Sage 500 ERP

Business Intelligence

Installation Guide

Version 1



Table of Contents

System Requirements	.1
Recommended System Requirements	. 1
Database Connectivity Supported	. 1
Sage 500 ERP Business Intelligence General Installation Guide	2
Creating the Report Repository folder	4
Client Server Installation Guide	7
Workstation Licenses	1

System Requirements

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

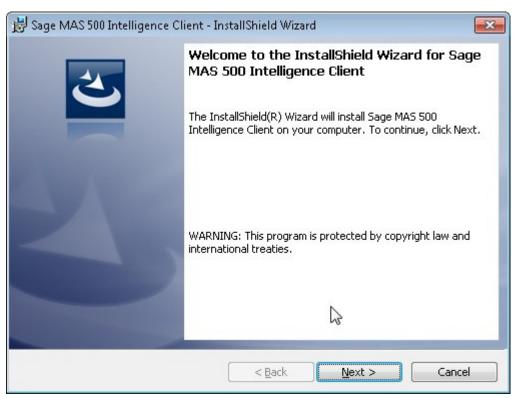
Database Connectivity Supported

Sage 500 ERP Business Intelligence uses ODBC and OLEDB technology to gain access to Open Database Systems via the Connector. Sage 500 ERP Business Intelligence 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 500 ERP Business Intelligence Connector module natively works with several database types, it only ships with Reports & Templates for the Sage 500 ERP Business Intelligence databases that run on a SQL Database.

Sage 500 ERP Business Intelligence General Installation Guide

1. To begin installation launch the setup file. The Welcome screen will appear.



- 2. Click Next.
- 3. Click Next to install to the default folder or Change to browse to an alternative folder.

😸 Sage MAS 500 Intelligence Client - InstallShield Wizard	x
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	
K < Back Install Cancel	

- 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 sp 1.
- 5. When the installation has completed, a window will appear confirming successful completion.

😼 Sage MAS 500 Intelligence Client - InstallShield Wizard				
<u>ب</u>	InstallShield Wizard Completed			
	The InstallShield Wizard has successfully installed Sage MAS 500 Intelligence Client, Click Finish to exit the wizard.			
	2			
	< <u>B</u> ack Einish Cancel			

- 6. Click Finish.
- 7. The VSTOR screen will appear. There is no need to take any action as the screen will close once VSTOR has installed.

🛃 Sage MAS 500 Intelligence Client - InstallShield Wizard 🛛 🛛 🛛					
2	InstallShield Wizard Completed The InstallShield Wizard has successfully installed Sage MAS 500 Intelligence Client. Click Finish to exit the wizard.				
Installing Checking \ Installing VSTOR 3.0. This may take several minutes.					
	< Back Finish Cancel				

Creating the Report Repository folder



NOTE: A central Report Repository folder must be created on your network so all users can 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. The users will need to be given full permission to access this folder.

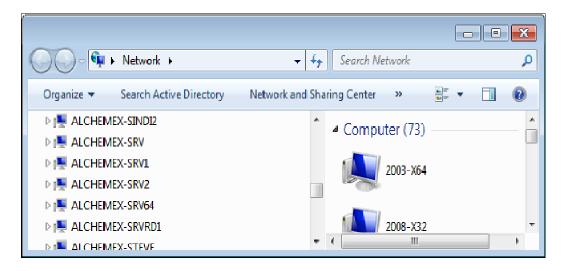
1. If using Windows 7/Vista Select the **Start** button and select



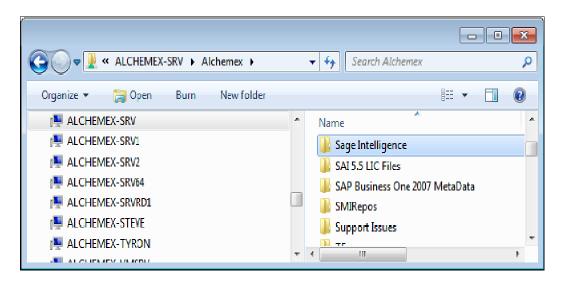


If using Windows XP then select the Places icon and select the relevant network directory.

2. Select and expand the **Appendix** icon. A list of network directories will appear.



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



4. Right click on the folder you created and select Properties> Security.

💫 Sage Intelligence Properties	×			
General Security Previous Versions Customize				
Object name: \\ALCHEMEX-SRV\Alchemex\Sage Intelligence	æ			
Group or user names:				
Account Unknown(S-1-5-21-2111372106-2470008458-286	*			
Lewellyn Jones (Lewellyn@Alchemex.local)	Ŧ			
To change permissions, click Edit.				
Permissions for Llewellyn Jones Allow Deny				
Full control	<u>*</u>			
Modify	=			
Read & execute				
Read	-			
For special permissions or advanced settings, Advanced elick Advanced.				
Learn about access control and permissions				
OK Cancel App	ly 🔤			



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

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

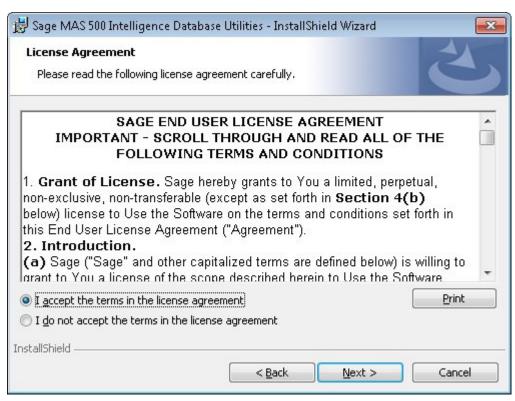
Permissions for Sage Intelligent	ce	×		
Security				
Object name: \\ALCHEMEX-SRV\Alchemex\Sage Intelligence				
Group or user names:				
📕 👗 Genevieve Davids (Geneviev	e@.Alchemex.loca	0 🔺		
📕 🥈 Delegate (Delegate@Alcheme				
Account Unknown(S-1-5-21-2		008458-286		
Lewellyn Jones (Lewellyn@A				
Bomain Users (ALCHEMEX\E)omain Users)	T		
III.		- F		
	Add	Remove		
Permissions for Llewellyn Jones	Allow	Deny		
Full control				
Modify				
Read & execute				
List folder contents				
Read				
Learn about access control and permissions				
ОК	Cancel	Apply		

Client Server Installation Guide

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



2. Click Next.



3. Accept the License Agreement and click Next.

🛃 Sage MA	.S 500 Intelligence Database Utilities - InstallShield Wizard 🛛 🛛 🗪
9.7547764664.05076	on Folder At to install to this folder, or click Change to install to a different folder.
	Install Sage MAS 500 Intelligence Database Utilities to: C:\Program Files (x86)\Sage Software\Sage MAS 500 Intelligence
InstallShield -	< <u>B</u> ack Next > Cancel

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

😼 Sage MAS 500 Intelligence Client - 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
S < Back Install Cancel

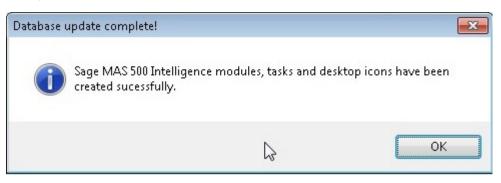
5. Click **Install** to continue. *Note*: If .NET Framework 3.5 sp1 or higher is not installed on the system, setup will perform the installation of the .NET Framework 3.5 sp 1.

Sage MAS 500	Intelligence - Installation
0	If you have previously installed Sage MAS 500 Intelligence or have created Sage MAS 500 Intelligence modules, tasks and desktop icons please ignore this step and click "Ignore". To continue click 'Continue'
	Continue Ignore
40 T 11	

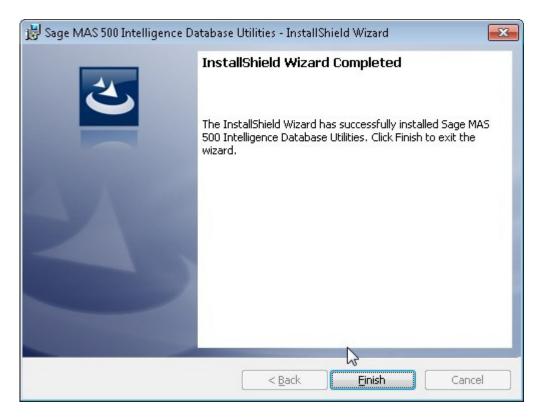
6. Click **Continue** if this is the first installation of Sage MAS 500 Intelligence or **Ignore** if not.

Server name:		
ALCHEMEX-W7364		
Database name:		
mas500_app		
		()
🔲 Use Windows Auther	ntication	
Login:		
Password		
Description		
Please enter your MAS 50 Sage MAS Intelligence ca modules, tasks and MAS		

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



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



9. Click Finish.

Workstation Licenses

Sage 500 ERP Business Intelligence uses a workstation Licensing model. After you have registered your Sage 500 ERP Business Intelligence installation, you will have a (n) Workstation Licenses available (where n is the number of Licenses you have purchased). The first (n) workstations to access Sage 500 ERP Business Intelligence 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 Business Intelligence* licenses and module configuration.

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

🔽 License Manager			K
<u>File H</u> elp			
Connector Licensed Report Manager Licenses Assigned Licenses	YES Report Designer 10 Report Viewer		
User	License Type	Workstation	
	Report Manager		
<u>A</u> dd <u>C</u> hange	<u>D</u> elete		

2. Select the Add button to add a new license, the below screen will open.

Add license		×
User		•
License Type	Report Manager Report Viewer	•
	<u>O</u> K <u>C</u> ancel	

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