

# **Installation and Configuration Guide**

## **Advanced Marketing Solution (AMS) Logix**

Release 7.2

BCC5-0000-5009

Issue B



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# Preface

## Audience

This book is written for software installers, service personnel, system integrators, and field engineers.

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## References

### NCR AMS Publications

- *AMS Logix User Guide for the Consumer Marketing (CM) Engine* (BCC5-0000-2355)
- *AMS Logix User Guide for the Copient Promotion Engine (CPE)* (BCC5-0000-2354)
- *AMS Logix User Guide for the Universal Engine (UE)* (BCC5-0000-5016)
- *AMS Brokers Installation and Configuration Guide* (BCC5-0000-5097)
- *AMS Promotion Engine Installation and Configuration Guide* (BCC5-0000-5098)
- *Enterprise Preference Manager (EPM) Installation and Configuration Guide* (BCC5-0000-5015)
- *Enterprise Preference Manager (EPM) User Guide* (BCC5-0000-5228)

### AMS Technical Publication

- *Key Rotation and Data Migration*



**Note:** For more information, consult an NCR Representative.



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## Revision Record

Issue	Date	Remarks
A	Aug 2018	First Issue
B	Aug 2018	<ul style="list-style-type: none"><li>• Added details about mandatory data migration.</li><li>• Added details about the installation credentials requiring SQL Administrator rights.</li></ul>

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# *Chapter 1:* Advanced Marketing Solution

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## Overview

The Advanced Marketing Solution (AMS) provides a consolidated means of executing targeted marketing through content management, offer automation, customer account management, and enterprise or store communication. It consists of the following major components:

- Logix Application
- Brokers
- Enterprise Promotion Engine

This publication defines the basic components of a Logix enterprise server and the corresponding requirements. It also describes the following required procedures to successfully install and configure the system:

1. Installing and configuring the Logix enterprise servers
2. Installing and configuring the Logix application



**Note:** Information included in this publication are intended as a guide and may vary slightly depending on the current infrastructure. The procedures are based on one physical machine for the database server and the web or application server. They are not intended to recommend a configuration for a specific site.

### ***Limitation***

This publication describes the steps for installing and configuring the Logix enterprise server with the following limitation:

- The software build versions displayed on the installation images may not be the exact versions delivered to customers. For information about the software build version for the release, consult with an NCR Representative.

## Logix Application

The Logix application is the web-based interface to AMS. It enables marketing professionals to assemble and manage offers with specific behaviors based on associated customer and product data. The Logix application uses four databases:

- LogixRT (Real Time Database)—contains offer parameter, customer groups, product groups, printed receipts, discounts, graphics, and other offer attributes.
- LogixWH (Warehouse Database)—saves information related to System Health, Impressions, Reporting and Transaction history.
- LogixXS (Cross-Shopping Database)—manages customer-related information when customers cross-shop such as conducting transactions at multiple retail locations. It accepts customer IDs and updates offer progress and user rewards.
- LogixEX (Extended Database)—supports the issuance process that logs transactional reward data. This is an optional database.



**Note:** These databases may reside together on the same physical server, or on different servers depending on the expected database load or size.

## Enterprise System

The Enterprise System consists of central servers that keep system data and coordinate system actions. Its key components include one or more of each of the following servers:

- Database server—acts as the main repository for offer variables (customer groups, product groups, and so forth), execution parameters (limits, periods, locations, and so forth) and offer content, all of which are managed through the Logix web interface.
- Web server—manages the communication of data through the system and runs applications that automate the delivery and reconciliation of incentives among channels. The web server also operates the Logix web interface.

## Store-level System

The store-level system distributes offer content and incentives to terminals and requests store-specific offer content, variables, and parameters from the enterprise at configurable intervals. This ensures the accuracy of account information across locations. Local servers monitor customer purchases and interaction at the POS and at other customer touch points and deliver incentives in real time.

The AMS offers multiple promotion engines that act as store-level systems:

- Copient Promotion Engine (CPE)—typically used at retail locations where non-NCR POS workstations are installed.
- Consumer Marketing Engine (CM)—used in NCR POS environments and integrates with the NCR Advanced Checkout Solutions (ACS).
- Universal Engine (UE)—used in both NCR and non-NCR POS environments.



**Note:** The AMS can also integrate with other pre-existing promotion engines if a store solution is already in place.

## Hardware Requirements

The performance of AMS is directly related to its data volume and configuration. In order for the servers to handle the load and for the POS workstations to efficiently work with AMS, refer to an NCR Professional Services Consultant for the hardware configuration of each component.

# Software Requirements

This section provides a list of required software to successfully install and use Logix on the server system.

## Logix Application

To use and properly display the Logix application user interface, ensure that the following requirements are installed and configured on the system:

Requirement	Description
Browser	<p>Logix supports the following browsers:</p> <ul style="list-style-type: none"><li>• Internet Explorer (IE) (version 9, 10, or 11)</li><li>• Google Chrome (version 44 or higher)</li></ul> <p><b>Note:</b> Configure the browser to allow pop-ups for the domain where Logix resides.</p>
JavaScript	<p>Enable JavaScript on the browser to streamline how the UI operates on Logix pages that use JavaScript.</p> <p><b>Note:</b> Always enable JavaScript.</p>
Display	NCR recommends a minimum 800x600 (SVGA) color display.
Unicode	<p>Install a Unicode-capable font to correctly display content that includes non-English and non-standard characters in the Logix UI.</p> <p><b>Note:</b> Logix content is encoded in Unicode UTF-8, standard that facilitates displaying non-English or non-standard characters (Ã, Σ, Я, 書, and so forth).</p>

## Enterprise Servers

Ensure that the following software requirements are installed on the Database and Web servers. Third-party software can be downloaded from each vendor's website. To install third-party software, follow the installation instructions provided on each vendor's website.

When installing the prerequisite applications, ensure that you have administrative privileges on the system.

### Database Server

The following applications are required for the database server.

Application Type	Application and Version
Operating System	One of the following: <ul style="list-style-type: none"><li>Microsoft® Windows Server 2012 R2 Standard edition (64-bit)</li><li>Microsoft® Windows Server 2016 Standard edition (64-bit)</li></ul>
Database Management System	One of the following: <ul style="list-style-type: none"><li>Microsoft® SQL Server® 2012 (64-bit)</li><li>Microsoft® SQL Server® 2016 (64-bit)</li></ul>

## Web Server

The following applications are required for the Web server.

Application Type	Application and Version
Operating System	<p>One of the following:</p> <ul style="list-style-type: none"><li>• Microsoft® Windows Server 2012 R2 Standard edition (64-bit)</li><li>• Microsoft® Windows Server 2016 Standard edition (64-bit)</li></ul>
Database Management System	<p>One of the following:</p> <ul style="list-style-type: none"><li>• Microsoft® SQL Server® 2012 (64-bit)</li><li>• Microsoft® SQL Server® 2016 (64-bit)</li></ul>
Internet Information Services	<ul style="list-style-type: none"><li>• Microsoft® Internet Information Server (IIS) 7 on a Windows Server 2012 OS</li></ul> <p><b>Note:</b> IIS 7 can be installed through the local Server Roles. To configure the local Server Roles, refer to <a href="#">Windows Server 2012</a> on page 28.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"><li>• Microsoft® Internet Information Server (IIS) 10 on a Windows Server 2016 OS</li></ul> <p><b>Note:</b> IIS 10 can be installed through the local Server Roles. To configure the local Server Roles, refer to <a href="#">Windows Server 2016</a> on page 35.</p> <p><b>Note:</b></p>
Other applications	<ul style="list-style-type: none"><li>• Microsoft® .NET Framework version 4.6.2 or later</li><li>• RabbitMQ Server version 3.6.5</li><li>• Microsoft URL Rewrite Module 2.0 for IIS 7 (64-bit)</li><li>• Microsoft® SQL Server® 2012 Native Client (64-bit)</li><li>• Logix application</li></ul>

## Solution Installation Package

The AMS Solution is released through an FTP site in .msi format. It is also available in zipped format with the corresponding Release Notes. The zipped package can be extracted to a drive on the server, to a shared network, or to a portable data storage device.



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## *Chapter 2:* Installing and Configuring the Database Server

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### Overview

The database server acts as the main repository for offer variables (customer groups, product groups, and so forth), execution parameters (limits, periods, locations, and so forth) and offer content, all of which are managed through the Logix web interface. It contains four databases for the Logix application:

- LogixRT
- LogixWH
- LogixXS
- LogixEX

The databases may reside together on the same physical server, or on different servers depending on the expected database load or size.

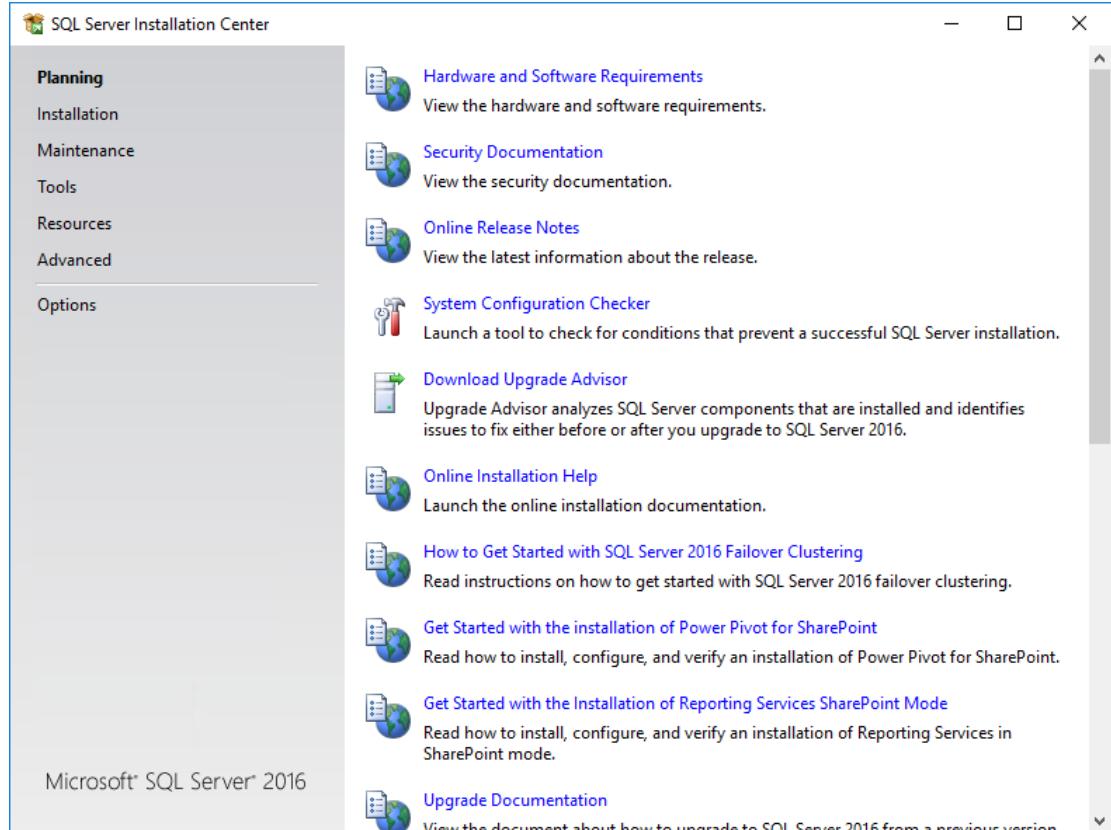
**! Important:** Install the database server before installing the other components.

Before installing and configuring the database server, ensure that the software prerequisites are installed and correctly configured. This chapter provides the procedures for installing and configuring the database server.

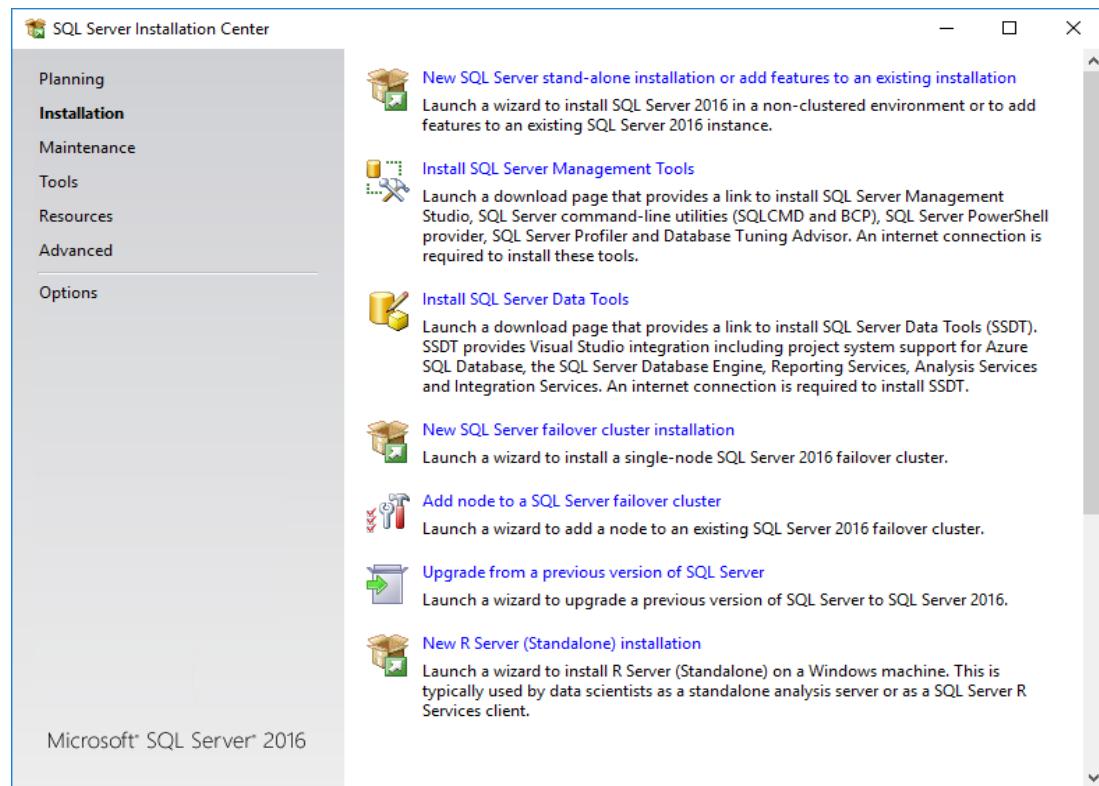
# Installing the Database Server

To install the database server, follow these steps:

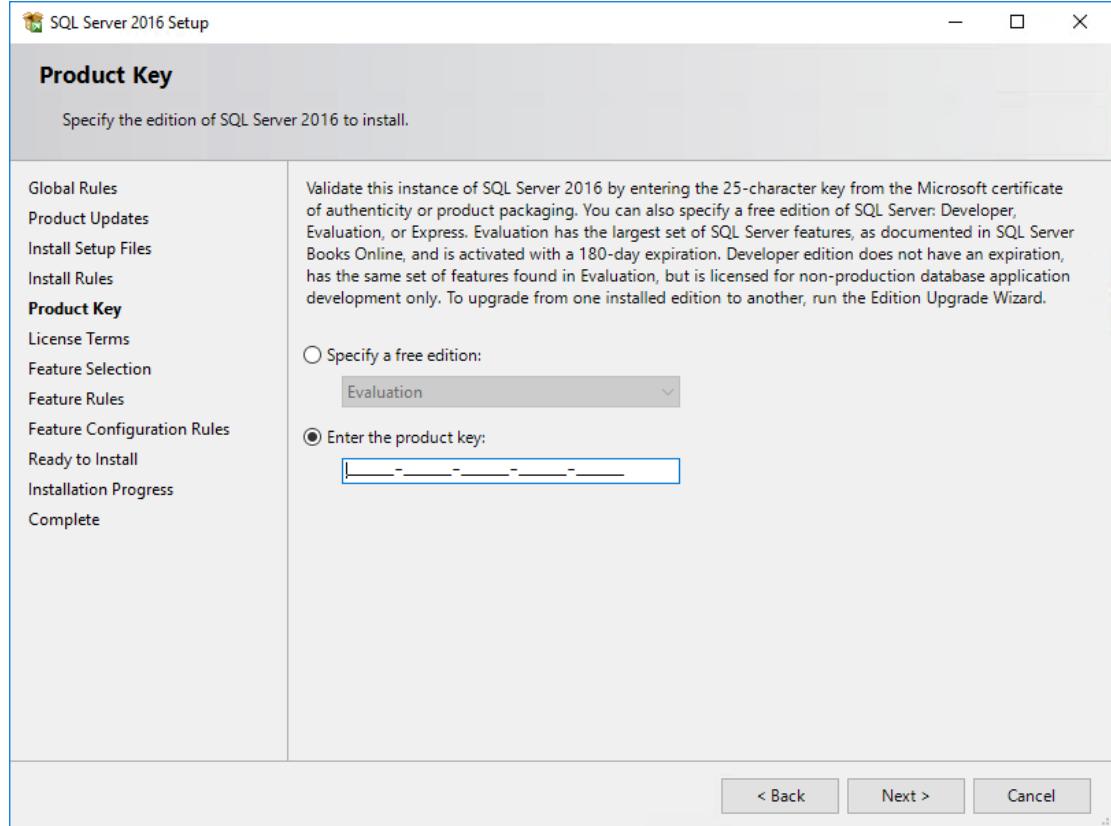
1. From the SQL Server installer, select **setup.exe**. The SQL Server Installation Center window is displayed.



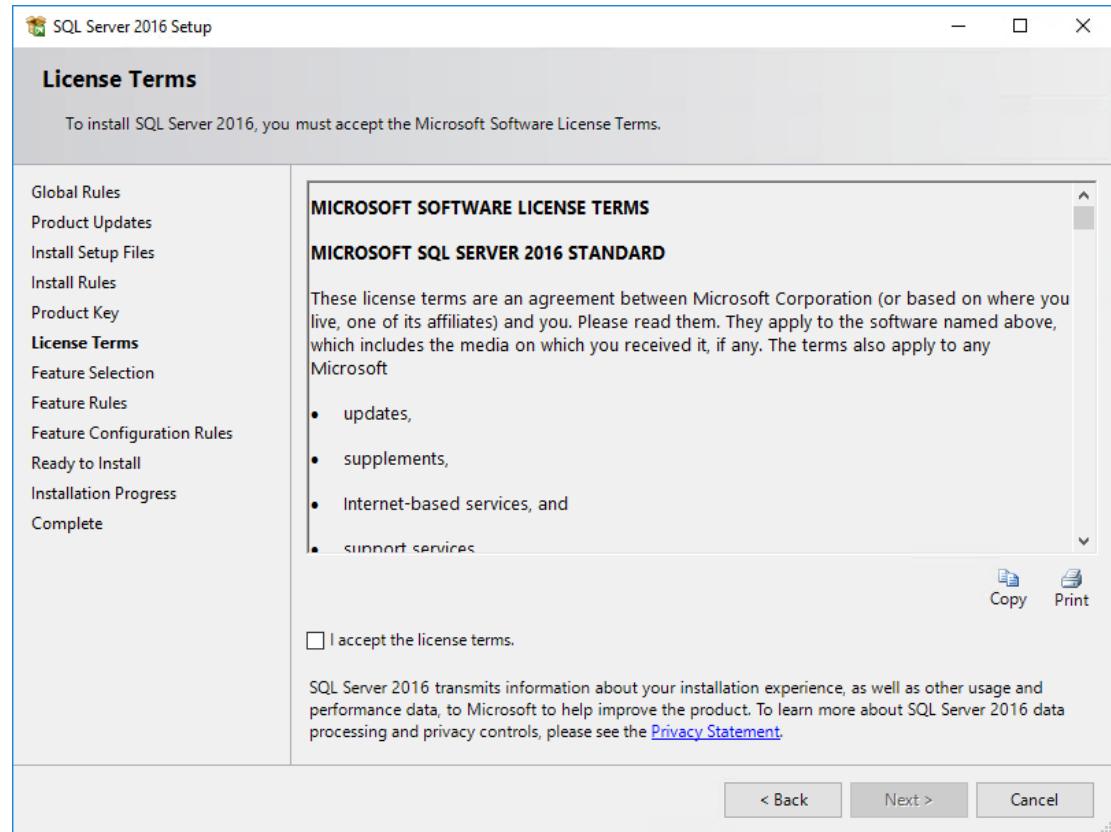
2. Select **Installation**. The application displays the installation options.



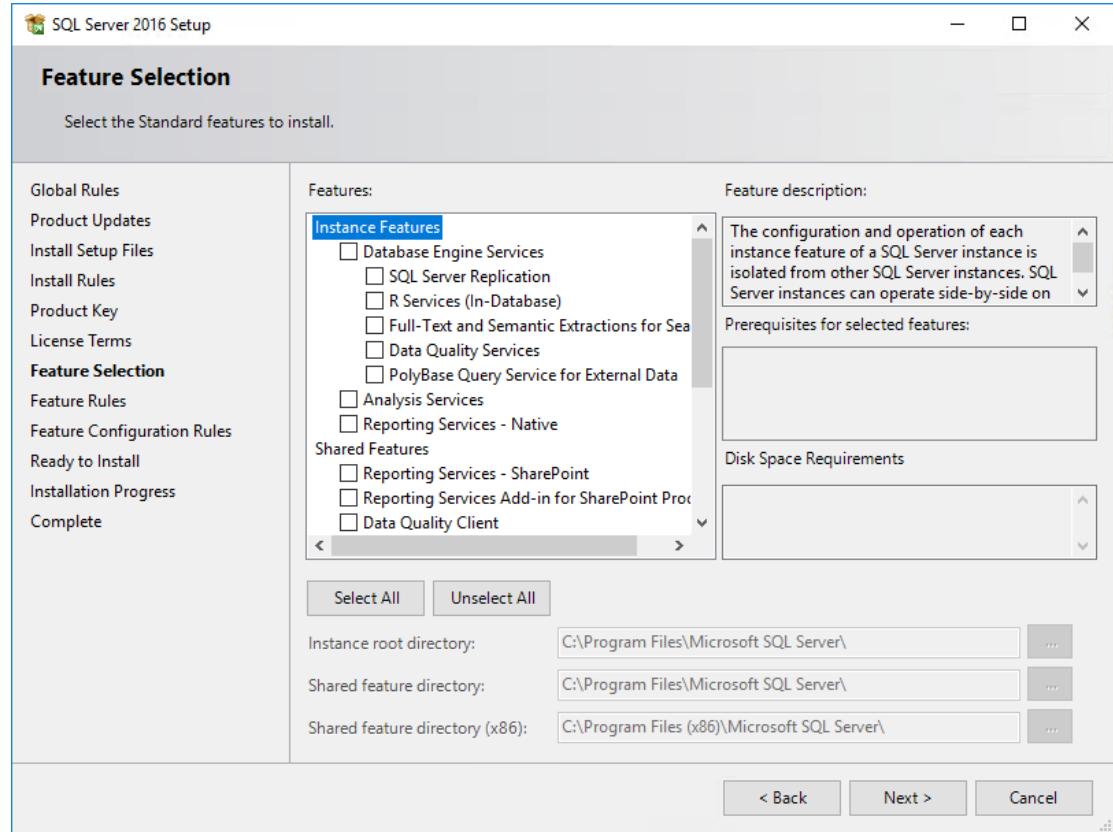
3. Select **New SQL Server stand-alone installation or add features to an existing installation**. The installation automatically configures the Global Rules, Product Updates, Install Setup Files, and Install Rules screens, and then displays the Product Key screen.



4. Enter the **product key**, and then select **Next**. The License Terms screen is displayed.



5. Select **I accept the license terms**, and then select **Next**. The Feature Selection screen is displayed.



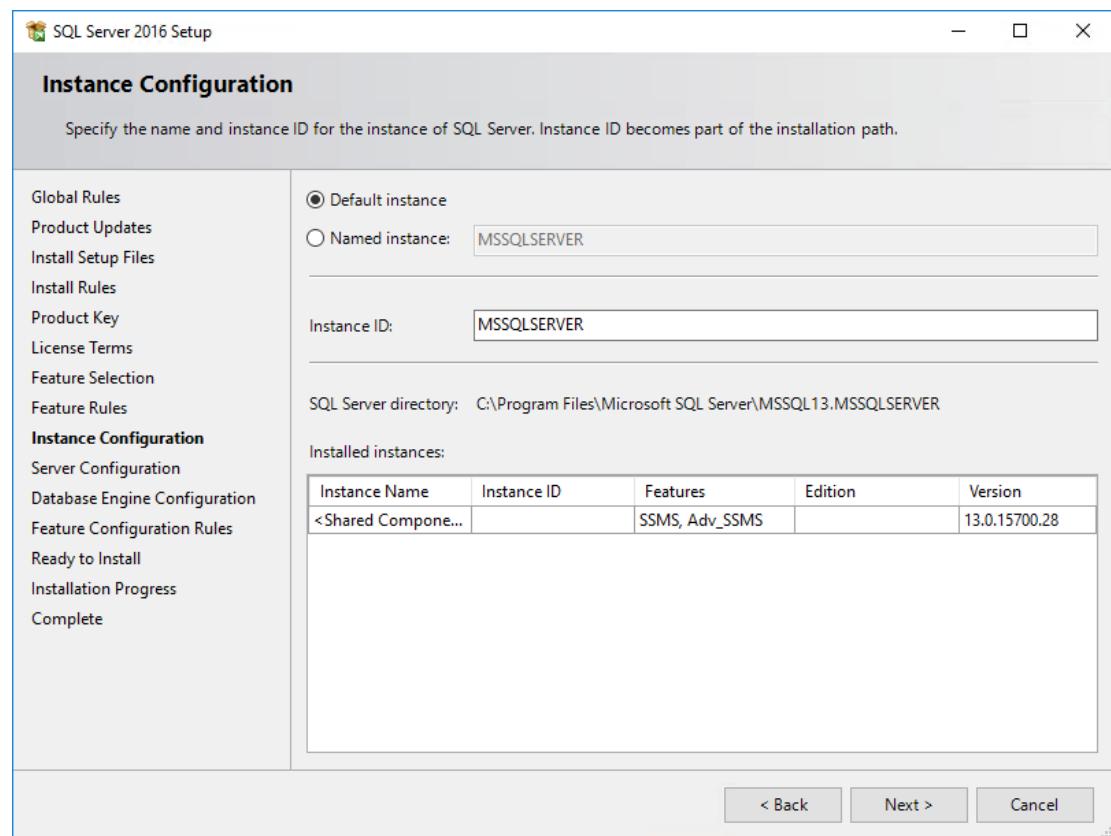
6. Select the following features:

- **SQL Server Replication**
- **SQL Client Connectivity SDK**

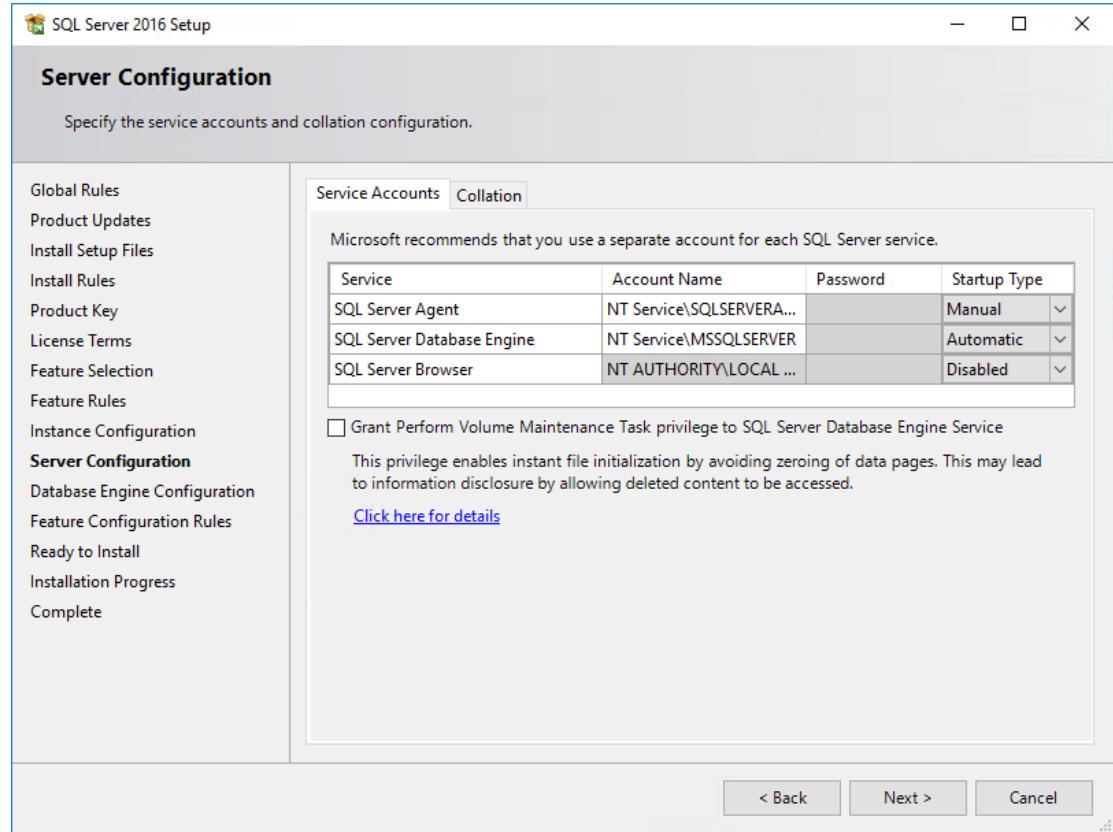
The following features can also be installed but are not mandatory:

- Analysis Services
- Reporting Services - SharePoint
- Data Quality Client
- Client Tools Connectivity
- Integration Services
- Client Tools Backwards Compatibility
- Client Tools SDK
- Documentation Components
- Distributed Replay Controller
- Distributed Replay Client

7. Select **Next**. The Instance Configuration screen is displayed.



8. Select **Default Instance**, and then select **Next**. The Server Configuration screen is displayed.



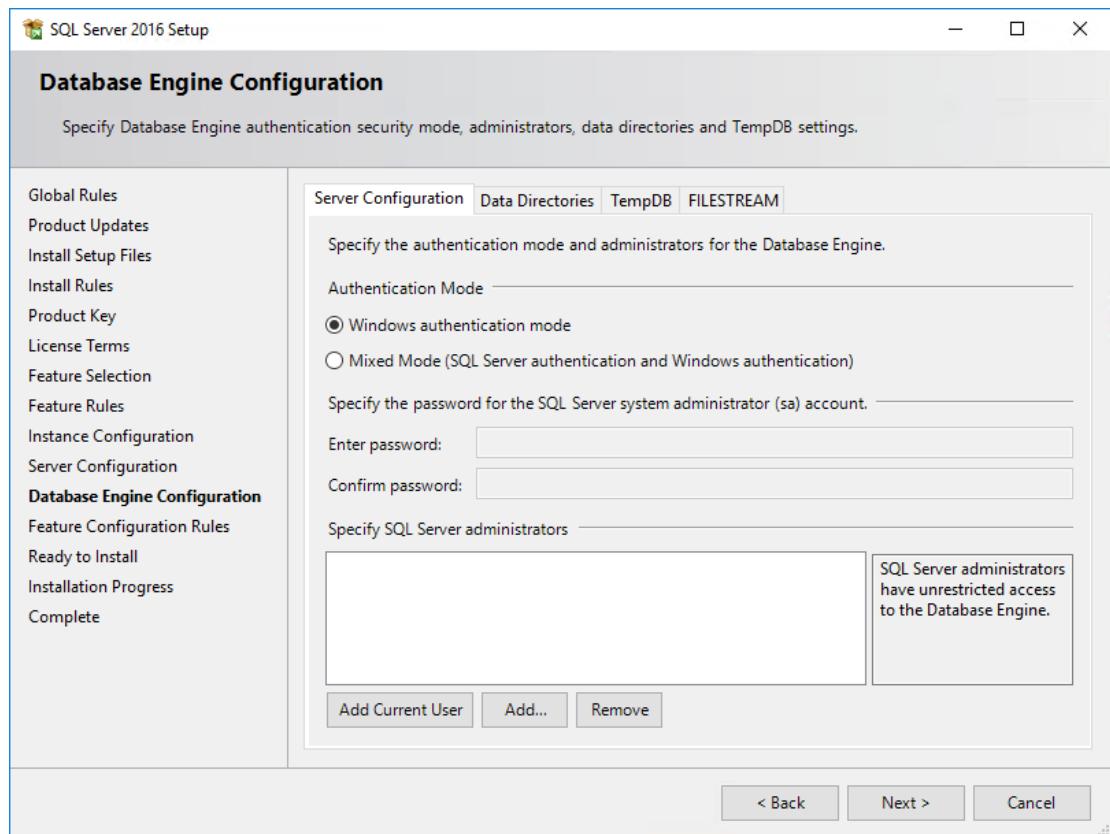
9. Set the parameters for the following services:

Service	Account Name	Password	Startup Type
SQL Server Agent	NT Service\SQLSERVERAGENT	None	Automatic
SQL Server Database Engine	NT Service\MSSQLSERVER	None	Automatic
SQL Server Browser	NT AUTHORITY\LOCAL SYSTEM	None	Automatic



**Note:** If the Logix shared directory is in another machine, run the SQL Server Database Engine from an account that has permission to access that network share. To share the directory, refer to [Assigning User and Folder Permissions](#) on page 60.

10. Select **Next**. The Database Engine Configuration screen is displayed.



11. Do the following:

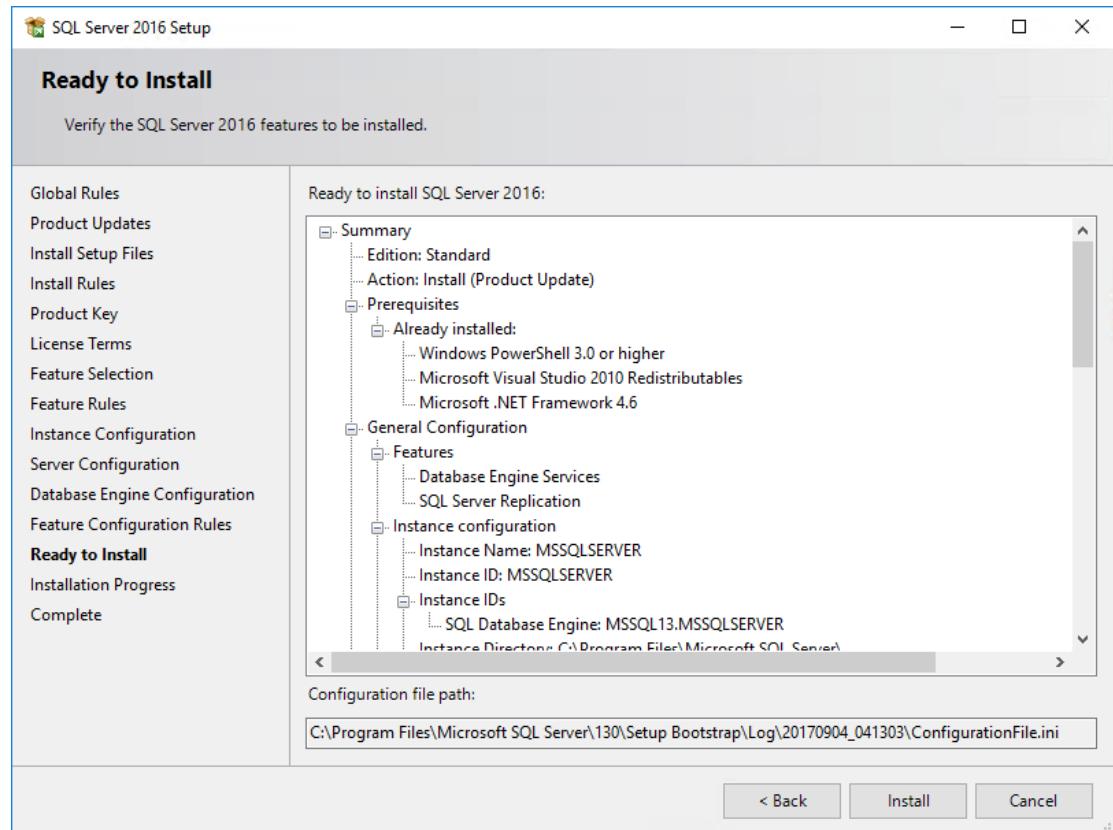
- Select **Mixed Mode** and then enter and confirm the system administrator (sa) account password.



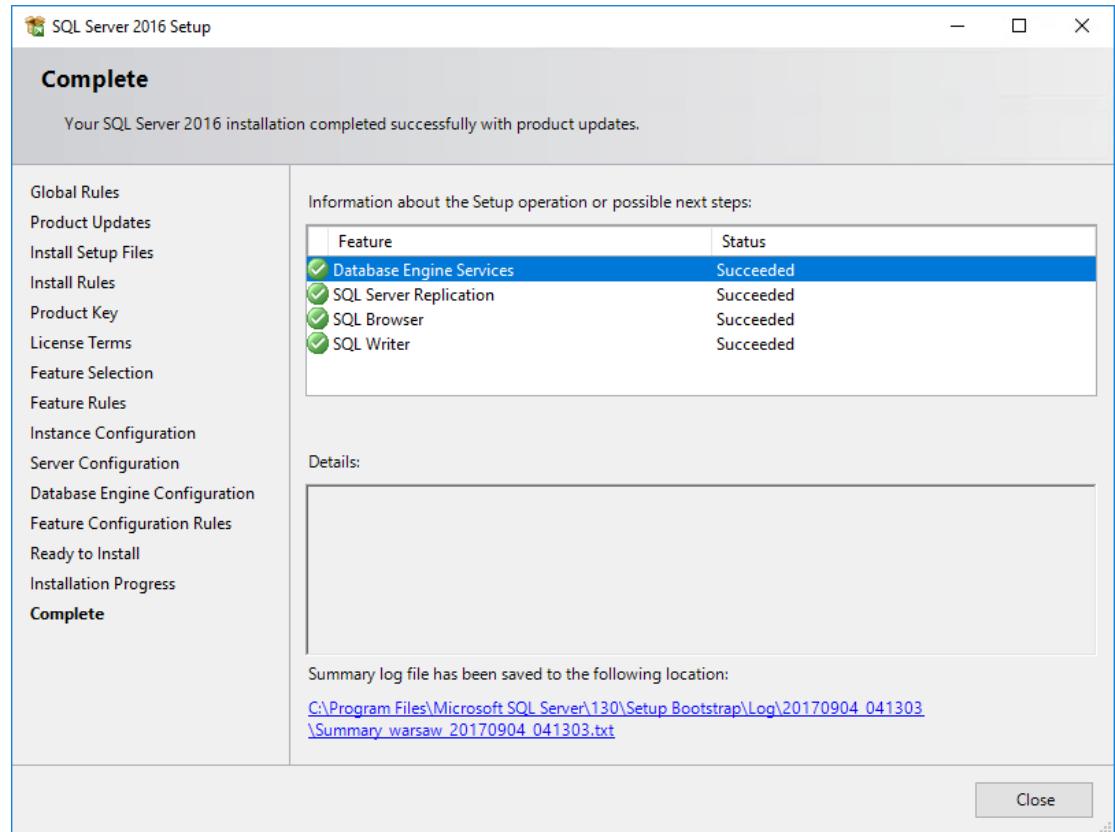
**Note:** This password is required when installing the Logix databases. To use this password, refer to [Installing the Logix application](#) on page 43.

- Select **Add Current User** to add a system user administrator account.

12. Select **Next**. The application displays the installation configuration summary.



13. Select **Install**. When the installation process is complete, the following window is displayed.



14. Select **Close**.

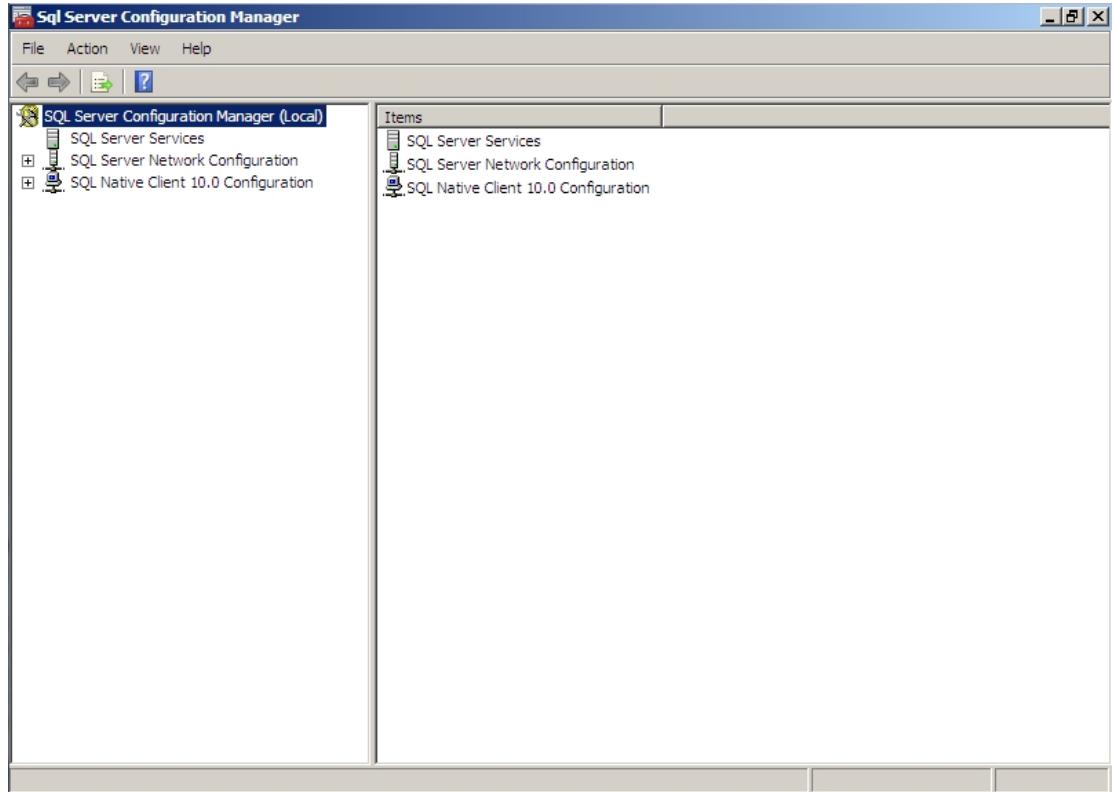
After installing the database server, do the following:

- Ensure that the TCP/IP is enabled. For more information, refer to [Enabling TCP/IP](#) on the next page.
- Install the Logix application. For more information, refer to [Installing and Configuring the Logix Application](#) on page 27.

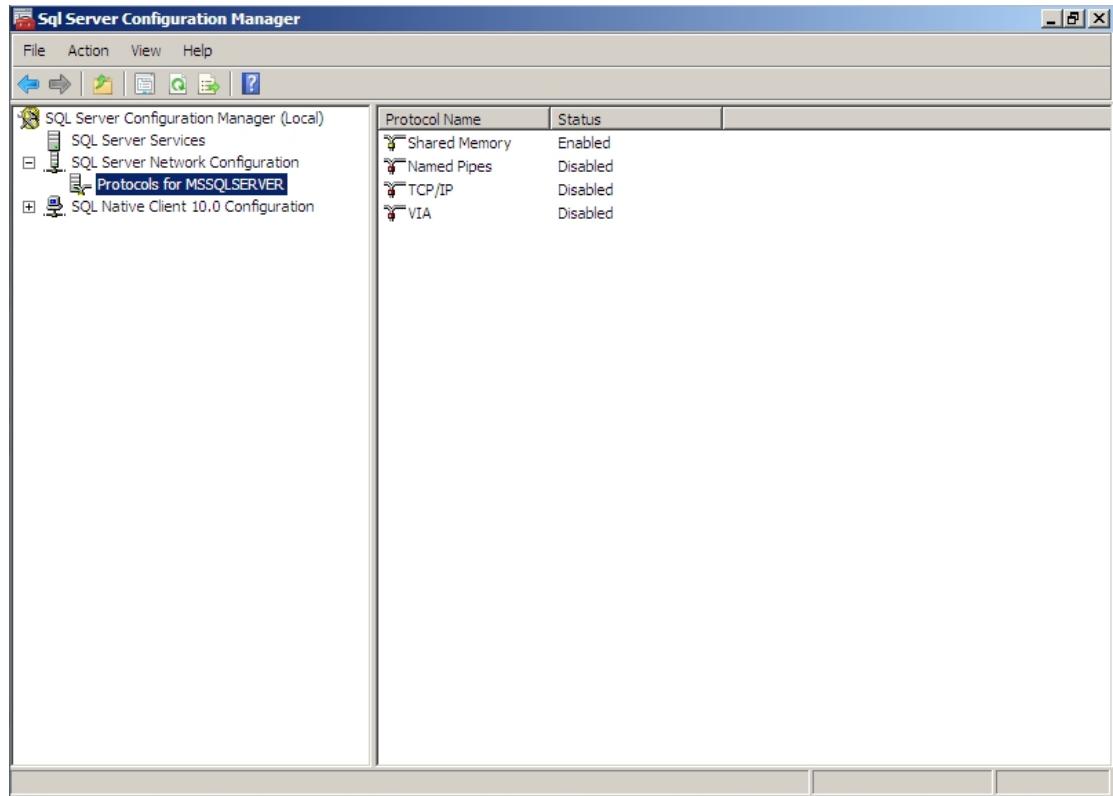
## Enabling TCP/IP

After installing the SQL Server, ensure that the TCP/IP for the SQL Server is enabled. To enable the protocol, follow these steps:

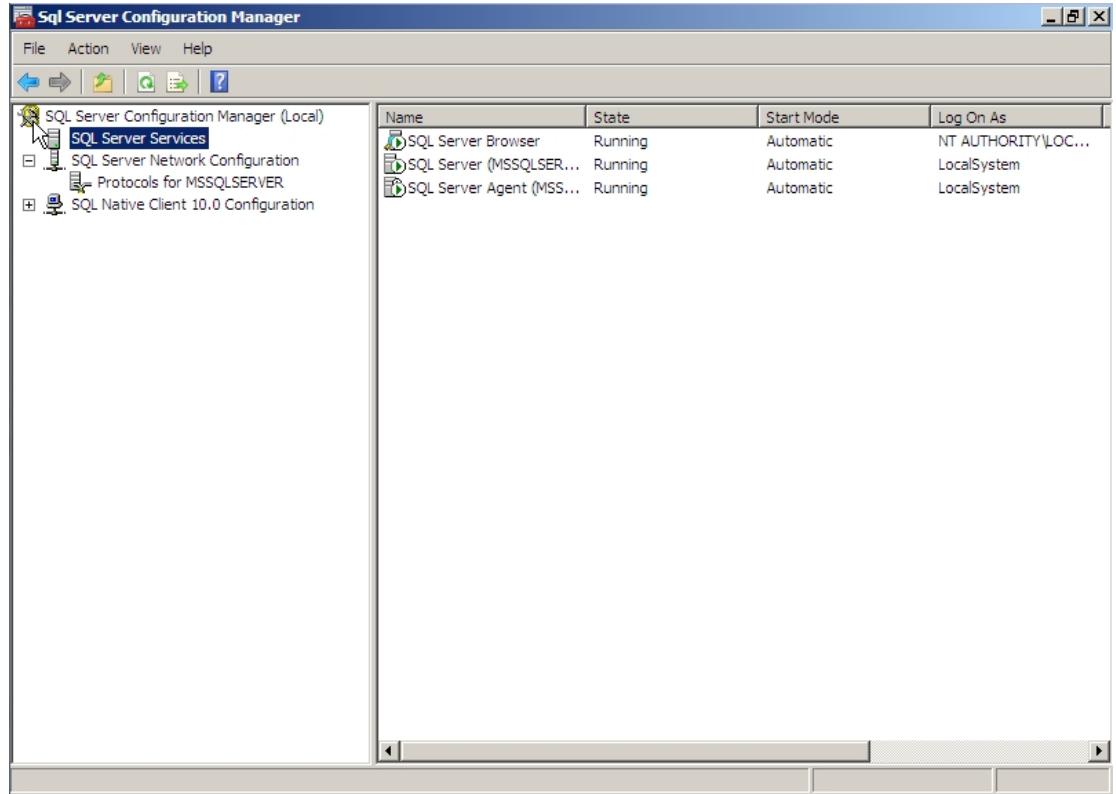
1. Open the **SQL Server Configuration Manager** from the All Programs list at the Start menu. The SQL Server Configuration Manager window is displayed.



2. Expand the *SQL Server Network Configuration* node and then, select **Protocols for SQLSERVER**. The protocols are displayed.



3. Right-click **TCP/IP** and then select **Enable**. Select the **SQL Server Services** node. The following window is displayed.



4. From the right pane, right-click **SQL Server (MSSQLSERVER)** and then select **Restart** to apply the changes.

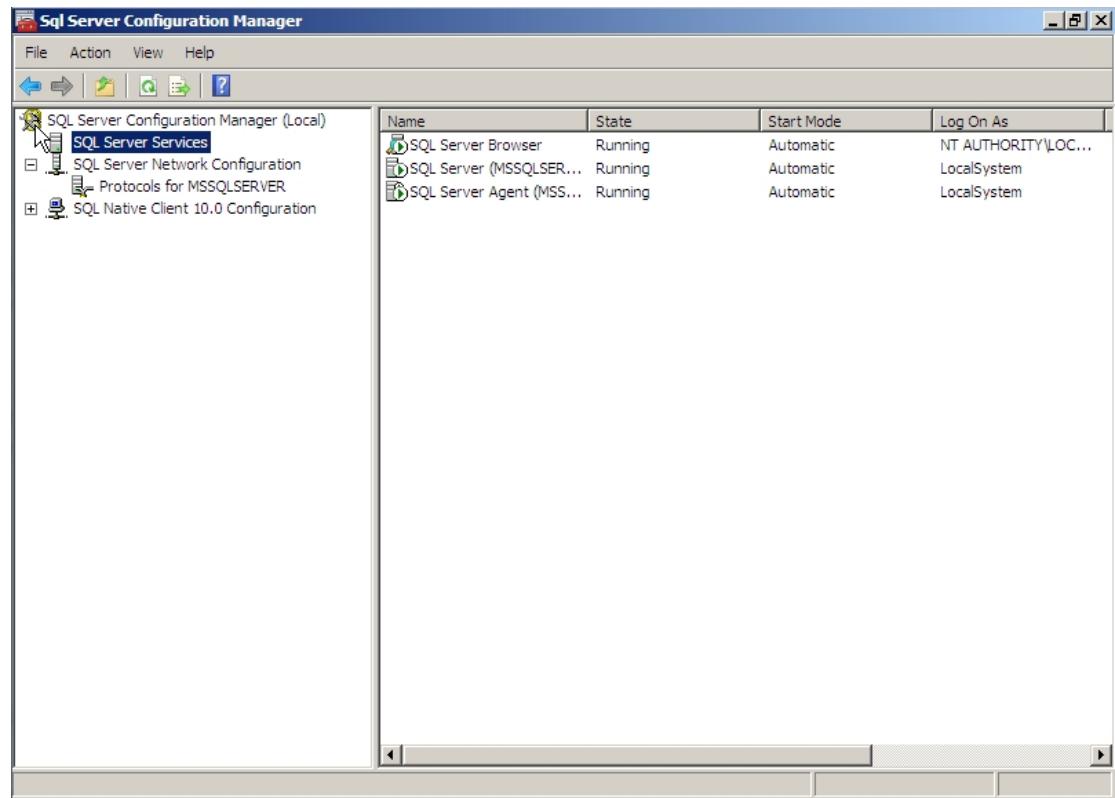


**Note:** Ensure that the SQL Server Browser is running. For more information, refer to [Setting SQL Server Browser Start Mode](#) on the facing page.

## Setting SQL Server Browser Start Mode

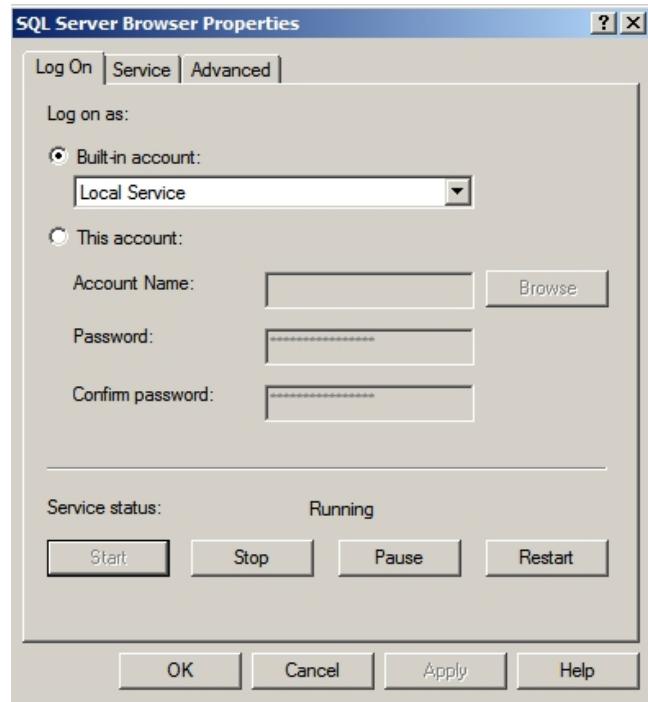
To access the SQL Server Browser Properties window to ensure that it is running, follow these steps:

1. From the SQL Server Configuration Manager window, select the **SQL Server Services** node. The following window is displayed.



2. From the right pane, right-click **SQL Server Browser** and then select **Properties**.

The corresponding properties window is displayed.



3. Select the **Service** tab and set the Start Mode to **Automatic**.
4. Select **Apply** and then **OK** to apply the changes.



**Note:** Ensure that Microsoft .NET 4.0 is installed in the system to use the Logix installer. For more information on installing Logix, refer to [Installing and Configuring the Logix Application](#) on page 27.

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# *Chapter 3:* Installing and Configuring the Logix Application

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## Overview

The Logix application user interface is the interface to the AMS. This chapter provides the procedures for the following tasks:

1. Configuring Server roles
2. Installing the Logix application
3. Sharing the installation directory
4. Logging on to Logix
5. Configuring the Logix settings
6. Configuring the Promotion Engine settings

The procedures assume that the Web server software requirements are already installed and configured in the server system. For more information on the requirements for the Web Server, refer to [Enterprise Servers](#) on page 7.



**Note:** The Logix application can be installed on the Web server, on the Database server, or on the Application server.

# Installing IIS Server Roles

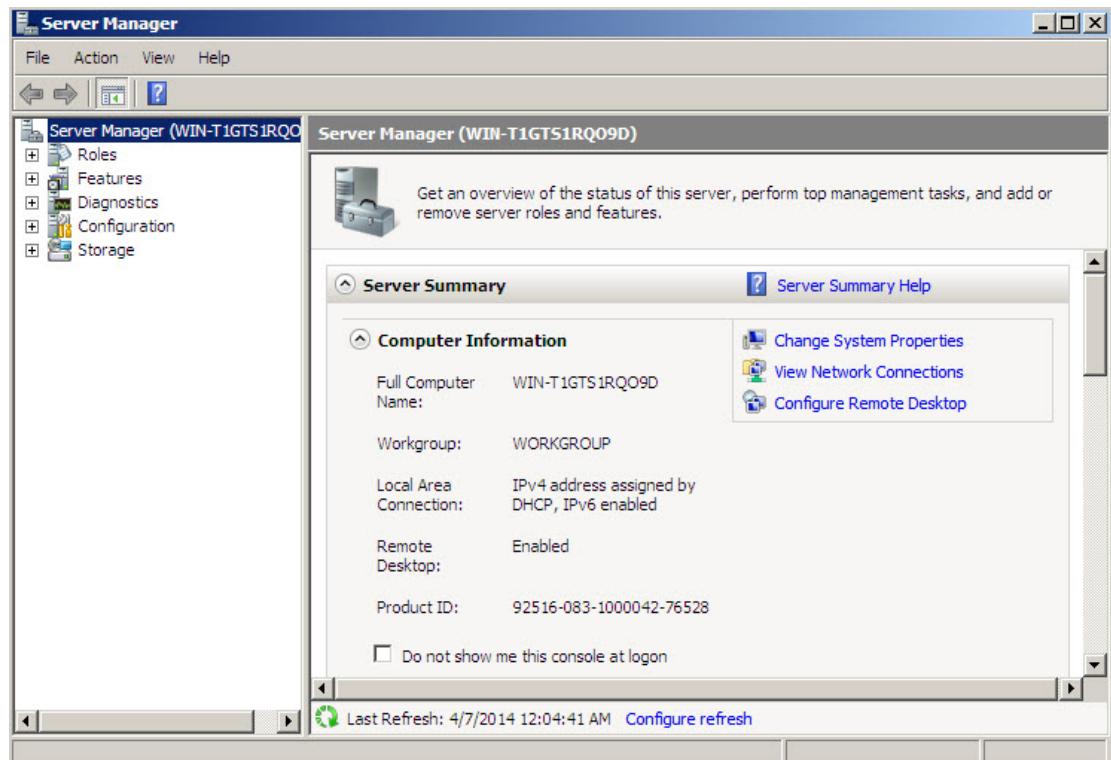
Before installing and configuring the Logix application, ensure that the Application Server and the IIS Web Server are correctly configured for specific tasks. This section describes configuring the IIS on the following operating systems:

- Windows Server 2012
- Windows Server 2016

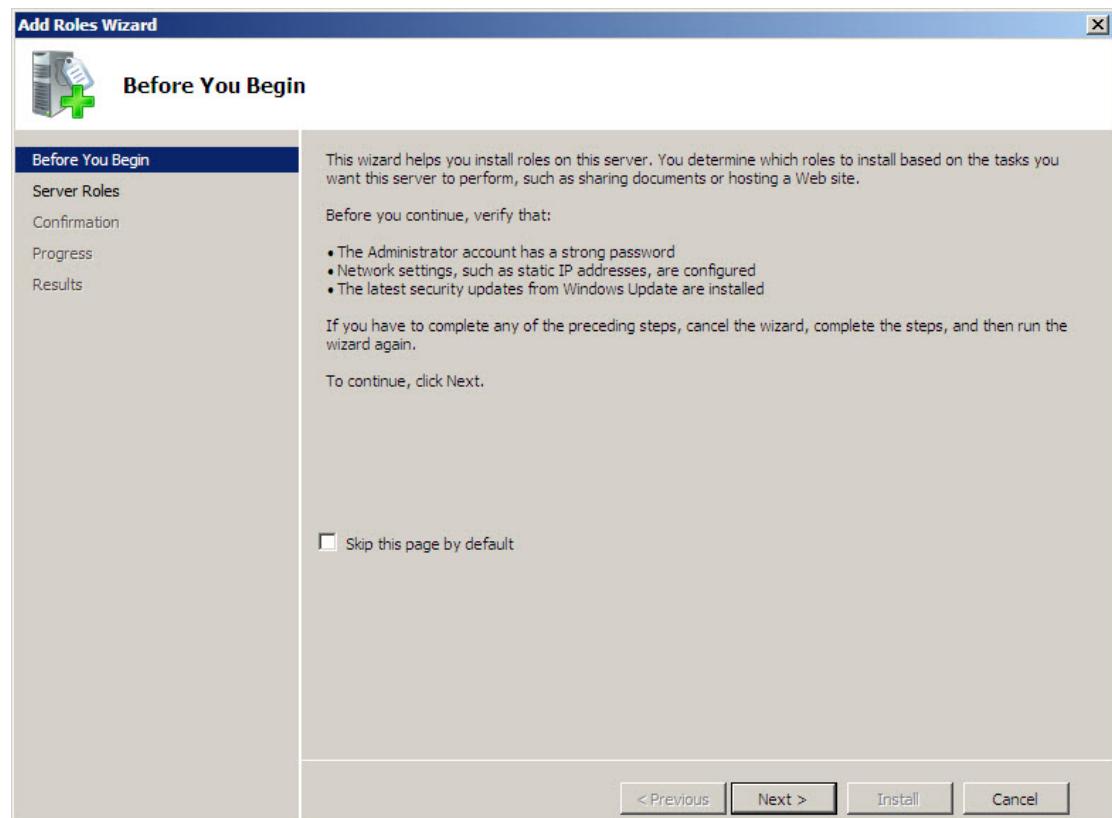
## Windows Server 2012

To install IIS 7 server roles on a Windows Server 2012 OS, follow these steps:

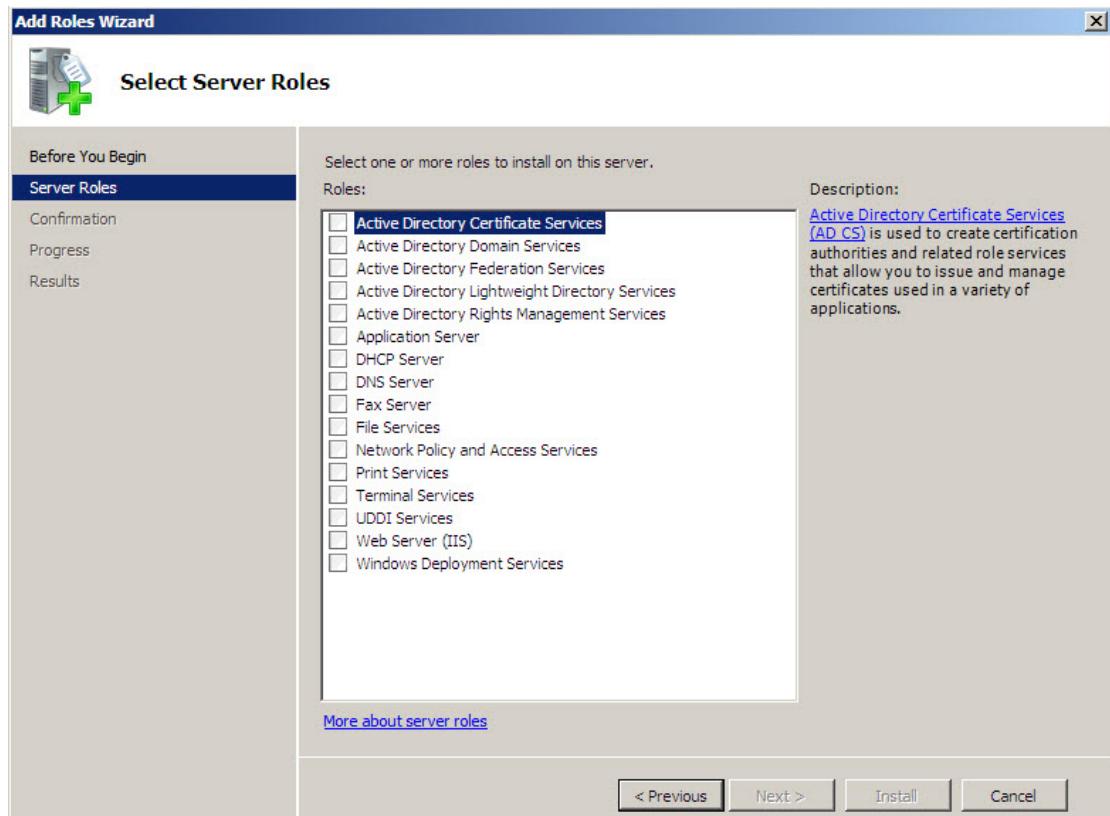
1. From the Start menu, select **All Programs**.
2. From the Administrative Tools menu, select **Server Manager**. The application displays the Server Manager window.



3. From the Roles section, select **Add Roles**. The Add Roles Wizard is displayed.



4. Select **Next**. The Select Server Roles window is displayed.



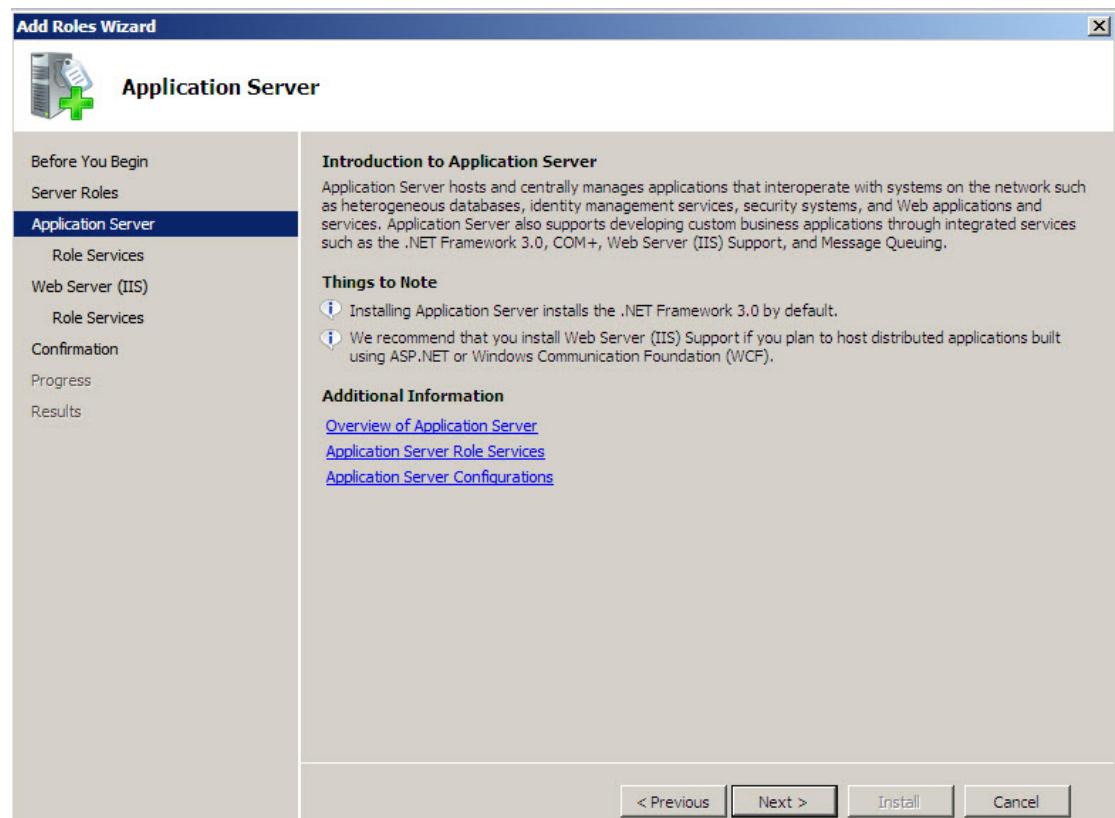
5. Select the corresponding check boxes of the following options:

- **Application Server**
- **Files Services**
- **Web Server (IIS)**

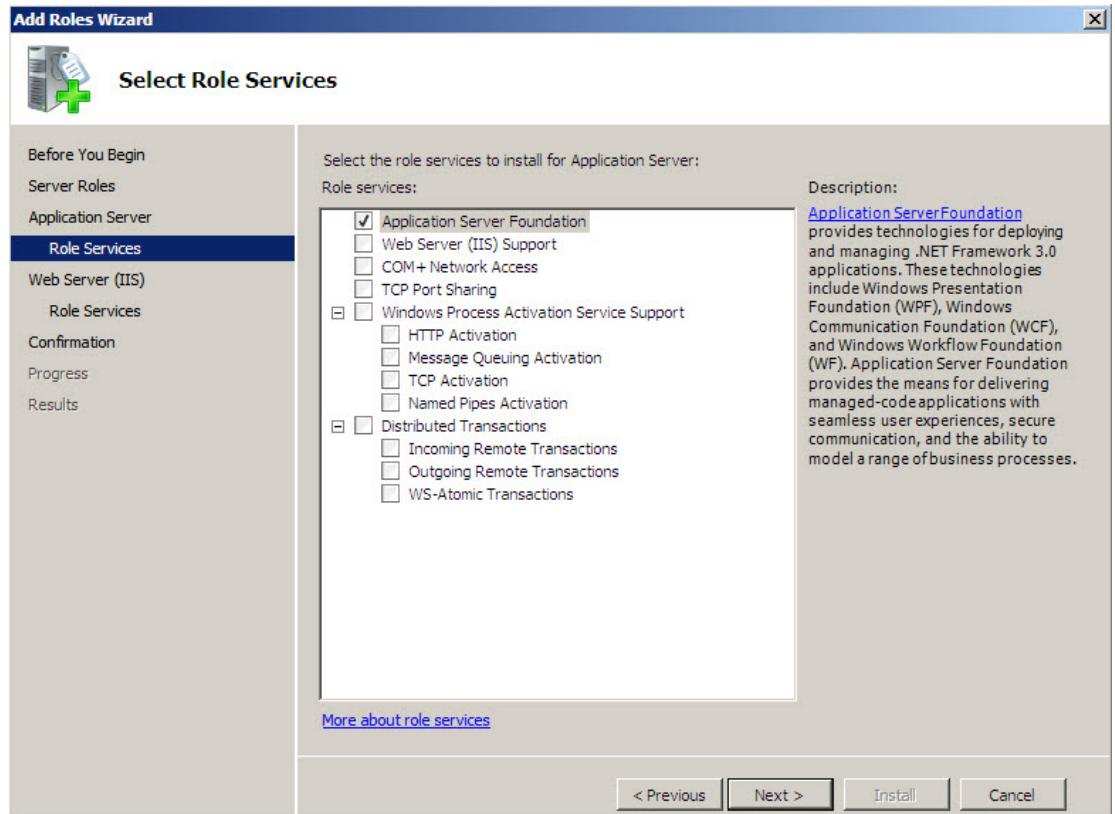


**Note:** Install additional features or roles based on the selected options if they are required.

6. Select **Next**. The Application Server window is displayed.



7. Select **Next**. The Select Roles Services window is displayed.



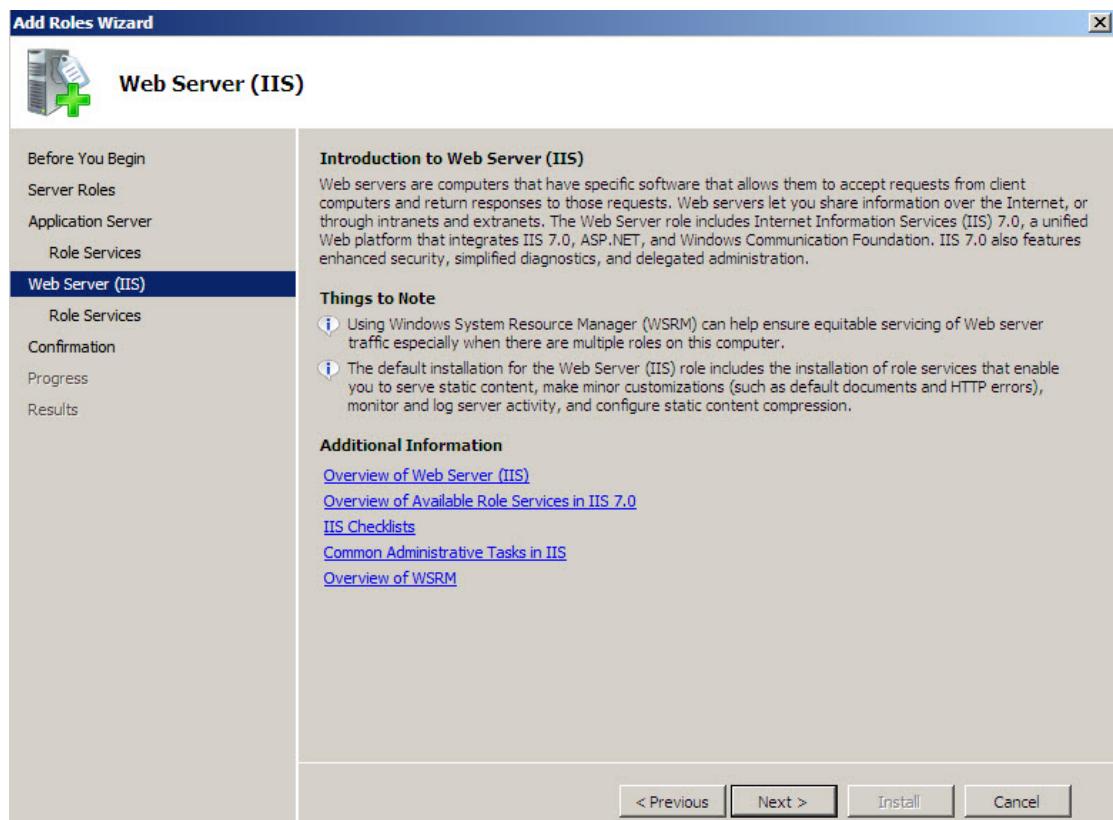
8. Select the corresponding check boxes of the following options:

- **.NET Framework**
- **Web Server (IIS) Support**

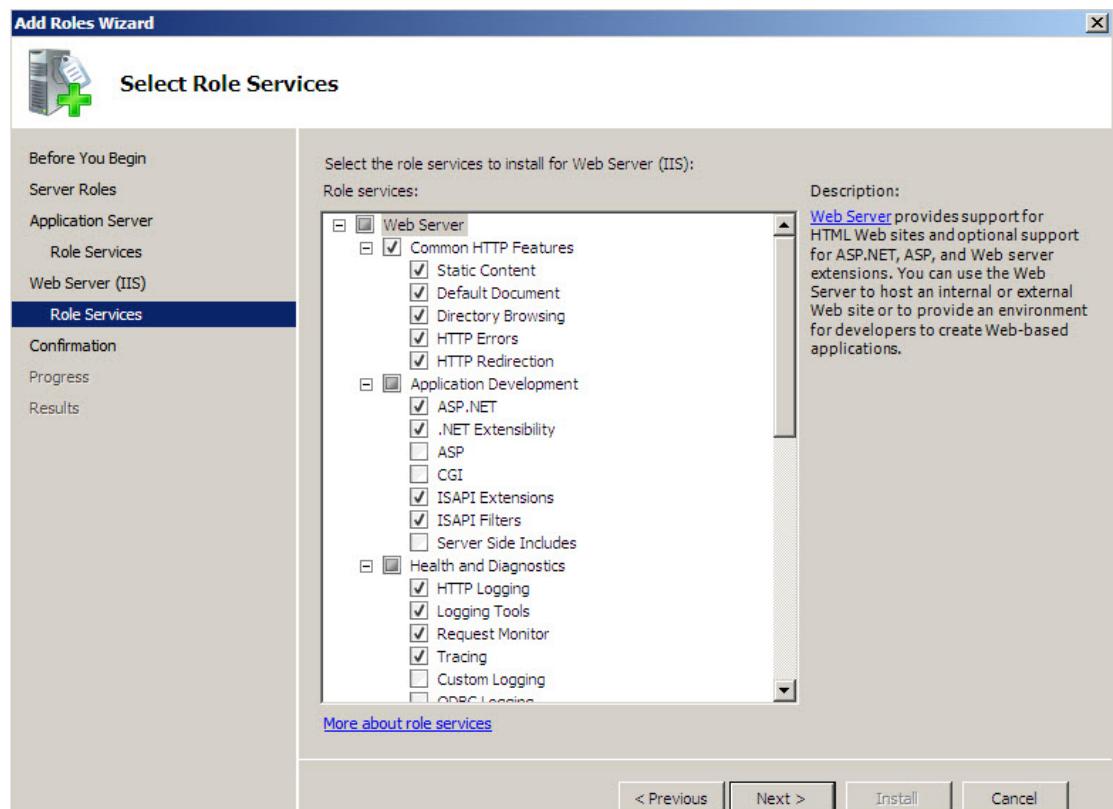


**Note:** Do not change the default values of other options. Install additional features or roles based on the selected options if they are required.

9. Select **Next**. The Web Server (IIS) window is displayed.



10. Select **Next**. The Select Role Services window is displayed.



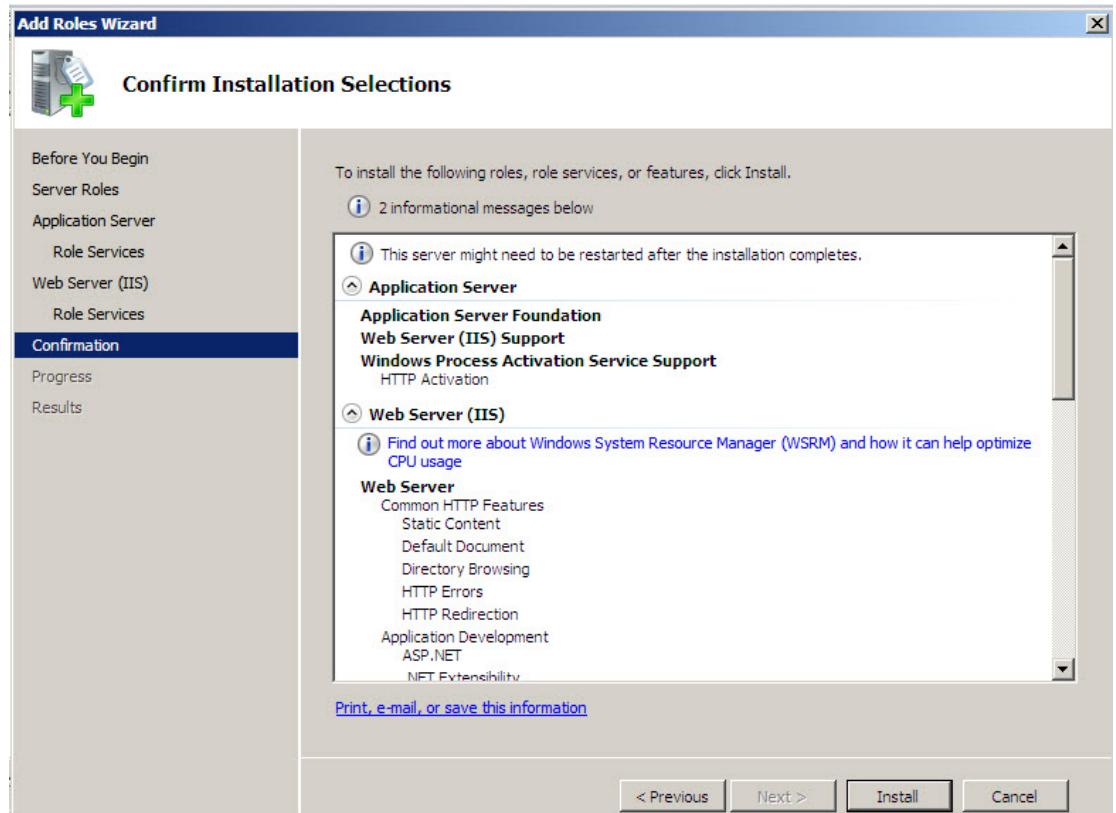
11. Under Application Development, select the corresponding check boxes of the following options:

- **ASP**
- **CGI**
- **Server Side Includes**

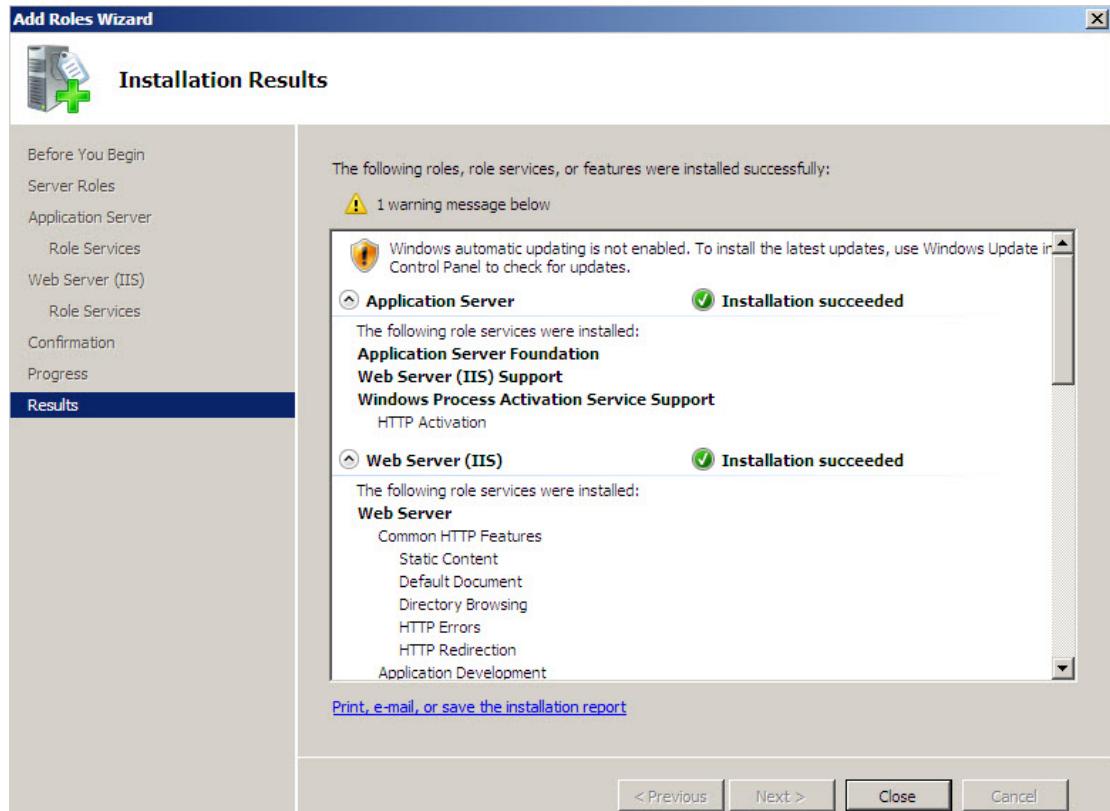


**Note:** Do not change the default values of other options. Install additional features or roles based on the selected options if they are required.

12. Select **Next**. The Confirm Installation Selections window is displayed.



13. Select **Install**. When the installation process is completed, the Installation Results window is displayed.



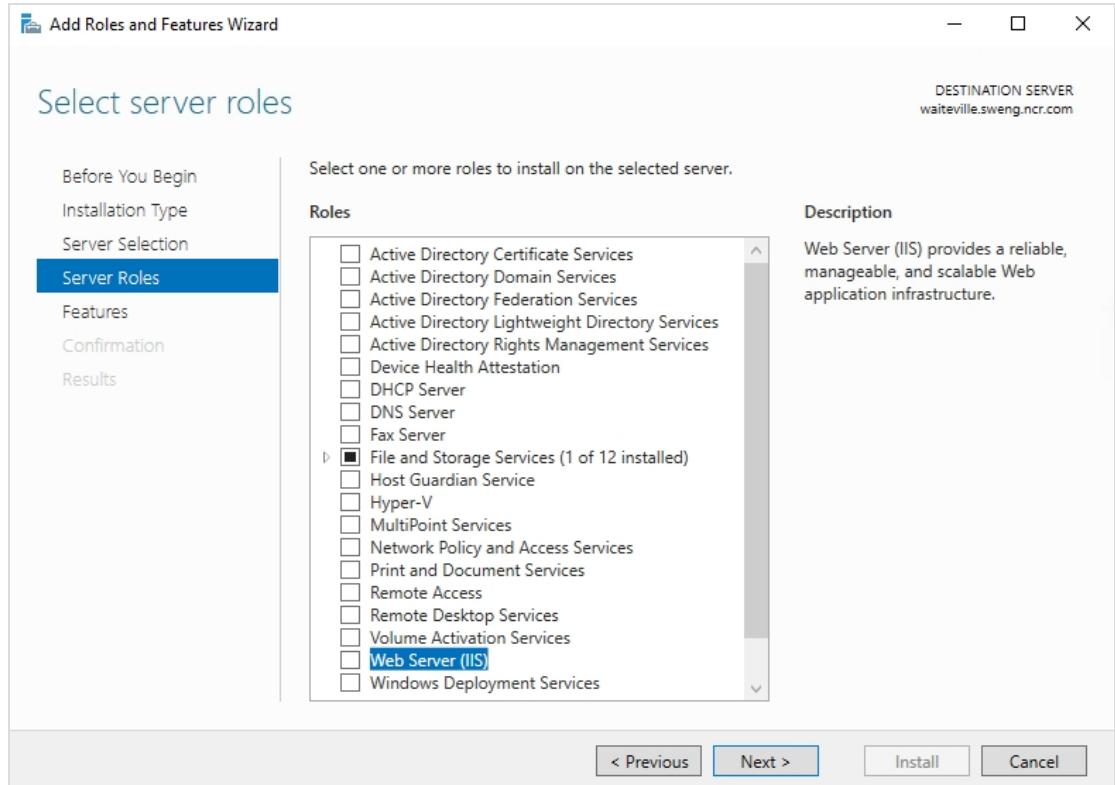
14. Select **Close**.
15. If necessary, restart the machine.

## Windows Server 2016

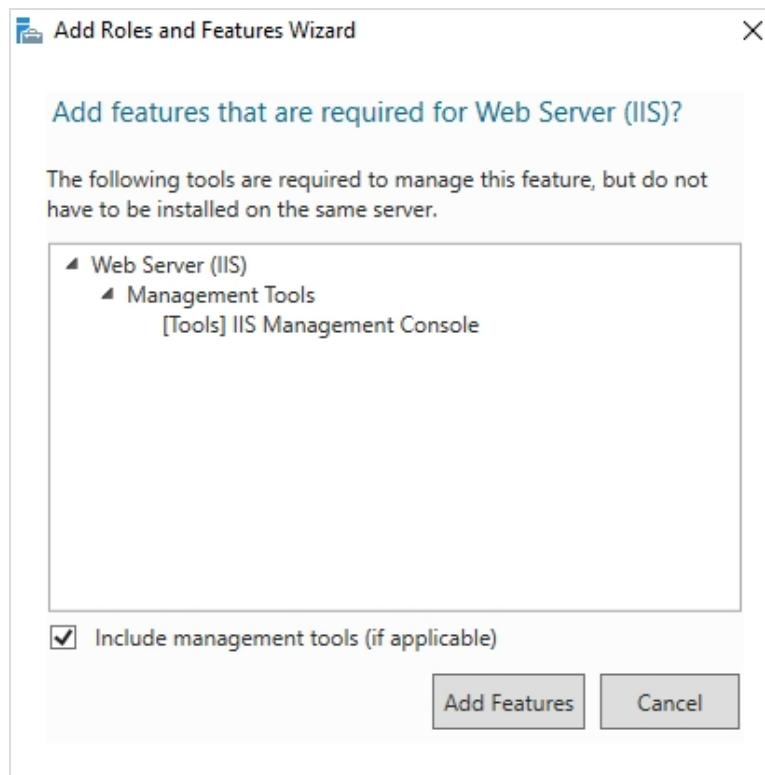
To install Web Server IIS 10 server roles on a Windows Server 2016 OS, follow these steps:

1. From the Windows taskbar, select **Start→Server Manager**. The application displays the Server Manager—Dashboard window.
2. In the Configure this local server pane, select **Add roles and features**. The application displays the Before You Begin screen.
3. Select **Next**. The application displays the Installation Type screen.
4. Select the **Role-based or feature-based installation** option, and then select **Next**. The application displays the Server Selection screen.

5. Select the **Select a server from the server pool** option, and then select **Next**. The application displays the Server Roles screen.

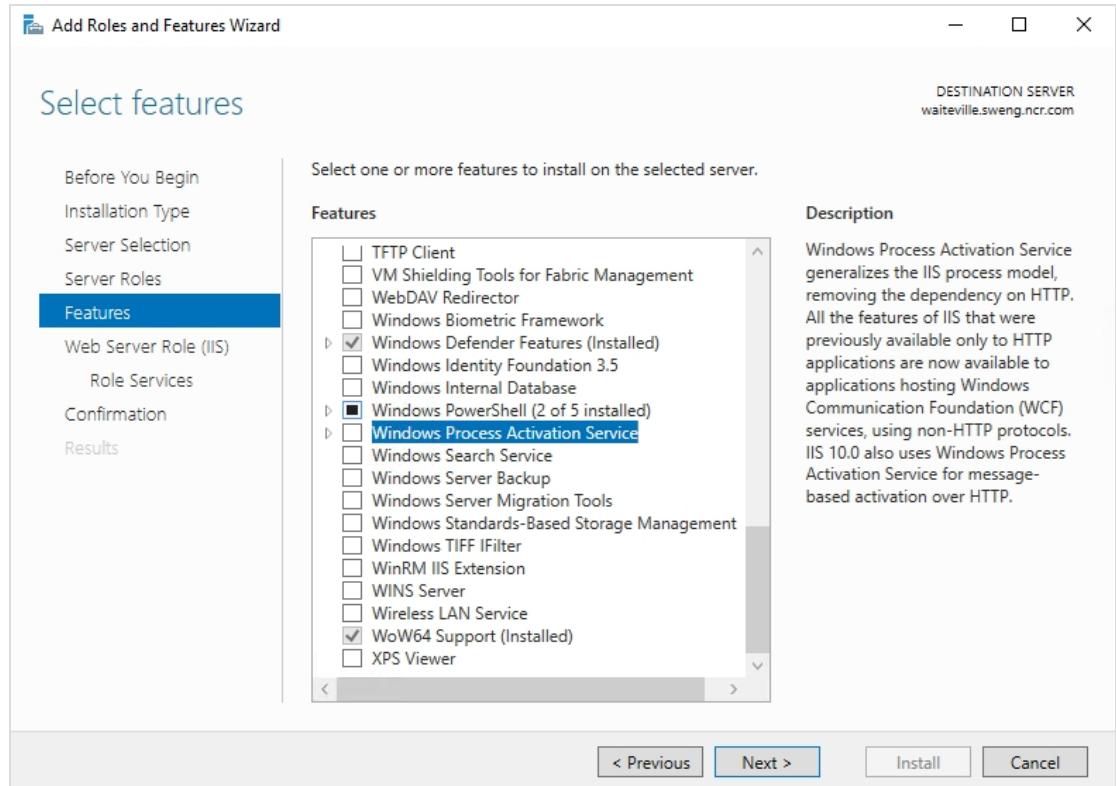


6. From the list of Roles, select the check box for the **Web Server (IIS)** option.



7. After selecting the check box for the Web Server (IIS) option, the application prompts for specific features to add. Select **Add Features**. The Server Roles screen is displayed.

8. Select **Next**. The Features screen is displayed.



9. Select the check box for the **Windows Process Activation Service** option.
10. Select **Next**. The Web Server Role (IIS) screen is displayed.
11. Select **Next**. The Role Services screen is displayed.

12. From the list of role services, validate that the following services are installed. If not yet installed, select the corresponding check boxes for the following options:

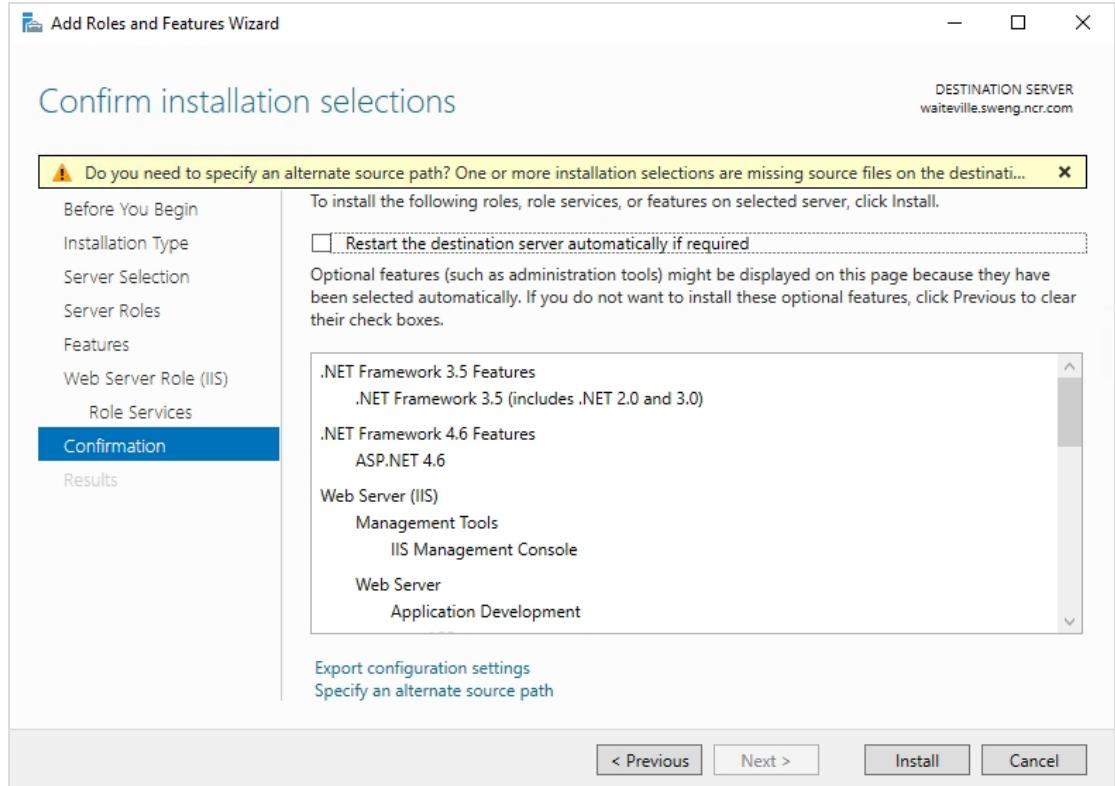
- Common HTTP Features
  - Default Document
  - Directory Browsing
  - HTTP Errors
  - Static Content
- Health and Diagnostics
  - HTTP Logging
- Performance
  - Static Content Compression
- Security
  - Request Filtering
  - IP and Domain Restrictions
  - Windows Authentication
- Application Development
  - .NET Extensibility 3.5
  - .NET Extensibility 4.6
  - ASP
  - ASP.NET 3.5
  - ASP.NET 4.6
  - CGI
  - ISAPI Extensions
  - ISAPI Filters



**Note:** For some services, the application displays a message about specific features to add. Select **Add Features**.

13. Select **Next**. The application displays the Confirmation screen.

 **Note:** Ensure that the operating system installation CD is inserted in the CD-ROM drive. Otherwise, the system displays a message for the user to provide an alternate source path.

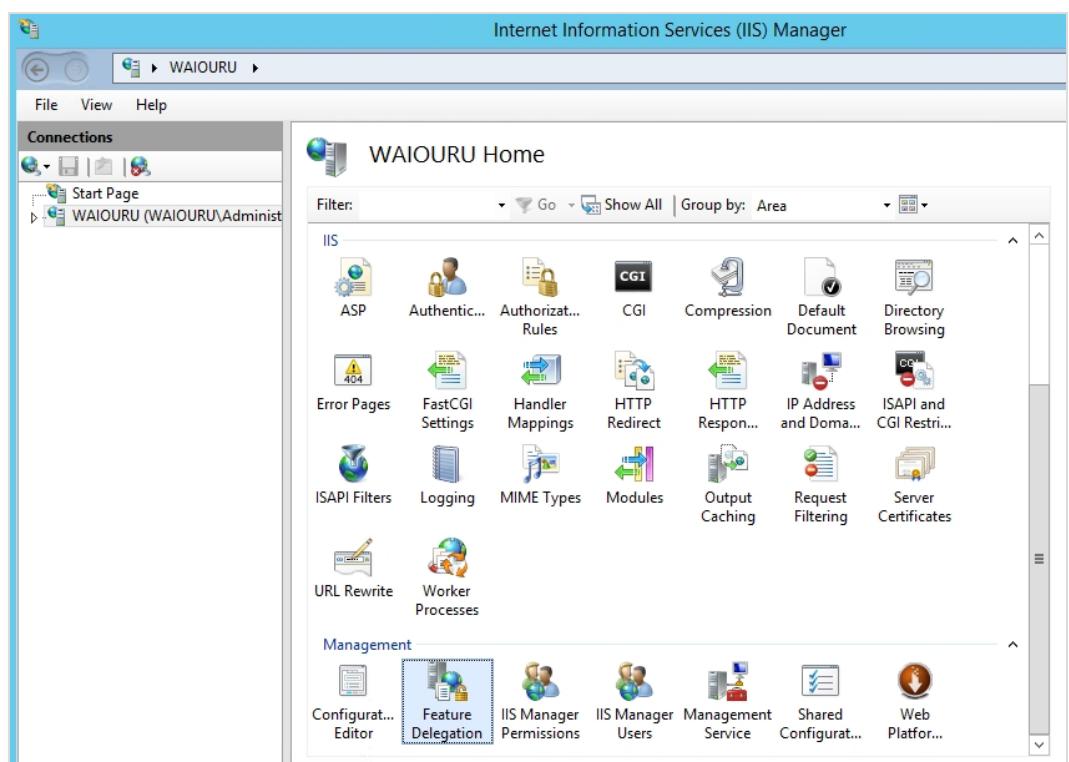


-  **Note:** If the system requires an alternate source path, do the following:
- Select the **Specify an alternate source path** link at the bottom of the screen.
  - If the operating system installation files source path is known, specify the source path.
14. Select **Install**. The application displays the Installation Progress screen. When the installation is completed, the application displays the Results screen.
  15. Select **Close** to close the installation wizard.
  16. If necessary, restart the machine.

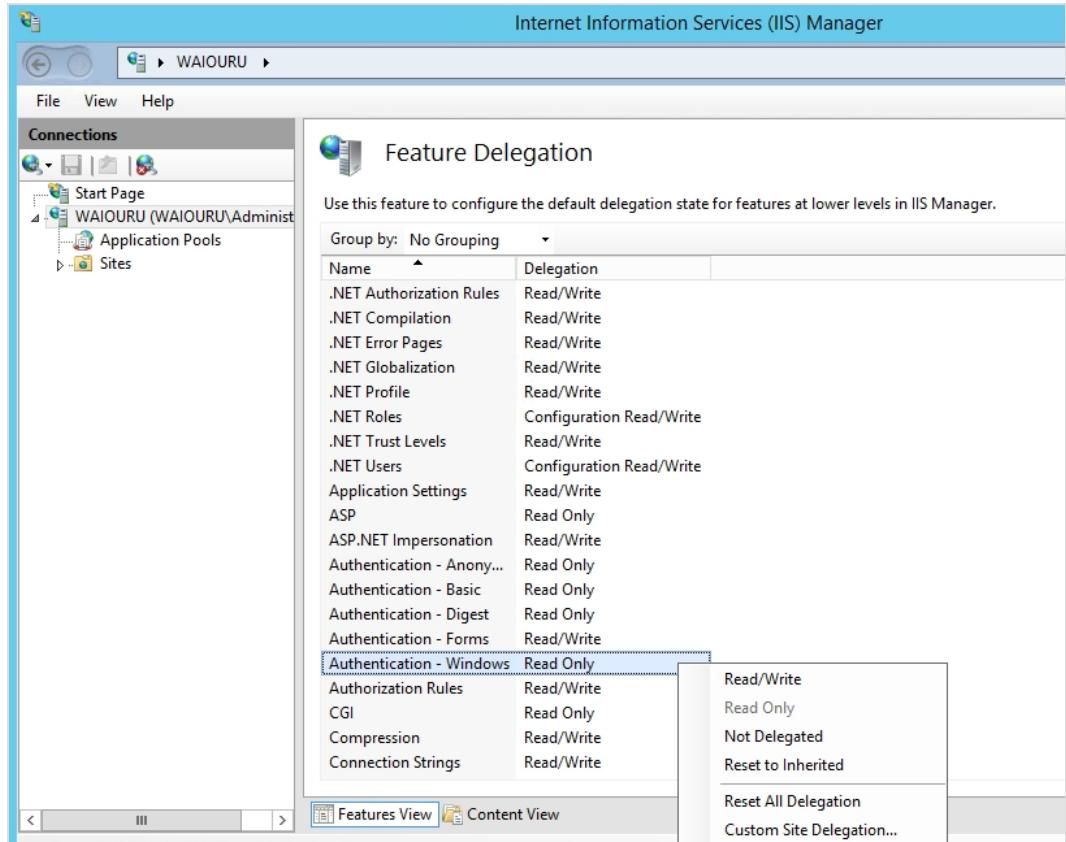
## Additional Configurations

To complete the IIS 10 installation, follow these steps:

1. Validate that the World Wide Web Services - HTTP in is added to the Windows Firewall rules. Do the following:
  - a. From the list of local Administrative Tools, select **Windows Firewall with Advanced Security**. The Windows Firewall with Advanced Security window is displayed.
  - b. Select **Inbound Rules**, and double-click **World Wide Web Services (HTTP Traffic-In)**. The Properties window is displayed.
  - c. Select the **Protocol and Ports** tab, and verify that it is using port 80.
  - d. Close the application.
2. Revisit the server roles, and validate that the **Windows Process Activation Service** role is installed. For more information, refer to [Windows Server 2016](#) on page 35.
3. Assign the Authentication - Windows feature with Read/Write permissions. Do the following:
  - a. From the list of local Administrative Tools, select **Internet Information Services (IIS) Manager**. The Internet Information Services (IIS) Manager window is displayed.
  - b. From the Connections pane, select the **server**.



- c. From the list of features, double-click **Feature Delegation**. The Feature Delegation screen is displayed.



- d. Right-click **Authentication - Windows**, and then select **Read/Write**.
4. From the list of local services, validate that the following services are *Running*:
  - Windows Process Activation Service
  - World Wide Web Publishing Service

# Installing the Logix application

**! Important:** NCR recommends to install the Logix application first before the other AMS components.

This publication describes the steps for installing the Logix application supporting the EPM application integration.

## ***Prerequisite***

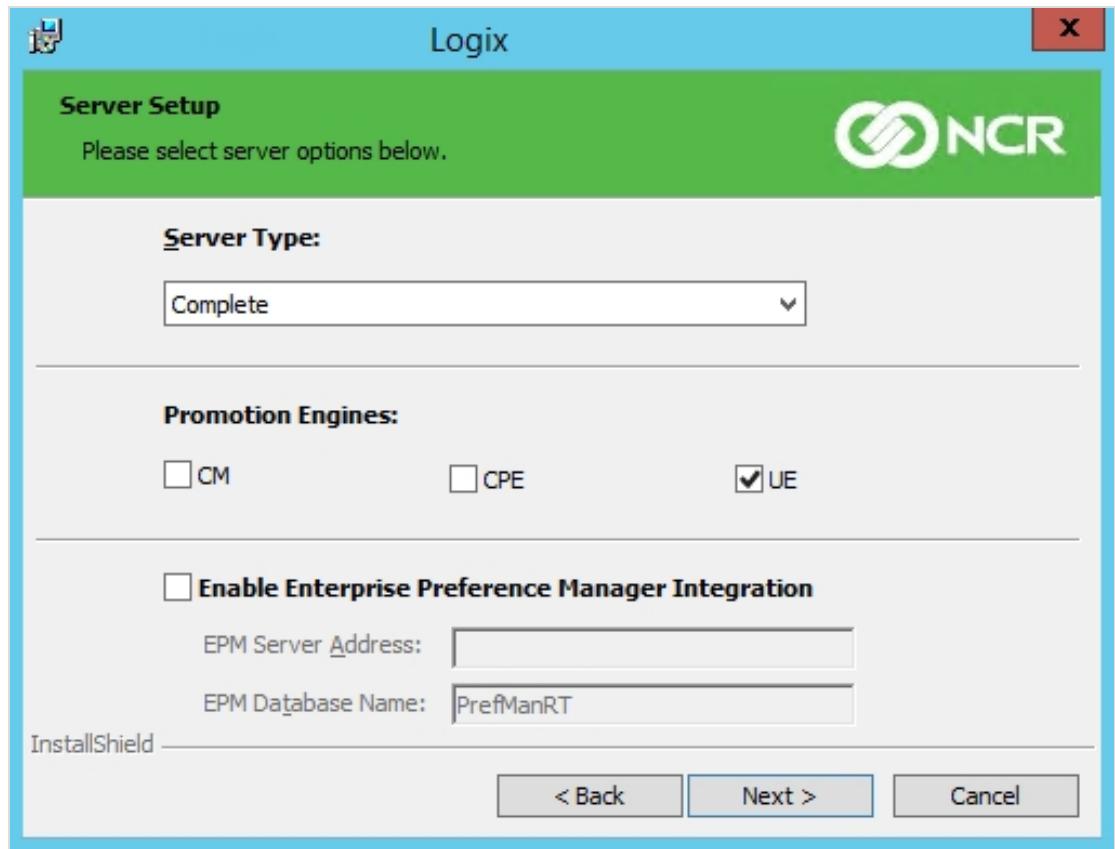
Before installing the Logix application, do the following:

- Ensure that you have Administrative privileges on the system where Logix will be installed.
- Run the installers as an Administrator. Doing this practice helps avoid issues related to registry updates and several custom actions execution, which are directly related to system changes.
- If upgrading release 6.x and previous release versions to release 7.0 and later versions, data migration is mandatory. For more information, refer to *Key Rotation and Data Migration* or consult with an NCR Representative.

To install the Logix application, follow these steps:

1. Double-click `Logix .msi` to run the installer. The Logix Installation Wizard is displayed.

2. Select **Next**. The application displays the Server Setup screen.



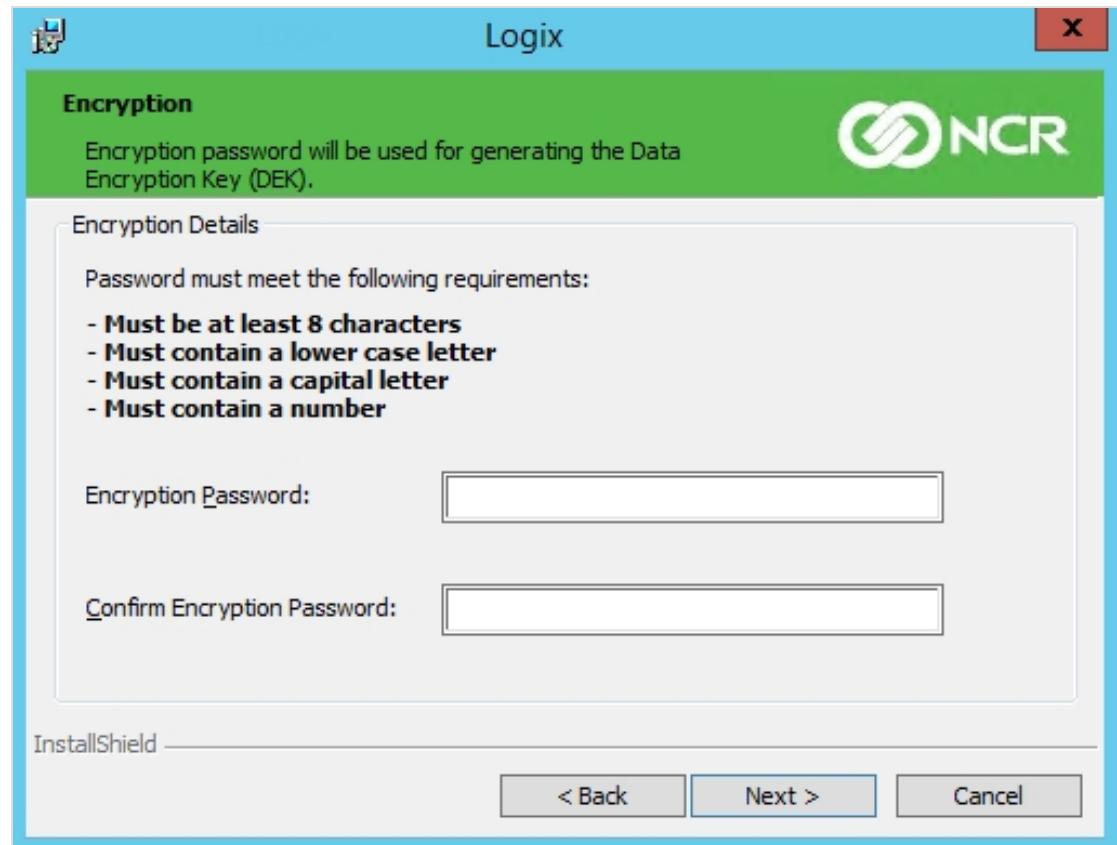
3. Do the following:

- Select a server type from the Server Type drop-down list:
  - **Complete**—installs everything on one server, or when users do not intend to use another server. Select this option when running everything on one server. As an example, the procedures in this section uses the Complete installation.
  - **Application Server**—creates the Logix Agents user, installs the Logix Agents, and starts the Logix Agents based on the configured settings.
  - **Database Server**—creates the required database logins, the required database users, and installs any or all four Logix databases based on the configured settings.
  - **Web Server**—sets up the Logix Web site and connectors.
- Select the check box for the promotion engine to install. For this release, **UE** and **CPE** are supported.



**Note:** If in case the EPM application is installed first and with the option for integrating with the Logix application enabled, the check box for the Enable Enterprise Preference Manager Integration option is preselected. Enter the EPM Server Address and the EPM Database Name on its corresponding fields. By default, the value of the EPM Database Name is *PrefManRT*.

4. Select **Next**. The application displays the Encryption screen.



5. Enter and then confirm the **Encryption Password**. This password is used to generate the Data Encryption Key (DEK).

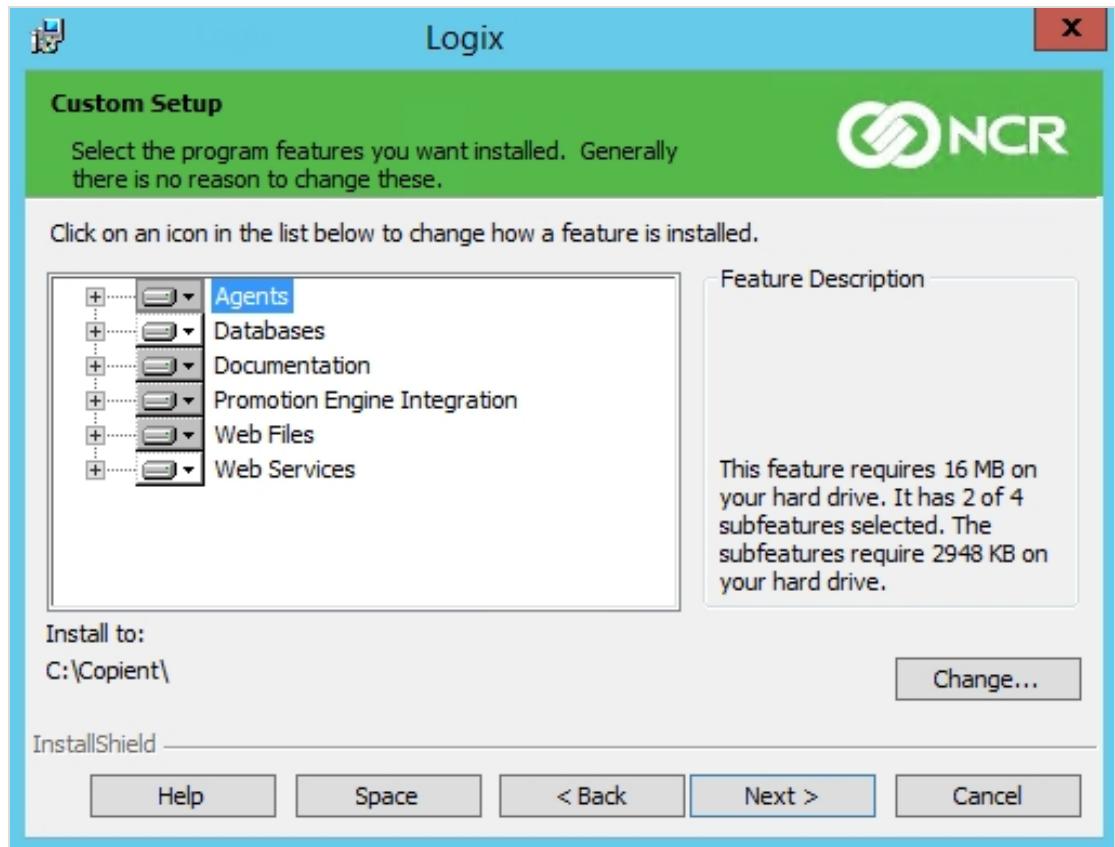
The encryption password must conform to the following requirements:

- Must be at least 8 characters in length
- Must contain a lowercase letter
- Must contain an uppercase letter
- Must contain a numeric character



**Note:** Use the same encryption password in the EPM and the Brokers installations.

6. Select **Next**. The application displays the Custom Setup screen.



**Note:** To install a program feature, select the feature, and then select the This feature will be installed on a local hard drive option.

The Custom Setup screen displays the program features that can be installed:

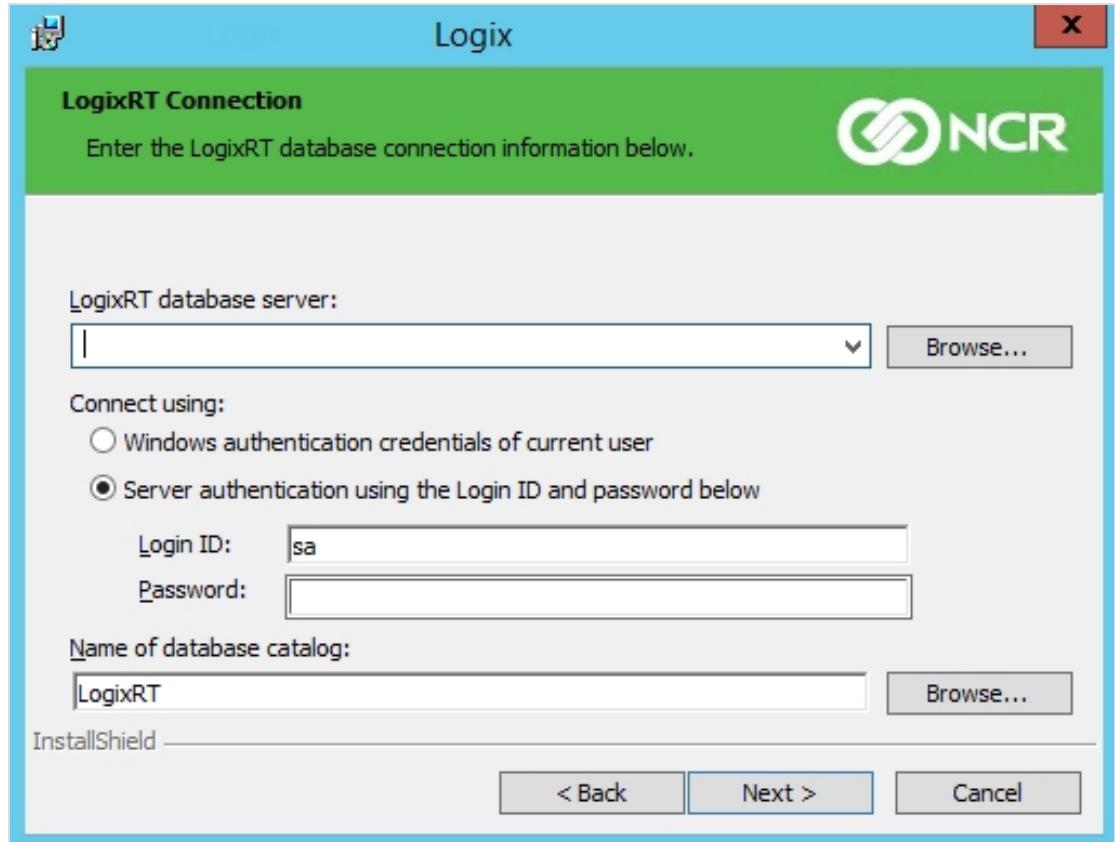
- Agents—installs the applications in the Web server that hosts Logix. These agents are Windows Services that perform specialized functions to support AMS. For more information on the agents that will be installed, refer to Appendix B of the *Logix User Guide for the Universal Engine* (BCC5-0000-5016).
- Databases—installs the Logix databases:
  - LogixRT
  - LogixXS
  - LogixWH
  - LogixEX
- Documentation—includes the following documentations in the installation:
  - Logix Install Document.pdf
  - Logix SDK.doc
  - NCR AMS - Excentus RM User Manual.pdf

- Points Update Web Service.pdf
- Process Points Programs Agent.pdf
- OCD Manual installation.pdf (if selected)
- Promotion Engine Integration—specifies that the selected promotion engines will be supported by Logix. If the selected Server Type is Complete and the Databases feature is selected, this program feature is selected for installation, by default.
- Web Files—creates the Web Uploads folder at the Logix installation directory. For example, if Logix is installed on the C drive, the C:/Copient/AgentFiles/WebUploads folder is created.
- Web Services—installs the following Web Services:
  - MessagingService—installs the messaging service that publishes messages to the RabbitMQ Queues and sends bulk emails for offline support purposes. After installing this feature, the MessagingService folder is created in the Logix installation directory. For example, C:/Copient/MessagingService/.
  - OCD—installs the Offer Collision Detection (OCD) feature. This feature determines if an offer collides with any existing offers that are either deployed or awaiting deployment. For more information about this feature, refer to the "Collision Reports" section in the *Logix User Guide for the Universal Engine* (BCC5-0000-5016).



**Note:** Select **Change** to change the Logix installation directory.

7. Select **Next** on the Custom Setup screen. The application displays the first screen from the series of Database Server connection screens.



8. Establish the Database Server connection details. Use the following table to provide the correct values for the database connection.

Database Server screen	Field name	Value
The installation wizard displays the Database Connection screens for each database: • LogixRT database server • LogixXS database server • LogixWH database server • LogixEX database server	[Database name] database server	From the drop-down list, select one of the following: <ul style="list-style-type: none"><li>• (local)—if the Database Server is installed on the local machine.</li><li>• If the Database Server is on another machine, select the Database Server from the drop-down list.</li></ul>
	Connect using: Windows authentication credentials of current user	Select this option if using Windows authentication to connect to the databases. <b>Note:</b> Ensure that the current user logged on to the server has SQL Administrator rights.
	Connect using: Server authentication using the Login ID and password below	
	Login ID	Enter the SQL user name that the NCR processes will use during execution. <b>Note:</b> Ensure that the DB user entered on the Login ID field has SQL Administrator rights.
	Password	Enter the password associated with the login id.
	Name of database catalog	Leave the default database names as displayed.



**Note:** By default, the installation wizard remembers the entries from the previous screens. If no changes are required, leave the entries as displayed, and then select Next in the succeeding Database Server connection screens. If it is necessary to update values, then enter the new values in the corresponding fields.

9. After entering all the details for the databases, select **Next**. The Agents User screen is displayed.



10. On this screen, do the following:

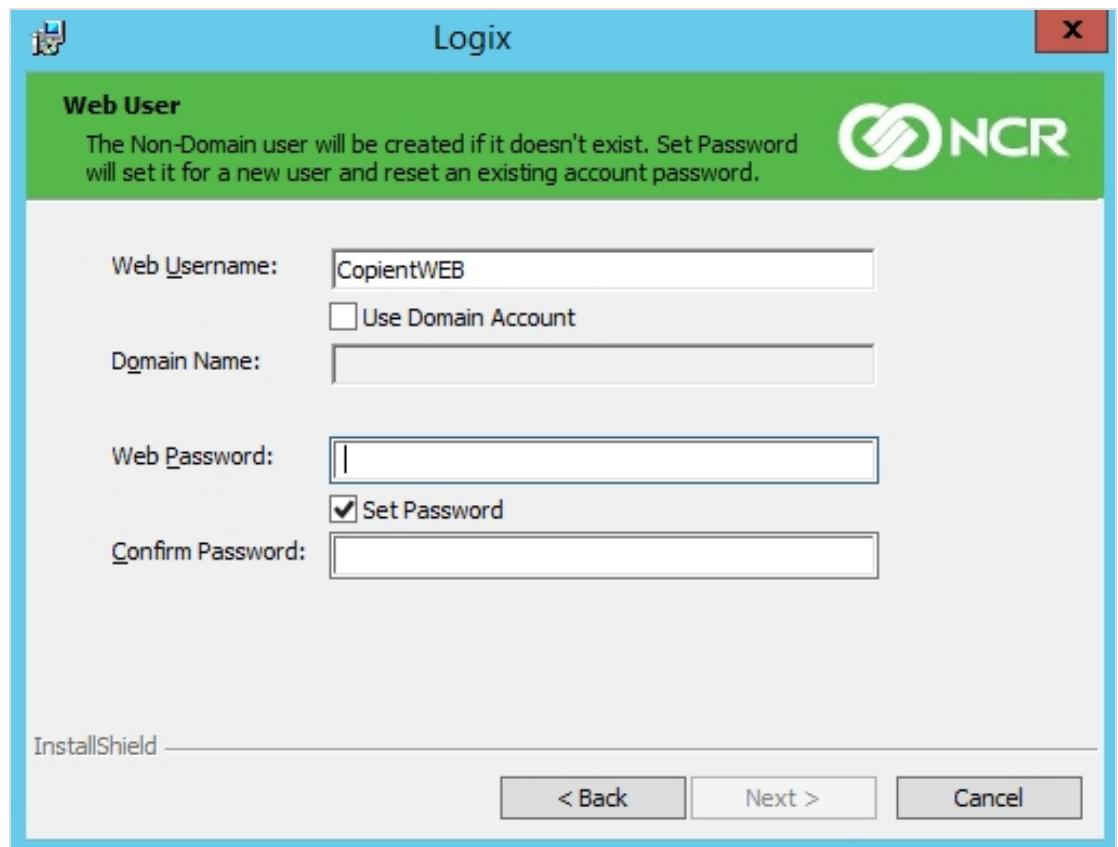
- If creating a new Agents User, enter a **Username** and then enter and confirm this user's password. Select the check box for the Set Password option to set this user's password.



**Note:** This username will be used during the EPM installation.

- If using a domain account, select the check box for the Use Domain Account option, and then enter the password for this account, and the **Domain** where this account belongs.
- Select the check box for one of the following options:
  - Autostart Agents on system start—sets the agents to automatically start when system is restarted.
  - Start Agents now—sets the agents to automatically start after the installation.

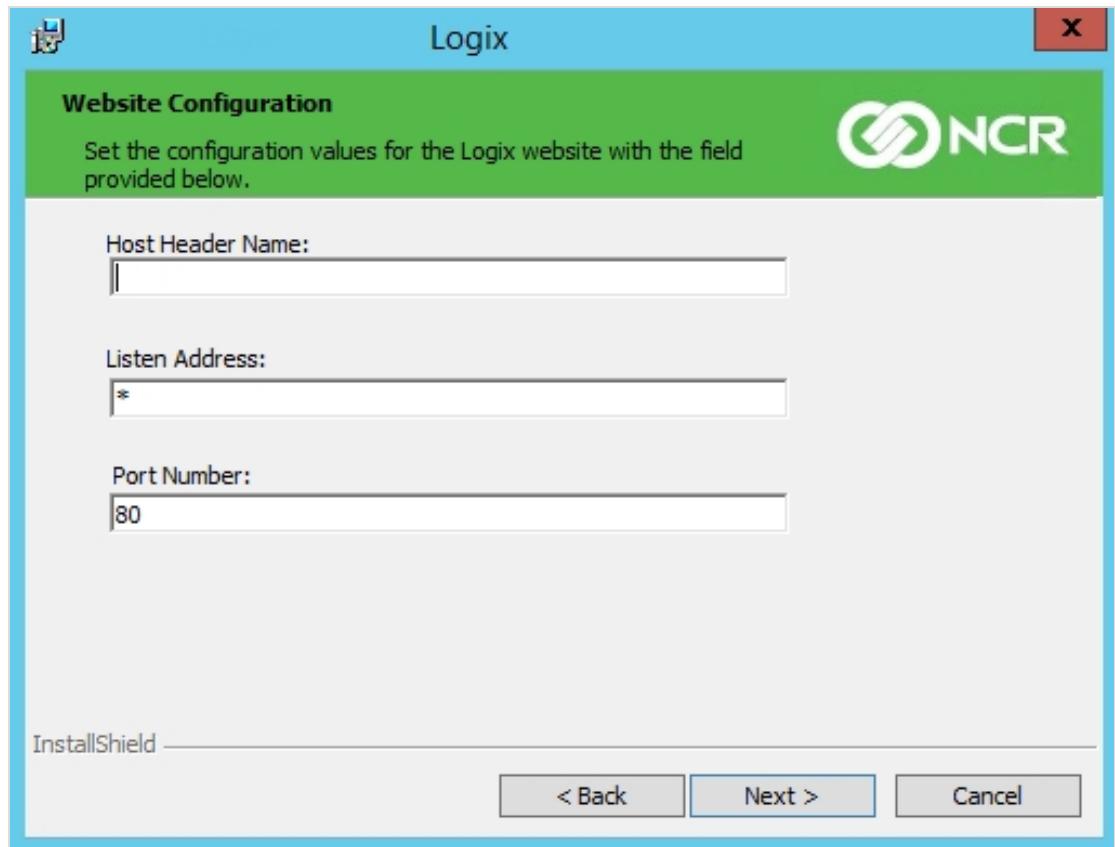
11. Select **Next**. The Web User screen is displayed.



12. On this screen, do the following:

- If creating a new Web User, enter a **Username** and then enter and confirm this user's password. Select the check box for the Set Password option to set this user's password.
- If using a domain account, select the check box for the Use Domain Account option, and then enter the password for this account, and the **Domain** where this account belongs.

13. Select **Next**. The Website Configuration screen is displayed.



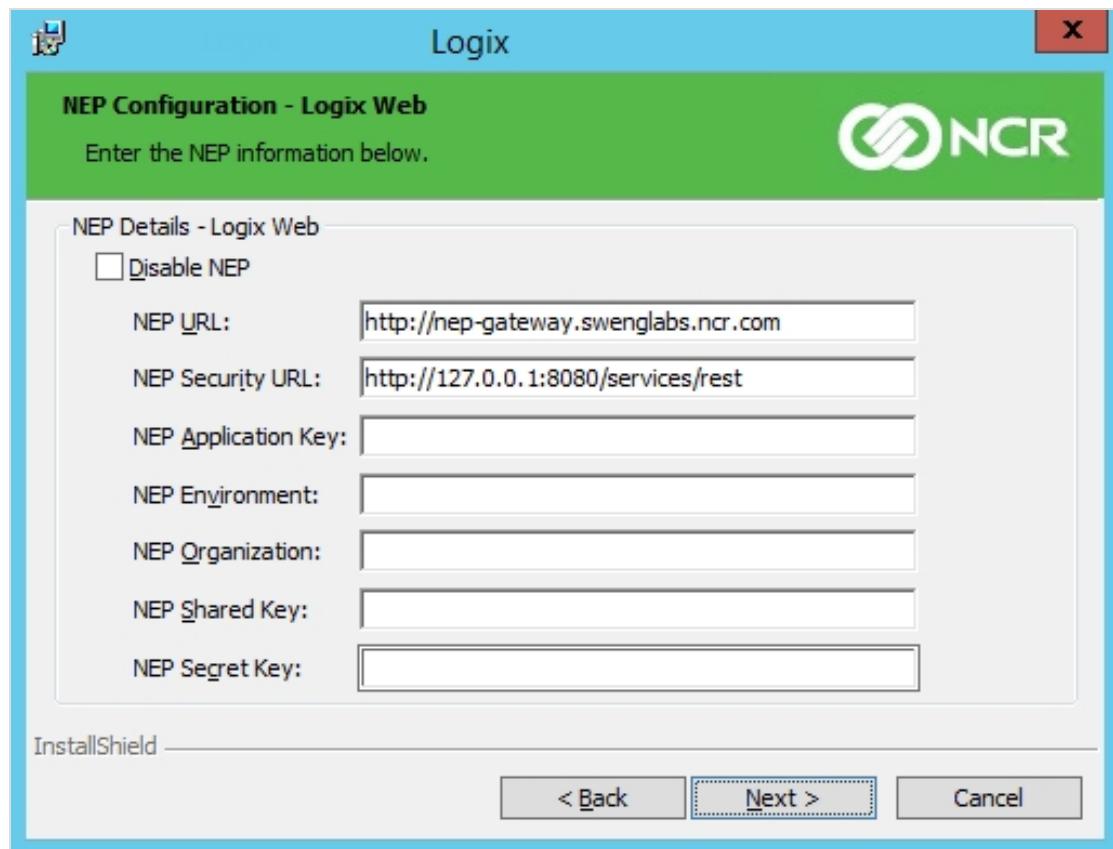
14. On this screen, do the following:

- Enter a host header name.
- Leave the default values for the Listen Address and Port Number as is. Change the default values only when necessary. If values must be changed for the environment, ensure that the modified values are correct.



**Note:** If Logix and EPM are installed on the same machine, enter a different port to use for the EPM website.

15. Select **Next**. The NEP Configuration - Logix Web screen is displayed.



**Note:** By default, NEP is enabled. To disable NEP security, select the check box for the Disable NEP option.

16. Enter the following information:

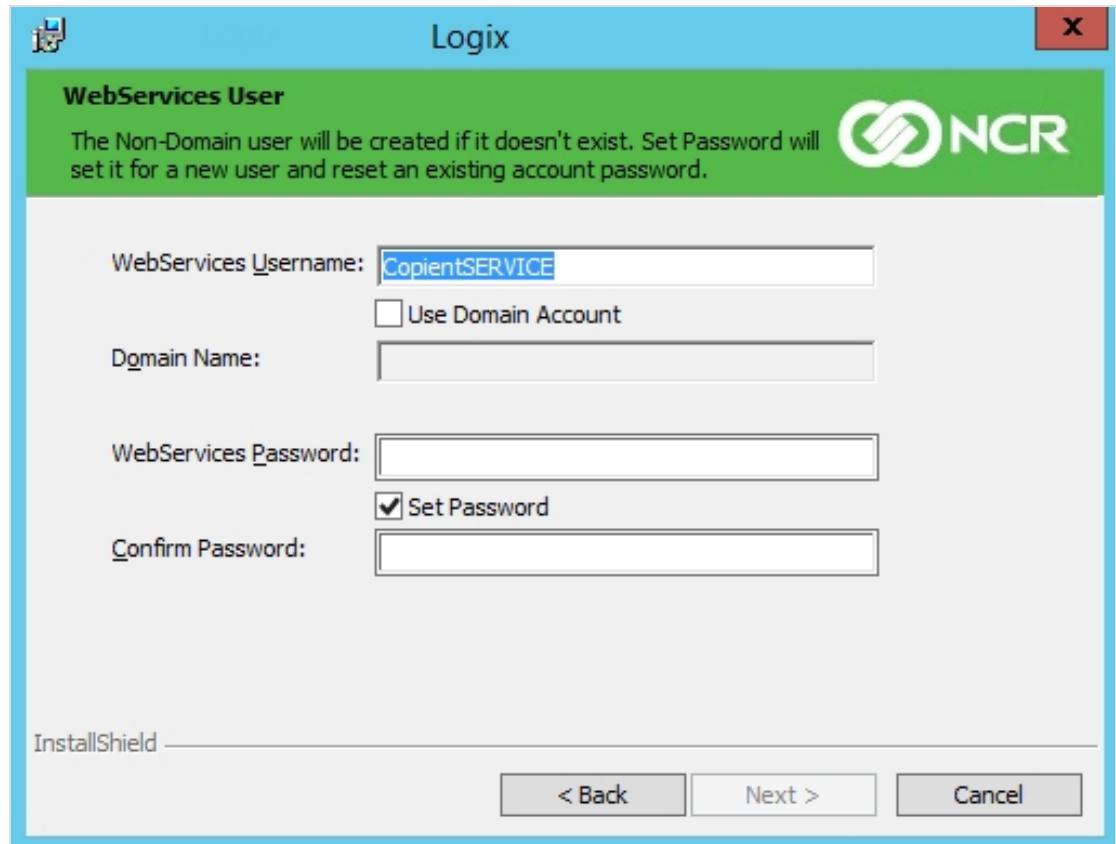
- NEP URL—specifies the URL of the NEP API gateway where Logix connects. The default value is *http://nep-gateway.swenglabs.ncr.com*.
- NEP Security URL—specifies the URL where NEP is deployed or configured. The URL follows this format: `http://<IP address>:<port number>/services/rest`

In the sample image, NEP is deployed and configured locally. If deployed and configured from another server, a sample URL would be:  
`http://153.71.15.168:8080/services/rest`

- NEP Application Key—specifies the application key of Logix.
- NEP Environment—specifies the environment where the HTTP requests should be applied.
- NEP Organization—specifies the name of the organization that HTTP requests should be applied.

- NEP Shared Key—specifies a unique identifier for both the user and the access key.
- NEP Secret Key—specifies the secured key. Each shared key must have a secret key.

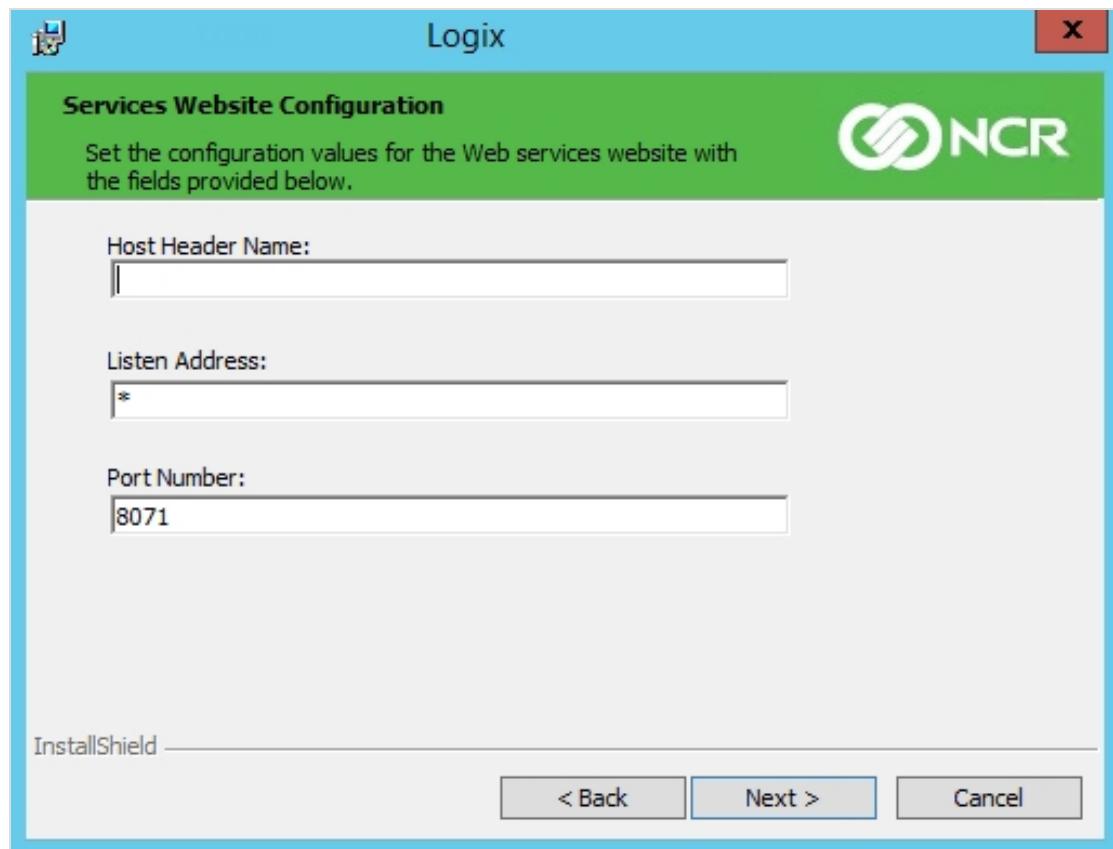
17. Select **Next**. The WebServices User screen is displayed.



18. On this screen, do the following:

- If creating a new Web Services User, enter a **Username** and then enter and confirm this user's password. Select the check box for the Set Password option to set this user's password.
- If using a domain account, select the check box for the Use Domain Account option, and then enter the password for this account, and the **Domain** where this account belongs.

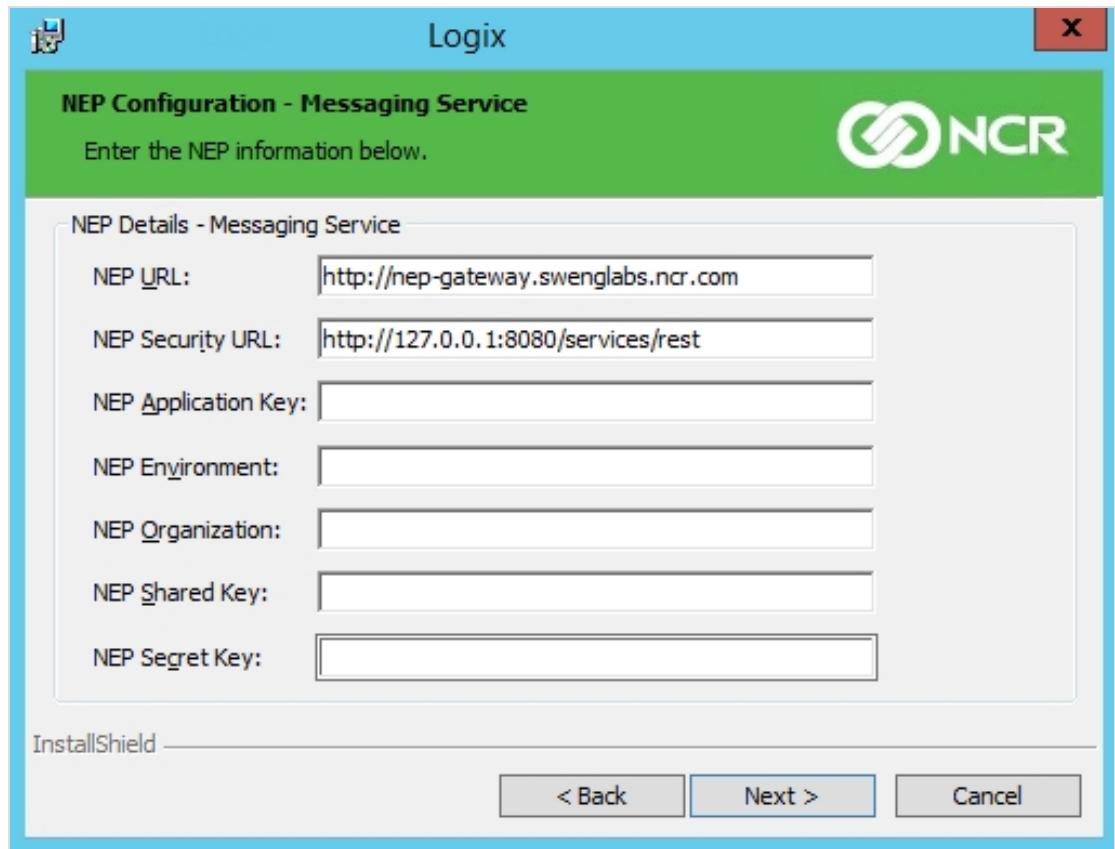
19. Select **Next**. The Services Website Configuration screen is displayed.



20. On this screen, do the following:

- Enter a host header name.
- Leave the default values for the Listen Address and Port Number as is. Change the default values only when necessary. If values must be changed for the environment, ensure that the modified values are correct.

21. Select **Next**. The NEP Configuration - Messaging Service screen is displayed.



22. Enter the following information:

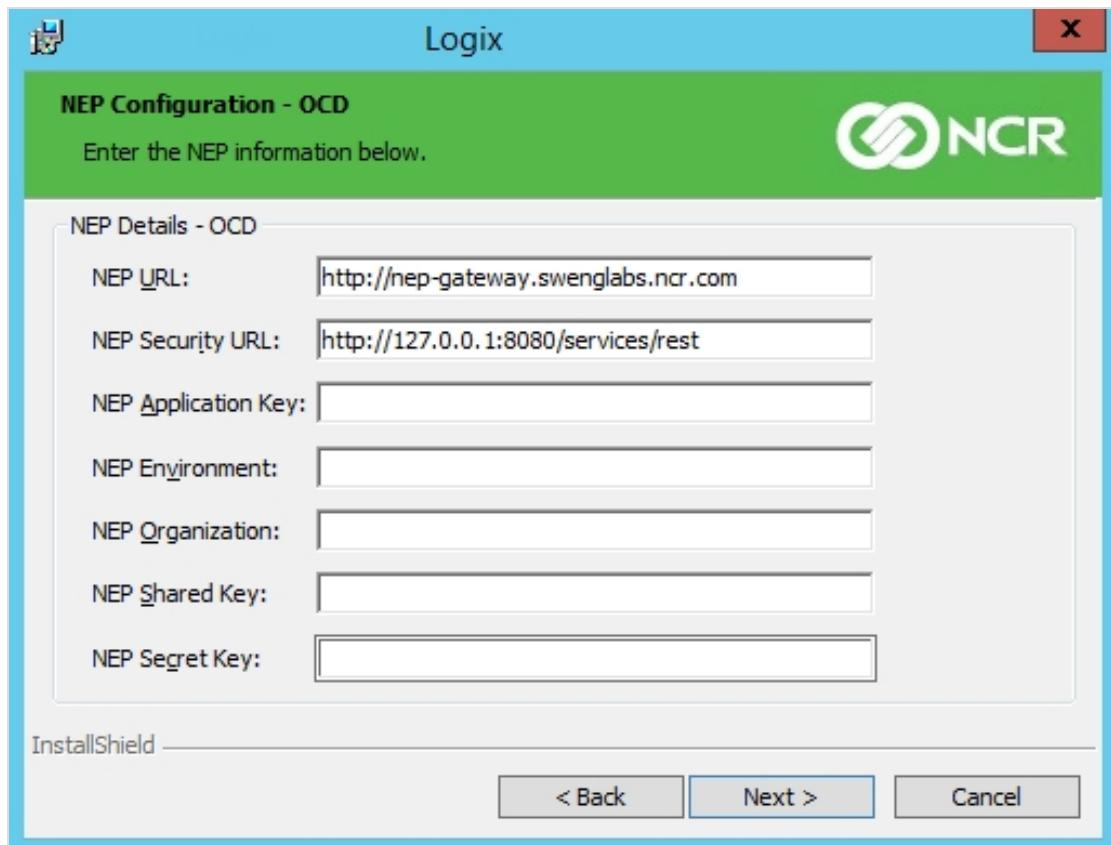
- NEP URL—specifies the URL of the NEP API gateway where Logix connects. The default value is *http://nep-gateway.swenglabs.ncr.com*.
- NEP Security URL—specifies the URL where NEP is deployed or configured. The URL follows this format: `http://<IP address>:<port number>/services/rest`

In the sample image, NEP is deployed and configured locally. If deployed and configured from another server, a sample URL would be:  
`http://153.71.15.168:8080/services/rest`

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- NEP Organization—specifies the name of the organization that HTTP requests should be applied.
- NEP Shared Key—specifies a unique identifier for both the user and the access key.

- NEP Secret Key—specifies the secured key. Each shared key must have a secret key.

23. Select **Next**. The NEP Configuration - OCD screen is displayed.



24. Enter the following information:

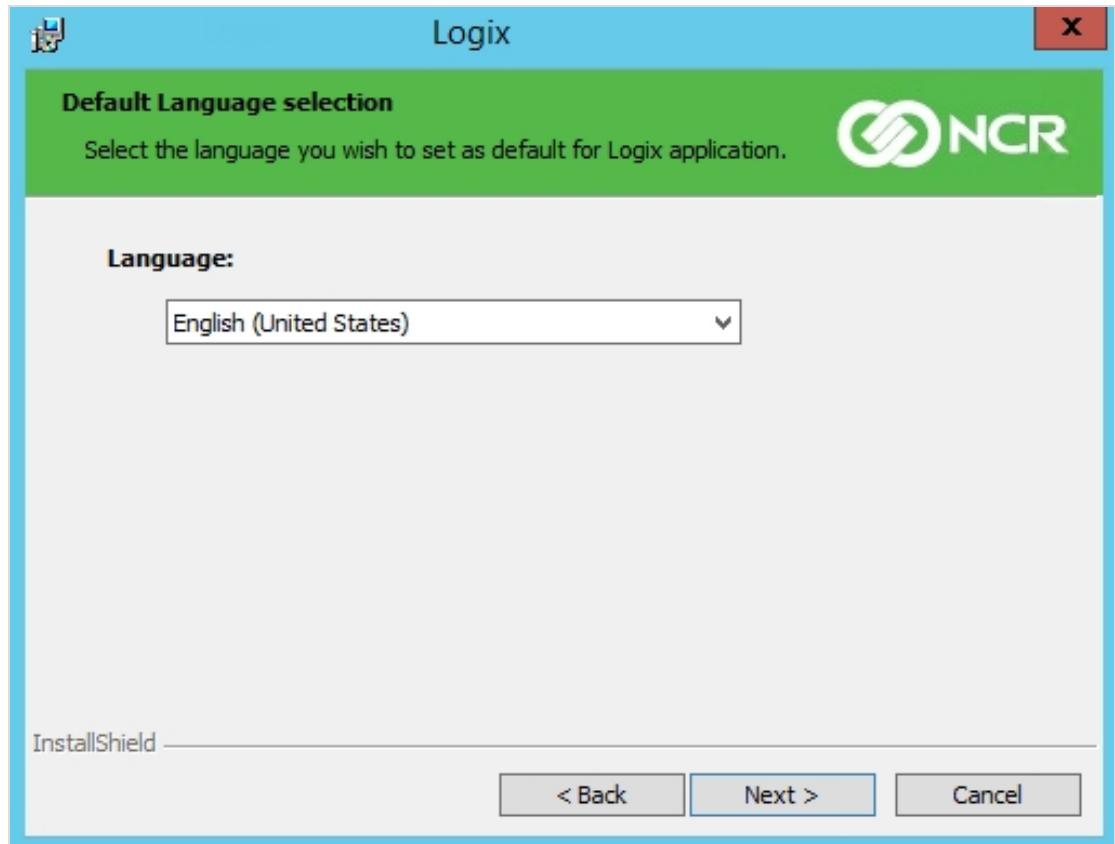
- NEP URL—specifies the URL of the NEP API gateway where Logix connects. The default value is *http://nep-gateway.swenglabs.ncr.com*.
- NEP Security URL—specifies the URL where NEP is deployed or configured. The URL follows this format: `http://<IP address>:<port number>/services/rest`

In the sample image, NEP is deployed and configured locally. If deployed and configured from another server, a sample URL would be:  
`http://153.71.15.168:8080/services/rest`

- NEP Application Key—specifies the application key of Logix.
- NEP Environment—specifies the environment where the HTTP requests should be applied.
- NEP Organization—specifies the name of the organization that HTTP requests should be applied.

- NEP Shared Key—specifies a unique identifier for both the user and the access key.
- NEP Secret Key—specifies the secured key. Each shared key must have a secret key.

25. Select **Next**. The Default Language selection screen is displayed.



26. Select a default language for Logix, and then select **Next**. The Ready to Install the Program screen is displayed.
27. Select **Install**. When the installation process is complete, the following window is displayed.
28. Select **Finish**. The application exits the installation wizard.



**Note:** If the *Show the Windows Installer log* check box was selected, the Windows Installer log is displayed after the wizard window is closed.

## Verifying the Logix installation

After installing the Logix application, do the following:

- Ensure that the Logix installation directory is shared with the Application user, Web user, and the SQL user account. To share this directory, refer to [Assigning User and Folder Permissions](#) on the next page.
- Log on to the Logix website to configure the Logix user interface. To log on to Logix, refer to [Logging on to Logix](#) on page 1.  
 **Note:** Use the server's IP address to open the Logix website using the following format: <localhost>/logix/login.aspx.
- Configure the Logix settings. For more information, refer to [Configuring the Logix settings](#) on page 73.
- Configure the Promotion Engine settings that were installed with Logix. For more information, refer to [Configuring the Promotion Engine settings](#) on page 78.
- If the language selected during installation is non-English, configure the language settings. For more information, refer to [Setting the regional language](#) on page 90.
- Optional: Retailers can use an http connection to access Logix. For more information, refer to [Binding the SSL Certificate](#) on page 96.

## Assigning User and Folder Permissions

To meet a security requirement, only specific users must have permissions to specific folders. When assigning user and folder permissions, NCR recommends to use the advanced sharing option. Using the advanced sharing option automatically assigns Read/Write permissions to the specified users on the basic file sharing option.

Some retailers may require additional users to have specific folder permissions to meet their needs. For more information, consult with an NCR Representative.

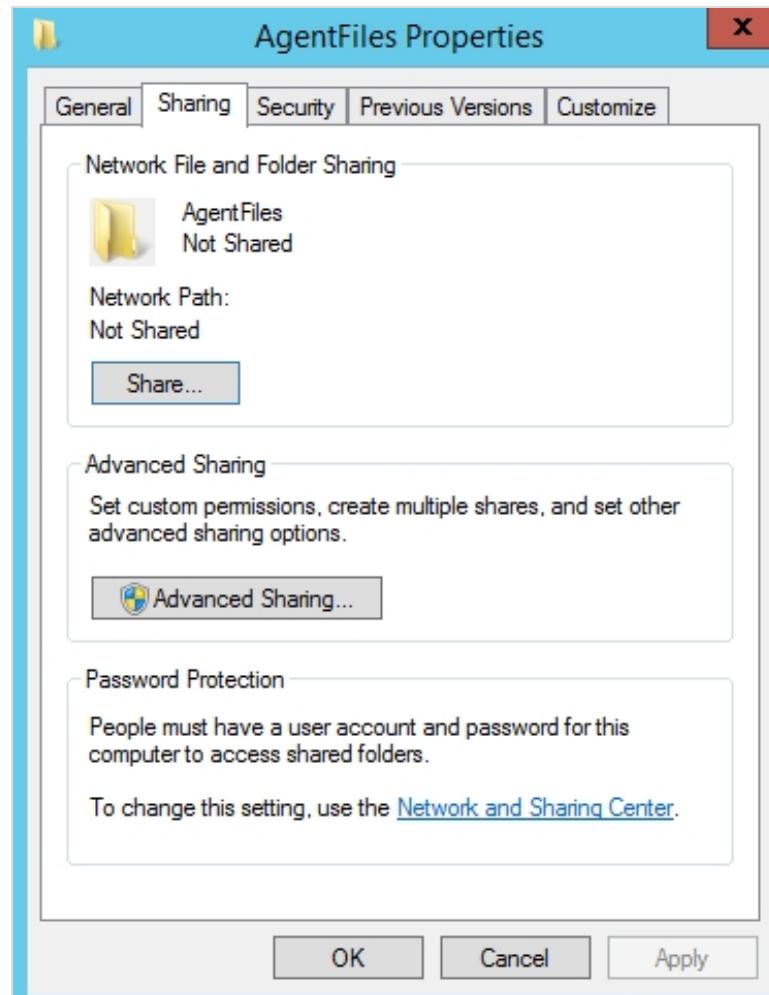
The following folders are used in this task.

Folder	Location
AgentFiles	C:\Copient\AgentFiles
WebUploads	C:\Copient\AgentFiles\WebUploads
Agents	C:\Copient\Agents

To grant folder permissions to specific users, follow these steps:

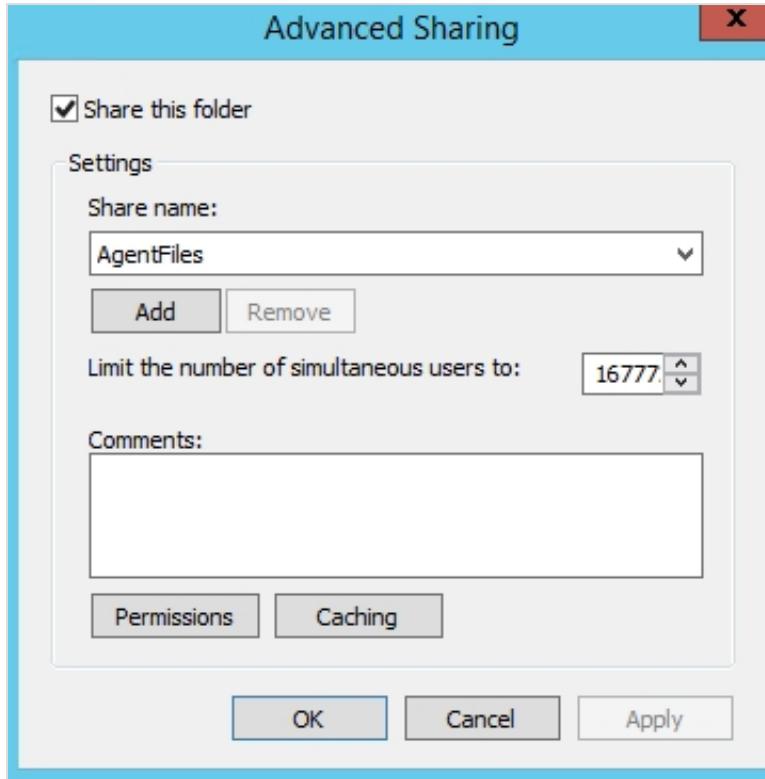
1. Right-click the folder, and then select **Properties**. The [folder name] Properties window is displayed.

**Example:** In the following example, the AgentFiles folder is selected.



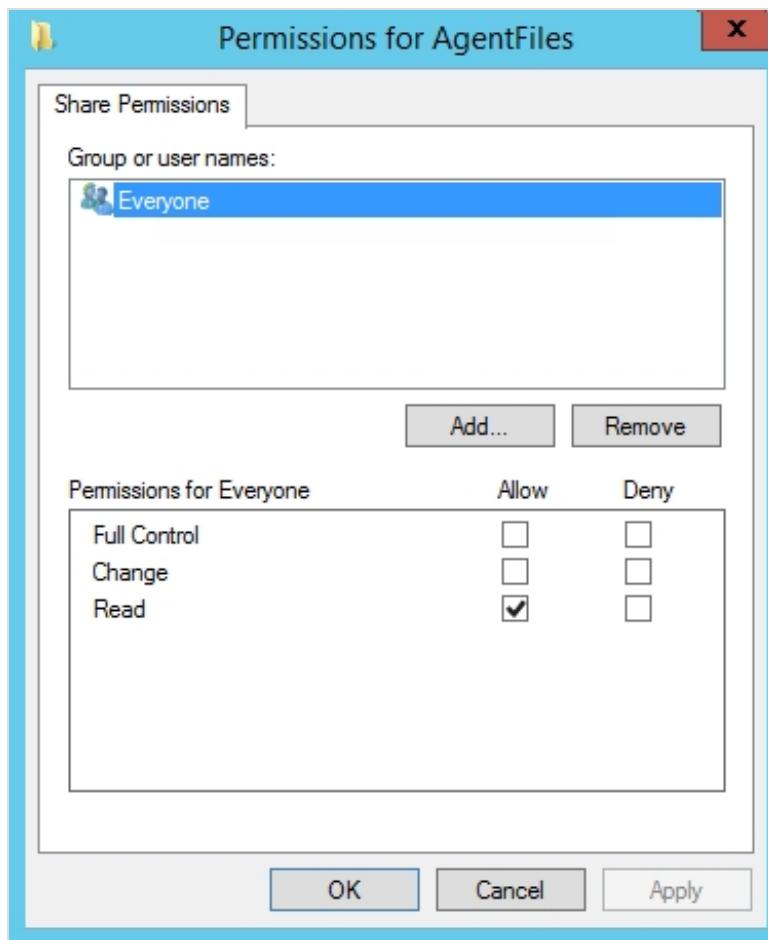
2. Select the **Sharing** tab. The Sharing screen is displayed.

3. On the Sharing screen, select **Advanced Sharing**. The Advanced Sharing window is displayed.

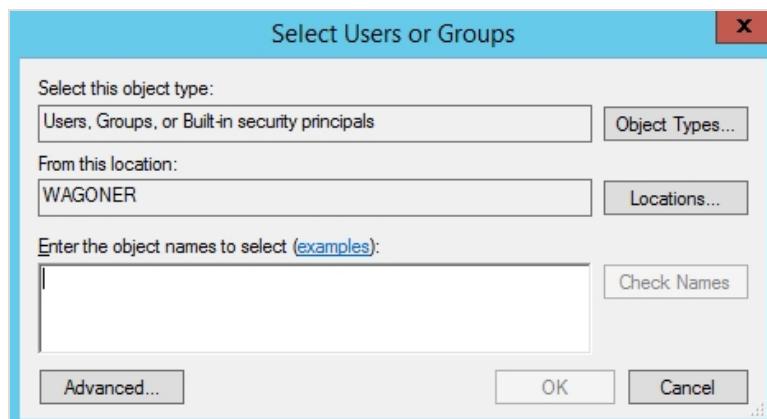


4. On this window, do the following:
  - Select the check box for the *Share this folder* option.
  - Leave the default value for the *Limit the number of simultaneous users to* option.

5. Select **Permissions**. The Permissions for [folder name] window is displayed.



6. By default, the Everyone group is assigned with Read permissions. For the Everyone group, do the following:
- Clear the check box for the Read permission.
  - On the Permissions for [folder name] window, select **Apply**. The Everyone group is then removed from the list of groups displayed on the window.
  - Select **Add**. The Select Users or Groups window is displayed.



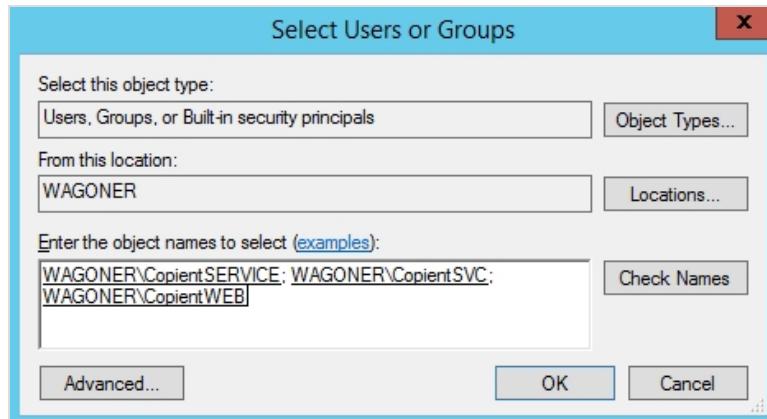
7. On the text box, enter the following users:

- **CopientSERVICE**
- **CopientSVC**
- **CopientWEB**

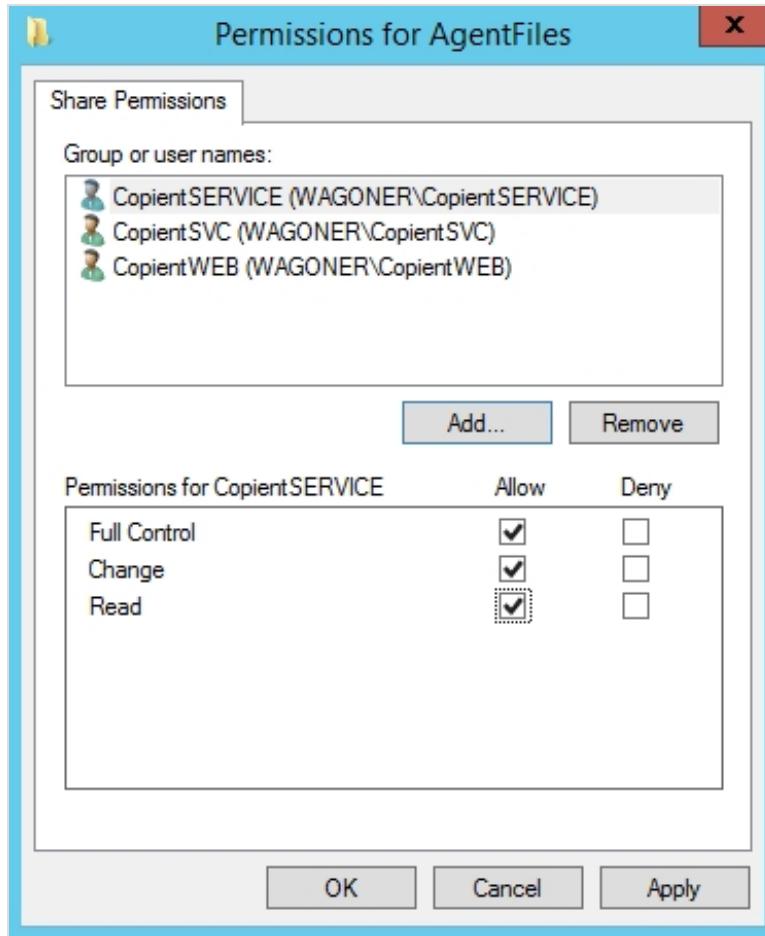


**Note:** After adding each user, select **Check Names** to ensure that the correct name format is added.

The window is then updated with the following details.

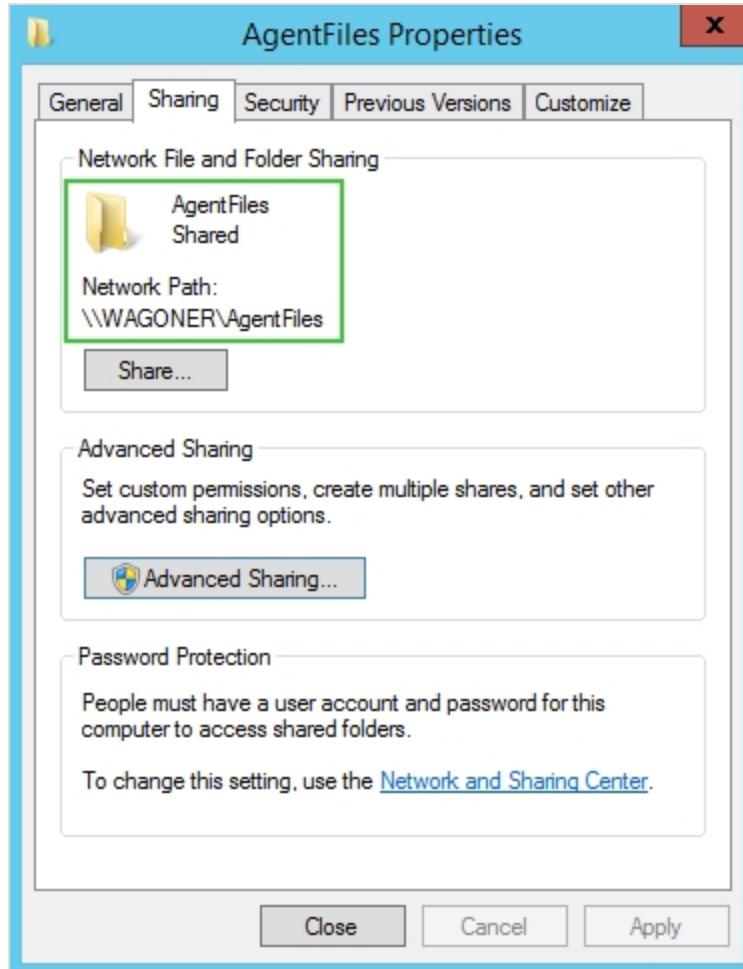


8. Select **OK** to close the window. The Permission for [folder name] window is redisplayed.
9. For each of the added users, select the check box for the Full Control permission. Selecting this check box automatically selects the check boxes for the Change and Read permissions.



10. On the Permissions for [folder name] window, select **Apply**, and then select **OK** to save changes. This window is then closed.

11. On the Advanced Sharing window, select **Apply**, and then select **OK** to save changes. The [folder name] Properties window is displayed with details about the network path.



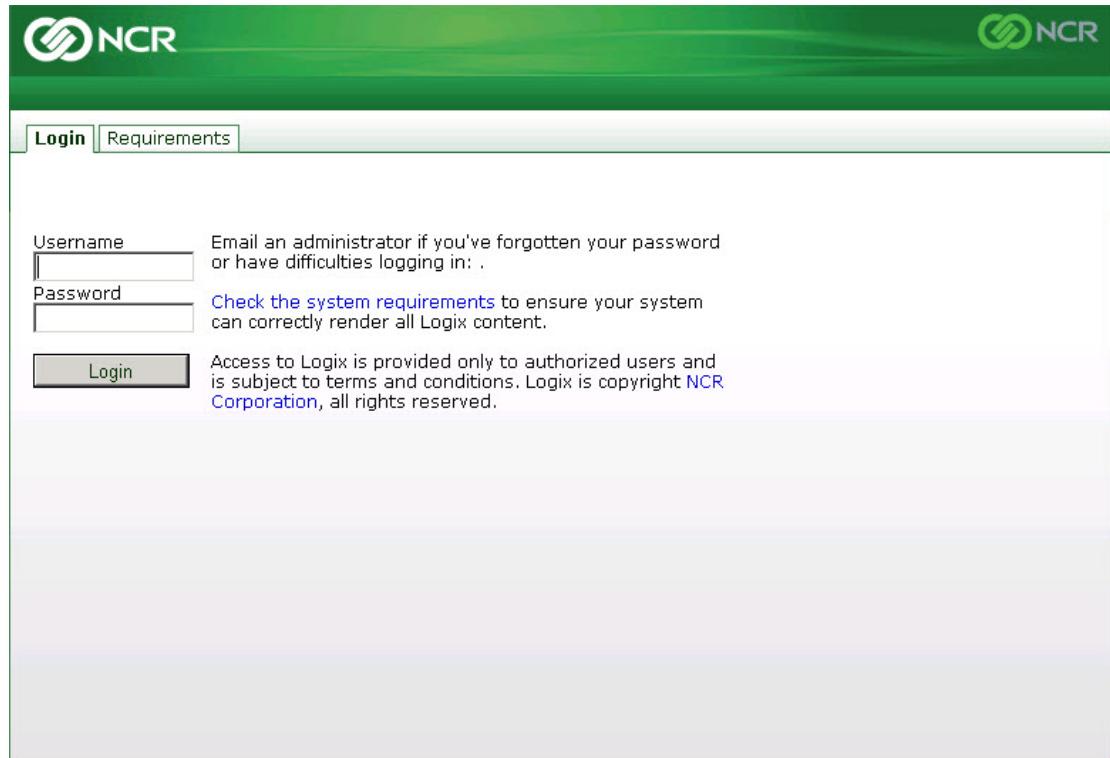
12. Select **Close** to close the window.
13. On the WebUploads and Agents folders, repeat steps 1-12 to apply changes.

## Logging on to Logix

Logging on to Logix requires a Username and a Password. If logging on to Logix for the first time, the user may need to change password. For more information, refer to [Logging on for the first time](#) on page 70.

To log on to Logix, follow these steps:

1. Go to the Logix website using the server's IP address. The Logix application Login page is displayed.



**Note:** Take note of the following:

- To open the Logix website, use the following format:  
`http://<localhost>/logix/login.aspx`.
  - To access Logix locally using `http://127.0.0.1/` or `http://<IP address>/` on the Internet Explorer browser, make sure to first add these URLs in the Internet Explorer Trusted Sites.
2. Enter the **Username** and the **Password**.

3. Select **Login**. If the logon is successful, the Status page is displayed by default.

The screenshot shows the NCR Logix 6.3 build 0 rev 112420 status page. The top navigation bar includes links for Logix, Offers, Customers, Products, Programs, Graphics, Locations, Admin, Status (which is selected), and About. The status bar at the top right shows the date and time: 06:11 | Friday, May 26, 2017 | Default User | Logout.

**System status:**

Item	Deployed	Total
Offers	New 0	0
Folders	New 0	0
Templates	New 0	0
Customer groups	New 1	2
Product groups	New 2	2
Points programs	New 0	0
Stored value programs	New 0	0
Graphics	New 0	0
Layouts	New 0	0
Stores	New 0	0
Store groups	New 0	0
Terminals	New 1	1
Users	New 1	1

**System notices:**

- Agents
- CPE IPL Needed
- UE IPL Needed
- CPE Store Health
- UE Server Health
- No offers have been modified since deployment.

**User status:**

Default User  
Administrator

**Edit your preferences/settings**

**Your recent activity**

Logged in	Date 5/26/2017
-----------	----------------

**Search:**

Offers

**Events:**

Today	Date
Nothing	

Coming up	Date
Nothing	

Recent activity	Date
Nothing	

If the logon is unsuccessful due to an expired password, the following message is displayed.

The screenshot shows a web-based application interface with a green header bar featuring the NCR logo. Below the header is a white content area. In the center of the content area is a form titled "Change Password". A red horizontal bar at the top of the form contains the text "Please change your password as it has expired". Below this bar are three input fields: "Current Password", "New Password", and "Confirm New Password". At the bottom of the form are two buttons: "ChangePassword" and "Clear".

Enter a new and valid password to log on successfully. This password is then automatically saved in the user's account settings.



**Note:** For information on using Logix, refer to the Logix User Guide for the promotion engine that is used in the system.

## Logging on for the first time

User account passwords in Logix must be valid. Each password must have the following password complexity requirements:

- It should contain a minimum length of eight characters.
- It should contain at least one of each of the following:
  - Upper-case letter
  - Lower-case letter
  - Special character
  - Numeric character

On the initial logon after installing Logix, the Username is admin and the Password is admin by default. Because admin does not pass all of the password complexity requirements, the following window is displayed upon initial logon.

**Change Password**

**Password fails to meet password policy requirements. Please change your password. Password length should be minimum 8 characters and should contain at least one uppercase, lowercase, digit and special character.**

Current Password:

New Password:

Confirm New Password:

The user must change the password at the Login page to a valid one.

## Changing the user account password

To change the password during the initial logon, follow these steps:

1. In the Logix Login page, enter the **Username** and the **Password**, and then select **Login**.

The screenshot shows the NCR Logix Login interface. At the top, there are two tabs: "Login" (which is selected) and "Requirements". Below the tabs, there are two input fields: "Username" and "Password". To the right of the "Username" field is a note: "Email an administrator if you've forgotten your password or have difficulties logging in: .". To the right of the "Password" field is a note: "Check the system requirements to ensure your system can correctly render all Logix content.". Below these fields is a "Login" button. To the right of the button is a copyright notice: "Access to Logix is provided only to authorized users and is subject to terms and conditions. Logix is copyright NCR Corporation, all rights reserved."

The Change Password window is displayed.

The screenshot shows the NCR Logix Change Password interface. At the top, there is a red banner with the text: "Change Password" and "Password fails to meet password policy requirements. Please change your password. Password length should be minimum 8 characters and should contain at least one uppercase, lowercase, digit and special character.". Below the banner, there are three input fields: "Current Password", "New Password", and "Confirm New Password". Below these fields are two buttons: "ChangePassword" and "Clear".

2. Enter the **Current Password**.

3. Enter and then confirm the **New Password**. The new password must be valid.
4. Select **ChangePassword**.



**Note:** Selecting the Clear button clears the data entered in the fields.

The system changes the password and displays the following message.

Change Password

Password changed successfully. Please click on the continue button to login.

Current Password:

New Password:

Confirm New Password:

5. Select **Continue** to display the Logix Login page and to log on using the new password.

User account passwords may also be changed in the User Configuration page of Logix. For more information, refer to the “Changing the User Account Password” section in the Logix User Guide for the promotion engine that is installed with the Logix system.

# Configuring the Logix settings

To allow the base system to receive the Logix application, configure the settings from the Logix interface.

To configure the Logix settings, follow these steps:

1. Log in to **Logix** and then select **Admin→Configuration**. The Configuration page is displayed.

The screenshot shows the NCR Logix Configuration page. At the top, there is a navigation bar with links for Logix, Offers, Customers, Products, Programs, Graphics, Locations, Admin, Agents, Connectors, Configuration, Offer health, Server Health, Reports, and Users. The Configuration link is highlighted. Below the navigation bar, the title "Configuration" is displayed. A note states: "Unlike other editable classes of items such as offers, groups or points, configuration items are those that non-administrative users generally should not control. They appear throughout the UI as the choices available in various selectors." Below this note, there is a grid of 14 buttons, each representing a configuration item and its associated settings. The buttons are arranged in three rows of four. The first row contains: Attributes, Mutual exclusion groups, Store Hierarchies, and Settings. The second row contains: Categories, Product Hierarchies, Tender types: CM, and Settings: CM. The third row contains: Data exports, Roles, Tender types: CPE/UE, and Settings: CPE. The fourth row contains: Departments, Scorecards: Points, Terminals, and Settings: CPE Health. The fifth row contains: Buyers, Scorecards: SV, Vendors, and Settings: UE. The sixth row contains: External sources, Scorecards: Discount, Rejection Types, and Settings: Web. The seventh row contains: Manual adjustment UPCs, Scorecards: Limits, Trigger Code Message, and Settings: Cache. The eighth row contains: Reason Codes.

Attributes	Mutual exclusion groups	Store Hierarchies	Settings
Categories	Product Hierarchies	Tender types: CM	Settings: CM
Data exports	Roles	Tender types: CPE/UE	Settings: CPE
Departments	Scorecards: Points	Terminals	Settings: CPE Health
Buyers	Scorecards: SV	Vendors	Settings: UE
External sources	Scorecards: Discount	Rejection Types	Settings: Web
Manual adjustment UPCs	Scorecards: Limits	Trigger Code Message	Settings: Cache
Reason Codes			

2. Select **Settings**. The Settings page is displayed.

The screenshot shows the NCR Logix application interface with the following details:

**Top Navigation Bar:** Includes links for Logix, Offers, Customers, Products, Programs, Graphics, Locations, Admin, and a timestamp indicating it is 22:16 on Wednesday, January 13, 2016, for Default User.

**Main Navigation:** Agents, Connectors, Configuration, Offer health, Server Health, Reports, and Users.

**Current Section:** Configuration > Settings > Customers.

**Customers Section:** Contains settings for customer record creation, inquiry default page, transaction view, lock timeout, service URL, supplemental sorting, group ID type, card count display, householding, continuity policy, and balance adjustment notes.

**General Section:** Contains settings for reward status ID, CRM engine, filter for offers, scorecard location, savings tracking, and external CRM customer group level.



**Note:** Use the chevron button of a corresponding option type to either hide or expand available options settings.

3. Go to the **Customers** pane.

The Customers pane configuration window contains the following settings:

- Allow customer record creation if not found in customer inquiry: No
- Customer inquiry default page: General
- Customer inquiry transactions default view: Only with redemptions
- Customer record lock timeout (minutes): 0
- Customer Service URL: (empty)
- Sort Customer Supplementals by: Name
- Default customer group ID type: Loyalty card number
- Display card count on customer group page: No
- Enable householding: Yes
- Household continuity demotion policy: Never demote continuity
- Require note when adjusting balance: No

4. Set the *Allow customer record creation if not found in customer inquiry* setting to **Yes**.
5. Go to the **General** pane.

The General pane configuration window contains the following settings:

- Add RewardStatusID: 1
- Default CRM engine: No external interface
- Default filter for Customer Offers: Show favorite offers
- Default scorecard total line location: Bottom
- Enable savings to date: No
- External CRM customer group level: Customer
- External CRM integration: TCRM
- Installation name: [SERVER NAME]
- Logix External URL: (empty)
- Enable notes: Yes
- Notification Service URL: [ServiceURL]/MessagingService/mes
- Offer validation enabled on status page: No
- PHA HierarchyResyncQueue Threshold: 5000
- StoredValue Programs for Expired Points report(comma-separated): 1
- Support email address: (empty)
- System email address: NewServer@example.com
- System password: (empty)
- Trigger code range begin: 0
- Trigger code range end: 0

6. Set the following settings:

General Setting	Value
Trigger code range begin	00000000000000001
Trigger code range end	99999999999999999



**Note:** After setting the Trigger code range settings in the Logix UI, run the following SQL query in the LogixRT database:

**Update SystemOptions Set OptionValue=16 where OptionID=52**

7. Go to the **Paths** pane.

The screenshot shows the 'Paths' configuration pane. It includes fields for various paths: 'Add External Offers File Path' (set to \\[SERVER NAME]\\Logix5\\AgentFile), 'Agent import file path', 'Graphics storage path', 'Logging Path Primary', 'Logging Path Secondary (local failover)', 'SMTP address', and 'Workspace file path' (set to \\[SERVER NAME]\\Logix5\\AgentFile). There is also a small icon in the top right corner of the pane.

8. Set the following settings:

Paths Setting	Value
Add External Offers File Path	\\\<IP Address of server where Logix is installed>\AgentFiles\ExternalOffers
Agent import file path	\\\<IP Address of server where Logix is installed>\AgentFiles\Import
Graphics storage path	\\\<IP Address of server where Logix is installed>\C:\Copient\LogixWebRoot\data\graphics
Logging Path Primary	\\\<IP Address of server where Logix is installed>\C:\Copient\Logs
Workspace file path	\\\<IP Address of server where Logix is installed>\WebUploads

9. Select **Save**.



**Note:** After configuring the Logix settings, configure the settings of each promotion engine installed with Logix. For more information, refer to [Configuring the Promotion Engine settings](#) on the next page.

## Configuring the Promotion Engine settings

After installing Logix and configuring the Logix settings, configure the settings of each promotion engine installed with Logix.



**Note:** Configure these settings only if the corresponding promotion engine is installed with Logix.

For more configuration information, refer to the Logix User Guide specific for each of these promotion engines.

## Configuring the Consumer Marketing (CM) settings

To configure the CM promotion engine settings, follow these steps:

1. Log in to **Logix** and then select **Admin→Configuration**. The Configuration page is displayed.

Attributes	Mutual exclusion groups	Store Hierarchies	Settings
Categories	Product Hierarchies	Tender types: CM	Settings: CM
Data exports	Roles	Tender types: CPE/UE	Settings: CPE
Departments	Scorecards: Points	Terminals	Settings: CPE Health
Buyers	Scorecards: SV	Vendors	Settings: UE
External sources	Scorecards: Discount	Rejection Types	Settings: Web
Manual adjustment UPCs	Scorecards: Limits	Trigger Code Message	Settings: Cache
Reason Codes			

2. Select **Settings: CM**. The CM settings page is displayed.

The screenshot shows the 'CM settings' page within the NCR Logix application. The page header includes the NCR logo, the date and time (18:25 | Thursday, January 14, 2016), and user information (Default User | Logout). The main menu bar has tabs like Logix, Offers, Customers, Products, Programs, Graphics, Locations, Admin (which is selected), and EPM. Below the menu is a sub-menu with tabs: Agents, Connectors, Configuration (selected), Offer health, Server Health, Reports, and Users. The 'CM settings' page itself has several configuration items with dropdown menus:

- Allow employees to use Alternate ID: No
- CRM - show data type: No
- Enable "do not item distribute" for conditions and rewards: No
- Enable "effect minimum order" for discounts: No
- Enable auto-send outbound upon deploying AMS created offers: No
- Enable category for points program: No
- Enable Engine Export button on offers: No
- Enable ExpireCentralServerTZ Option for Stored Value Programs: No
- Enable manual send outbound for offers created externally: No
- Enable static fuel discount flag: No
- Enable web message for rewards: No
- External offers BannerID: (empty input field)
- External offers mapping file path: (empty input field)
- Fuel partner import file path: (empty input field)
- Global offer end time: 23:59
- Global offer start time: 00:00

At the bottom right of the page are 'Save' and 'EPM' buttons.

3. Set the following settings:

CM Setting	Value
Enable web message for rewards	Yes
External offers mapping file path	\\\<IP Address of server where Logix is installed>\logix5\AgentFiles\Import
Offer file path for Catalina	\\\<IP Address of server where Logix is installed>\logix5\AgentFiles
Offer file path for CM	\\\<IP Address of server where Logix is installed>\logix5\AgentFiles\Export\PromoMaint

4. Select **Save**.

## Configuring the Copient Promotion Engine (CPE) settings

To configure the CPE settings, follow these steps:

1. Log in to **Logix** and then select **Admin→Configuration**. The Configuration page is displayed.

The screenshot shows the NCR Logix Configuration page. At the top, there is a navigation bar with links for Logix, Offers, Customers, Products, Programs, Graphics, Locations, and Admin. The Admin link is highlighted. Below the navigation bar, there is a sub-navigation bar with links for Agents, Connectors, Configuration, Offer health, Server Health, Reports, and Users. The Configuration link is highlighted. The main content area is titled "Configuration". A note below the title states: "Unlike other editable classes of items such as offers, groups or points, configuration items are those that non-administrative users generally should not control. They appear throughout the UI as the choices available in various selectors." Below this note, there is a grid of 16 buttons arranged in four rows of four. Each button has a label and a corresponding "Settings" label. The buttons are: Attributes (Settings), Mutual exclusion groups (Settings), Store Hierarchies (Settings), Categories (Settings: CM), Product Hierarchies (Settings: CM), Tender types: CM (Settings: CM), Data exports (Settings: CPE), Roles (Settings: CPE), Tender types: CPE/UE (Settings: CPE), Departments (Settings: CPE Health), Scorecards: Points (Settings: CPE Health), Terminals (Settings: CPE Health), Buyers (Settings: UE), Scorecards: SV (Settings: UE), Vendors (Settings: UE), External sources (Settings: Web), Scorecards: Discount (Settings: Web), Rejection Types (Settings: Web), Manual adjustment UPCs (Settings: Cache), Scorecards: Limits (Settings: Cache), Trigger Code Message (Settings: Cache), and Reason Codes (Settings: Cache).

2. Select **Settings: CPE**. The CPE settings page is displayed.

**CPE settings**

**Discounts**

Allow negative default: When creating a discount it should by default allow items to go negative

Best deal default: When creating a discount it should be incremental by default

Default discount chargeback department code (basket-level): 0000 - Tender

Default discount chargeback department code (department-level): -1 - Prorate

Default discount chargeback department code (item-level): 0 - Item's department

Flex best deal discounts: Flex best deal discounts if there are external discounts

Flex negative for discount default: Flex discounts if they cause the item to go negative

HIGO: Discount the lowest valued items

Max Incentive NAK Count: 10

Send Item Level Discounts as Earned: Disabled

Take net of external discounts: Only take net of external discounts at levels below evaluation level

Take net of internal discounts: Only take net of internal discounts at levels below evaluation level

**Customers**

Card filter: No card filtering

CPE customer ID: Use MemberID as household

Cross-shop eligibility limits: Yes

Customer group accuracy (0.00 to 0.99): 0.2

3. Go to the **Paths** section.

The screenshot shows the NCR Logix application's configuration interface. The top navigation bar includes links for Logix, Offers, Customers, Products, Programs, Graphics, Locations, Admin, and a user session indicator (Default User | Logout). Below the navigation is a toolbar with tabs: Agents, Connectors, Configuration (which is selected), Offer health, Server Health, Reports, and Users. The main content area is titled 'CPE settings' and contains a 'Paths' section with the following fields:

- Central server install path: D:\
- CPE Offer Agent file path: [empty]
- Default ImageFetch URL: [empty]
- Default IncentiveFetch URL: [empty]
- Default PhoneHome IP address: [empty]
- IPL Temp File Path: [empty]

A 'Save' button is located in the top right corner of the configuration panel.

4. Set the following settings:

Paths Setting	Value
Central server install path	The drive where Logix is installed. <b>Example:</b> C:\
CPE Offer Agent file path	\</IP Address of server where Logix is installed>\logix5\AgentFiles\Export\CPE
Default ImageFetch URL	http://<IP Address of server where Logix is installed>/data/graphics/
Default IncentiveFetch URL	http://<IP Address of server where Logix is installed>/offerfiles/Export/CPE/

5. Go to the **Miscellaneous** section.

The screenshot shows the NCR Logix application interface. At the top, there is a navigation bar with links for Logix, Offers, Customers, Products, Programs, Graphics, Locations, Admin, and a user dropdown. Below the navigation bar, a sub-menu bar includes Agents, Connectors, Configuration, Offer health, Server Health, Reports, and Users. The main content area is titled "CPE settings" and contains a "Miscellaneous" section. This section contains various configuration parameters with dropdown menus and input fields. A "Save" button is located in the top right corner of the form area.

Miscellaneous Setting	Value
Enable Issuance	Yes
Enable reporting (enterprise)	Yes
Impression reporting default	Enabled
Redemption reporting default	Enabled

6. Set the following settings:

Miscellaneous Setting	Value
Enable Issuance	Yes
Enable reporting (enterprise)	Yes
Impression reporting default	Enabled
Redemption reporting default	Enabled

7. Select **Save**.

## Configuring the Universal Engine (UE) settings

To configure the UE settings, follow these steps:

1. Log in to **Logix** and then select **Admin→Configuration**. The Configuration page is displayed.

The screenshot shows the NCR Logix Configuration page. At the top, there is a navigation bar with links for Logix, Offers, Customers, Products, Programs, Graphics, Locations, and Admin. The Admin link is highlighted. Below the navigation bar, there is a sub-navigation bar with links for Agents, Connectors, Configuration, Offer health, Server Health, Reports, and Users. The Configuration link is highlighted. The main content area is titled "Configuration". A note below the title states: "Unlike other editable classes of items such as offers, groups or points, configuration items are those that non-administrative users generally should not control. They appear throughout the UI as the choices available in various selectors." Below this note, there is a grid of 16 buttons arranged in four rows of four. Each button has a label and a corresponding "Settings" label. The buttons are: Attributes (Settings), Mutual exclusion groups (Settings), Store Hierarchies (Settings), Categories (Settings: CM), Product Hierarchies (Settings: CM), Tender types: CM (Settings: CM), Data exports (Settings: CPE), Roles (Settings: CPE), Tender types: CPE/UE (Settings: CPE), Departments (Settings: CPE Health), Scorecards: Points (Settings: CPE Health), Terminals (Settings: CPE Health), Buyers (Settings: UE), Scorecards: SV (Settings: UE), Vendors (Settings: UE), External sources (Settings: Web), Scorecards: Discount (Settings: Web), Rejection Types (Settings: Web), Manual adjustment UPCs (Settings: Cache), Scorecards: Limits (Settings: Cache), Trigger Code Message (Settings: Cache), and Reason Codes (Settings: Cache).

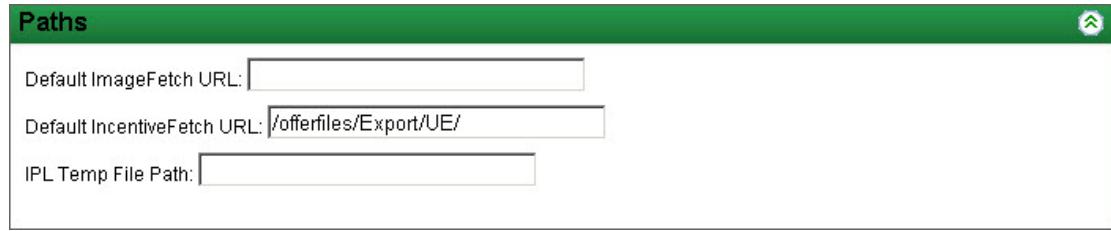
2. Select **Settings: UE**. The UE settings page is displayed.

The screenshot shows the 'UE settings' page in the NCR Logix application. The top navigation bar includes links for Logix, Offers, Customers, Products, Programs, Graphics, Locations, Admin, and a logout link. The main content area is divided into four sections:

- Paths**: Contains fields for 'Default ImageFetch URL' (empty), 'Default IncentiveFetch URL' (set to '/offerfiles/Export/UE/'), and 'IPL Temp File Path' (empty).
- Discounts**: Contains settings for offer conditions ('Allow discounts for offers with tender conditions: No'), discount behavior ('Discount rounding behavior: Traditional rounding'), alternate price selection ('Display alternate price application selection: Yes'), and flex discount logic ('Flex negative for discount default: Flex discounts if they cause the item to go negative').
- Customers**: Contains settings for promotion grid offers ('Allow Promotion Grid Offers: No') and cardholder offer periods ('New cardholder offer eligibility period (in days): 0').
- Alternate ID**: Contains a setting for pre-order eligibility ('Enable Pre Order Eligibility: 0').

A 'Save' button is located in the top right corner of the main content area.

3. Go to the **Paths** section.



The screenshot shows a configuration interface titled "Paths". It contains three text input fields:

- Default ImageFetch URL: [Empty]
- Default IncentiveFetch URL: [/offerfiles/Export/UE/]
- IPL Temp File Path: [Empty]

4. Set the following settings:

Paths Setting	Value
Default ImageFetch URL	<i>http://&lt;IP Address of server where Logix is installed&gt;/data/graphics/</i>
Default IncentiveFetch URL	<i>http://&lt;IP Address of server where Logix is installed&gt;/offerfiles/Export/UE/</i>

5. Go to the **Miscellaneous** section.

The screenshot shows the 'Miscellaneous' configuration window. It contains various settings with their current values or dropdown menus:

- Allow return discounting: Yes
- Default lane type: 13
- Default operator display type: 0
- Default printer type: 3
- Defer basket level offers evaluation to Total: No
- Enable customer locking: No
- Enable Issuance: No
- Enable Multiple Product Exclusion Groups: 0
- GetCustomerInfo IP address: [empty]
- Impression reporting default: Disabled
- IPL - Concurrent window (minutes): 0
- IPL - Max concurrent: 0
- IPL - Max records per batch: 0
- Item Level Adjustment Application: Never apply to future items; Never redistribute
- Number of cashier message lines (10 max): 2
- Offer validation grace period (hours): 8
- Zero balance messages default: Do not print
- Promotion Broker IP address along with port number(000.000.000.000:0000): [empty]
- Enable Reward Point Limits: 0
- Enable Issuance For Any Customer Transactions: No
- Operate At Enterprise?: Yes
- Use Server Health Service: No

6. Set the following settings:

Miscellaneous Setting	Value
Default lane type	6
Default operator display type	1
Default printer type	10

7. Select **Save**.



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# *Chapter 4:* Configuring the Logix Server

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## Overview

This chapter provides instructions on configuring the Logix server. It contains the following sections:

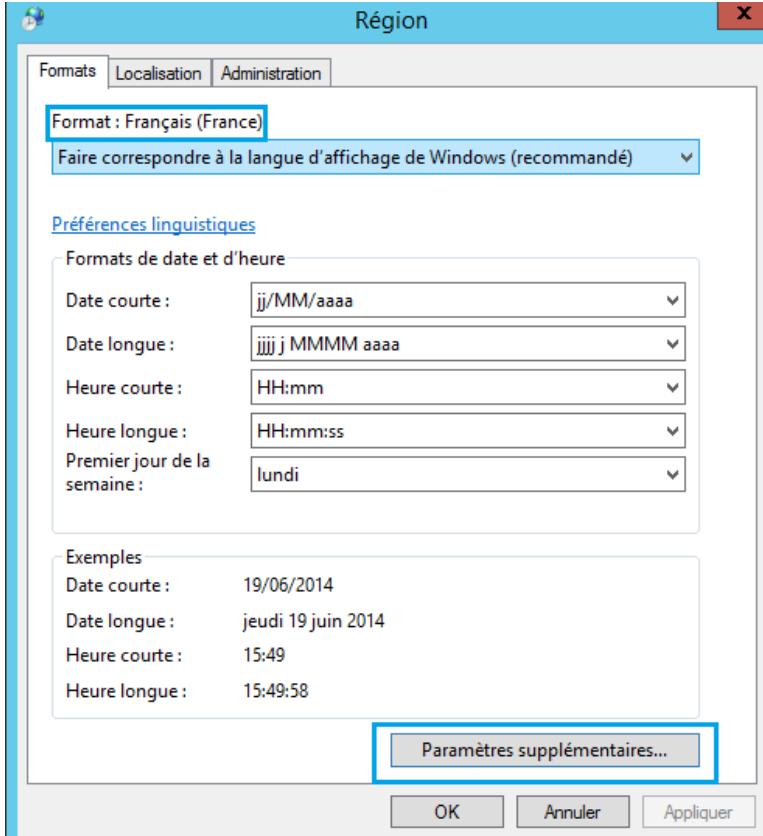
- [\*Configuring regional settings for Windows users\*](#) on the next page
  - [\*Configuring IIS\*](#) on page 93
  - [\*Binding the SSL Certificate\*](#) on page 96
-  **Note:** This step is optional.
- [\*Restarting Logix Agents\*](#) on page 102

# Configuring regional settings for Windows users

The following sections describe the steps to set up the regional language and the decimal symbol to period for the Windows users (CopientSVC and CopientWEB) of non-English servers.

## Setting the regional language

To set the regional language for non-English servers, follow these steps:

1. Log on to the Logix server using the credentials for the following users:
  - **CopientSVC**
  - **CopientWEB**
2. From the Control Panel, select **Region**. The Région window displays the language settings.  


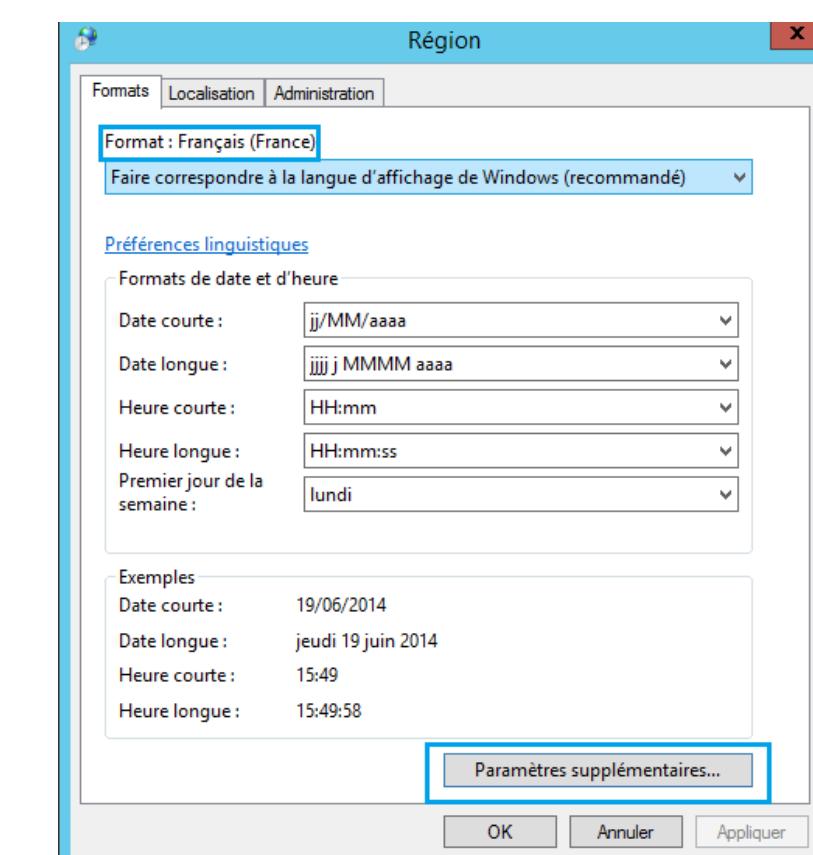
The screenshot shows the Windows 'Région' (Region) dialog box. The 'Format' tab is selected, showing 'Format : Français (France)' and a dropdown menu 'Faire correspondre à la langue d'affichage de Windows (recommandé)'. Below this, under 'Préférences linguistiques' (Language preferences), there's a section for 'Formats de date et d'heure' (Date and time formats) with dropdown menus for Date courte, Date longue, Heure courte, Heure longue, Premier jour de la semaine, and Exemples (Examples). At the bottom right of the dialog box is a button labeled 'Paramètres supplémentaires...' (More options...).

3. Update the settings if necessary.
4. Select **OK** to save the changes.

## Setting the decimal symbol to period

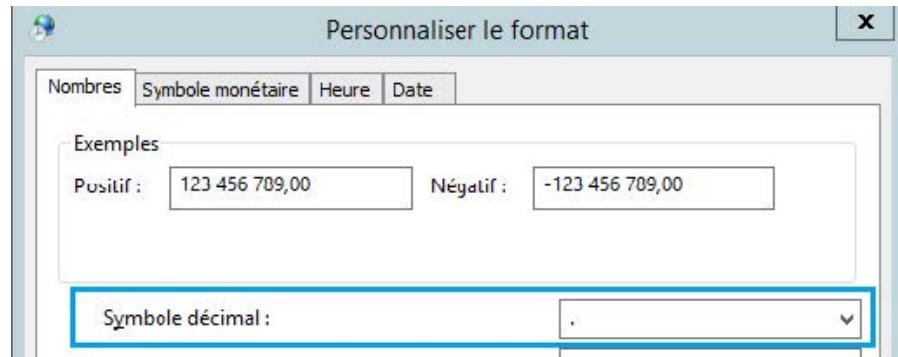
To set the decimal symbol to period, follow these steps:

1. Log on to the Logix server using the credentials for the following users:
  - **CopientSVC**
  - **CopientWEB**
2. From the Control Panel, select **Region**. The Région window displays the language settings.



3. Select **Paramètres supplémentaires...**.

The Personnaliser le format window is displayed.

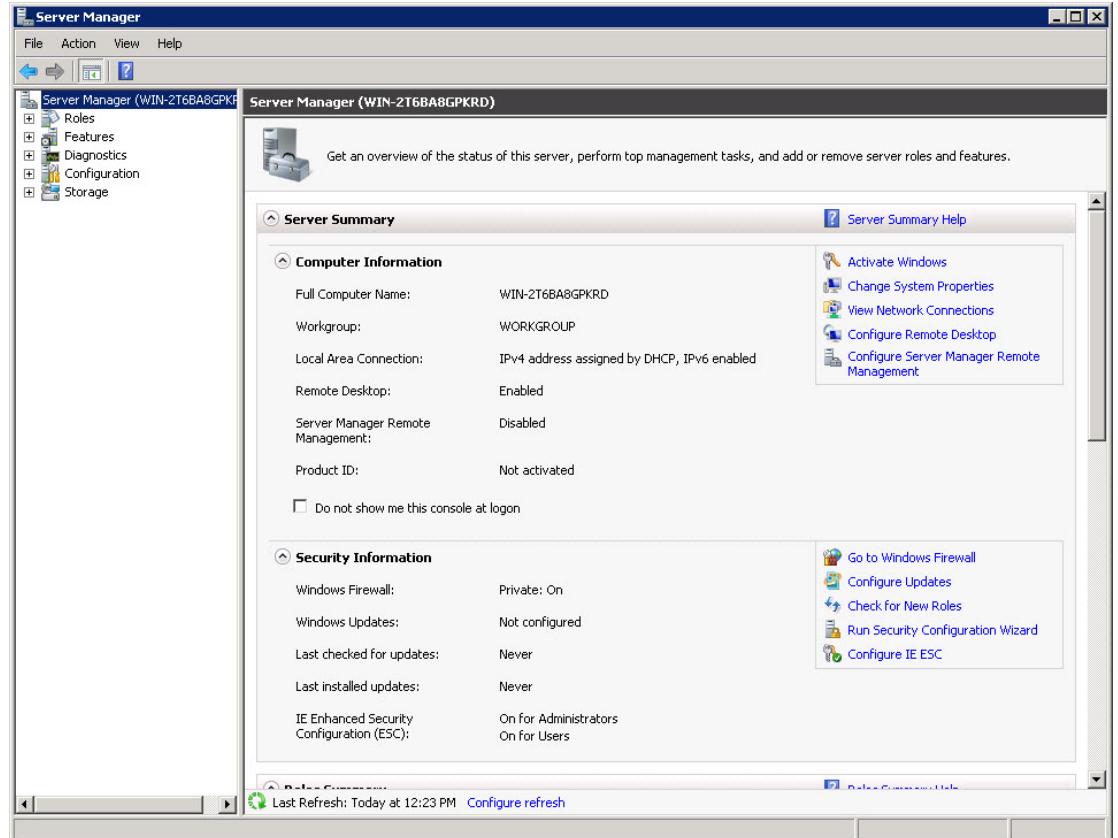


4. Change the value of **Symbole décimal** from comma to period.
5. Save the changes.

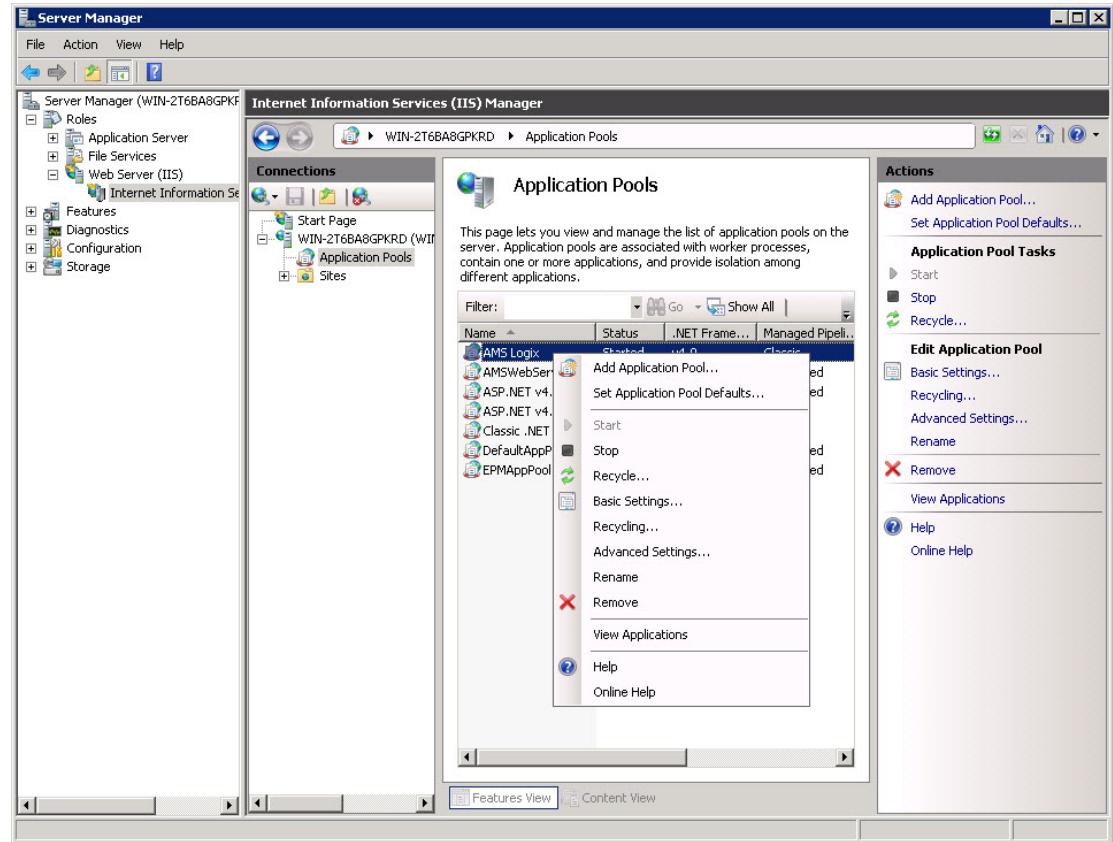
# Configuring IIS

To configure the IIS settings, do the following:

1. Select **Start→Administrative Tools→Server Manager**. The Server Manager window is displayed.

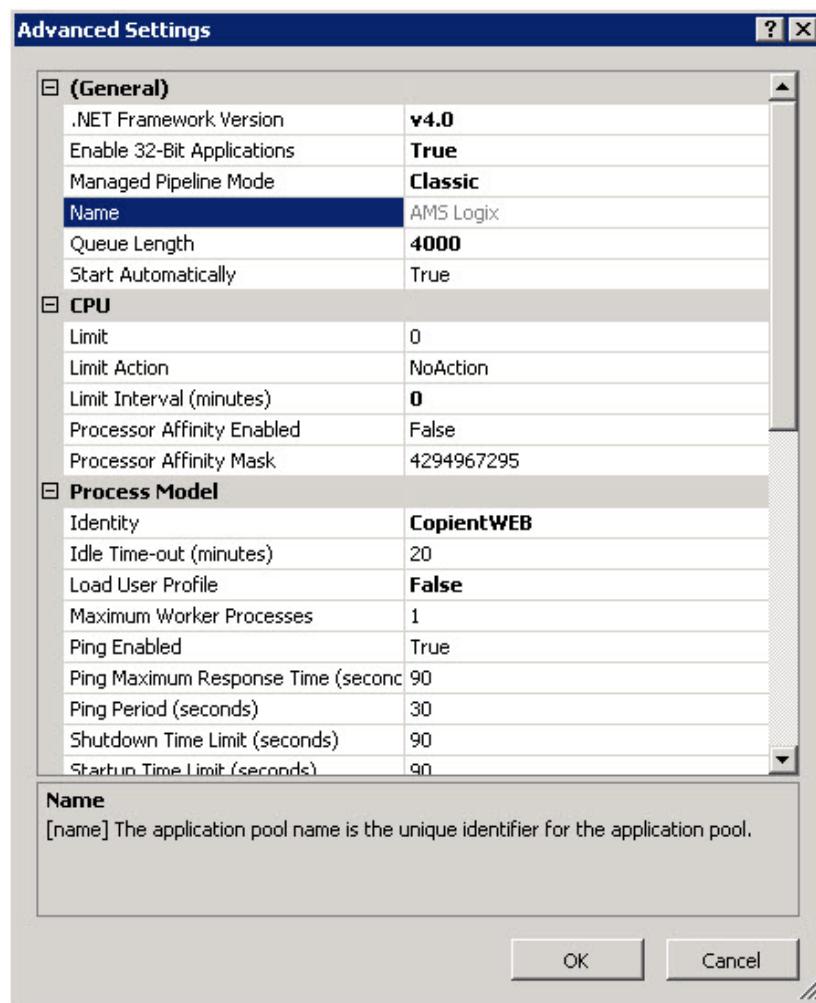


2. From the Server Manager window, right-click the **Application Pool** created for Logix.



3. Select **Advanced Settings**.

The Advanced Settings window is displayed.



4. Set the **Load User Profile** setting to **True**.
5. Select **OK**.

## Binding the SSL Certificate

Secure Sockets Layer (SSL) certificates establish secured and encrypted communication between the Web Server and the web browser.



**Note:** This step is optional. By default, Logix uses an *http* connection.

### **Prerequisite**

Retailers must first obtain an approved certificate. Retailers must create a Certificate Signing Request (CSR) and have it approved by a third-party Certificate Authority (CA). Each third-party CA may have their own methods of accepting certificate requests. This approved certificate must then be imported to the server. For more information, consult with an NCR Representative.

This section is limited to the following steps:

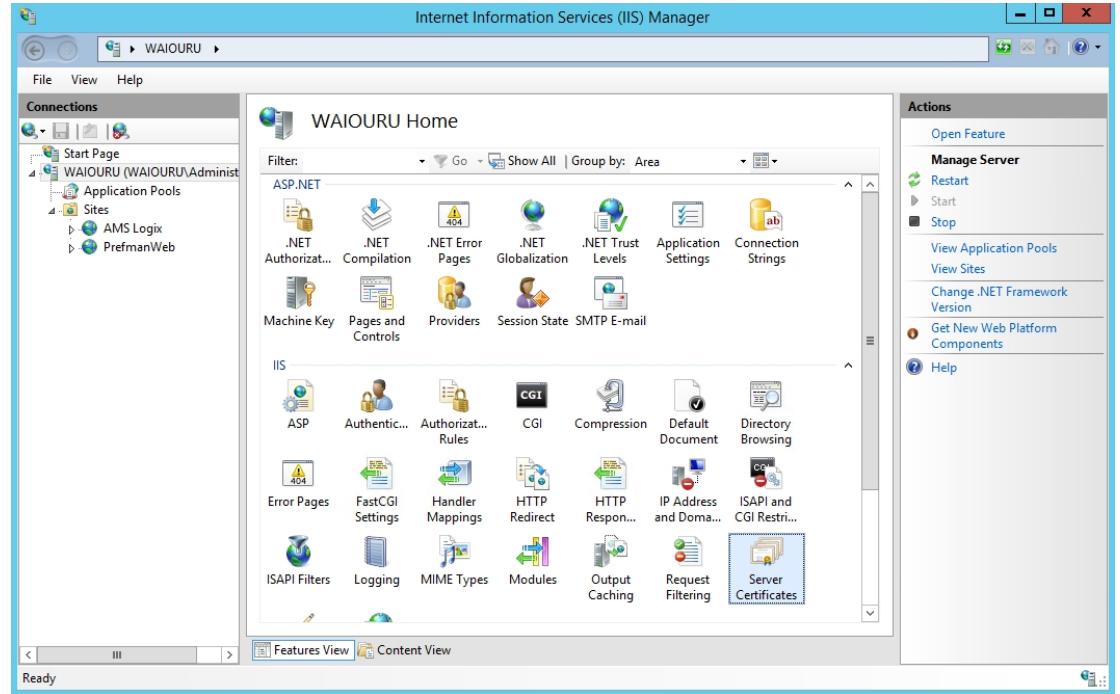
- Validating the certificate.
- Binding the certificate.
- Validating the SSL binding.

## Validating the SSL certificate

To validate the SSL certificate, follow these steps:

1. Go to the system Control Panel.
2. Open the **Administrative Tools**→**Internet Information Services (IIS) Manager**.  
The Internet Information Services (IIS) Manager window is displayed.

3. From the Connections pane, located on the left portion of the window, select the **server**. The list of features are displayed on the center pane.



4. From the IIS group on the center pane, select **Server Certificates**. The certificate obtained for the site is displayed on the following window.

**Example:**

Server Certificates

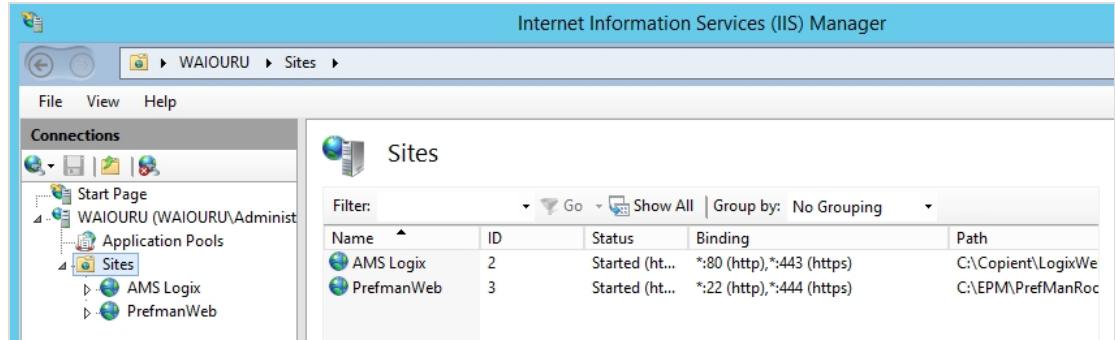
Use this feature to request and manage certificates that the Web server can use with websites configured for SSL.

Name	Issued To	Issued By
amscertificate	Win2012Std--2.sweng.ncr.com	Win2012Std--2.swen

## Binding the SSL certificate

To bind the SSL certificate, follow these steps:

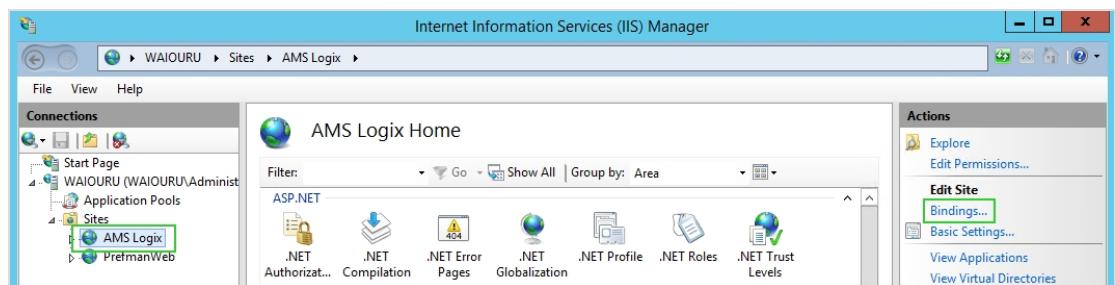
1. From the Connections pane on the Internet Information Services (IIS) Manager window, expand the server.
2. Select **Sites**. The application displays the sites on the following window.



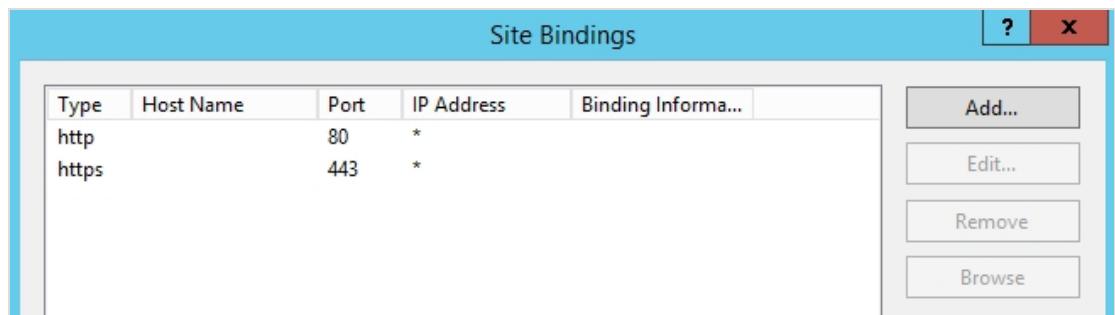
3. Select the **Site**. The following window is displayed.



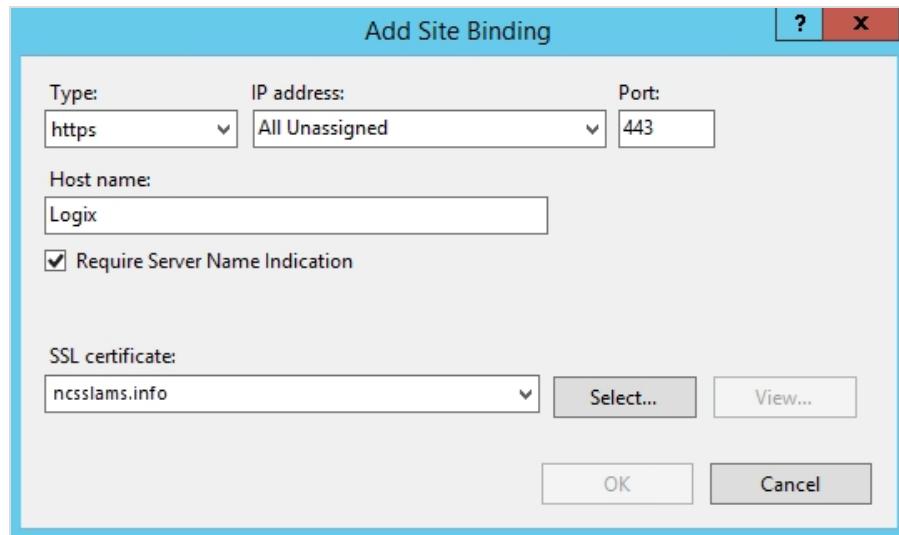
**Note:** In this example, AMS Logix is the selected site.



4. From the Actions pane, located on the right side of the window, select **Bindings**. The application displays the Site Bindings window.



5. Select **Add**. The application displays the following window:

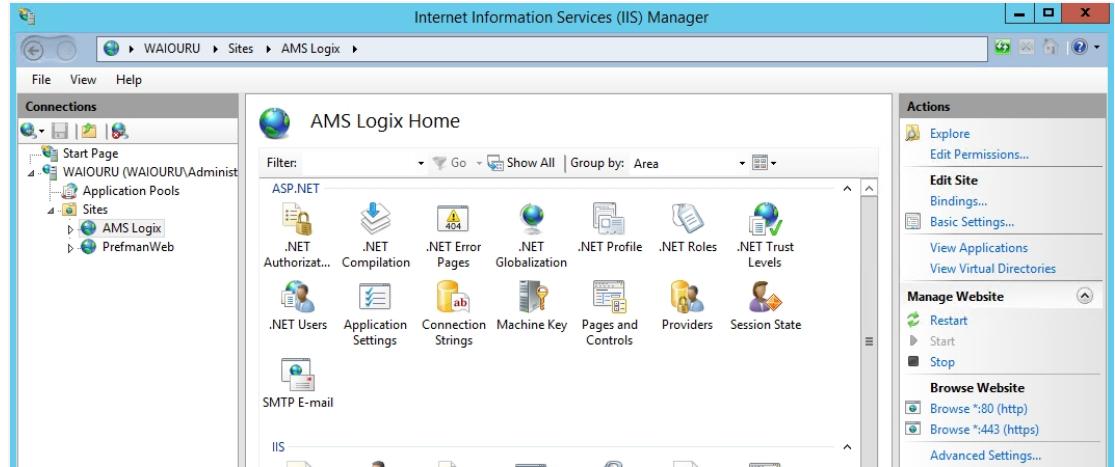


6. Do the following:
  - From the Type drop-down list, select **https**.
  - From the IP address drop-down list, select **All Unassigned** or the **IP address of the web site**.
  - On the Port field box, enter an available open port. Recommend to use **443** for Logix.
  - If there are multiple SSL certificates on the server, select the check box for the Require Server Name Indication option.
  - From the SSL certificate drop-down list, select the SSL certificate that you obtained.
7. Select **OK**. The certificate is bound.
8. Select **Close**. The window is closed.

## Validating the SSL binding

To validate that the site is now accessible through *https* connection, follow this step:

- From the Browse Website category in the Actions pane, located on the right side of the site window, select **Browse \*:<port number> (https)**.



The Logix application is displayed on the web browser with *https* in its URL.

## Securing Cookies

After binding the SSL certificate, the site must be configured to secure the cookie. By default, the secure flag for the site is disabled. Enabling the secure flag ensures that the web browser only transmits the cookie through an *https* or through a secure and encrypted channel.

To enable the secure flag, follow these steps:

1. Go to the application installation path. By default, it is at:  
C:\Copient\LogixWebRoot
2. Using a text editor, open the `web` file. The file type of this file is an XML configuration file.
3. In the `web` file, search for the `httpCookies` tag.
4. Change the value of the `requireSSL` attribute from `false` to `true`.

**Example:** The following is an example of an enabled secure flag.

```
<httpCookies httpOnlyCookies="true" requireSSL="true"  
lockItem="true"></httpCookies>
```

## Restarting Logix Agents

To restart Logix Agents, do the following from the C:\Copient\Agents directory:

1. Run the **!Stop All Copient Agents.bat** batch file to stop the agents.
2. Run the **!Start All Copient Agents.bat** batch file to restart the agents.

---

# *Chapter 5:* Upgrading the Logix Application

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## Overview

This section provides instructions on upgrading the Logix application.

- To plan for an upgrade, refer to [Planning for an Upgrade](#).
- To upgrade the Logix using an .msi installer, refer to [Upgrading Logix using the installer](#) on page 105.

## Planning for an Upgrade

Depending on the promotion engine's release version, upgrading to AMS Logix 7.0 and later versions would require one of the following steps:

- Application upgrade only
- Data migration and application upgrade

**! Important:** Before upgrading to a new release version, ensure that the software prerequisites match the requirements for the new release version. For more information, refer to the corresponding "Software Requirements" sections in the publications of the new release version.

## Data Migration

For data security, AMS 7.0 and later versions include the following features:

- requires authentication and authorization for all APIs
- encrypts Personally Identifiable Information (PII)

These features are not supported in previous release versions. After upgrading to release 7.0 and later versions, perform data migration. Data migration is mandatory.

The data migration process maintains the integrity of the data from previous release versions. This process also relates the data format from old release versions to release 7.0 and later versions.

Data migration is accomplished using the Data Migration utility. For more information, refer to *Key Rotation and Data Migration* or consult with an NCR Representative.

## Upgrade Plan

Refer to the following table for the steps to complete an upgrade to 7.0 and later versions.

Promotion engine	Release version	Upgrade to this AMS version	Do the following
CPE	<ul style="list-style-type: none"><li>• 5.x</li><li>• 6.x</li></ul>	7.0 and later versions	<ul style="list-style-type: none"><li>• Application upgrade</li><li>• Data migration</li></ul> <p><b>Note:</b> Additional configurations might be needed to complete the upgrade. For more information, consult an NCR Representative.</p>
UE	<ul style="list-style-type: none"><li>• 5.x</li><li>• 6.0</li><li>• 6.1</li><li>• 6.2</li></ul>	6.3	Application upgrade only
UE	6.3	7.0 and later versions	<ul style="list-style-type: none"><li>• Application upgrade</li><li>• Data migration</li></ul>



**Note:** AMS 6.2 and later release versions require Logix users to use a valid user account password. When using Logix 6.2 and later release versions, change the passwords of the existing user accounts to valid passwords. For more information, refer to [Logging on to Logix](#) on page 1.

# Upgrading Logix using the installer

The Logix application can be upgraded using the `.msi` installer. The upgrade can be done using the following methods:

- Automatic upgrade—for Logix applications that were installed using the installer.
- Manual upgrade—for Logix applications that were installed manually.

**! Important:** To avoid errors during upgrade, ensure that Logix is upgraded using the same user account that installed the existing version.

## Automatic upgrade

To upgrade to a later version, run the `.msi` installer of the version to upgrade. Running this installer analyzes the existing version and provides the details of the version to upgrade.

The installer automatically uninstalls the existing Logix application, upgrades the database, and then installs the new files.

**! Important:** An automatic upgrade does not require user interaction. However, if there are changes to the settings, ensure these changes are applied during the version upgrade. Enter the updated values on its corresponding fields, as necessary. These values are critical to ensure that the connection and communication across the enterprise is maintained.

In cases when the `.msi` installer run on the system is the same as the existing version, the installer analyzes the system and then prompts for the user to remove the existing version.

## Manual upgrade

To upgrade Logix manually, follow these steps:

1. Uninstall the existing version. For more information, refer to [Uninstalling the Logix Application](#) on page 107.
2. Do not remove any of the databases.
3. Run the Logix `.msi` installer of the new release version. For more information, refer to [Installing the Logix application](#) on page 43.



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# *Chapter 6: Uninstalling the Logix Application*

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## Overview

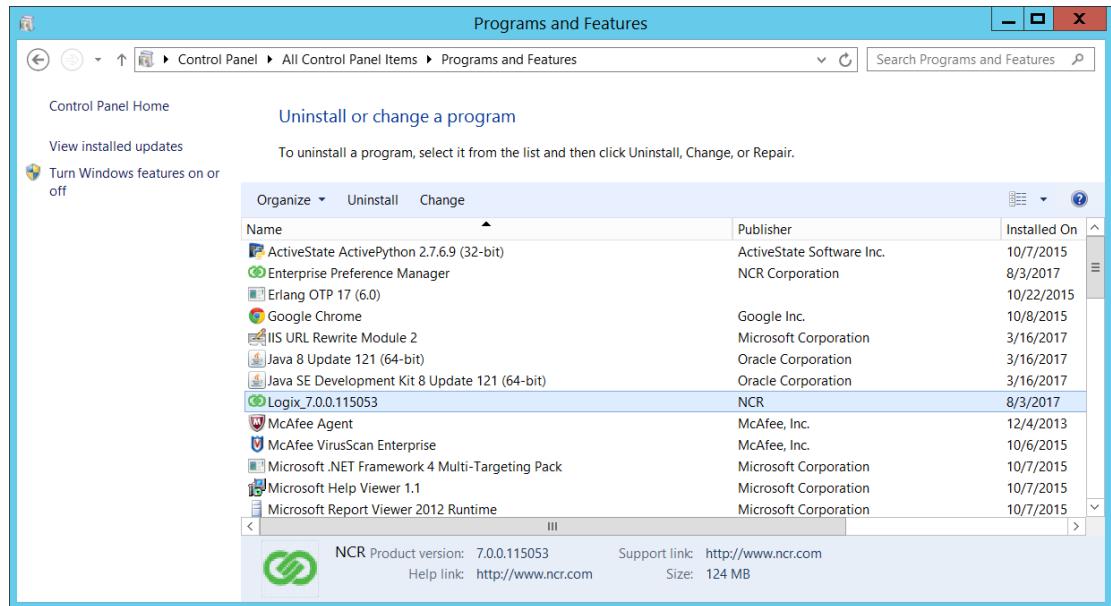
This chapter provides the following procedures for removing the Logix application from the system:

- Uninstalling Logix from the Programs and Features panel
- Uninstalling Logix using the installer
- Uninstalling Logix from the Command Prompt window

# Uninstalling Logix from the Programs and Features panel

To uninstall Logix through the Programs and Features panel, follow these steps:

1. From the Start menu, select **Control Panel→Programs and Features**. The Programs and Features window is displayed.
2. Select **Logix**. The Uninstall option is displayed in the table toolbar.



3. Select **Uninstall**. A confirmation window is displayed.
4. Select **Yes**. The Logix application is removed.

## Uninstalling Logix using the installer

To uninstall the Logix application using the .msi installer, follow these steps:

1. Right-click the Logix .msi installer and then select **Uninstall**. A confirmation message is displayed.
2. Select **Yes**. A process window is displayed. When the uninstallation process is completed, the process window is closed.

## Uninstalling Logix from the Command Prompt window

To remove Logix from the Command Prompt window, follow these steps:

1. Open the Command Prompt window.
2. Enter the following command:

```
start /wait msieexec /uninstall C:\Logix_7.0.x.xxxxx.msi /quiet
```



**Note:** Ensure that the package directory and the file name are replaced with the correct directory, file name, and version of the installer that is currently used in the system.

The Logix application is removed when the command prompt is displayed in the window.