Pre-Installation Procedures

Overview of the Installation Process

This chapter provides an overview of the planning and installation processes. The basic steps are:

- Survey the site and develop an installation plan based on the customer's needs

- Develop SmarTalker overlays

- Contract the purchase of SmarTalker mounting rails and clips, and schedule labor for installation, or purchase SmarTalker II mounting clips from NCR and schedule contract labor for clip installation

- Install the DecisioNet hardware and DecisioNet software

- Install the SmarTalker tags

- Validate the quality of installation

Note: This chapter provides an overview and does not contain every detailed step for every installation. An NCR representative will work with each customer to address every detail of a particular installation.

Phase 1: Survey Site and Plan the Installation

Once the customer has requested installation services, a number of activities are required. These activities consist of gathering, recording, and preparing information for presentation to the customers and the DecisioNet support team. The information gathered is used to formulate a strategy and identify the steps necessary to create a proper environment for operation of the DecisioNet System.

Phase 1 consists of the following tasks:

- Meet with the customer to determine requirements

- Survey the site

- Develop Software Integration plan (pilot only)

- Determine overlay design (Refer to the next section, "Phase 2: Scan the Site and Develop SmarTalker Overlays.")

- Determine a Hardware Installation Plan. (This includes CBSs, cabling, SmarTalkers, rails and clips, and all other related hardware components.)

- Establish an Installation Schedule

- Prepare a site installation plan

- Confirm the schedule with Manufacturing

- Review the plan with the customer

Note: For more information on Phase 1 tasks, see your NCR representative and reference the *DecisioNet System Implementation Guide* (497-0002329). For more information on site certification, see your NCR representative and reference the following documents:

- B005-0000-1138: *DecisioNet Support Tools Reference Guide* (document)
- G370-1182-0000: *EPL Implementation Package for Windows 95/NT* (disk media containing the EPL RF Certification Package)

- 497-0410343: *Certification/Re-certification Site Survey Procedure* (to document site configuration for support purposes)

Phase 2: Scan the Site and Develop SmarTalker Overlays

During the pre-installation phase, NCR works with the customer to design the paper overlays to be applied to the SmarTalker tags. Customers determine what details (such as UPC numbers, bar codes, re-order numbers, and product names) are to be printed on the overlays. After scanning the customer's existing price labels, NCR provides the overlay supplier with a file containing:

- A list of PLU item numbers to be managed by the DecisioNet System in each store.

- Product "location in the store" information. This position information is used to sequence the SmarTalker tags for installation.

- Overlay print data information.

- The supplier prints overlays that meet customer specifications and applies an overlay to each tag. For more information, refer to Chapter 9, "Loading the Pre-EPL File."

Phase 3: Contract the Purchase of SmarTalker Mounting Devices and Schedule Labor for Installation

Mounting rails are not part of the NCR-delivered system, but during the pre-installation phase, customers are referred to a SmarTalker rail supplier to begin the rail purchase process. Clips for SmarTalker II tags are purchased from NCR, but they are installed by an outside contractor. Keep these important points in mind:

- Consult the site survey developed during Phase 1 to determine what type and quantity of mounting materials are needed.

- When choosing or recommending types of mounting materials for a specific site, note that the primary considerations for customer satisfaction are security, durability, and ease of maintenance.

For more information, refer to Chapter 10, "SmarTalker and Rail Installation" or Chapter 11, "SmarTalker II and Rail Installation."

Phase 4: Install the DecisioNet Software and Hardware Infrastructure

The tasks in Phases 4 and 5 are often occurring in parallel but certain infrastructure tasks must be completed before the SmarTalker tags can be installed at a site. Phase 4 consists of the following tasks:

- Install the CBS infrastructure (Refer to Chapter 4, "Installing the Hardware Infrastructure.")

    - Install Electrical outlets for CBS power supplies
    - Install the CBS power cable to CBS(s)
    - Install the communication cable from the EPL controller to the RS-232/RS-422 Converter
    - Install the CBS(s) and their antennas in the ceiling
    - Install communication cables from the converter to first CBS and from CBS to CBS

- Load DecisioNet software (Refer to Chapter 5, "DecisioNet Software on a Windows NT System," Chapter 6, "DecisioNet Software on an NCR UNIX System," or Chapter 7,"DecisioNet Software on an SCO UNIX System.")

- Use the EPL Administration application Base Hardware Configuration screen to define the hardware CBS, power supply and receive antenna configuration. (Refer to Chapter 8, "Configuring the DecisioNet System Environment.")

- Test the CBS and RF infrastructure (Refer to Chapter 12, "Testing the System.")

- Accomplish site certification. For more information on this procedure, see an NCR representative and reference the *Certification/Re-certification Site Survey Procedure* (497-0410343).

Phase 5: Install the SmarTalker Tags

Although physical placement of the SmarTalker tags is one of the last tasks to be completed, preparation is occurring in parallel with Phase 4 of the installation. The SmarTalker installation consists of the following tasks:

- Develop a pre-EPL file in cooperation with the overlay supplier (Refer to "Phase 2: Scan the Site and Develop SmarTalker Overlays" in this chapter, and Chapter 10, "SmarTalker and Rail Installation" or Chapter 11, "SmarTalker II and Rail Installation.")

- Install the SmarTalker rails and clips according to instructions provided by the manufacturer.

- Install the SmarTalker tags (Refer to Chapter 10, "SmarTalker and Rail Installation" or Chapter 11, "SmarTalker II and Rail Installation.")

- Load the pre-EPL file and initialize the SmarTalker tags (Refer to Chapter 9, "Loading the Pre-EPL File.")

Phase 6: Validate Quality of the Installation

The final phase of the installation process is to ensure the quality of the installation. Refer to Chapter 12, "Testing the System."

Example List of Install Tasks

The install process can be broken into distinct functions, but the execution of these tasks must be carefully choreographed. The following list gives an example of typical tasks. This manual explains procedures involving software and hardware installation and testing. For detailed information on tasks involving project planning, such as site surveys, see your NCR representative and reference the *DecisioNet System Implementation Guide* (497-0002329).

- Site requirements review meeting
- Survey the site to determine store square footage, types of shelving in existence, types of POS applications used, number of PLU items, etc.
- POS integration (1st site only)
- DecisioNet software configuration and customization (1st site only)
- Overlay print engine integration (1st site only)
- In aisle Radio Frequency (RF) handheld integration (1st site only)
- Coordinate contractor labor
- Planning meeting and overlay layout
- Scanning equipment arrives at site
- Scan product for EPL data
- Process scan data and send to overlay supplier
- Load EPL Software Base
- Electrical/data cable routing
- Install RS-422 adapter
- CBS and antenna mounting

- Test RF components and certify the site. For more information on site certification, contact your NCR representative and reference the following documents:
    - B005-0000-1138: *DecisioNet Support Tools Reference Guide* (document)
    - G370-1182-0000: *EPL Implementation Package for Windows 95/NT* (disk media containing the EPL RF Certification Package)
    - 497-0410343: *Certification/Re-certification Site Survey Procedure* (to document site configuration for support purposes)
- SmarTalker tags, pre-EPL file from overlay supplier, and SmarTalker rails and clips arrive at site
- Load pre-EPL table to initialize the SmarTalker tags
- Install SmarTalker rails and clips
- Install SmarTalker tags
- Quality control meeting
- Post install training