

Sage 500 ERP Intelligence  
Reporting  
Installation Guide

2012



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## 1.0 System requirements

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### 1.1 Recommended system requirements

- Operating system: Windows 2000, Windows XP, Windows Vista, Windows 7, Windows Server 2003, Windows 2008 Server, Windows Terminal Server.
- Microsoft Excel XP or higher.
- Hardware: CPU > 200 MHz.
- Memory: 32MB RAM.
- Hard Drive Space: 200MB.

### 1.2 Supported database connectivity

Sage 500 ERP Intelligence Reporting uses **ODBC** and **OleDb** technology to gain access to **Open Database Systems** via the **Connector**. Sage Intelligence Reporting includes direct support for most popular database systems, and connection types for these are included within the Connector. Where a connection type does not exist but where the system has an ODBC driver, these can be accessed via the **System DSN** connection types within the Connector.

Please note that although the Sage 500 ERP Intelligence Reporting Connector module natively works with several database types, it only ships with reports and templates for the Sage 500 ERP Intelligence Reporting databases that run on a SQL Database.

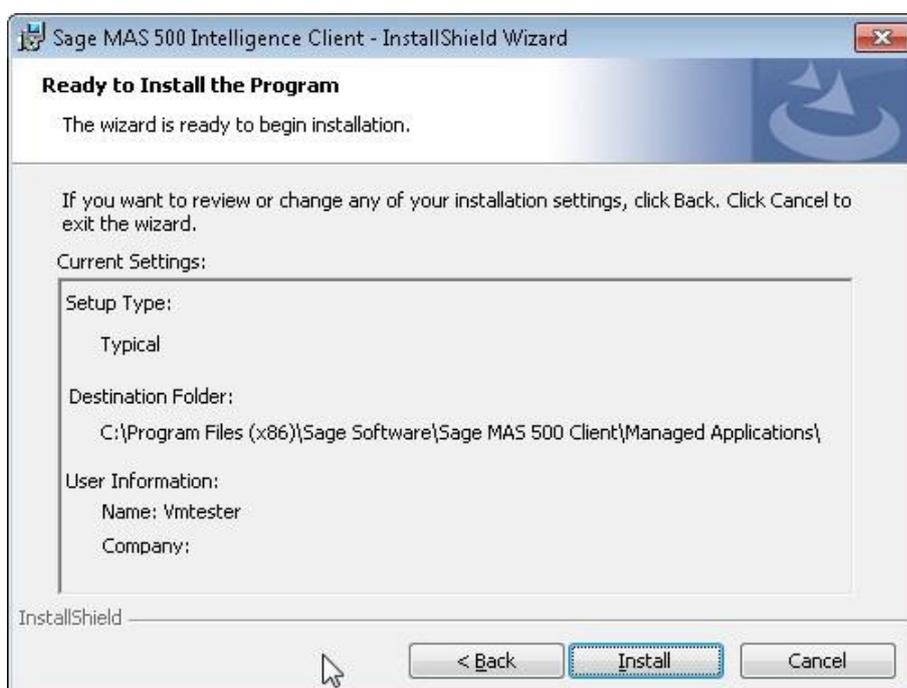
## 2.0 Sage 500 ERP Intelligence Reporting general installation guide

1. To begin the installation, launch the **setup file**.

The InstallShield wizard welcome screen displays:



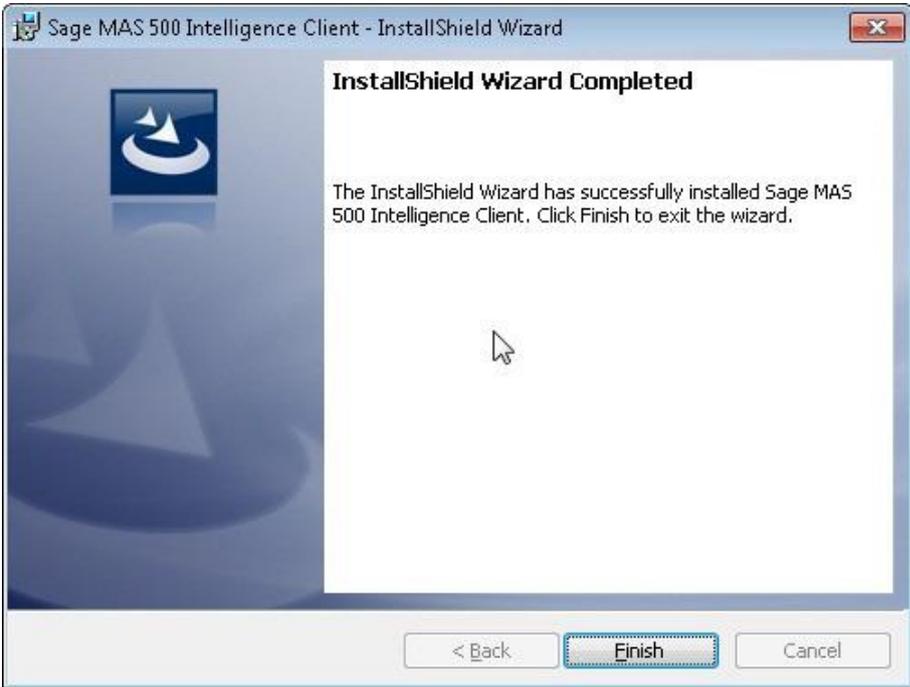
2. Click **Next**.
3. Click **Next** again to install to the default folder or **Change** to browse to an alternative folder.
4. Click **Install** to continue.





**NOTE:** If .NET Framework 3.5 sp1 or higher is not installed on the system, setup will perform the installation of the .NET Framework 3.5 sp1.

5. When the installation has completed, a window will display, confirming successful completion:



6. Click **Finish**.

7. The VSTOR screen displays:



There is no need to take any action as the screen will close once VSTOR has installed.

## 3.0 Creating the Report Repository folder

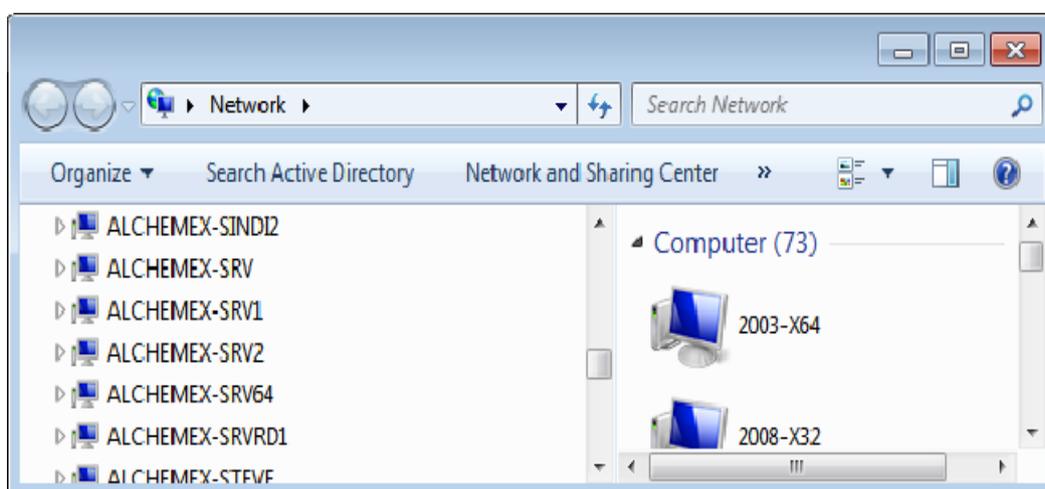


**NOTE:** A central Report Repository folder must be created on your network in order for all users to access the reports and templates. A universal naming convention (UNC) should be used when naming your Report Repository folder, e.g. \\server name\sage intelligence. This folder should be backed up so that you can restore all modified reports and templates from this back up. Users must be given full permissions in order to access this folder.

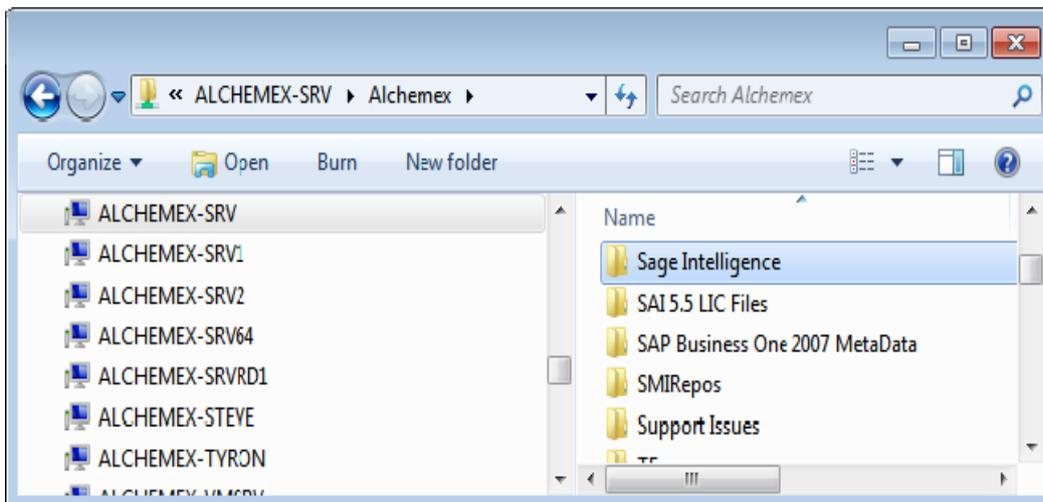
1. If using Windows 7/Vista, select the  **Start** button and select **network**.



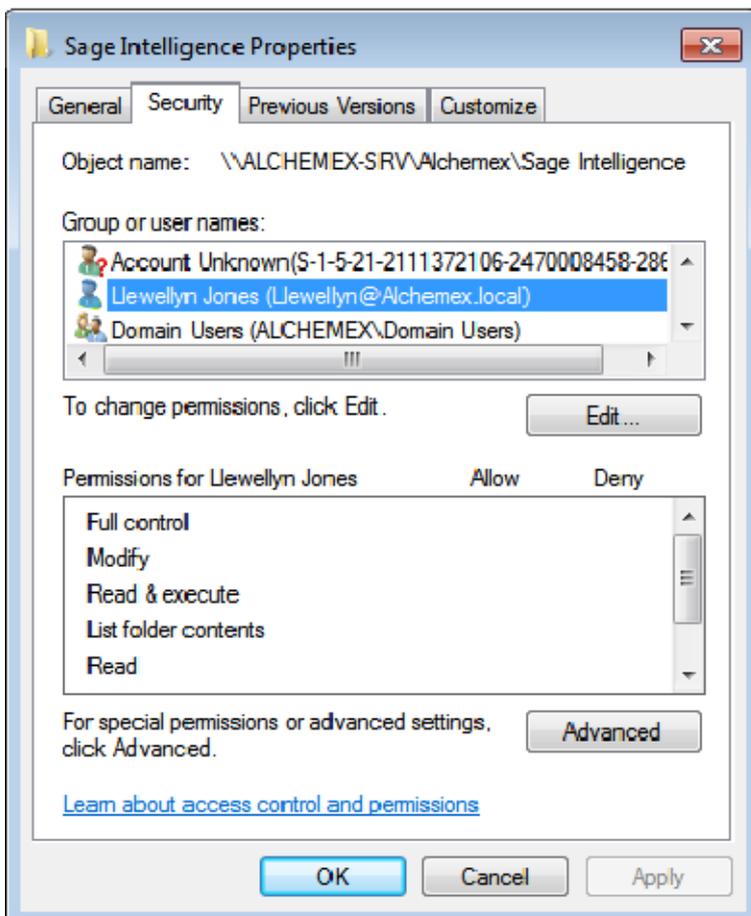
2. If using Windows XP then select the  icon and select the relevant network directory.
3. Select and expand the  **Network** icon. A list of network directories displays:



- Select a directory and create a new folder, which will be the Report Repository folder and rename the folder accordingly, for example: Sage Intelligence. Users will need existing permissions/rights to create a folder on a networked location.

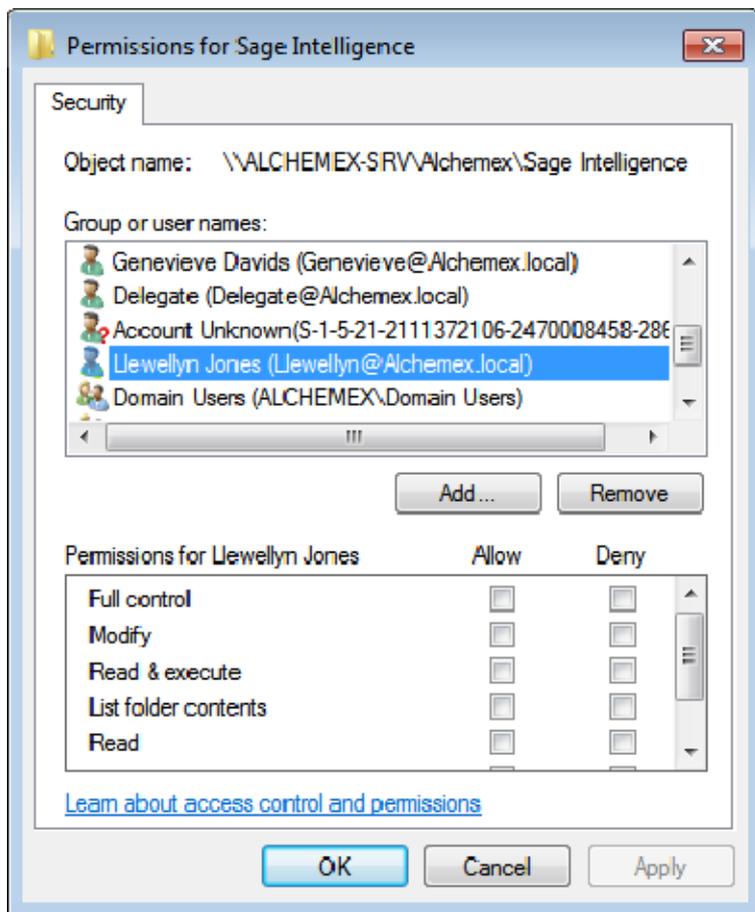


- Right-click on the folder you created and select **Properties**, then **Security**.



**NOTE:** Security permissions for user should be set to Full Control, thus allowing users full editing capabilities. Hint: it would be advisable to put all reporting users in a group and assign the group permissions to Full Control.

6. Click on a user's name from the **Group** or **usernames** box.
7. Tick the **Allow** checkbox on full control in the Permissions area.
8. Click the **OK** button.



Or

Users can create a folder in their required Drive (for example, :C or D) from the Host Machine.

Users can share the above created repository folder with respective permission rights for all the Required Users.

9. After successfully creating a Repository Folder, the same folder needs to be mapped in the Network Repository Path by clicking on the any task from MAS Intelligence > Tools, or MAS Intelligence > Maintenance, before accessing any Intelligence Reporting tasks.

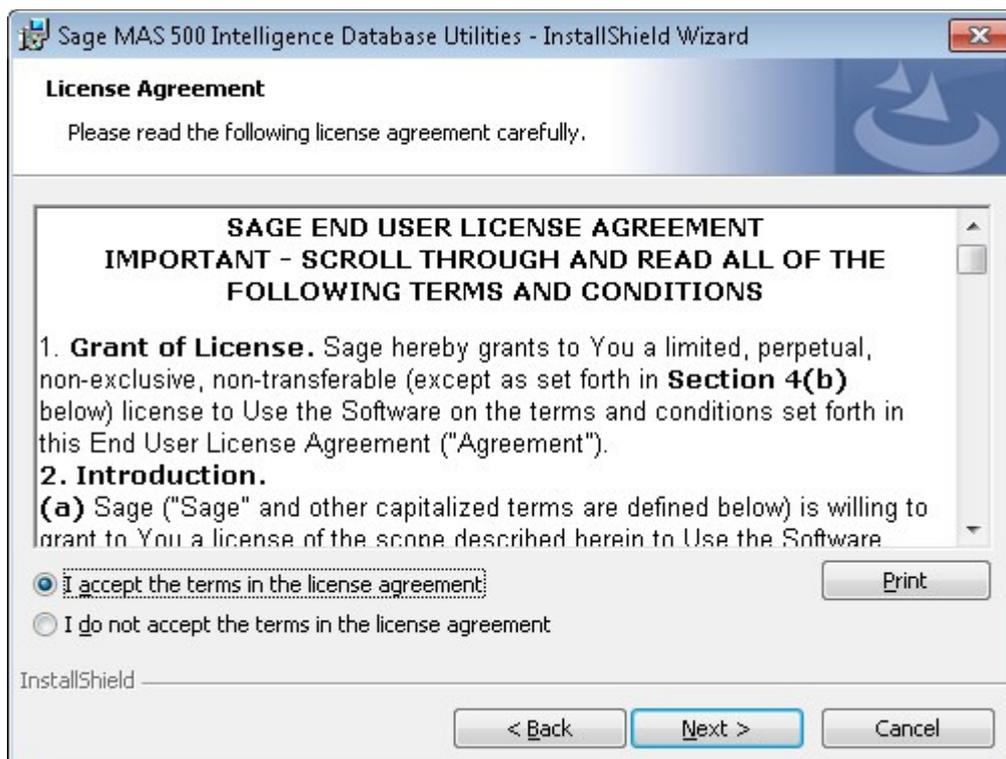


## 4.0 Client server installation guide

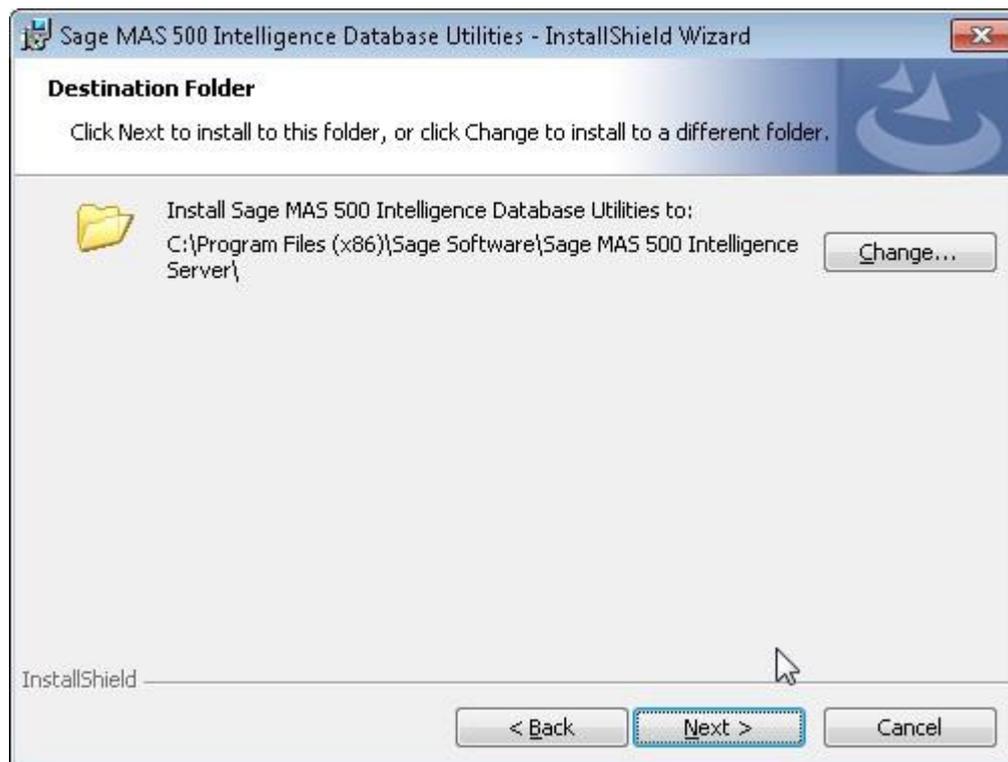
1. To begin the installation, launch the setup file. The InstallShield Wizard screen will appear.



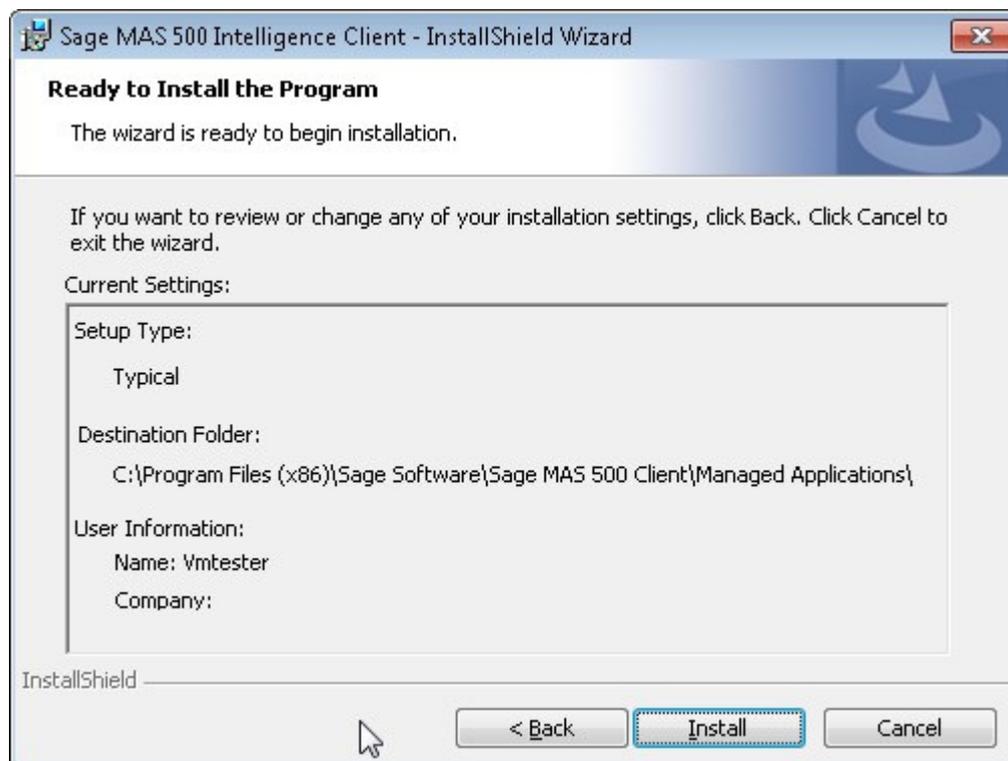
2. Click **Next**.



3. Accept the License Agreement and click **Next**.



4. Click **Next** to install to the default folder or **Change** to browse to an alternative folder.



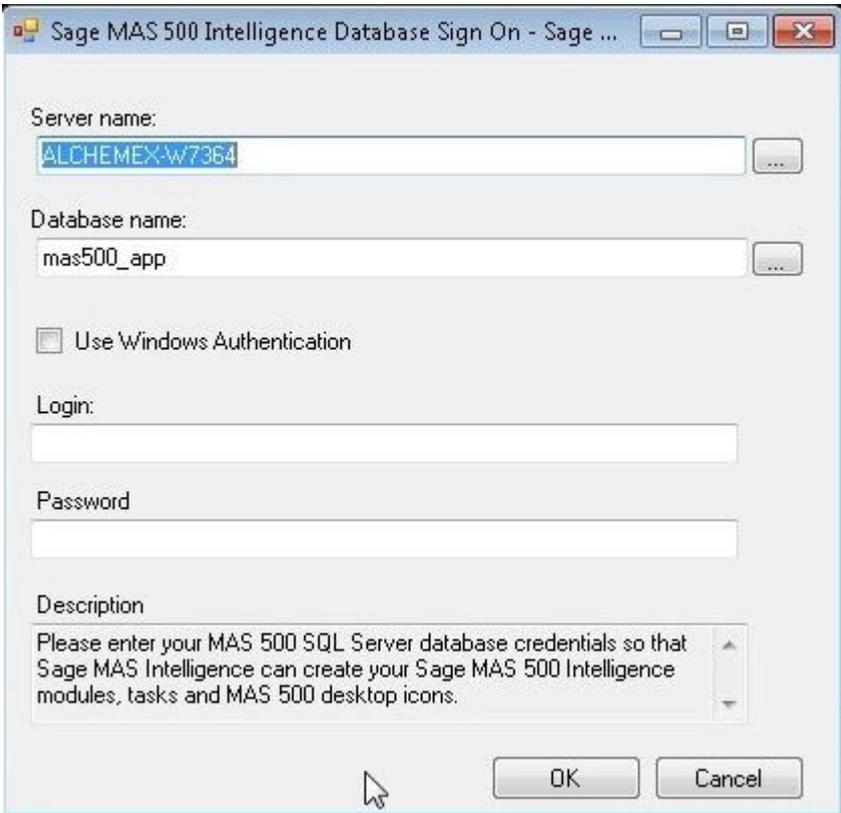
5. Click **Install** to continue.



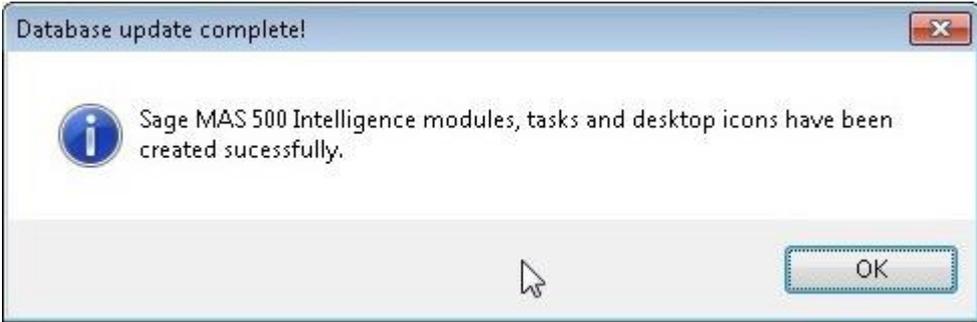
**NOTE:** If .NET Framework 3.5 sp1 or higher is not installed on the system, setup will perform the installation of the .NET Framework 3.5 sp1.



6. Click **Continue** if this is the first installation of Sage 500 ERP Intelligence reporting or **Ignore** if not.



7. Enter your **MAS 500 SQL Server database** credentials and click **OK**.



- When the installation has completed, a window will appear confirming successful completion.



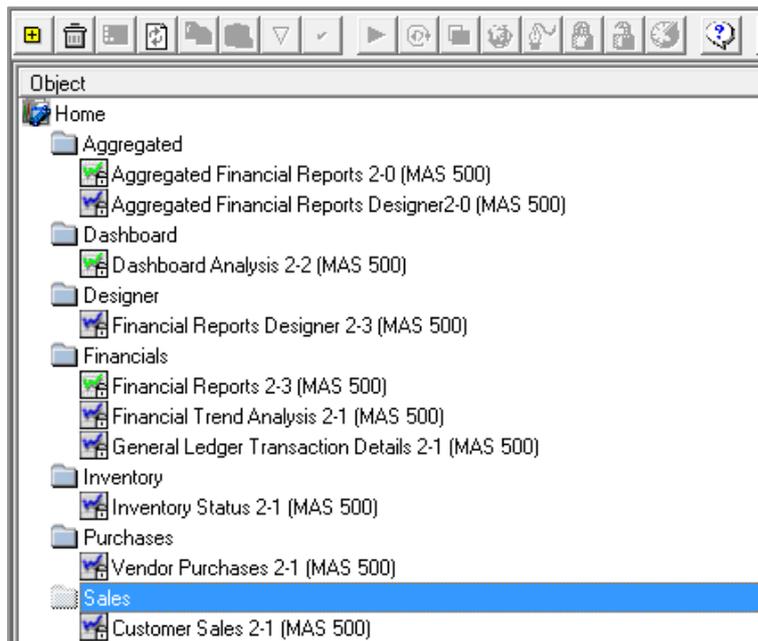
- Click **Finish**.

## 5.0 Bulk import / update reports functionality

1. When you have installed product updates, the new reports will be saved to the following folder:  
C:\Program Files\Sage Software\Sage SAGE 500 ERP Client\Managed Applications\SMIFramework\ReportUpdate\en
2. You can now use the **Bulk import / import option** to import the new report into the Report Manager. As per below instructions. When doing a bulk import of new reports, current reports and settings are not deleted.
3. The intention of bulk imports is to import new reports into the current metadata repository only and not to modify current versions of reports and settings that were created and saved prior to the bulk import.
4. Launch **SAGE 500 ERP Desktop**.
5. Launch **Report Manager**.

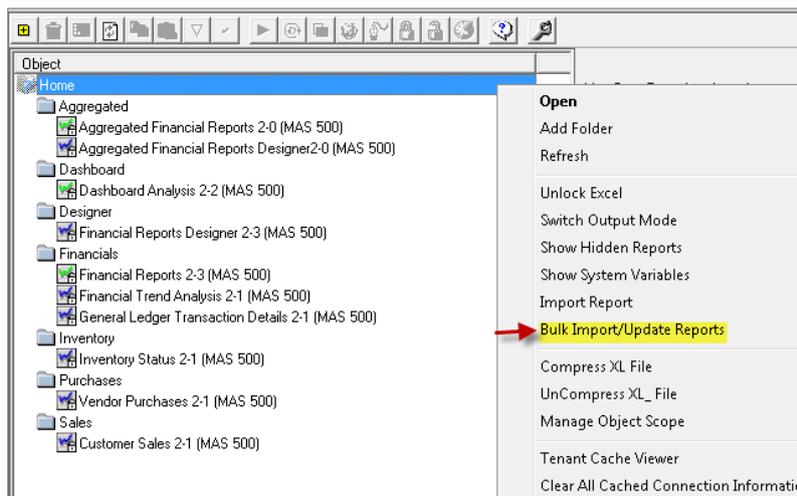


**NOTE:** The number of reports before performing Bulk Import/ Update Reports.

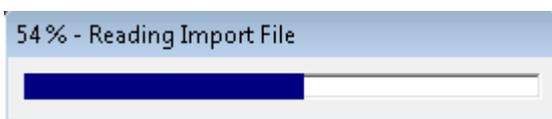
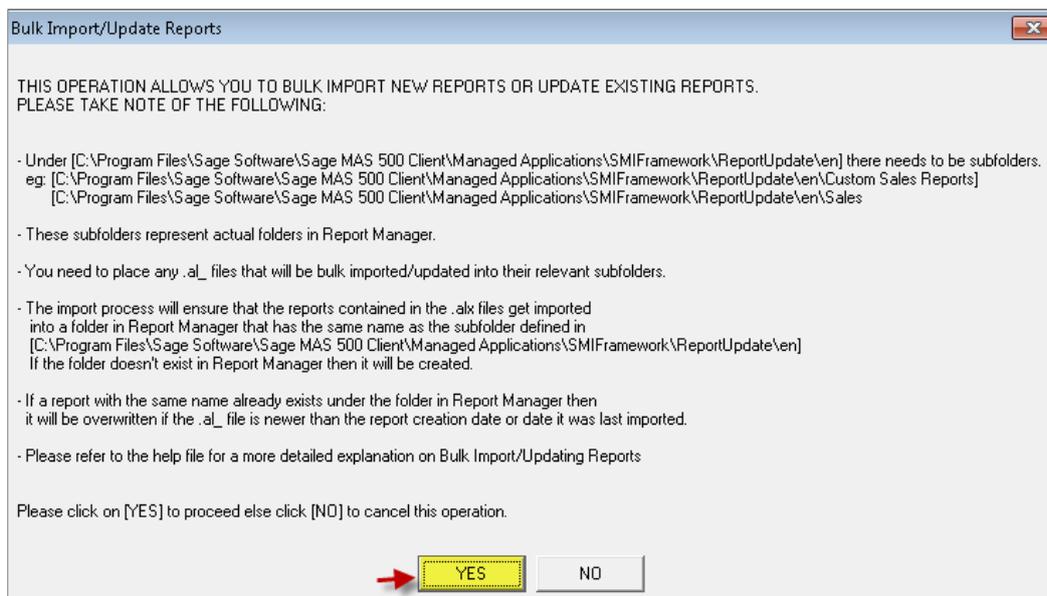


6. Right-click on the **Home** Node.

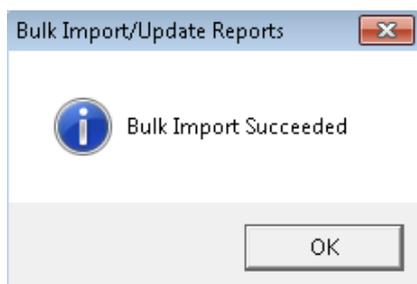
7. Select **Bulk Import/Update** reports.



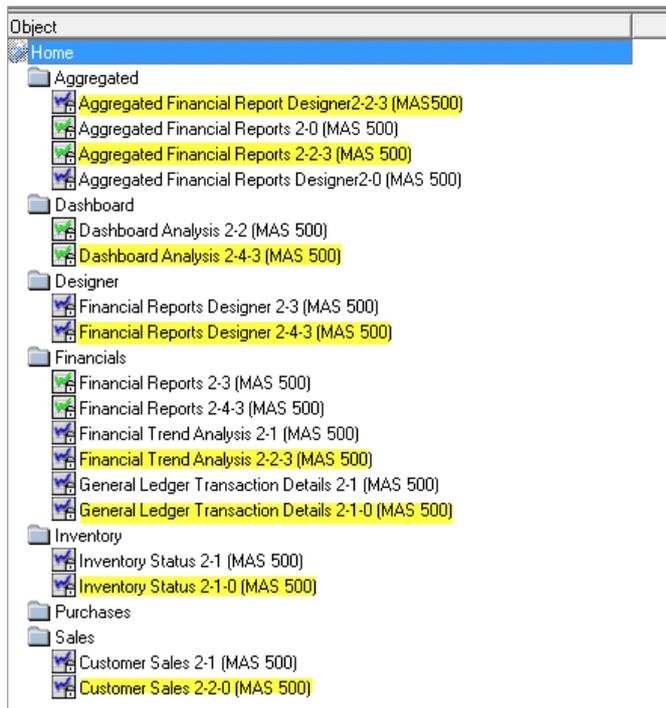
8. Click **Yes**.



9. If the import is successful, the following message displays:

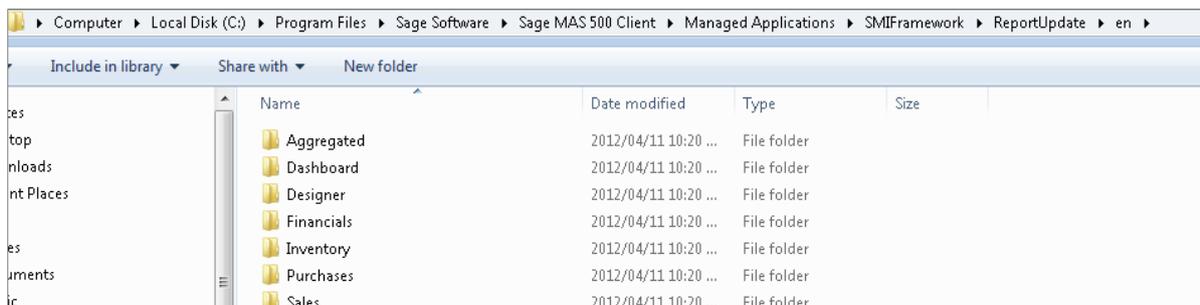


10. The new reports will be bulk imported alongside any existing reports.
11. If desired, old reports may now be removed via the Report Manager.



**NOTE:** The updated reports folder can be found in the below location:

C:\Program Files\Sage Software\Sage SAGE 500 ERP Client\Managed Applications\SMIFramework\ReportUpdate\en.



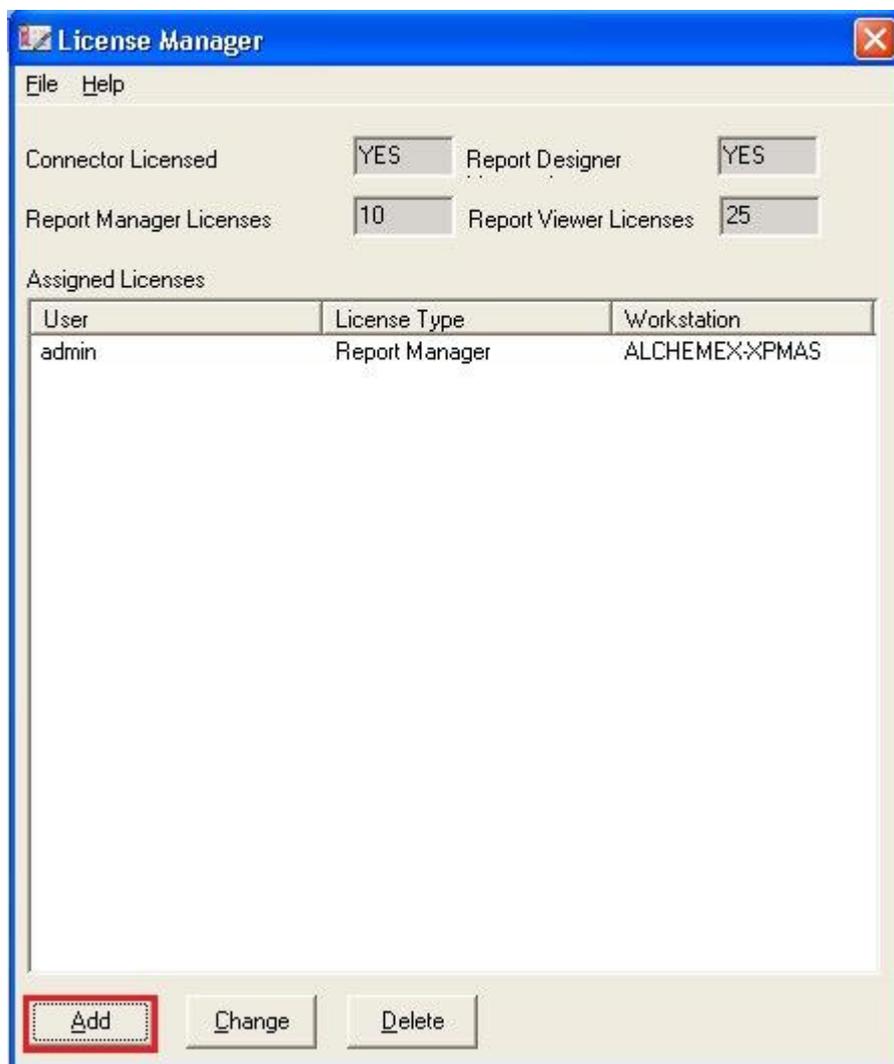
## 6.0 Workstation licenses

Sage 500 ERP Intelligence Reporting uses a “workstation” licensing model. After you have registered your Intelligence Reporting installation, you will have (n) workstation licenses available (where (n) is the number of licenses you have purchased). The first (n) workstations to access Sage 500 ERP Intelligence Reporting will be assigned these Licenses. When the (n) licenses have been assigned you will need to purchase more licenses or you will need to un-assign some existing licences.

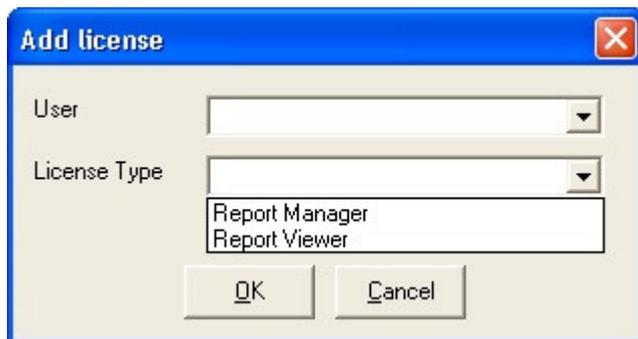
Licenses will be tied to a user name and workstation so the licensing is not “concurrent” licensing.

The License Manager provides a snapshot of your Sage 500 ERP Intelligence Reporting licenses and module configuration.

1. When the License Manager is opened, the screen below will display, listing the licenses.



2. Select the **Add button** to add a new license.
3. The Add License screen displays:



4. Enter the **User name** to assign the license to.
5. Choose the **license type** you would like to add.
6. Click **OK**.
7. You will now see the license you added along with the license type.