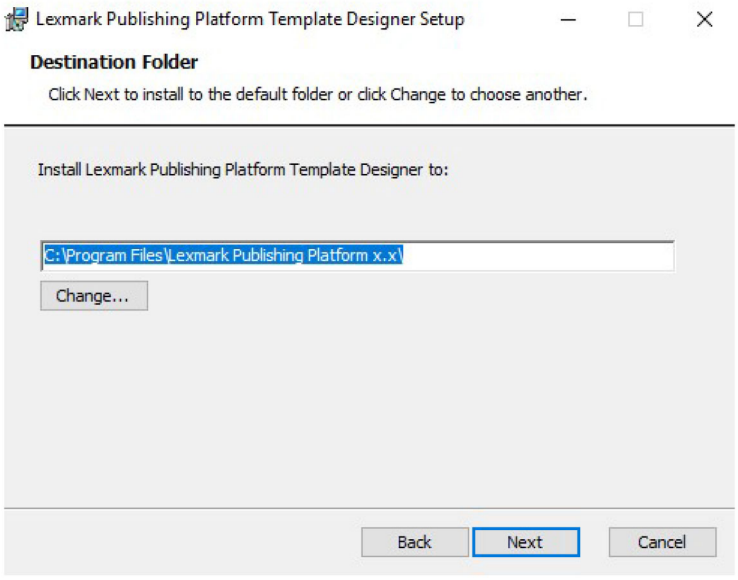
Note: If the database is running on a non-default instance name and non-default port, then provide the instance name.

6 Provide the database server login ID and password.

7 Select a database.

8 Browse to a folder where you want to save the template designer files.

Note: We recommend keeping the default directory.



9 Install the Template Designer.

Notes:

- The Export Utility component is installed along with the Template Designer.
- To install Export Utility on a separate computer, see “Installing the Export Utility” on page 34.

Export Utility

Export Utility helps to transfer the designed templates from development to production environments.

The following section shows how to install this component.

Deployment readiness checklist

You can install Export Utility on a supported Microsoft SQL Server that runs on any of the following operating systems:

- Windows Server 2019
- Windows Server 2016
- Windows Server 2012

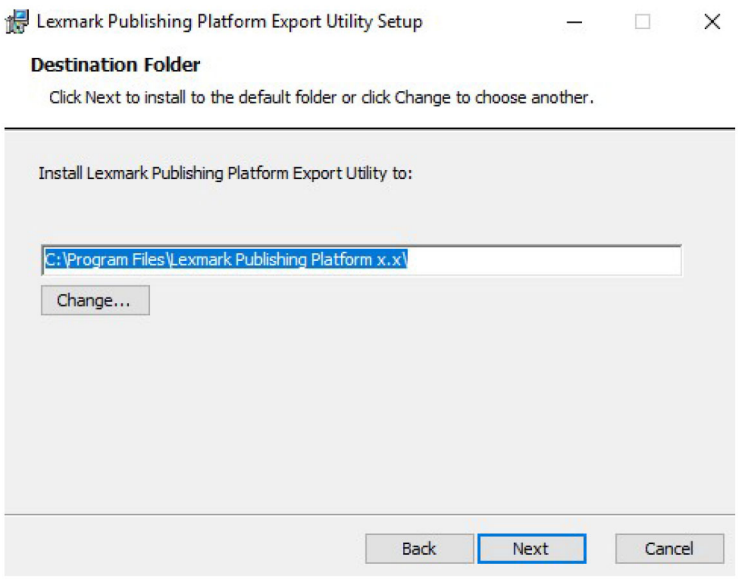
Before you begin, make sure that the following applications are installed on the server:

- Microsoft .NET Framework 4.5 or later
- Microsoft Visual C++ 2017 Redistributable
- Microsoft ODBC Driver 17 for SQL Server

Installing the Export Utility

1. Obtain the Export Utility installer.
2. Run the ExportUtilityInstall.exe file as an administrator.
3. Read and accept the *End-User License Agreement (EULA)*, and then click **Install**.
4. Browse to a folder where you want to save the Export Utility files.

   Note: We recommend keeping the default directory.



Note: Make sure that the component is installed successfully.

Print Control Service

The In-Store Publisher uses Print Control Service to print signages and labels on local printers. You must install the Print Control Service and the In-Store Publisher on the same computer or server.

Refer to the *Lexmark Print Control Service Installation Guide* for more details.

Publishing Authenticator

Lexmark Publishing Authenticator is a component used for the Single Sign On (SSO) environment. It uses the Open ID Connect (OIDC) and Open Authorization (OAuth) protocosl. User must install and configure this installer to enable SSO for Publishing Platform Manager (PPM) and In-store Publisher (ISP) portals.

Note: *This product is optional and may be installed later in the environment.*

Deployment readiness checklist

You can install Publishing Authenticator on a supported Microsoft SQL Server that runs on any of the following operating systems:

- Windows Server 2019
- Windows Server 2016
- Windows Server 2012

Before you begin, make sure that the following applications are installed on the server:

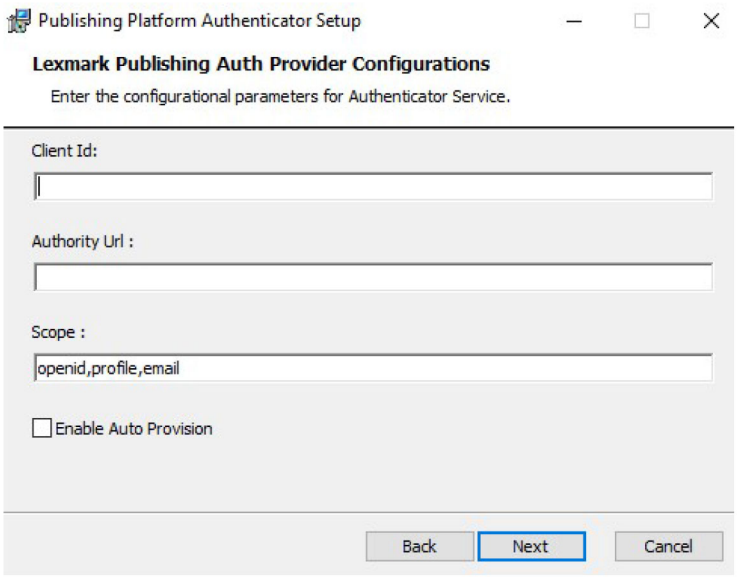
- Microsoft ODBC Driver 17 for SQL Server
- .NET 3.1 Runtime Hosting Bundle
- Microsoft Visual C++ 2017 Redistributable

Installing Publishing Authenticator

1. Obtain the **Publishing Authenticator** installer.
2. Run the **LexmarkPublishingAuthenticator.exe** file as an administrator.
3. Read and accept the *End-User License Agreement (EULA)*, and then click **Install**.
4. Click **Next**.
5. Provide the fully qualified domain name (FQDN) or IP address of the SQL database server.

   Note: If the database is running on a non-default instance name and non-default port, then provide the instance name.
6. Provide the database server login ID and password.
7. Select a database.

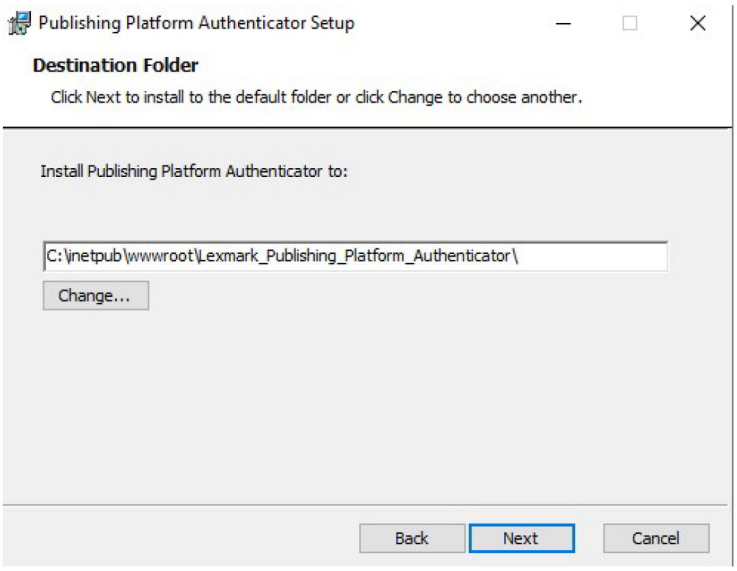
8 In the Lexmark **Publishing Auth Provider Configuration** page, type the client ID and authority URL in the respective fields.



Notes:

- Client Id and Authority Url are required fields.
- If you want to change the default scope value, then type it in the Scope field in comma-separated values.
- If necessary, select the **Enable Auto Provision** check box.
- For more details, refer to the *PPR SSO Integration with Azure AD* document.

9 Browse to a folder where you want to save the Publishing Authenticator files.



Note: We recommend keeping the default directory.

10 Install Publishing Authenticator.

FAQ

How to change the database connection strings after installation?

The Database connection strings are stored in the encrypted form in the **appsetting.json** file, located at C:\inetpub\wwwroot\Lexmark_Publishing_Platform_Authenticator inside the ConnectionStrings:DataConnection key. Refer to the following steps to encrypt a connection string:

1. Go to C:\inetpub\wwwroot\Lexmark_Publishing_Platform_Authenticator\ProtectConfigData.
2. Open the command prompt.
3. Type **`ProtectConfigData <ServerName> <DatabaseName> <UserID> <Password>`**.
4. Run the **ProtectConfigData.exe** file.
5. Replace the existing encrypted connection string inside the **appsetting.json** file with the newly encrypted connection string from the command prompt.

Notices

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September 2021

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