

# **Site Manager Installation Guide**

LS One – 2017.2



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# 1 Introduction

## 1.1 The purpose of this document

The purpose of this document is to give a quick overview of the installation of LS One 2017.2 Site Manager.

To see which new features are available in this release of the Site Manager please look at the [release notes](#) on our [LS One Online help](#) website.

## 1.2 Functional overview

LS One Site Manager is a back office application fully integrated with the LS One POS solution. It is a flexible and feature-rich application to support various business models and possible deployment scenarios.

The Site Manager can be implemented with all features or only a few, depending on the needs of the Site Manager user. The purpose of this new back office application is to serve as a small chain or site deployment. It is independent of the Microsoft Dynamics platform. Therefore, it can target different markets.

The Site Manager requires one of the following operating systems:

- Windows 7
- Windows 8
- Windows 8.1
- Windows 10
- Windows 2003 Server
- Windows 2008 Server

The Site Manager is set up on the Back Office, Store and can also function on a POS. The Site Manager communicates with the POSs using Replication.

## 1.3 Demonstration data

The Demonstration Data is based on a fictitious company, Aurora International Ltd. This company is located in France and its company currency is the Euro. All the data in this company is fictitious and not necessarily correct in all countries.

## 1.4 Icons used in this guide



Tip



Note



Warning

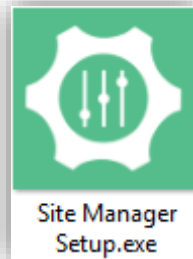
## 2 Installing Site Manager



You need to have approximately 1 GB of free disk space for the application.

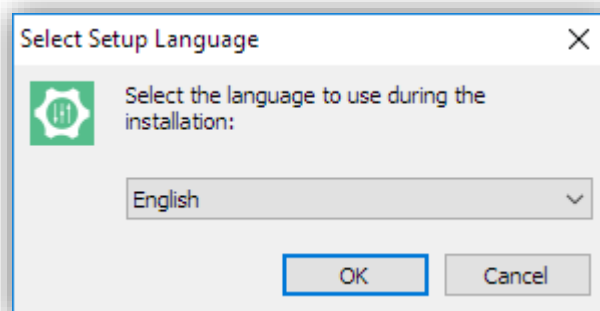
### 2.1 Site Manager application setup

Place the Site Manager Setup application in a folder chosen for the purpose.

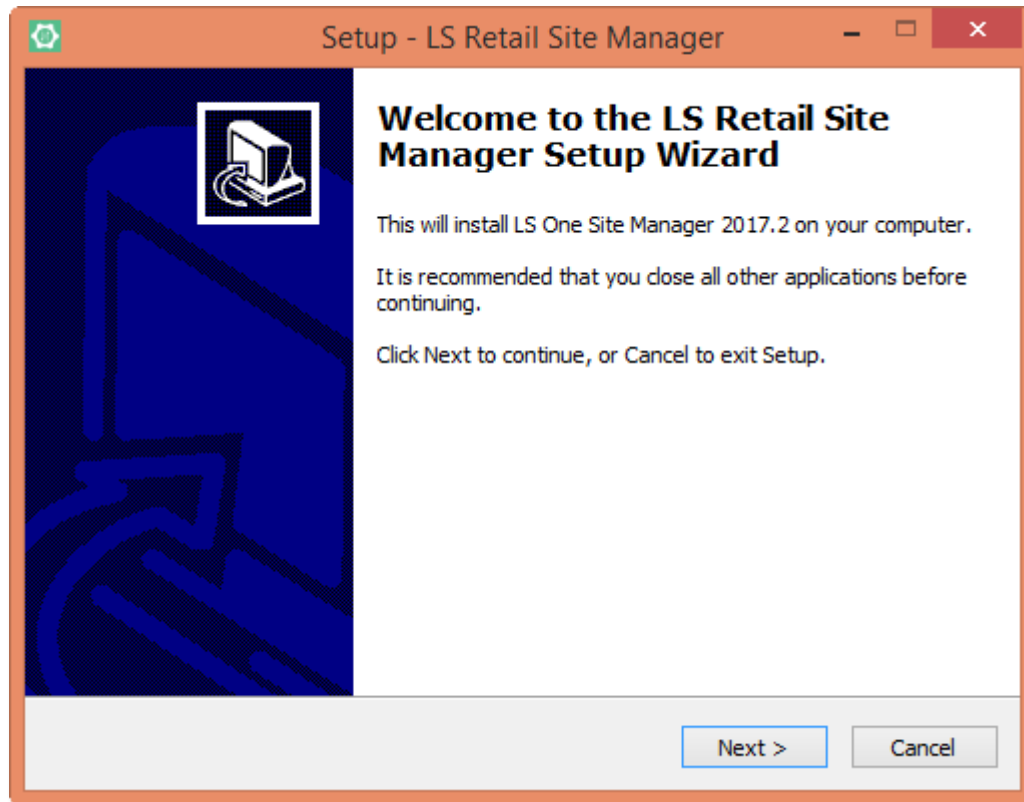


Once you have started the setup application you are prompted for permission to make changes to the computer. Press the **Yes** button to continue with the installation.

Select the language to use during the installation.



The Site Manager Setup Wizard asks you to follow a familiar step-by-step installation process.



## 3 Activation of the application

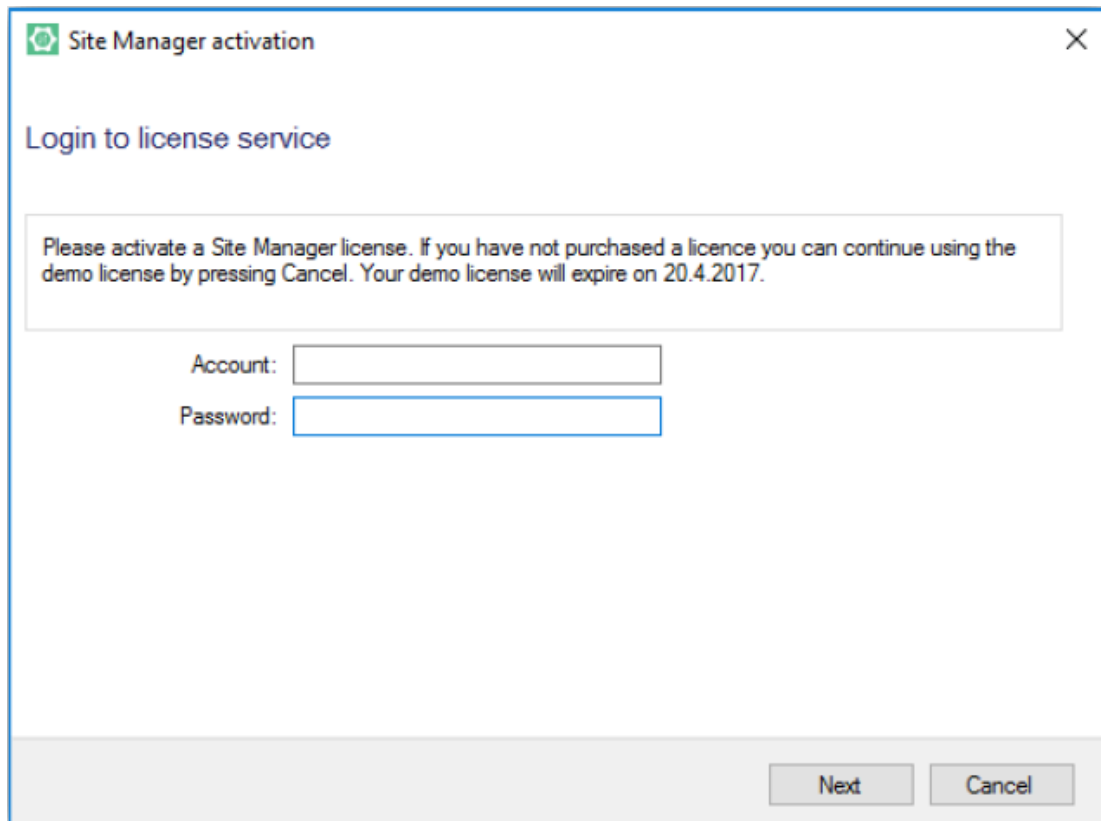
In LS One 2017 the Site Manager license mechanism changed. Now you get one LS One license account which includes all your POS licenses and Site Manager licenses.



Note that you need to have an internet connection while activating the license. After that perpetual licenses will not need a connection and subscription licenses need to be able to validate at least once a month.

### 3.1 Demo license

If you are installing LS One for the first time and don't have a license key yet you can use the demo license. When you run the Site Manager for the first time you will be asked to activate a license. To use the demo license just press the *Cancel* button to open the application.



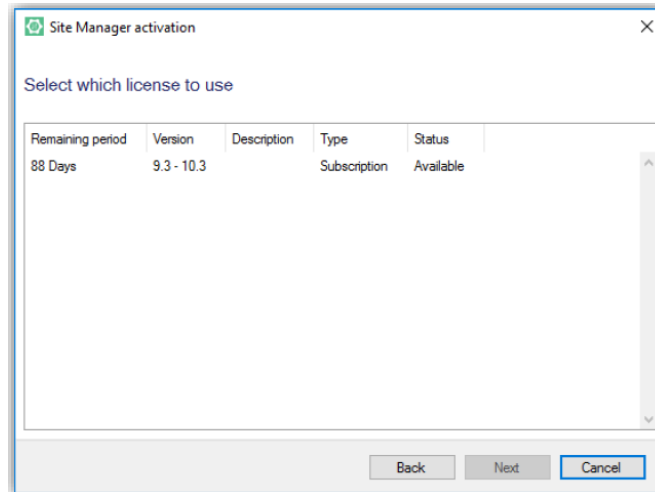
The screenshot shows a window titled "Site Manager activation" with a close button (X) in the top right corner. Below the title bar, the text "Login to license service" is displayed. A message box contains the text: "Please activate a Site Manager license. If you have not purchased a licence you can continue using the demo license by pressing Cancel. Your demo license will expire on 20.4.2017." Below this message, there are two input fields: "Account:" and "Password:". At the bottom right of the window, there are two buttons: "Next" and "Cancel".



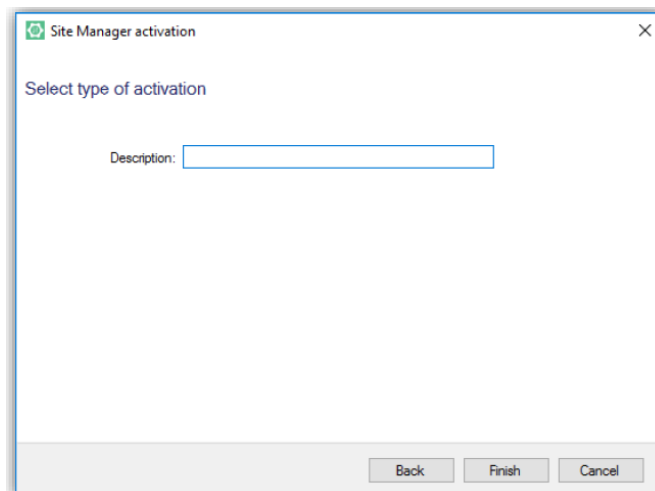
You will be able to use the Site Manager for 30 days on this license. When you are using the demo license the Site Manager will ask you for a license key every time you start.

## 3.2 Activating a license

If you have purchased licenses for the Site Manager you should have credentials to log into the license service. You can use those on the dialog in image 3.1.1. After login to the license service the dialog will list licenses available to you.

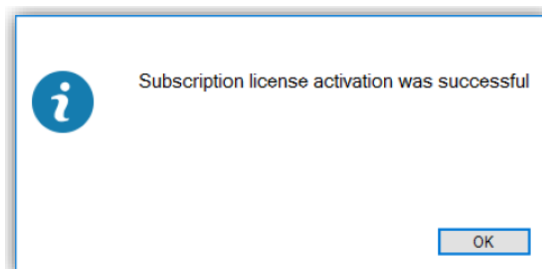


To proceed with activation you need to select one of the licenses from the list.



Enter a description for the license for future reference.

Finally you should get confirmation that the license was successfully activated

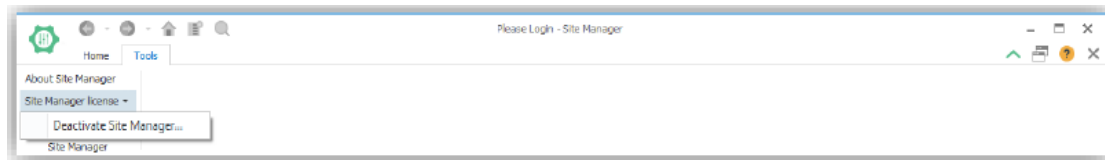


Finally you should get confirmation that the license was successfully activated

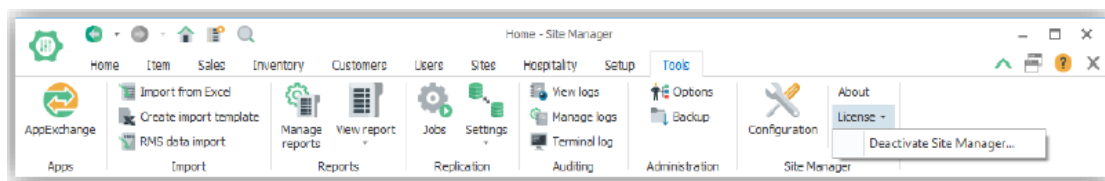
### 3.3 Deactivation

If there is need to update the hardware the Site Manager is running on you first need to deactivate the Site Manager on the current machine to free the license so it can be activated on the new machine.

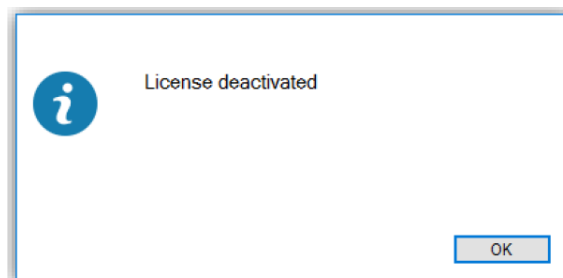
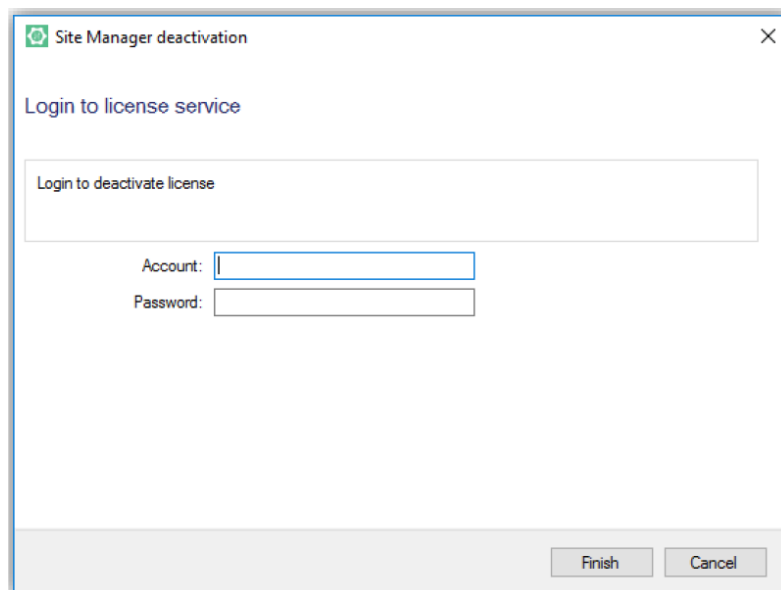
To do this you launch the Site Manager application and in the ribbon open Tools > Site Manager license... > Deactivate Site Manager...



or if you are logged into the Site Manager:



Once selected you need to reenter the license account credentials



After deactivation the next time the site manager is run it will call for activation



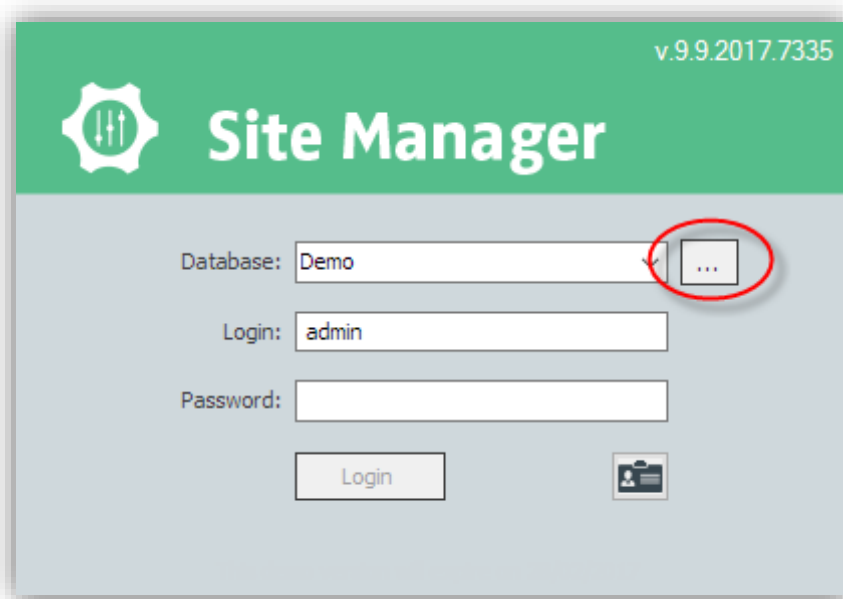
## 4 Authenticated SQL Servers

### 4.1 First login

The first time you log in, the database is not set.

Select the ... button (the three dots to the right of the Database field) to edit the database.

The Authenticated SQL Servers window appears, enter the necessary information and select or create the correct database.

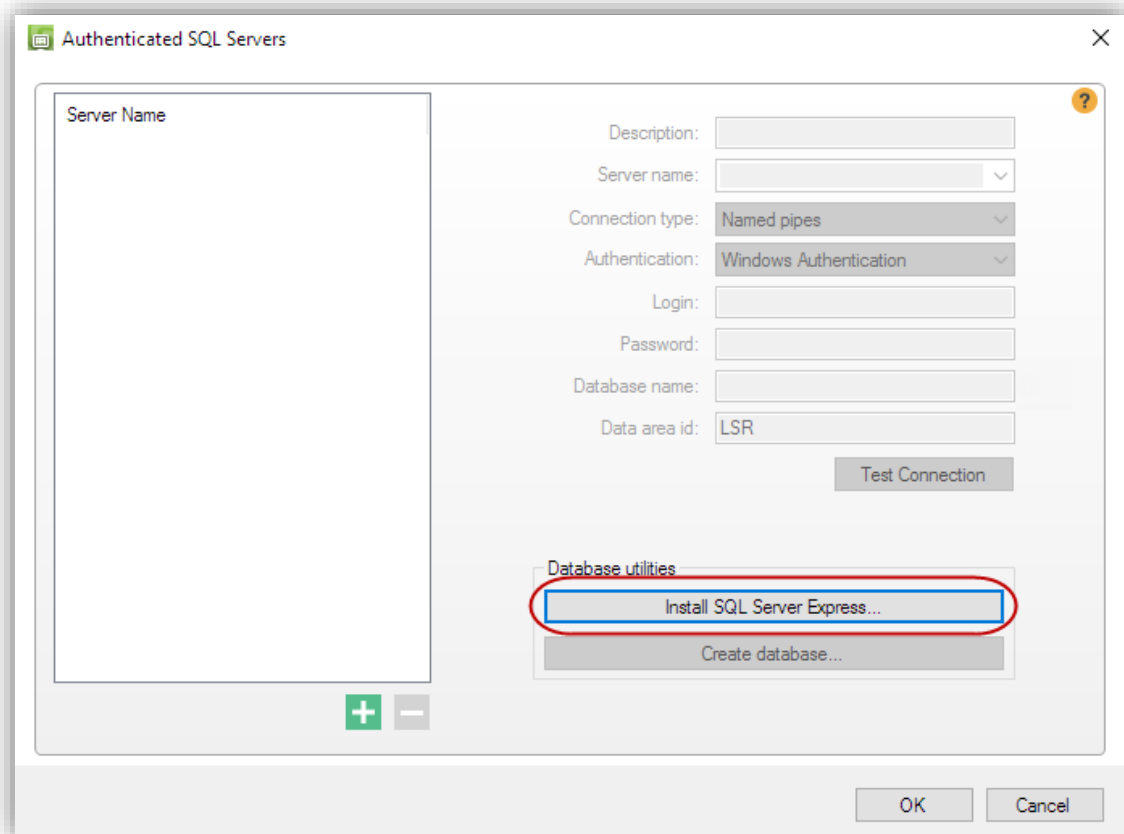


## 4.2 Install database

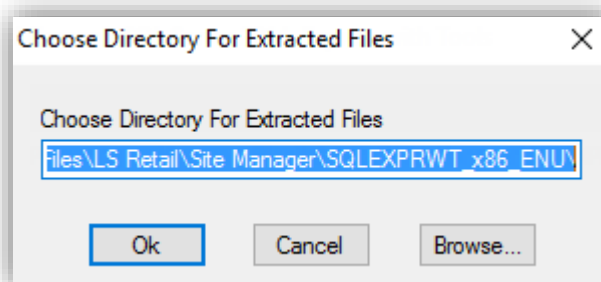
When you click on the ... button, the *Authenticated SQL Servers* dialog appears.

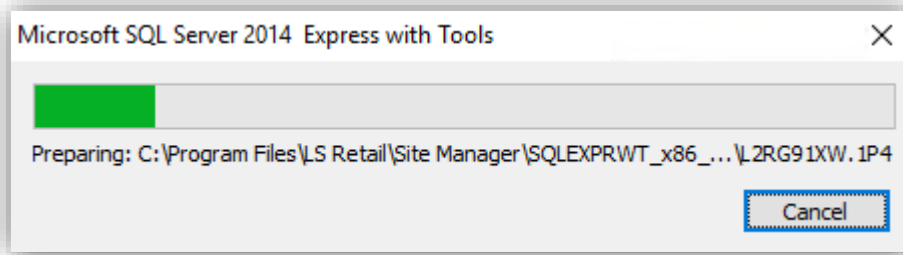
If there is no database server preinstalled you have to install a database server.

The following image displays the default option, *Install SQL Server Express...*



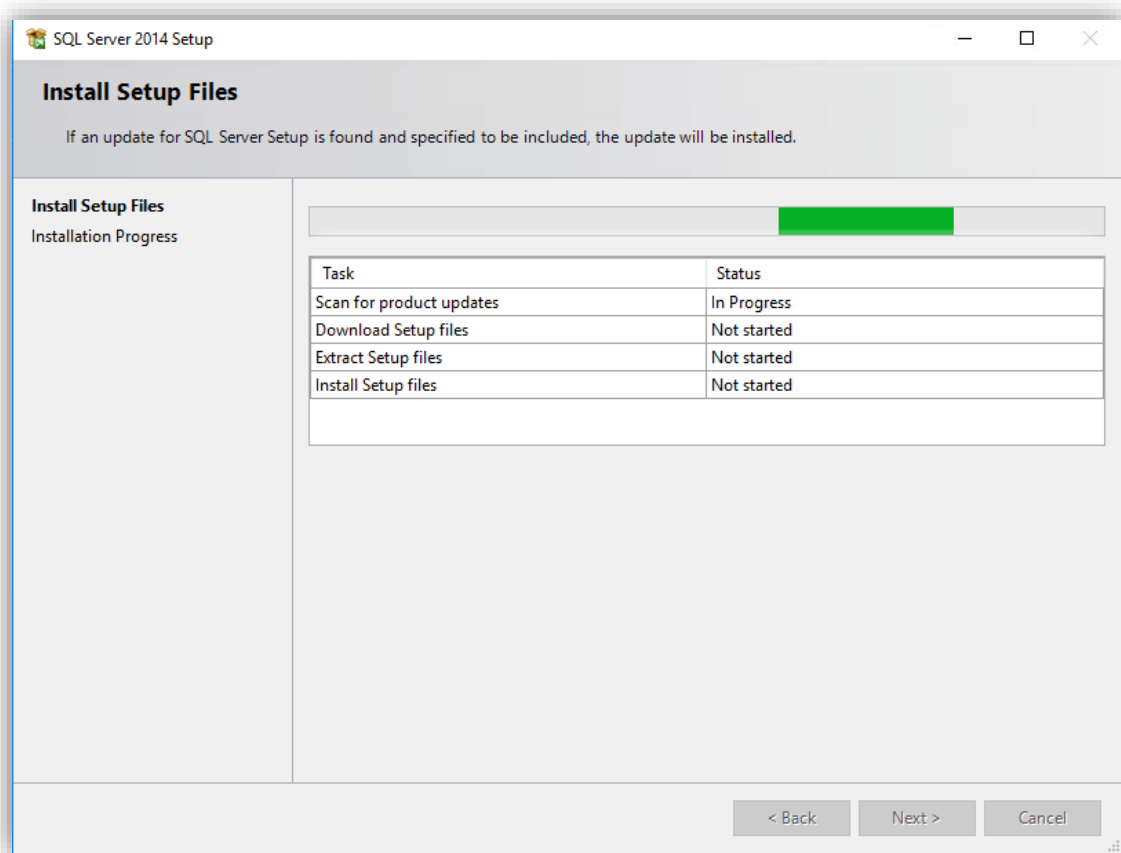
You will be asked to choose a directory and after you press **Ok** the install progress will start.





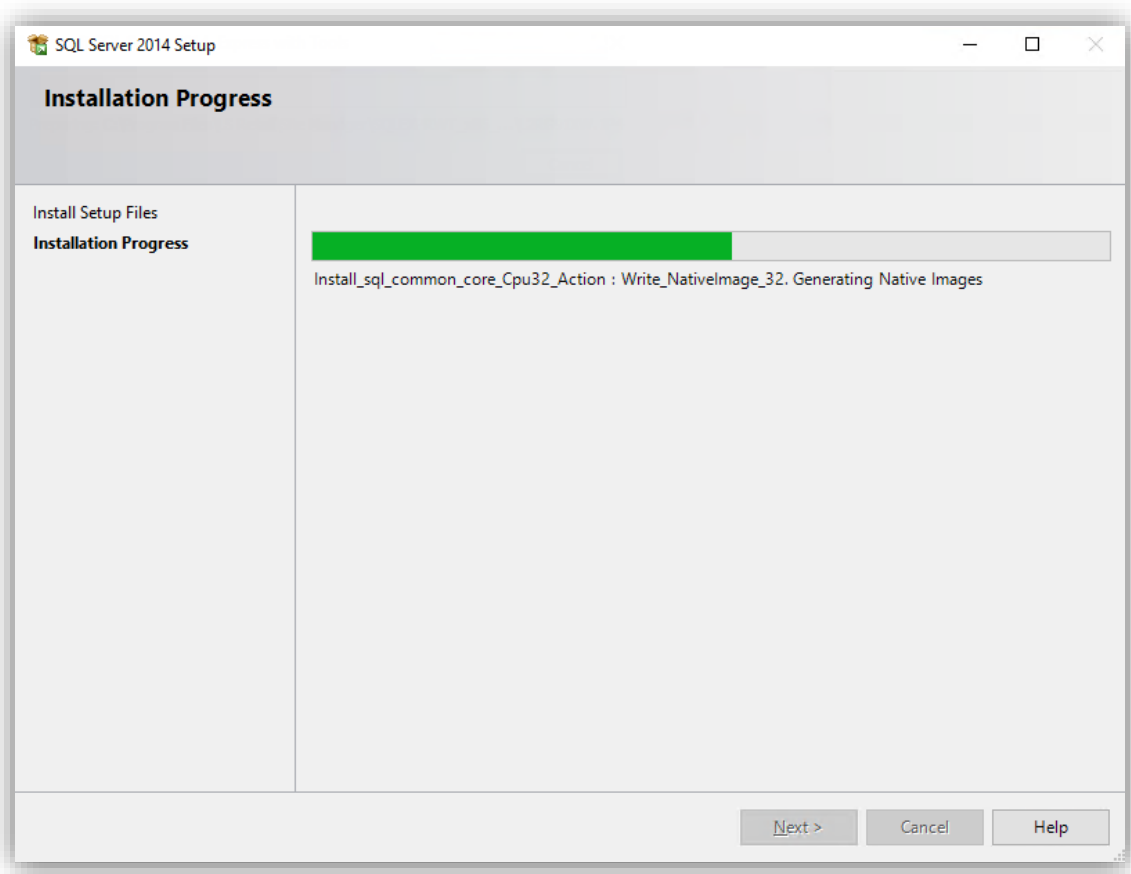
Select the **Next** button to start the install setup

#### 4.2.1 Install setup for SQL Server express...



Select the **Next** button to start the install progress.

#### 4.2.2 Install progress for SQL Server express...



#### 4.2.3 Final message of the installation progress

SQL Server 2014



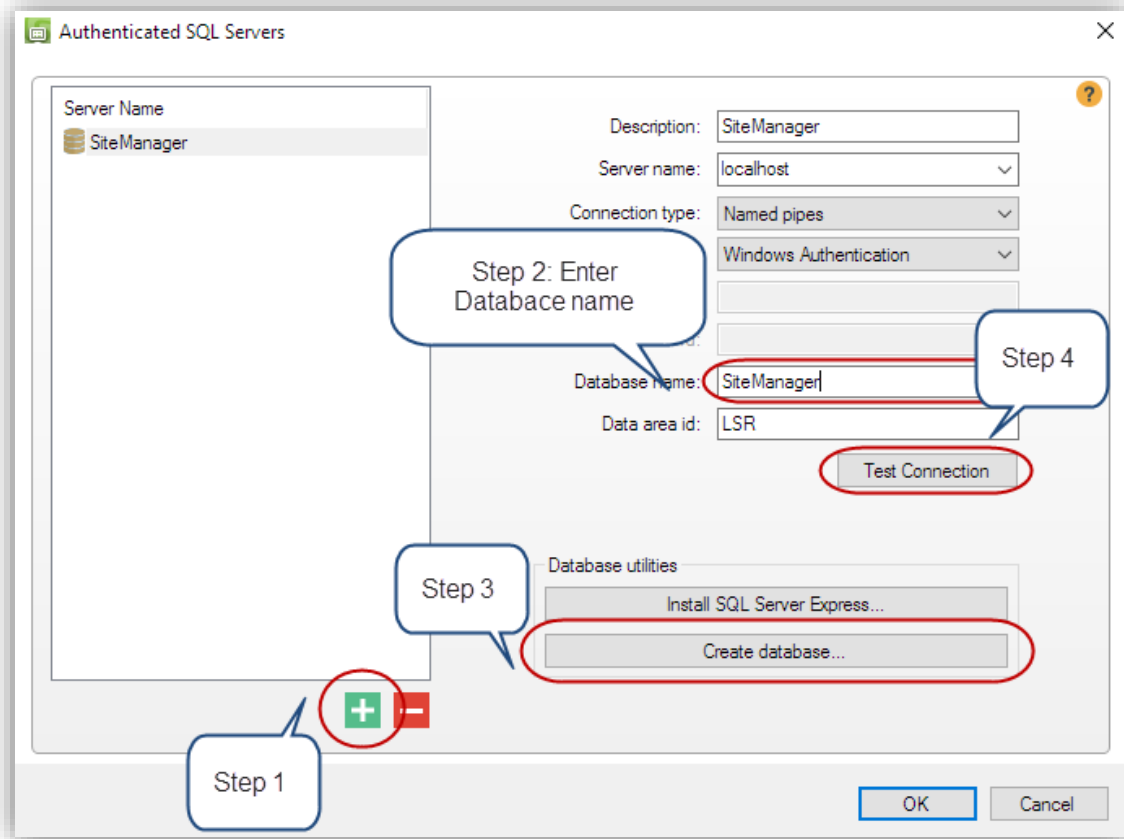
Please wait while Microsoft SQL Server 2014 Setup processes the current operation.

When the progress is finished you will be taken back to the database window (image 4.2.1) where you will proceed with the setup.

## 4.2 Step-by-step: Connecting to a new database

When you connect to a new database the process is as shown below:

### 4.2.4 Connecting to a new database



Connecting to a database or creating a new one is a part of the installation.

1. Select the green **Add** button to add a database.
2. Enter the **Database name**.
3. Click on the **Create database** button.



If the database has an instance name (e.g. SQLEXPRESS), the entry in the text field **Server name** needs to run **localhost\SQLEXPRESS**. This was defined in 4.1.



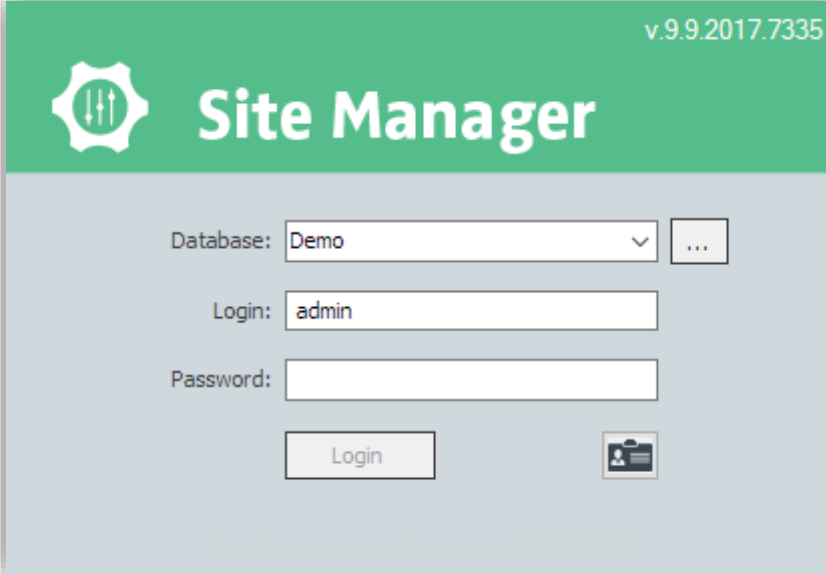
It might be preferable to set the authentication to the database administrator account (instead to the default *Windows Authentication*).

4. Test the connection by selecting the **Test Connection** button.

A dialog appears stating "Connecting to database worked." Click on **OK** to continue.

Once you have a working connection you can click **OK** to return to the login screen.

#### 4.2.5 Site Manager login dialog



The Site Manager login dialog features a green header with a gear icon and the text 'Site Manager' and 'v.9.9.2017.7335'. Below the header, there are three input fields: 'Database:' with a dropdown menu showing 'Demo', 'Login:' with the text 'admin', and 'Password:' which is empty. A 'Login' button is positioned below the password field, and a small icon of a person with a briefcase is to its right.

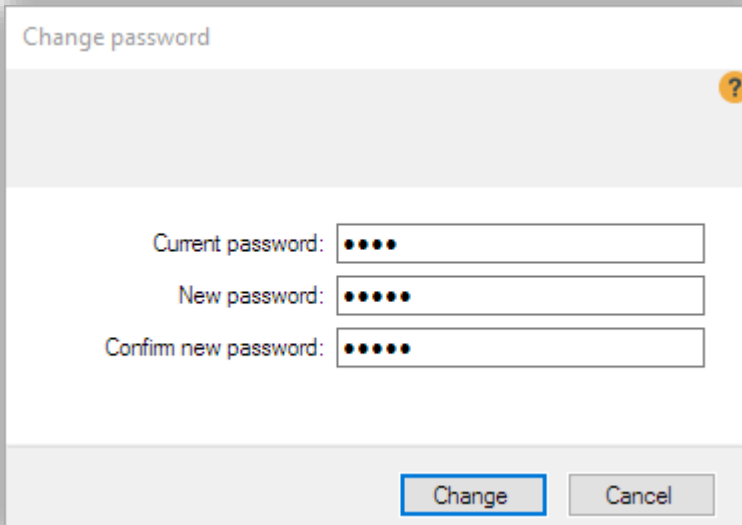
Enter the default user name and password:

Login: **admin**

Password: **1234**

After installing the Database and logging in for the first time you will be asked to change the password, after that you will be logged in with the new password.

#### 4.2.6 Change password dialog



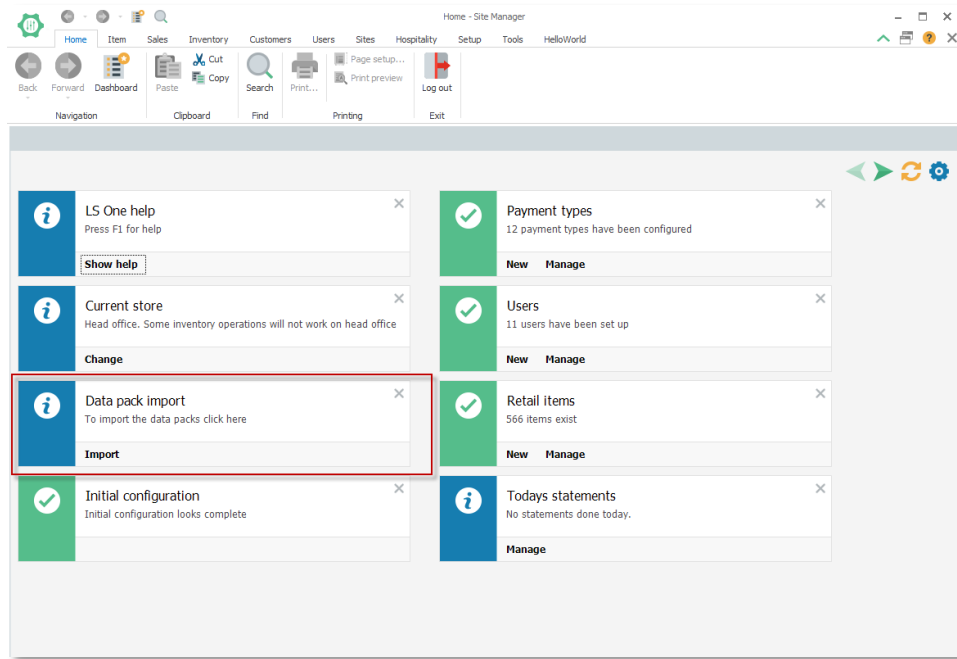
The 'Change password' dialog has a title bar with a question mark icon. It contains three input fields: 'Current password:' with four dots, 'New password:' with five dots, and 'Confirm new password:' with five dots. At the bottom, there are two buttons: 'Change' and 'Cancel'.

When asked to select location we recommend that you select **Head office**.

## 5 Demo data

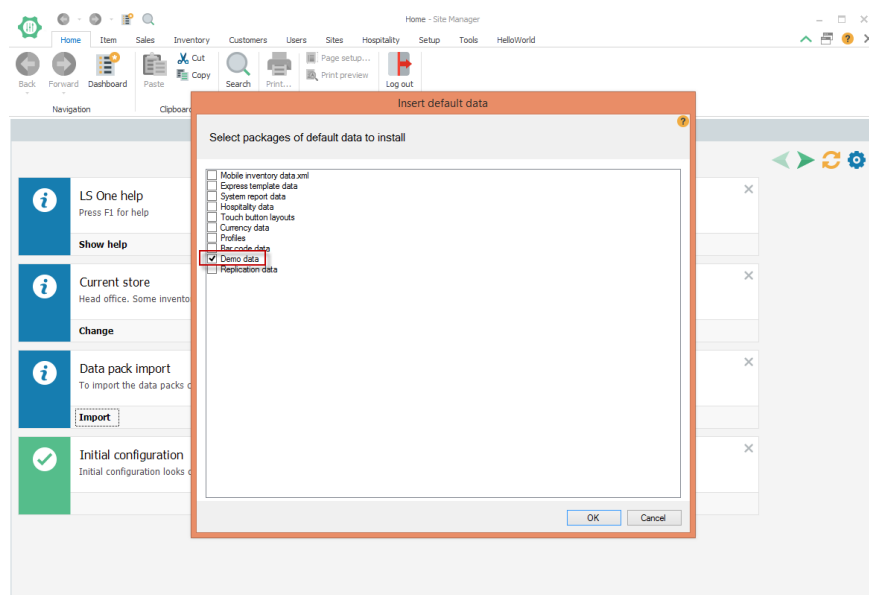
To install the demo data do the following:

Go to the **Dashboard** and click **Import** button on the **Data pack import** sticker on the dashboard.



Select the checkbox by *Demo data* on the list and click button **OK**.

### 5.1.1 Insert demo data

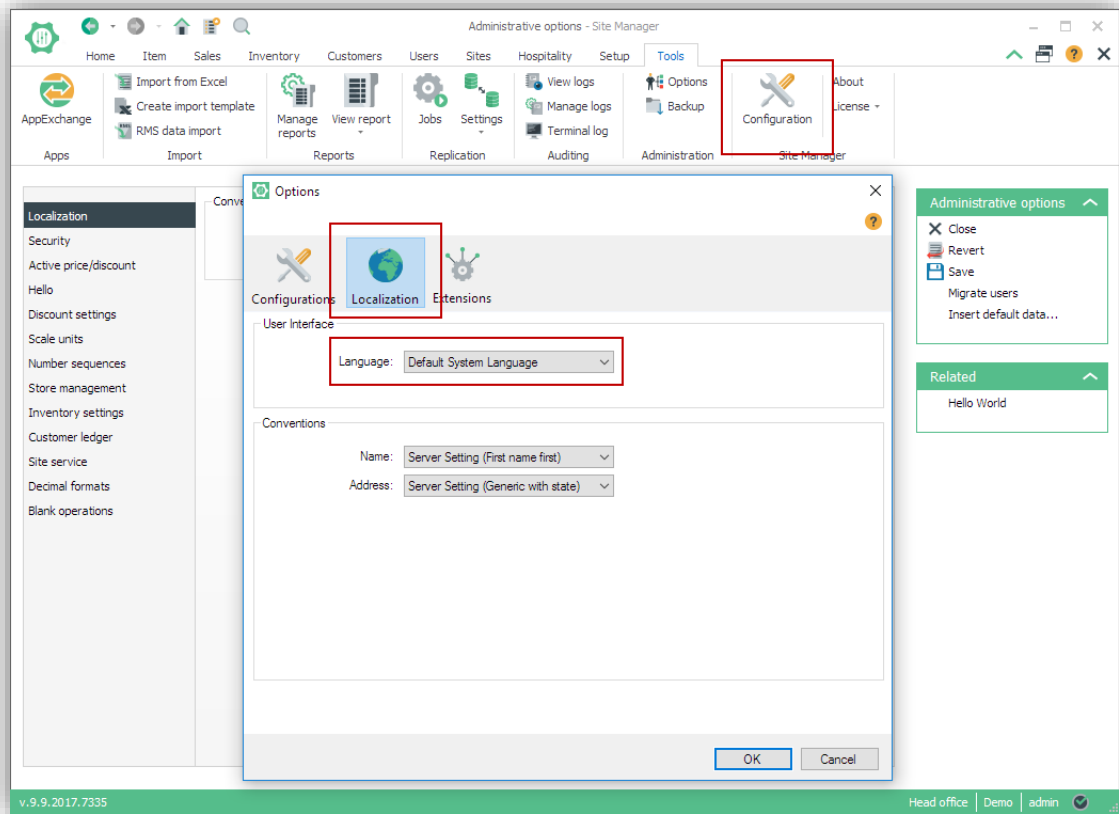


For more information about the [other data packs available](#) in the default data dialog please go to the [LS One Online help](#).

## 6 Setting language

Initially the language of the Site Manager is set to the language of the machine on which it is operating. To change the language of the Site Manager, go to: **Tools > Options > Localization**

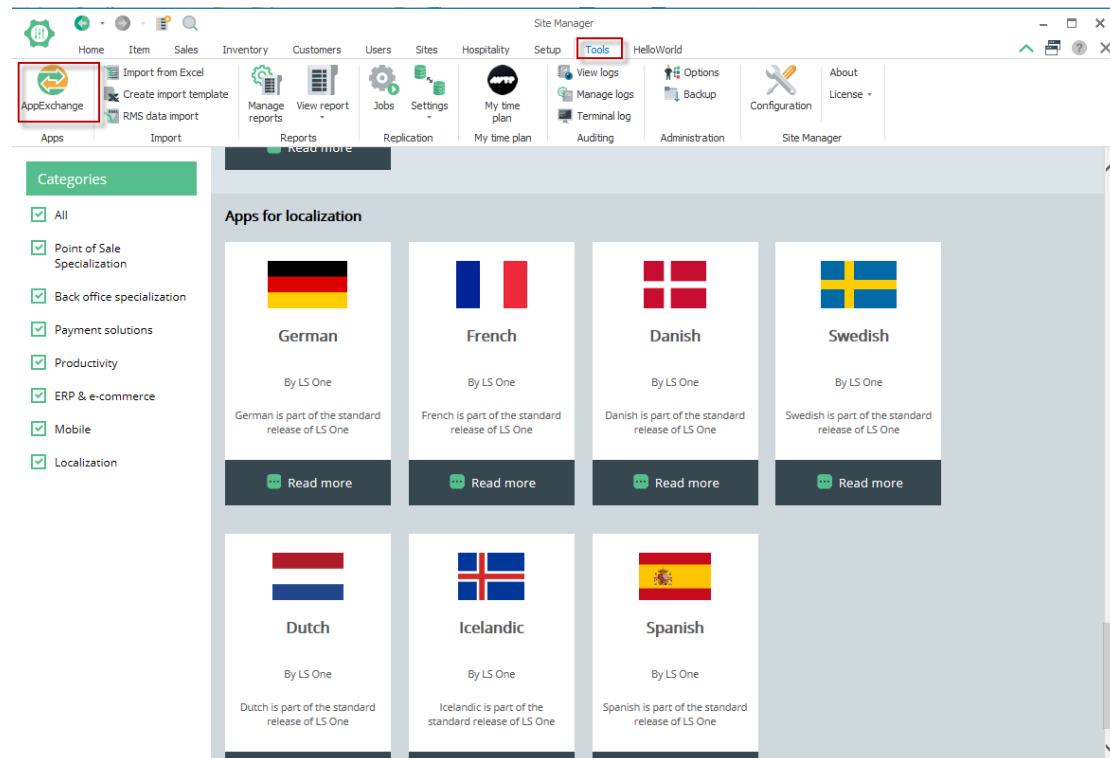
### 6.1.1 Localization dialog



You have to restart the application to activate the new language settings.

To see which languages are translated as a part of the LS One release please go to the AppExchange in the Site Manager to see the full list.





Each user or partner who wants to add or expand a new or partly covered language in their version can get Babylon files from LS One to create a new language and compile new language satellites. The Babylon.NET localization software can be used for all basic translations. On top of that, partners can seek extra support from LS One where an interactive database is maintained with support from the partners.

## 7 Create a new user

A user with administrative rights can create as many users as needed.

The customer has to decide whether to be connected to a domain, using the same settings as when the user enters their account locally or creating a Standalone user.

In the User view there is a Permissions tab, where there is a list of permissions found on the Site Manager. The permissions available depend on your local settings.



To avoid having to set permissions to each user individually, create User groups that you can simply put users in and make them inherit the permissions settings in that group.

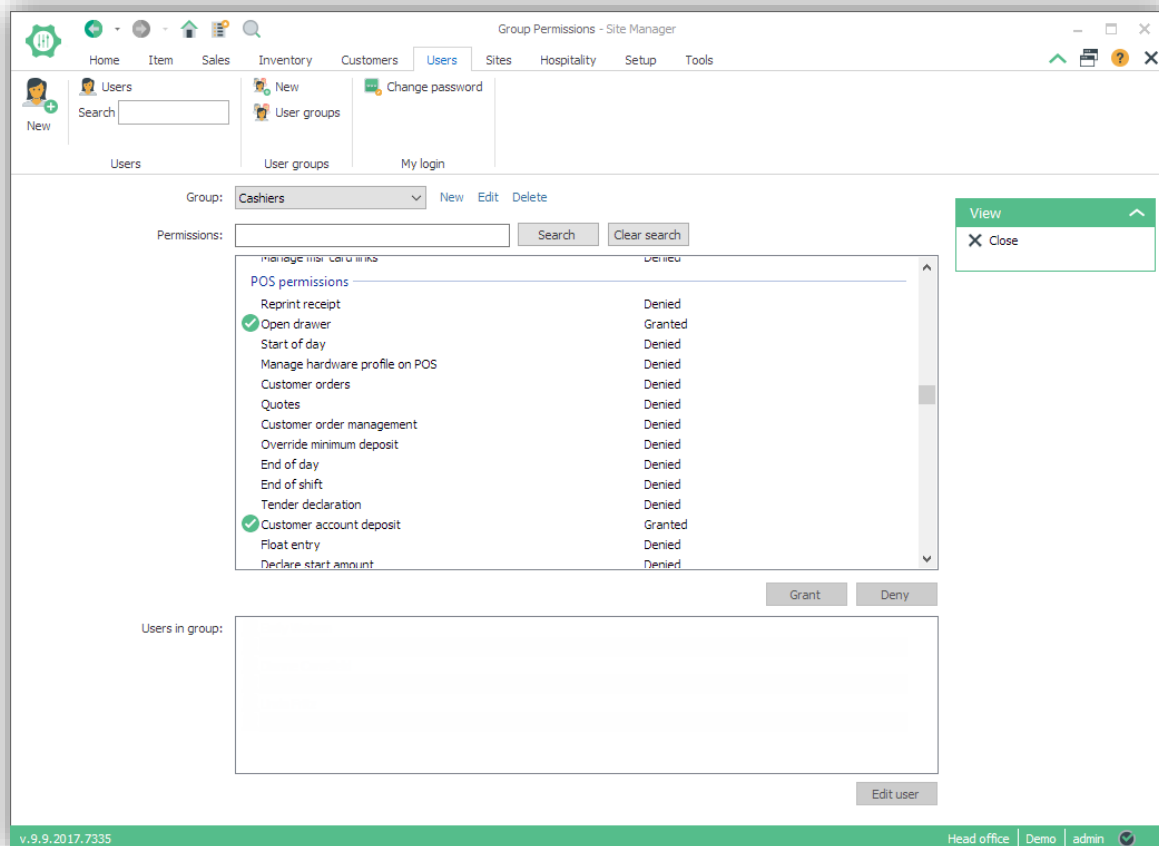
If you are migrating users from previous versions of the Site Manager, see the *Migration User Guide – LS One 2013*. This guide can be found on the partner portal (requires login). That guide also has more information about permissions.

### 7.1 Permissions

To create user groups, go to **Security > User groups > New user group**

In the Group Permissions view below permissions are granted to the group and any user put in this group will inherit those settings.

#### 7.1.1 Group Permissions View



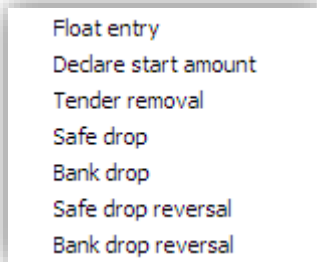
You can grant or deny permissions by highlighting one or multiple lines on the list and clicking buttons: *Grant* or *Deny*.

In these cases, the message: “Granted” or “Denied” appears in the line.

## 7.2 Permissions icons

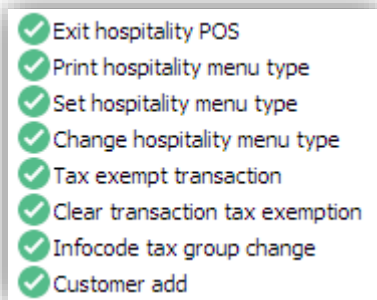
When a permission is denied, a padlock icon appears.

### 7.2.1 User permission denied



When a permission is granted, a green icon with a white tick inside appears.

### 7.2.2 User permission granted



More information about [user creation](#) and [permissions](#) can be found in the [LS One Online help](#).

## 7.3 Creating an Active Directory user in Site Manager

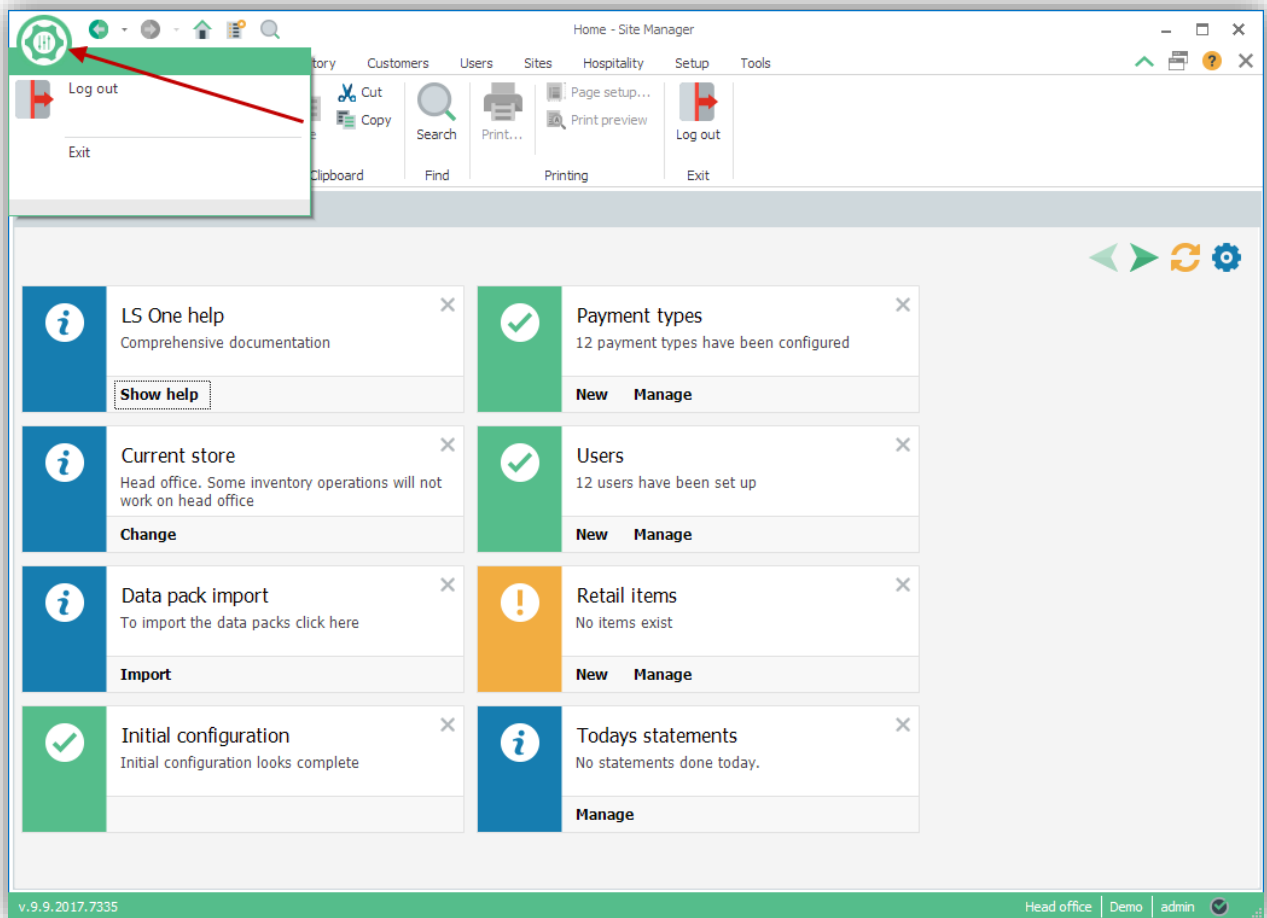
The Site Manager users can be linked to the Active Directory on your domain. For further information on how to configure such a user [see instructions here](#) in the [LS One Online help](#).

## 8 Log out and in

### 8.1 Log Out

The log out window is in the top left corner of the application and there you have the option either to **Log out** or **Exit**.

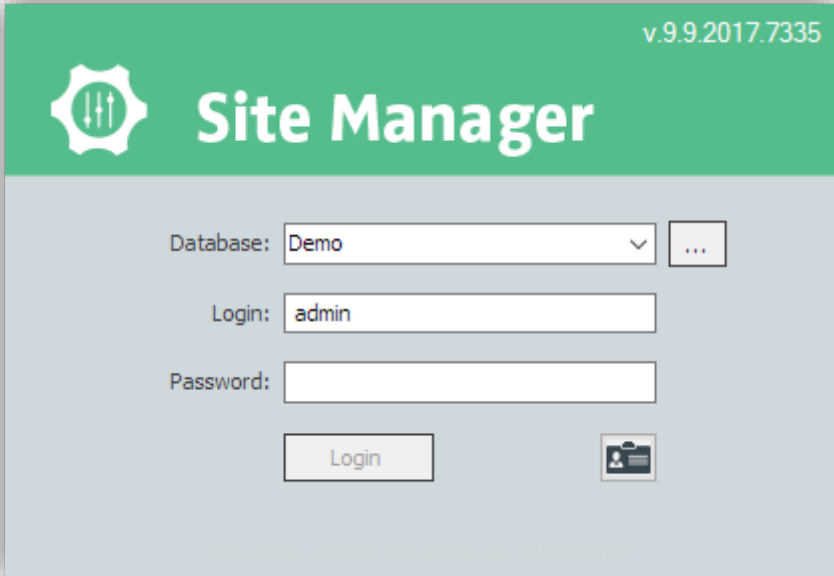
#### 8.1.1 Log out



## 8.2 Log in

When you enter the Site Manager application the login window appears. Now everything should be ready to log in according to the settings chosen earlier. The predefined settings appear automatically and you only need to enter your password.

### 8.2.1 Login view



The login window for Site Manager has a green header bar. On the left is a gear icon with three vertical bars inside. To its right is the text "Site Manager". In the top right corner of the header is the version number "v.9.9.2017.7335". Below the header is a light blue-grey area containing the login form. The form has three input fields: "Database:" with a dropdown menu showing "Demo" and a small square button with three dots; "Login:" with a text box containing "admin"; and "Password:" with an empty text box. Below these fields is a "Login" button and a small icon of a person with a briefcase.