

## Sage 500 ERP 2016

Sage Intelligence Reporting Upgrade Guide

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#### **1.0 System Requirements**

Supported Operating Systems: Windows 2000, Windows XP, Windows Vista, Windows 7, Windows Server 2003, Windows 2008 Server

- 1. Microsoft Excel 2007, 2010, 2013
- 2. Hardware: CPU 1GHz or greater
- 3. Memory: 512MB RAM
- 4. Microsoft SQL Server 2005, 2008/R2 and 2012
- 5. Hard Drive Space: 1Gb or more

#### 2.0 Supported Database Connectivity

Sage 500 ERP Intelligence Reporting uses ODBC and OLEDB technology to gain access to Open Database Systems via the Connector. Sage 500 ERP Intelligence Reporting includes direct support for most popular database systems and Connection Types for these 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.

Please note that although the *Sage Intelligence Reporting* Connector module natively works with several database types, it only ships with Reports & Templates for the *Sage Intelligence* databases that run on a SQL Database.

#### 3.0 Upgrade Instructions

This document serves the purpose of guiding a user on upgrading their Sage 500 ERP Intelligence from one version to another. The uninstallation of software and databases is not required when upgrading Sage 500 ERP Intelligence Reporting.

Please ensure the following Sage 500 ERP software is installed before the Sage 500 ERP Intelligence Reporting software can be upgraded.

- Sage 500 ERP Client
- Sage 500 ERP DatabaseExpress
- Sage 500 ERP Client Installation (E.g. 7.4)
- Sage 500 ERP Intelligence Server

Please ensure that your system meets the minimum system requirements and that the User Account Control (UAC) is disabled under the User Accounts in the Control Panel in Windows, otherwise problems will be encountered when trying to run the Sage 500 ERP Intelligence software.

#### 4.0 Installing Sage Intelligence Reporting

1. Locate the folder where the Intelligence Reporting software is stored and double click on the Setup file and the Preparing to Install screen will appear.

Sage 500 ERP Intelligence R	eporting - InstallShield Wizard
1	Preparing to Install
0	Sage 500 ERP Intelligence Reporting Setup is preparing the InstallShield Wizard, which will guide you through the program setup process. Please wait.
	Extracting: Sage 500 ERP Intelligence Reporting.msi
	Cancel

2. The Welcome screen will open. Click the Next > button.

😸 Sage 500 ERP Intelligence Reporting - InstallShield Wizard 🛛 💦				
	Welcome to the InstallShield Wizard for Sage 500 ERP Intelligence Reporting The InstallShield(R) Wizard will allow you to modify, repair, or remove Sage 500 ERP Intelligence Reporting. To continue, click Next.			
	< Back Next > Cancel			

3. The Read to Install the Program screen will appear. Click the Install button.

😸 Sage 500 ERP Intelligence Reporting - InstallShield Wizard 🧮	×
Ready to Install the Program	
The wizard is ready to begin installation.	
If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.	
Current Settings:	
Setup Type:	
Typical	
Destination Folder:	
C:\Program Files (x86)\Sage Software\Sage MAS 500 Client\Managed Applications\	
User Information:	
Name: Vmtester	
Company:	
InstallShield	
< Back Install Cancel	

4. The Destination Folder screen will appear. Either click the "Change..." button to change the folder or click the Next > button to use the default folder.

🥵 Sage 500	ERP Intelligence Reporting - InstallShield Wizard
	ion Folder kt to install to this folder, or click Change to install to a different folder.
	Install Sage 500 ERP Intelligence Reporting to: C:\Program Files (x86)\Sage Software\Sage MAS 500 Change Client\Managed Applications\
InstallShield -	< Back Next > Cancel

5. When Intelligence Reporting has finished installing, click the Finish button. The Install VSTOR 3.0 progress bar will appear and will close itself once VSTOR has been installed.

	InstallShield Wizard Completed
	The InstallShield Wizard has successfully installed Sage 500 ERP Intelligence Reporting. Click Finish to exit the wizard.
Installing	
	nstalling VSTOR 3.0. This may take several minutes.
Checking \ Ir	nstalling VSTOR 3.0. This may take several minutes.
Checking \ Ir	nstalling VSTOR 3.0. This may take several minutes.
Checking \ Ir	nstalling VSTOR 3.0. This may take several minutes.

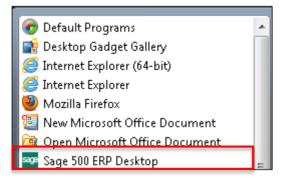
 Verify the version number after installation of Sage 500 ERP Intelligence 2016 by browsing to your Control Panel > Programs > Programs & Features. Select Sage 500 ERP Intelligence Reporting. Check that you have the latest version.

INICIOSOIL SQL SEIVEL 2000 NZ INALIVE CHEIL	містозон согрогаціон	
Microsoft Visual C++ 2008 Redistributable - x86 9.0.3	Microsoft Corporation	
🚥 Sage 500 ERP Intelligence Reporting	Sage Software, Inc.	
🚥 Sage 500 ERP Intelligence Reporting Database Utilities	Sage Software, Inc	
😼 Microsoft Report Viewer Redistributable 2008 SP1	Microsoft Corporation	
Microsoft .NET Framework 4.5.1	Microsoft Corporation	
Microsoft Office Professional Plus 2013	Microsoft Corporation	
🖟 Microsoft Visual Studio 2010 Tools for Office Runtim	Microsoft Corporation	
Microsoft SQL Server 2008 R2 (64-bit)	Microsoft Corporation	
Sage Software, Inc. Product version: 7.70.76	500.0025	
Help link: www.SagesoftwareOnli Updat		

### 5.0 Registering the Intelligence Reporting Upgrade

You will need to register (Not license) Intelligence Reporting online when you have finished upgrading.

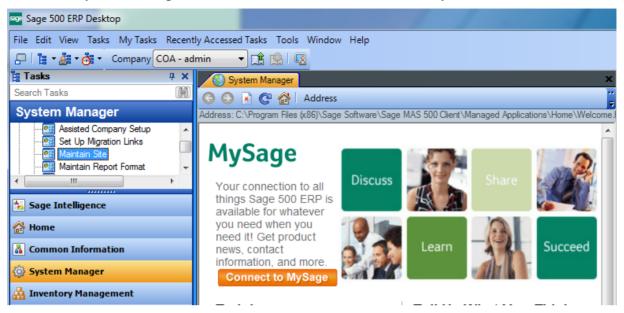
1. Click on either the Start menu or desktop short cut and select Sage 500 ERP Desktop to launch Sage 500 ERP.



- 2. The Sage 500 ERP Login box will appear. Enter the following details
  - User Name: enter your user name
  - Password: enter your password
  - Company: select a company

👓 Sage 500 ERP Log	jin	×
🔲 Use Windows Au	thentication	
User Name:	Admin	1
Password:	[	
Company:	SOA - Systems of America	•
Advanced Option	s OK	Cancel

3. Select System Manager and then click on Maintain Site in the system tree.



4. Select the Registration tab and click the Automatic Internet Registration button.

<b>Registration</b>	n <u>O</u> ptions	License	Registration Log
egistration Inform	ation		
License Type	Production	<u>C</u> ustomer Number	131336127
Company Name	Sage	Serial <u>N</u> umber	AXXCRAPA474
Contact Nam <u>e</u>	Carl	Unlocking <u>K</u> ey	MRTMTY

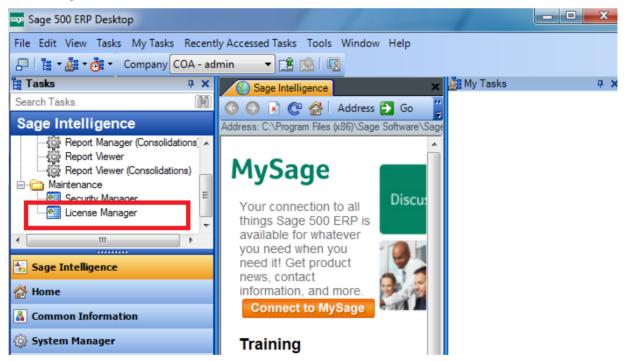
5. The Sage 500 ERP registration message box will appear. Click the OK button.

Sage 500 ERP
Your registration message has been updated. Users must log out in order for the new registration message to become effective.
ОК

6. The Registration Message box will now be populated. Log out and log back into Sage 500 ERP for the registration to take effect.

Registration Options - These buttons are disabled when no site settings have been saved				
	tic Internet Registration	Manual Registration		
Registration Messages				
Registration Request Message	WzL/rtew3xp9Zx20mg50S+JDom3c +S0yCizgJb5wcFXrmtCb1+X5JsZ1Z +b98DcGaQrja10VzoVmHiB/Xn2j9K +6Pe7TSVekT5NemutArVkTTqiq8a	TmYOgvsL0M5rnq		
Registration Message	+Ú90QrksPJ/BCvvD8ovfg6Z38ZM0 PYNKdGNJP0Z/Bli6wHX4x4cS9W utoVKDh79NwmBG0f8b	Ul2j+re2PEQitke&JlyHQeuk/EOosLe RH0clChBcu0CQ4DkvN+Vo92lYHW IaGU9vA9t6E5ahC5JRVqw0McFG05VJqelDoVVwf4z vBdnuGQXERfMTackJxwkh6VVbgGXgUGrYwQK6GR WzwSF07bjsfu1CluQIm5CY0gjwf1aKAhAIPCaAM3CJB		

7. Log back into Sage 500 ERP and select the Sage Intelligence>Maintenance>License Manager.



8. The License Manager screen will open. Click Help and select the About option.

E License Manager		×
File Help		
Connector Licensed Report Manager Licenses	YES Report Design 5 Report Viewer	er Licensed YES
Assigned Licenses	1	
User admin	License Type Report Manager	Workstation SSS500W764

9. The About screen will open. Check that the new version of Intelligence Reporting has been installed correctly. Click the OK button.

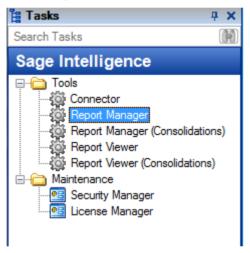
About Sage 500 ERP Intelligence Repo	orting X
	Sage 500 ERP Intelligence Reporting Version 2015
	Copyright (c) 2015
Sage Intelligence Reporting	Sage Alchemex Sage 500 ERP Reporting Component
	- OK

#### 6.0 Bulk Importing Reports

When upgrading to a new version of Intelligence Reporting any new reports included in the new version will need to be imported using the Bulk Import/ update feature in Sage 500 ERP Intelligence.

Please note that the Bulk Import feature will not overwrite any old reports.

1. Launch Sage 500 ERP and select the MAS Intelligence folder. Double click on Report Manager in the Tools folder.



Please note that a Report Manager license is required to run and access reports in the Report Manager.

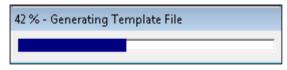
2. The Report Manager screen will open. Highlight the Home icon in the Object window, click on the Tools menu and select Bulk Import/Update Reports.

File	Ho	me	Tools	Help				
			×				Run All R	
	Export Report				Scheduler Command	Bulk Import/Upd	Bulk Import/Up	date listory
					Report			
Hom	e							Propertie
_	ashboard esigner	1						MetaData
-	inancials iventory							Auto Con

3. The Bulk Import/Update Reports popup screen will appear. Click 'Yes' to proceed with Bulk Import.

Bulk Import/Update Reports					
THIS OPERATION ALLOWS YOU TO BULK IMPORT NEW REPORTS OR UPDATE EXISTING REPORTS. PLEASE TAKE NOTE OF THE FOLLOWING:					
<ul> <li>Under [C:\Program Files (x86)\Sage Software\Sage MAS 500 Client\Managed Applications\SMIFramework\ReportUpdate\en] there needs to be subfolders.</li> <li>eg: [C:\Program Files (x86)\Sage Software\Sage MAS 500 Client\Managed Applications\SMIFramework\ReportUpdate\en\Custom Sales Reports]</li> <li>[C:\Program Files (x86)\Sage Software\Sage MAS 500 Client\Managed Applications\SMIFramework\ReportUpdate\en\Custom Sales Reports]</li> </ul>					
- These subfolders represent actual folders in Report Manager.					
- You need to place any .al_ files that will be bulk imported/updated into their relevant subfolders.					
<ul> <li>The import process will ensure that the reports contained in the .alx files get imported into a folder in Report Manager that has the same name as the subfolder defined in [C:\Program Files (x86)\Sage Software\Sage MAS 500 Client\Managed Applications\SMIFramework\ReportUpdate\en] If the folder doesn't exist in Report Manager then it will be created.</li> </ul>					
<ul> <li>If a report with the same name already exists under the folder in Report Manager then it will be overwritten if the .al_ file is newer than the report creation date or date it was last imported.</li> </ul>					
- Please refer to the help file for a more detailed explanation on Bulk Import/Updating Reports					
Please click on [YES] to proceed else click [NO] to cancel this operation.					

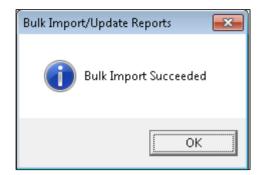
4. The Generating Template File progress bar will appear and close automatically.



5. The Reading Import File progress bar will appear and will close automatically.

13 % - Reading Import File			

6. Message will be displayed showing successful update of Reports.



7. Double click on "Home" icon in the object window to refresh the folders in the Report Manager. New reports will be appear in the Folders.

File Home Tools Help	
Import Export Output Toggle Hidden Scheduler Bulk Report Report Mode Reports Command Import/Update Clear Report Report	ot Fields
☆Home	Properties
<ul> <li>Dashboard</li> <li>Dashboard Analysis 2-5 (S500)</li> <li>Designer</li> <li>Demonstration Financial Report Designer 1-0</li> <li>Financial Report Designer 1-0</li> <li>Financials</li> <li>Financial Trend Analysis 2-4 (S500)</li> <li>General Ledger Transaction Details 2-2 (S500)</li> <li>Inventory</li> <li>Inventory Status 2-2 (S500)</li> <li>New Reports</li> <li>Purchases</li> <li>Vendor Purchases 2-2 (S500)</li> <li>Sales</li> <li>Customer Sales 2-3 (S500)</li> </ul>	MetaData Repository Location           \\SSS500W764\Users\vmtester\Desktop\Sage500\           Auto Connect Server           Auto Connect Catalog           Auto Connect User