

# 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.

😼 Sage 500 ERP Intelligence Rep	porting Database Utilities - InstallShield Wizard
ع ا	Welcome to the InstallShield Wizard for Sage 500 ERP Intelligence Reporting Database Utilities
	The InstallShield(R) Wizard will install Sage 500 ERP Intelligence Reporting Database Utilities on your computer. To continue, click Next.
	WARNING: This program is protected by copyright law and international treaties.
	< Back Next > Cancel

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

🐉 Sage 500 ERP Intelligence Reporting Database Utilities - InstallShield Wizard 🛛 🛛 🗾
License Agreement Please read the following license agreement carefully.
SAGE END USER LICENSE AGREEMENT
<ol> <li>Grant of License. Sage hereby grants to You a limited, perpetual, non-exclusive, non-transferable (except as set forth in Section 4(b) below) license to Use the Software on the terms and conditions set forth in this End User License Agreement ("Agreement").</li> <li>Introduction.</li> <li>(a) Sage ("Sage" and other capitalized terms are defined below) is willing to grant to You a license of the scope described herein to Use the Software</li> </ol>
I accept the terms in the license agreement     Print
I do not accept the terms in the license agreement
nstallShield
Cancel

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

🛃 Sage 500	) ERP Intelligence Reporting Database Utilities - InstallShield Wizard 📃 🗾
Destinati Click Ne:	ion Folder xt to install to this folder, or click Change to install to a different folder.
	Install Sage 500 ERP Intelligence Reporting Database Utilities to: C:\Program Files (x86)\Sage Software\Sage 500 ERP Intelligence Change Reporting Server\
InstallShield -	< Back Next > Cancel

4. Installation details will be displayed. Click Install.

😸 Sage 500 ERP Intelligence Reporting Database Utilities - 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 500 ERP Intelligence Reporting Server\
User Information:
Name: Vmtester
Company:
< Back Install Cancel

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

👸 Sage 500 ERP Intelligence Rep	porting Database Utilities - InstallShield Wizard 📃 🛛 🔫
2	InstallShield Wizard Completed
	The InstallShield Wizard has successfully installed Sage 500 ERP Intelligence Reporting Database Utilities. Click Finish to exit the wizard.
	< Back Finish Cancel

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.

ige 500 El	RP Intelligence Reporting - InstallShield Wizard
نگ <sup>Sa</sup>	age 500 ERP Intelligence Reporting requires the following items to be installed on your omputer. Click Install to begin installing these requirements.
Status	Requirement
Pending Pending	Microsoft VSTO 2010 Runtime x64 Microsoft .NET Framework 4.0 Full
	Install Cancel

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.

😸 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:
I InstallShield
< <u>B</u> ack Install Cancel

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.

etwork Repository Path	
\UJIBW764KN\Users\Vmtester\D	esktop\Sage 500 Metadata
The network folder repository is a store your centralized Sage 500 E that reports are common to all use assigning the network repository pa	shared folder that must be created RP Intelligence Reporting reports rs. Please create this folder before th.

**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.