

Sage 500 ERP 2016 Intelligence Reporting

Installation Guide

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1.0 Introduction

1.1 How to use this guide

This guide is designed to assist you in setting up a new installation of Sage 500 ERP 2016 Intelligence Reporting. This guide relates to the version 7.6.0 release of Intelligence Reporting.

This guide provides the information needed to install Sage 500 ERP 2016 Intelligence Reporting.

The order of topics in this guide matches the sequence of tasks you would typically perform to install and set up Intelligence Reporting.

We assume that you:

- Have completed Sage 500 ERP 2016 installation and setup.
- Have experience working with Sage 500 ERP 2016.

Note: This guide contains troubleshooting tips and technical information on configuring supported accounting systems and database engines for use with Intelligence Reporting. However, this guide is not a replacement for a qualified network or database administrator.

2.0 Getting Started

2.1 System Requirements

Before you can install Intelligence Reporting on a workstation or server ensure that your hardware and software meets at least the recommended system requirements and that you have the necessary prerequisites installed.

2.1.1 Recommended System Requirements

One of the following operating systems fully installed and operational:

- Windows 7 (32 and 64 bit)
- Windows 8 (32 and 64 bit)
- Windows Server 2008
- Windows Server 2012
- Windows Terminal Server
- Ensure Sage 500 ERP 2016, is fully installed and operational. For a complete guide on installing Sage 500 ERP 2016, please refer to the Sage 500 ERP Installation Guide.

Note: You do not need to have Sage 500 ERP installed on the same workstation, however, the workstation will need to be able to access to the Sage 500 ERP database.

- Microsoft .Net Framework 4.0 (This will be installed upon installation of Intelligence Reporting if it is not present).
- Microsoft Excel 2007 or later. Open Microsoft Excel at least once to ensure that it is fully licensed and activated before installing Sage Intelligence Reporting. Close Microsoft Excel before beginning the installation.
- Hardware: CPU > 1.3 GHz
- Memory: 2GB RAM
- Hard Drive Space: 350 MB

2.1.2 Database Connectivity Supported

Intelligence Reporting uses ODBC and OLEDB technology to gain access to Open Database Systems. Intelligence Reporting includes direct support for most popular database systems and Connection Types which are included within the Connector. For systems 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.

3.0 Installing Intelligence Reporting

3.1 Installing the Software

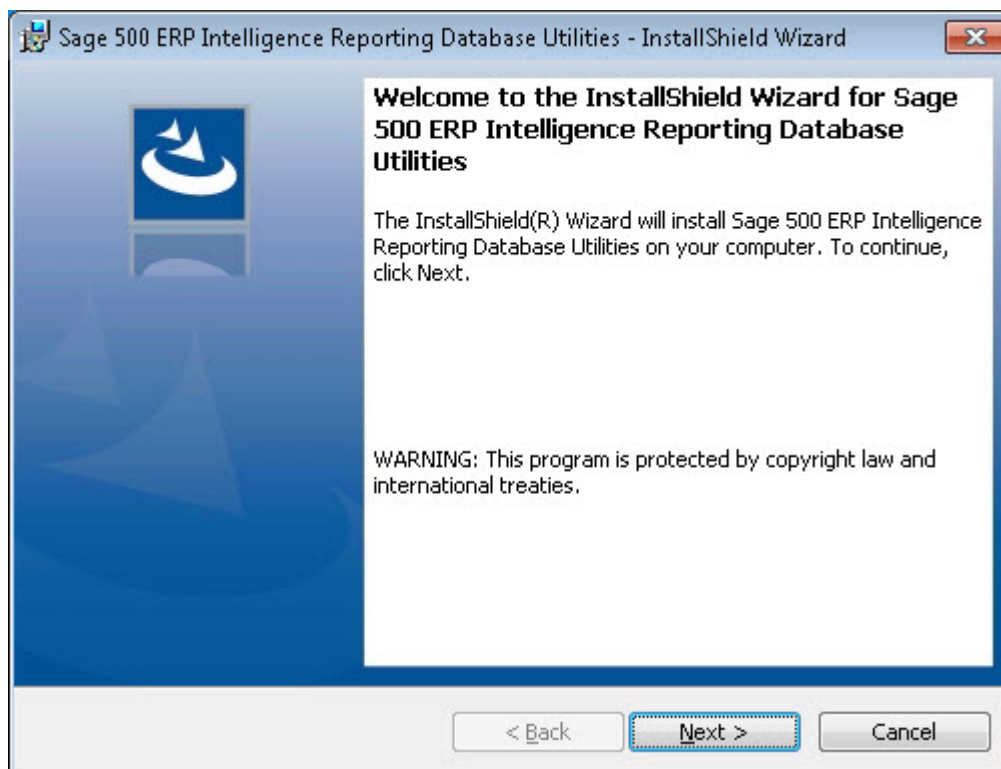
Sage 500 ERP Intelligence Reporting Database Utilities will first need to be installed on the Sage 500 ERP 2016 database server.

Sage 500 ERP 2016 Intelligence Reporting must be installed on all workstations where the software will be used. The following steps should be followed if you are installing Intelligence Reporting for the first time.

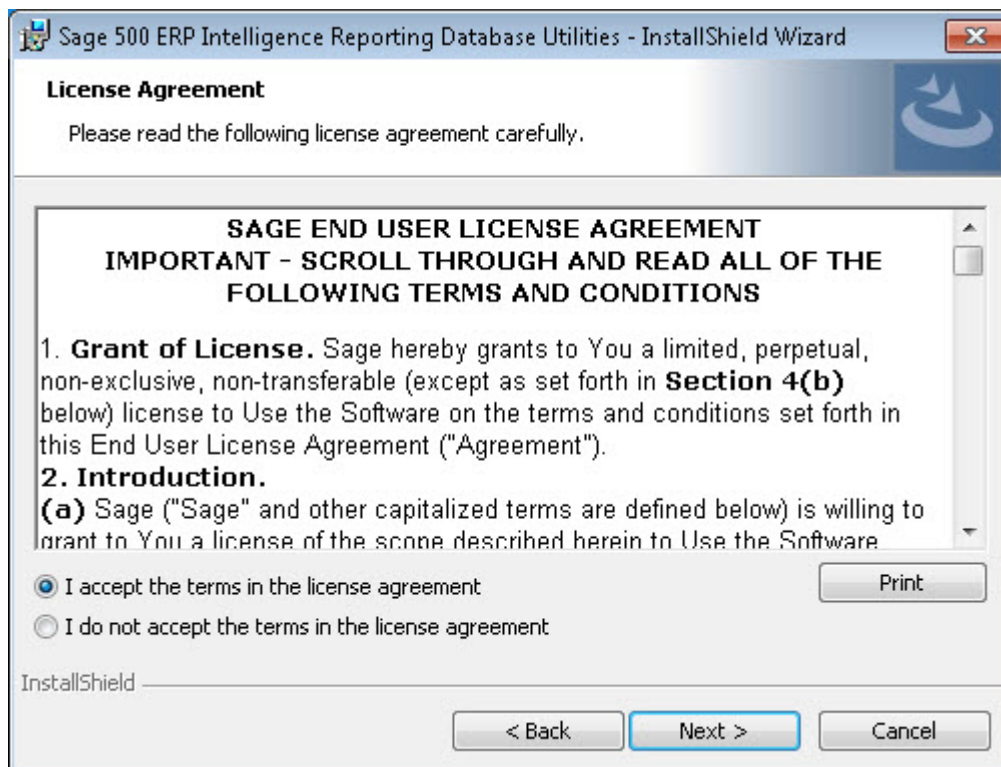
Before installing Intelligence Reporting please ensure that you have familiarized yourself with the system requirements.

Run the Sage 500 ERP Intelligence Reporting Server.exe file on the database server.

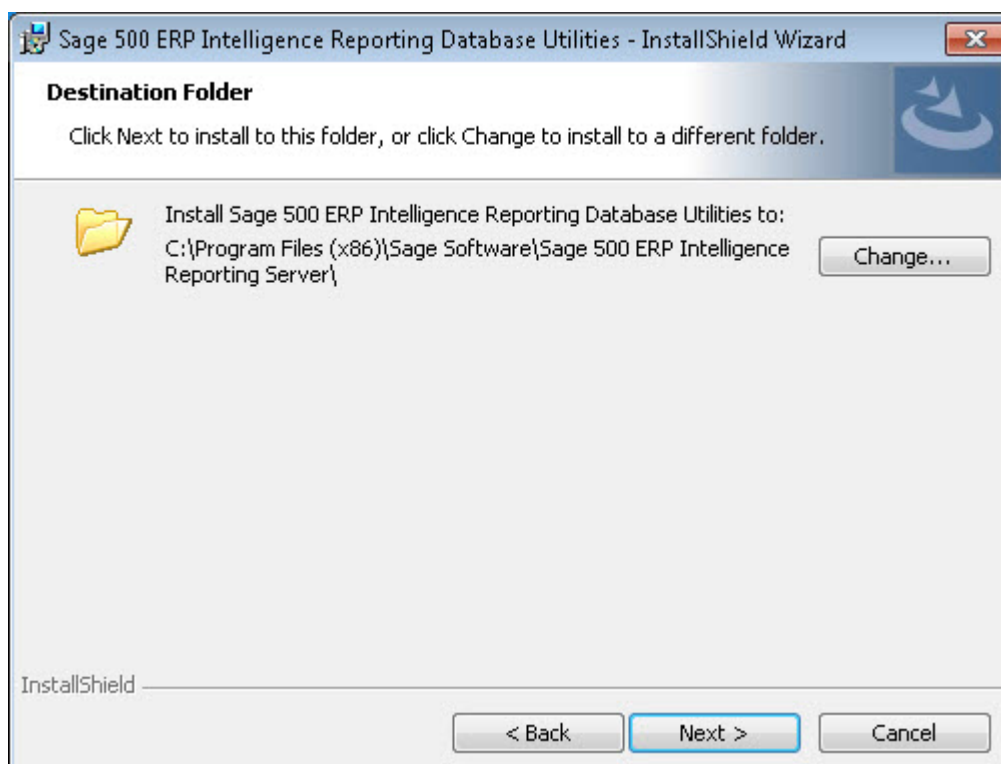
1. The Install Wizard will appear. Click on **Next**.



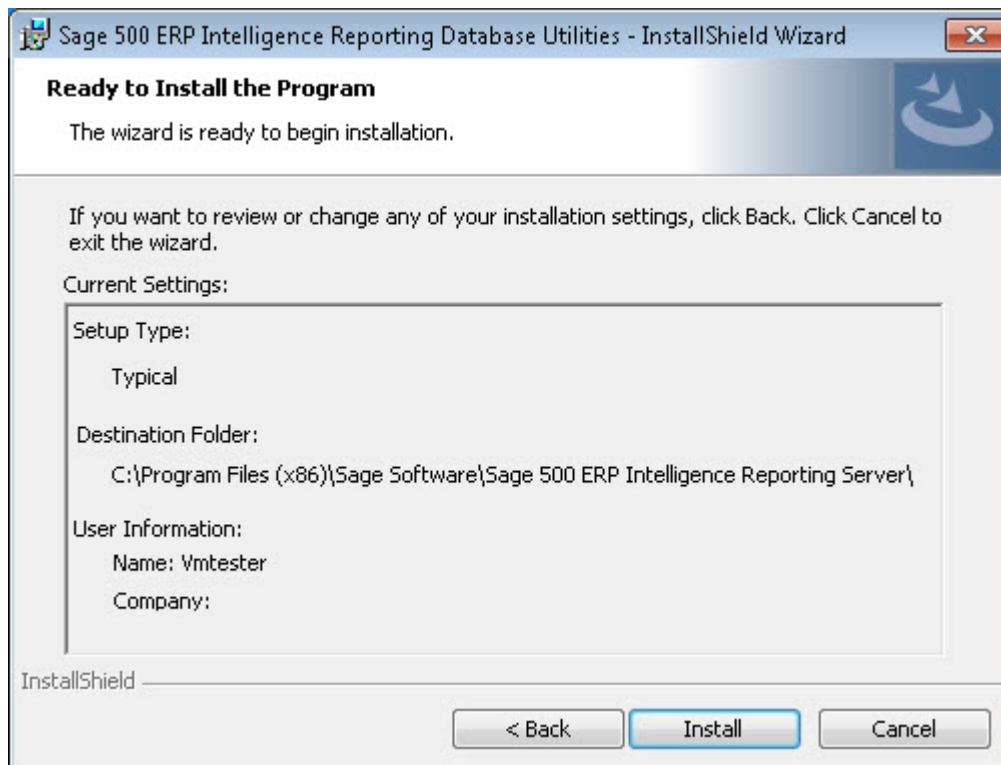
2. Accept the terms in the license agreement and click **Next**.



3. Click **Next** to choose the default install location or click Change to specify your own location and thereafter click **Next**.



4. Installation details will be displayed. Click **Install**.



5. Select **Finish** to complete the installation of Sage 500 ERP Intelligence Reporting Server.

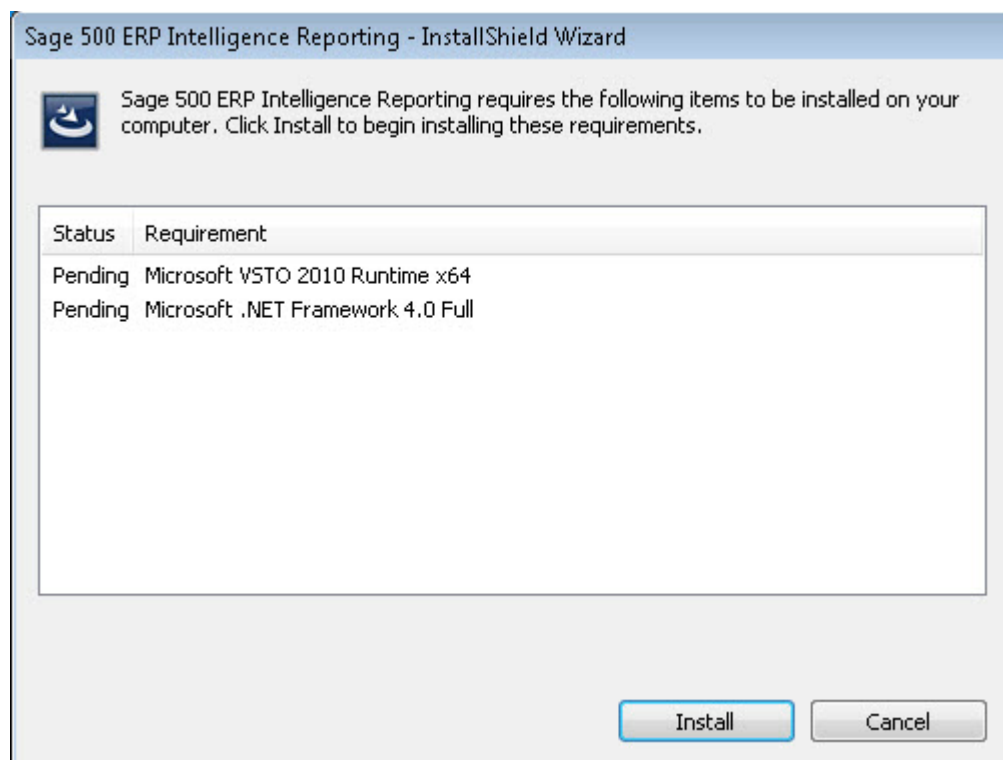


After installation is complete, you will need to install Sage 500 ERP Intelligence Reporting.exe onto all workstations where the software will be used.

Run the Sage 500 ERP Intelligence Reporting.exe file on the workstation by double clicking on it.

6. The prerequisites for Sage Intelligence will be installed before the software. Click on **Install**.

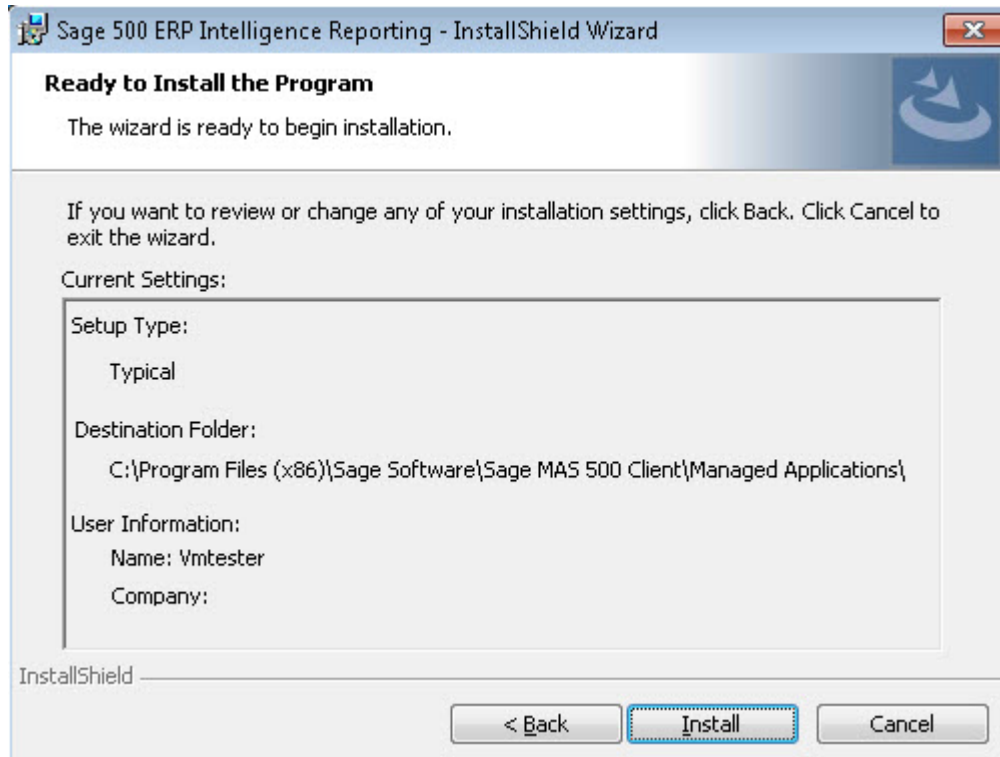
Note: Intelligence Reporting requires the Microsoft.NET 4.0 Framework and you will be prompted to install this if it is not already installed.



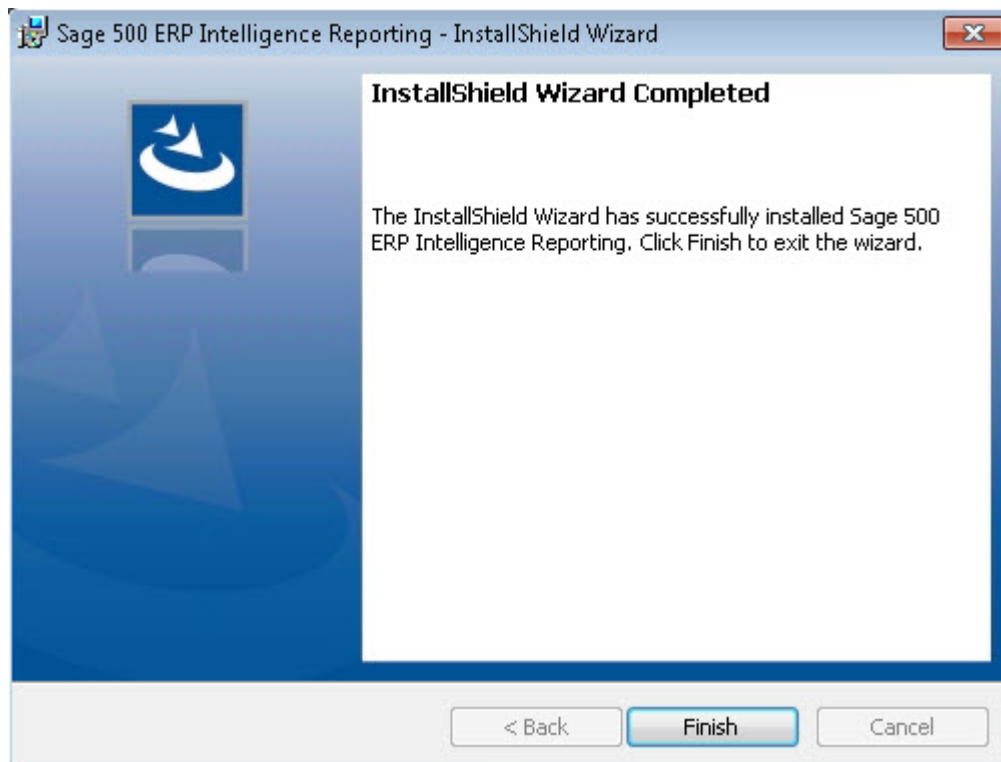
7. Once prerequisites have been installed, click **Next** to continue the installation.



8. Installation details will be displayed. Click **Install** to install Sage Intelligence Reporting.



9. Select **Finish** to complete the installation of Sage 500 ERP Intelligence Reporting.



4.0 The MetaData Repository

The MetaData Repository stores all of your important information including connection, container, report information and reporting trees in one folder.

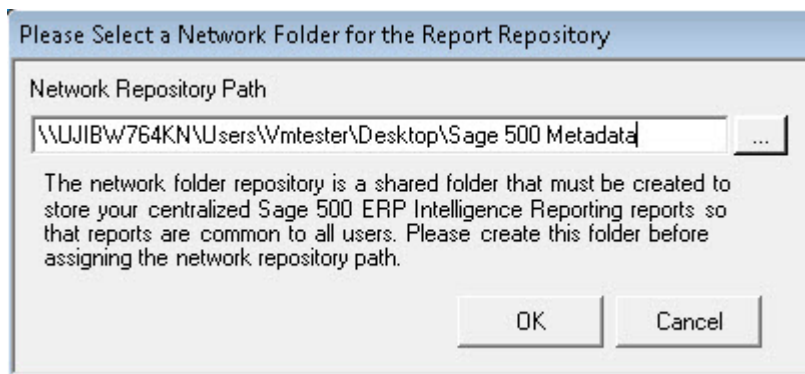
4.1 The Benefits of the MetaData Repository

Sharing the MetaData Repository folder allows report templates to be accessed by multiple users.

By storing all of your important information in one folder, backing up this folder will ensure that all of your connection, container, reporting trees and report templates can be easily restored in the event of data loss.

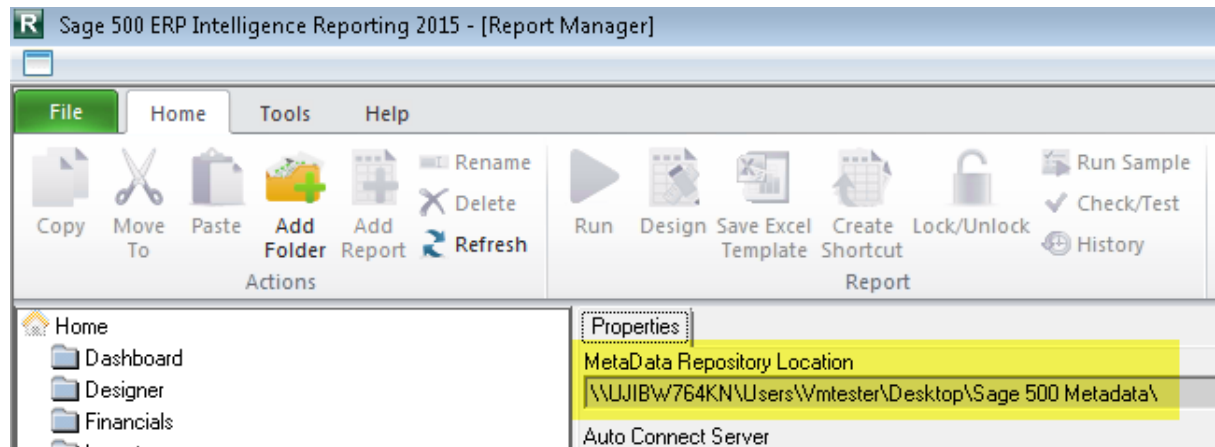
4.2 Creating your Report Repository

Upon first running the Sage Intelligence Reporting software, you will be prompted for a Network Repository Path. This is a shared folder created by the user in a known location.



Tip: It is recommended that you share the MetaData location so that you will be able to share your report templates with other Intelligence Reporting users. In order for users to access the MetaData on a network location they will need full access rights to the network folder.

The location of your MetaData Repository can be found by opening the Report Manager or Connector. Your MetaData Repository location will be displayed in the window that opens, on the **Home** tab.



Tip: Add this folder to your daily backups to ensure that all of your connection, container, reporting trees and report templates can be easily restored in the event of data loss.

4.3 Allowing Report Templates to be Accessed by Multiple Users

If you choose to run Sage 500 ERP 2016 Intelligence Reporting in a workstation environment, point the network repository path to the shared location you created on the server. This will allow the workstation to access connections, containers, reporting trees and report templates.