

Sage 500 ERP

Business Intelligence

Installation Guide

Version 1

sage

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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

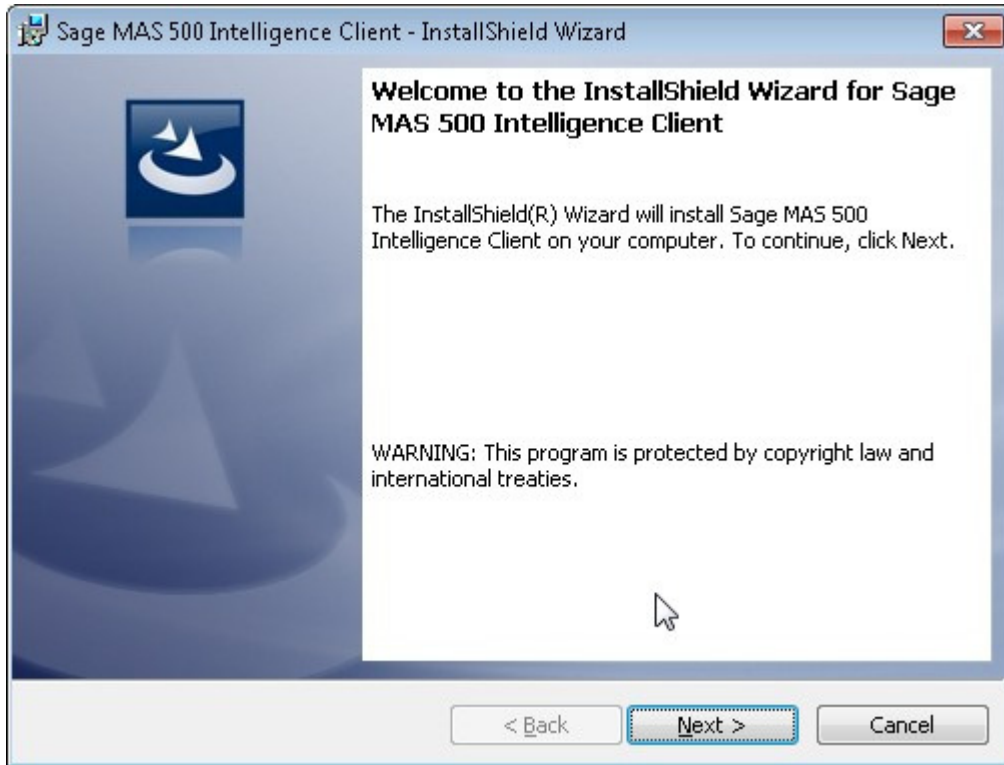
Database Connectivity Supported

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.

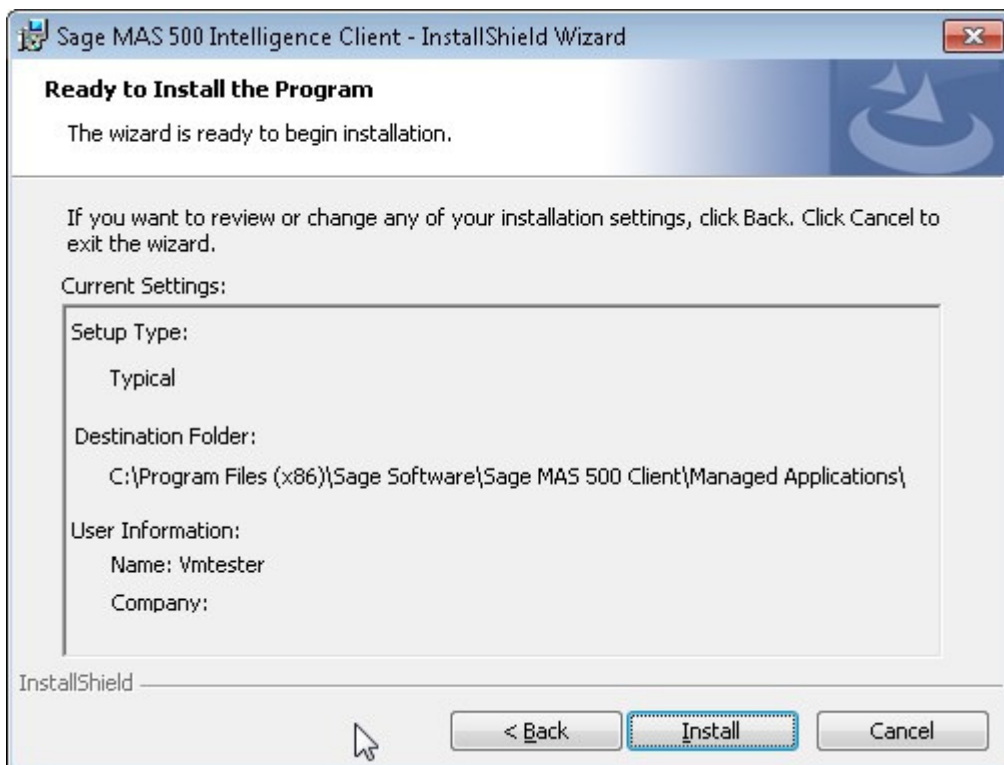
Please note that although the *Sage 500 ERP Business Intelligence* Connector module natively works with several database types, it only ships with Reports & Templates for the *Sage 500 ERP Business Intelligence* databases that run on a SQL Database.

Sage 500 ERP Business Intelligence General Installation Guide

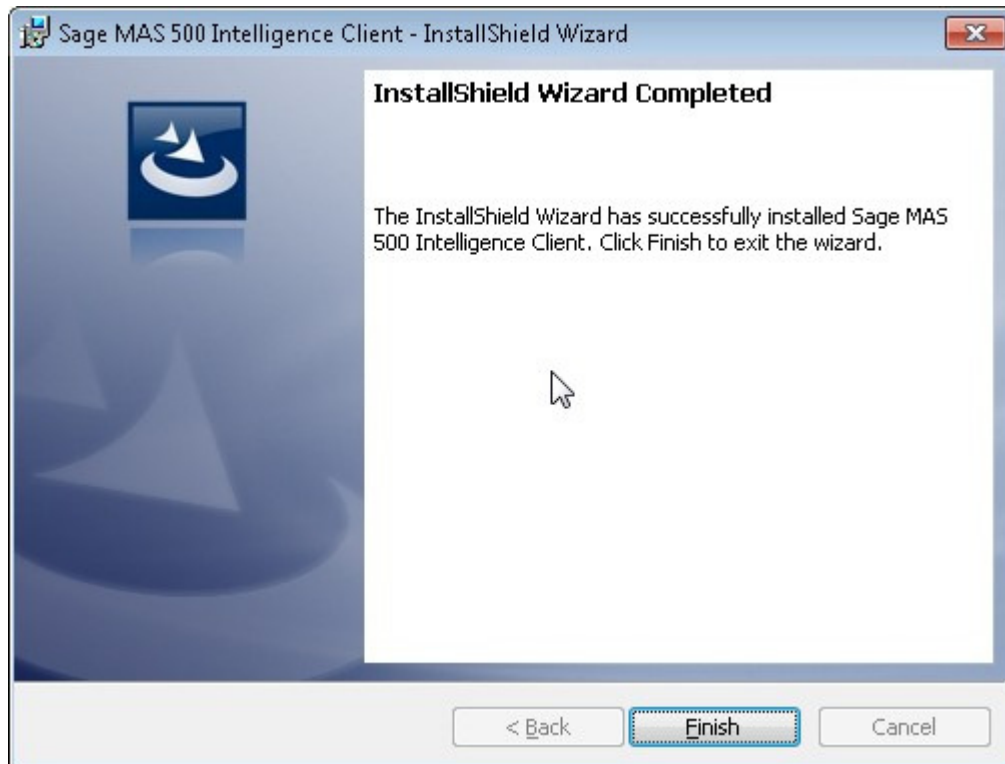
1. To begin installation launch the setup file. The Welcome screen will appear.



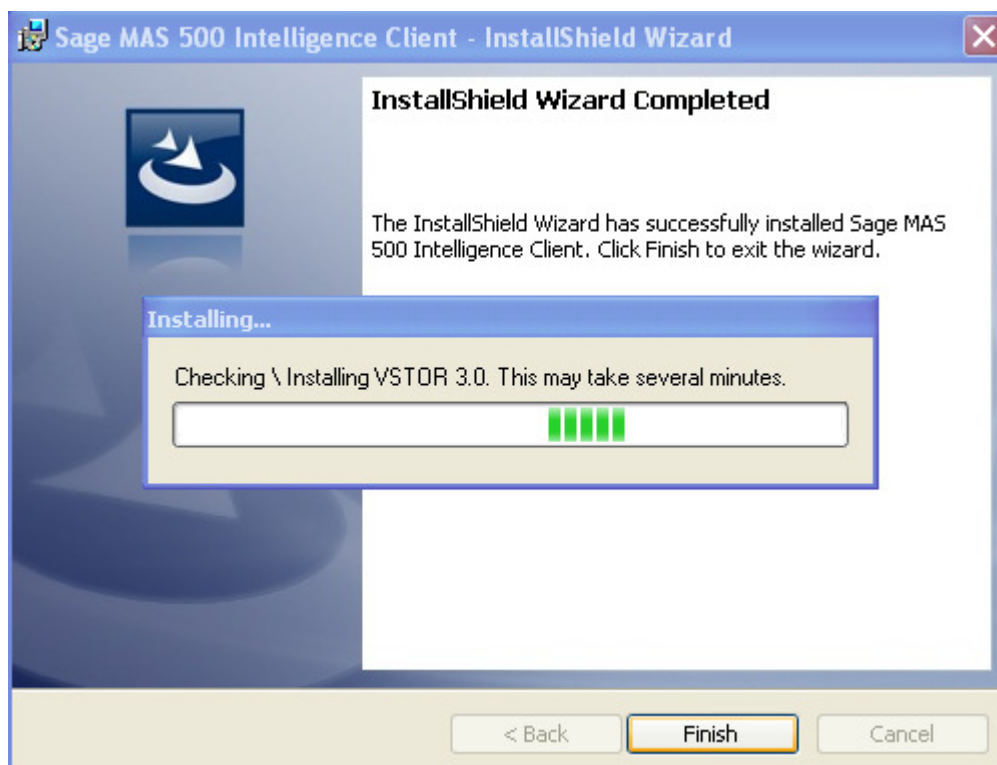
2. Click **Next**.
3. Click **Next** to install to the default folder or **Change** to browse to an alternative folder.



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




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

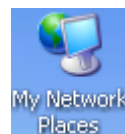
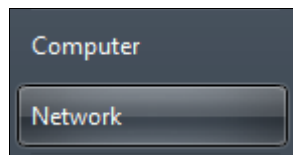


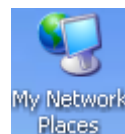
Creating the Report Repository folder



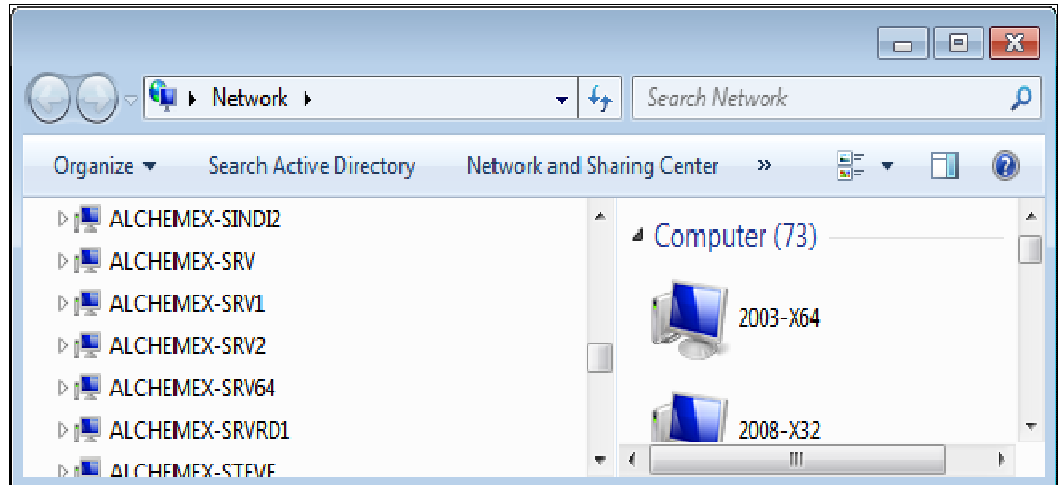
NOTE: A central Report Repository folder must be created on your network so all users can access the reports and templates. A Universal Naming Convention (UNC) should be used when naming your Report Repository folder, e.g. `\\server name\sage intelligence`. This folder should be backed up so that you 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

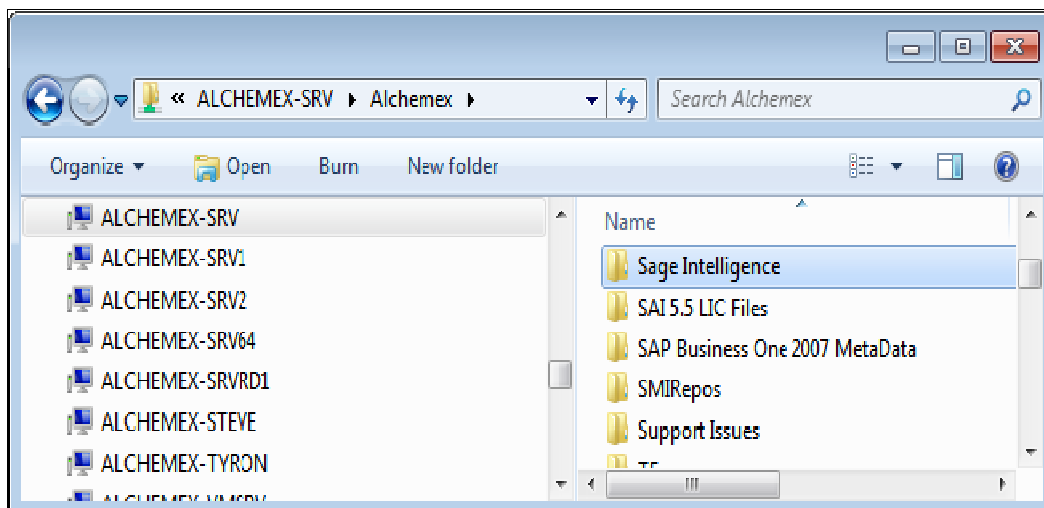


If using Windows XP then select the  icon and select the relevant network directory.

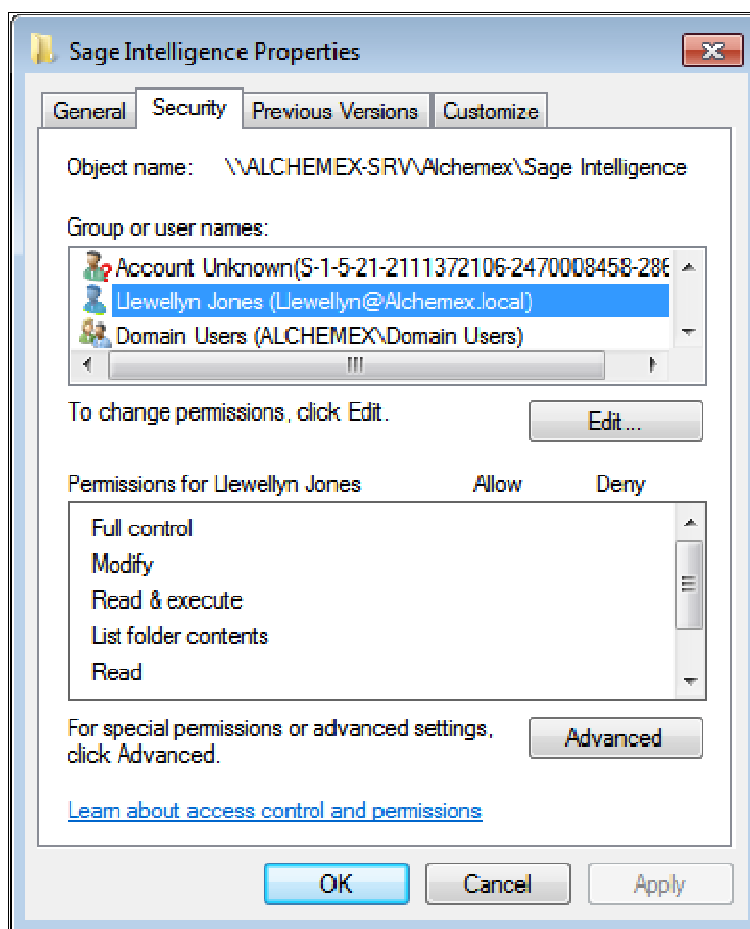
2. Select and expand the  Network icon. A list of network directories will appear.



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.



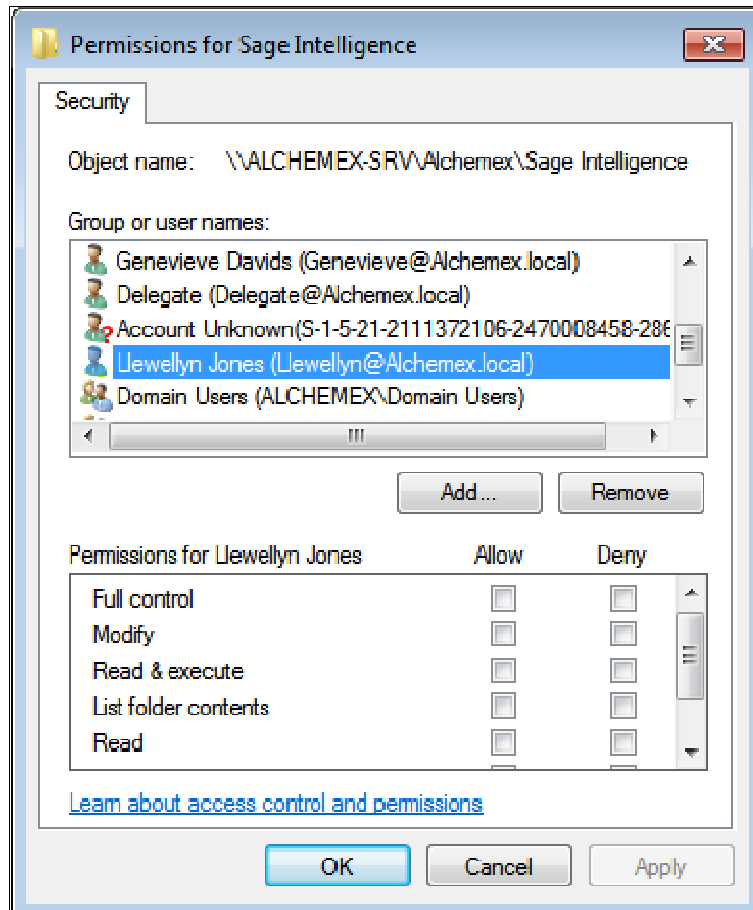
4. Right click on the folder you created and select Properties> Security.





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**.

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.

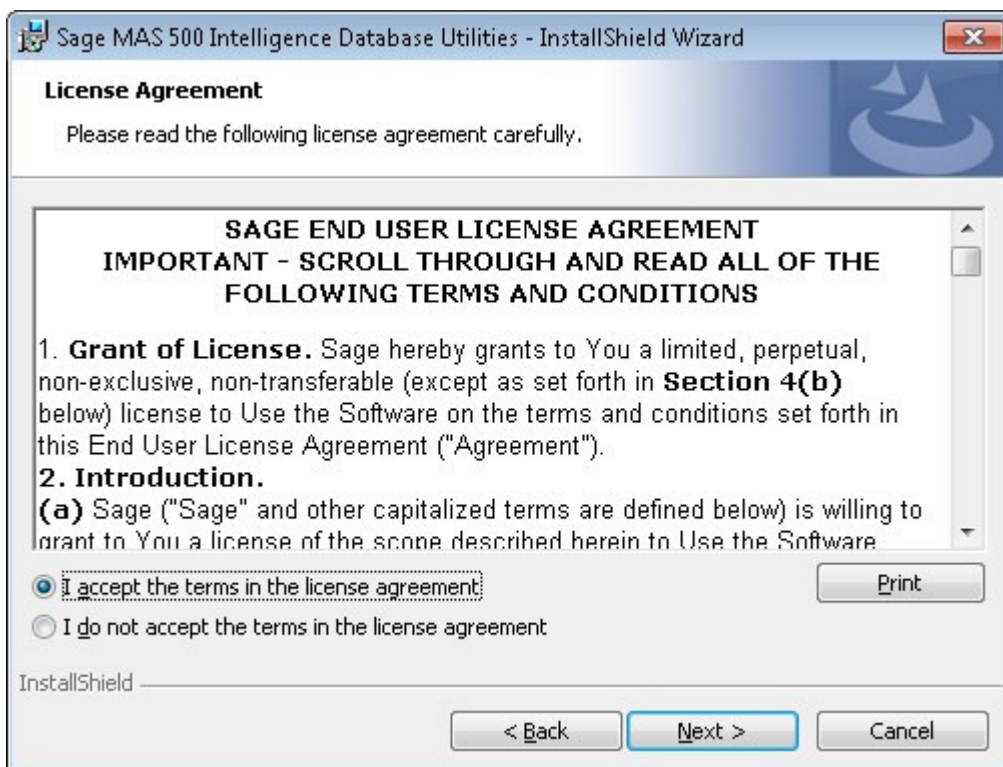


Client Server Installation Guide

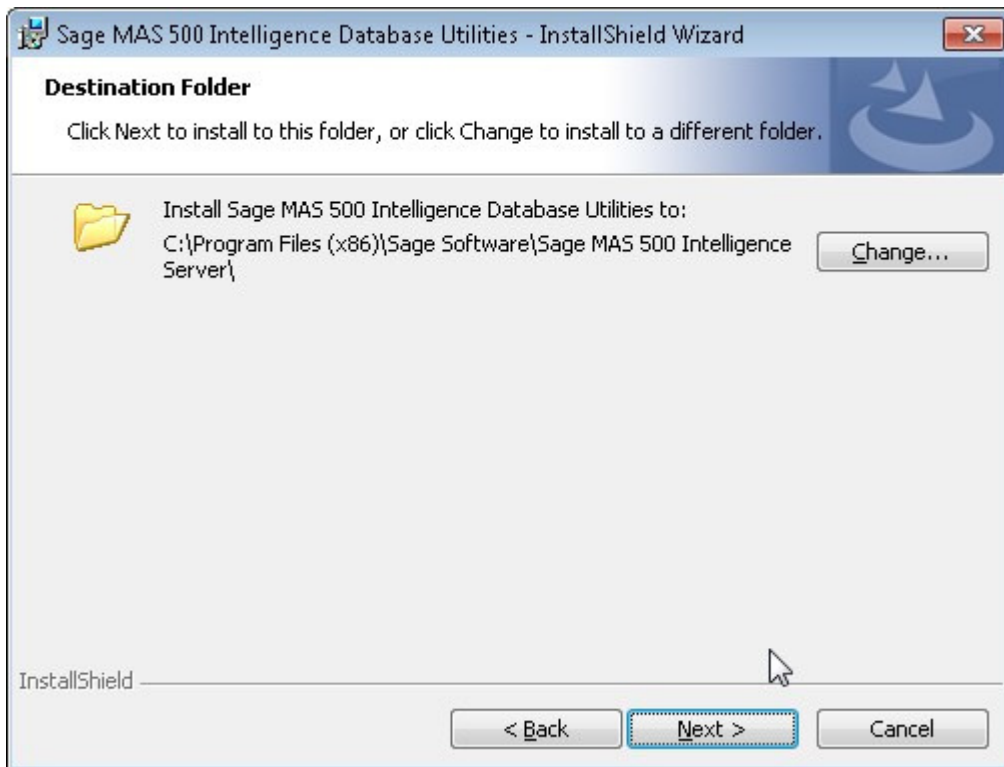
1. To begin installation launch the setup file. The InstallShield Wizard screen will appear.



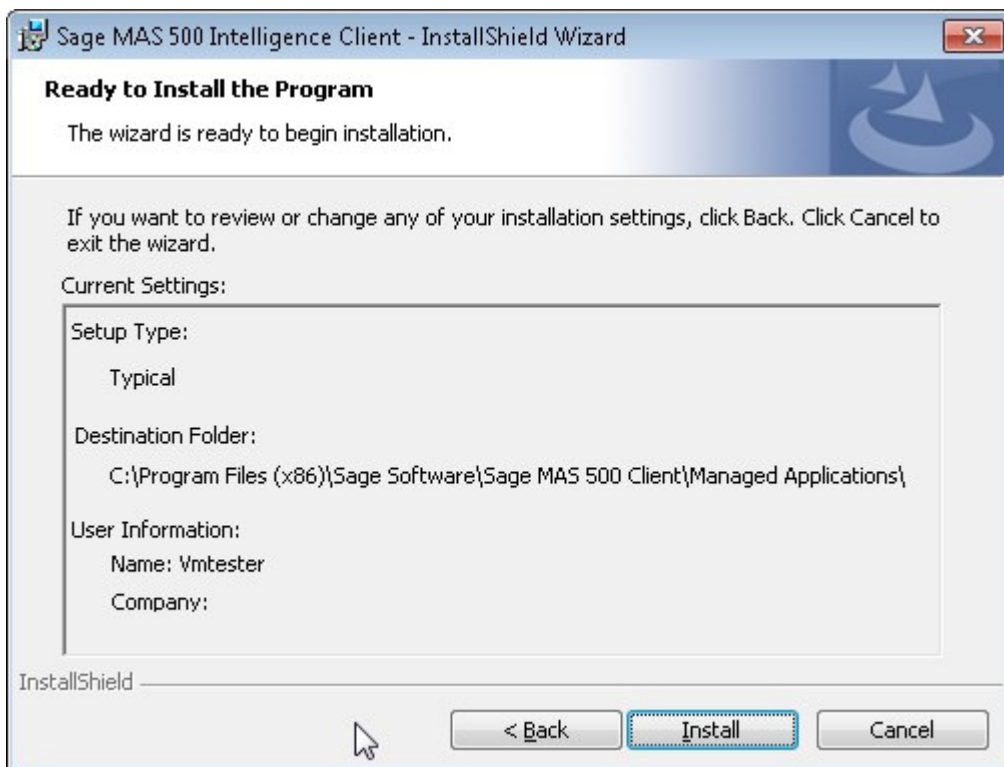
2. Click **Next**.



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



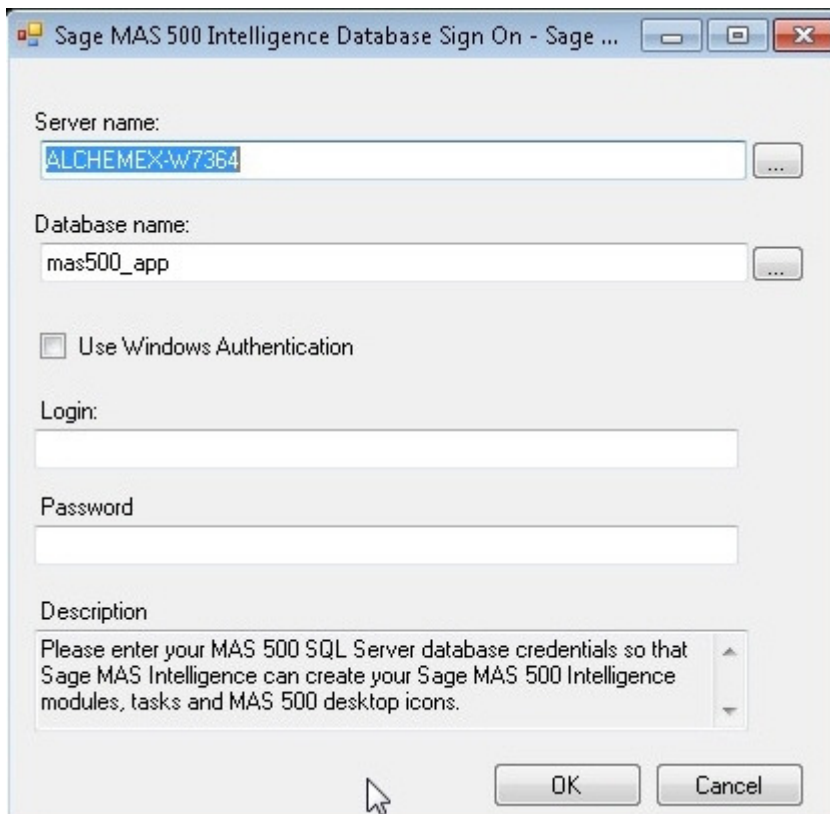
4. Click **Next** to install to the default folder or **Change** to browse to an alternative folder.



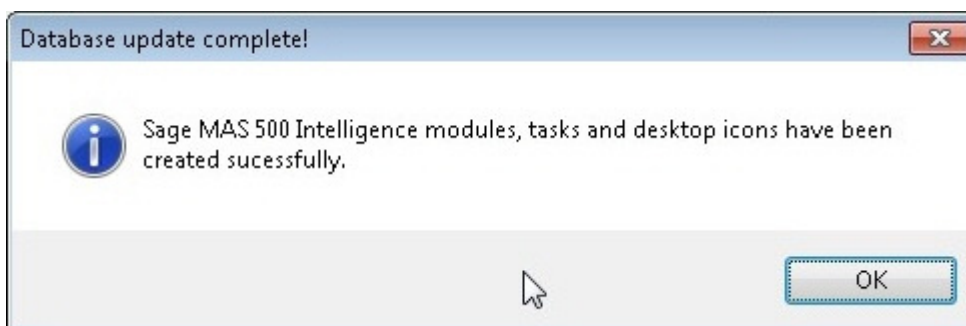
5. Click **Install** to continue. *Note:* If .NET Framework 3.5 sp1 or higher is not installed on the system, setup will perform the installation of the .NET Framework 3.5 sp 1.



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



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**.

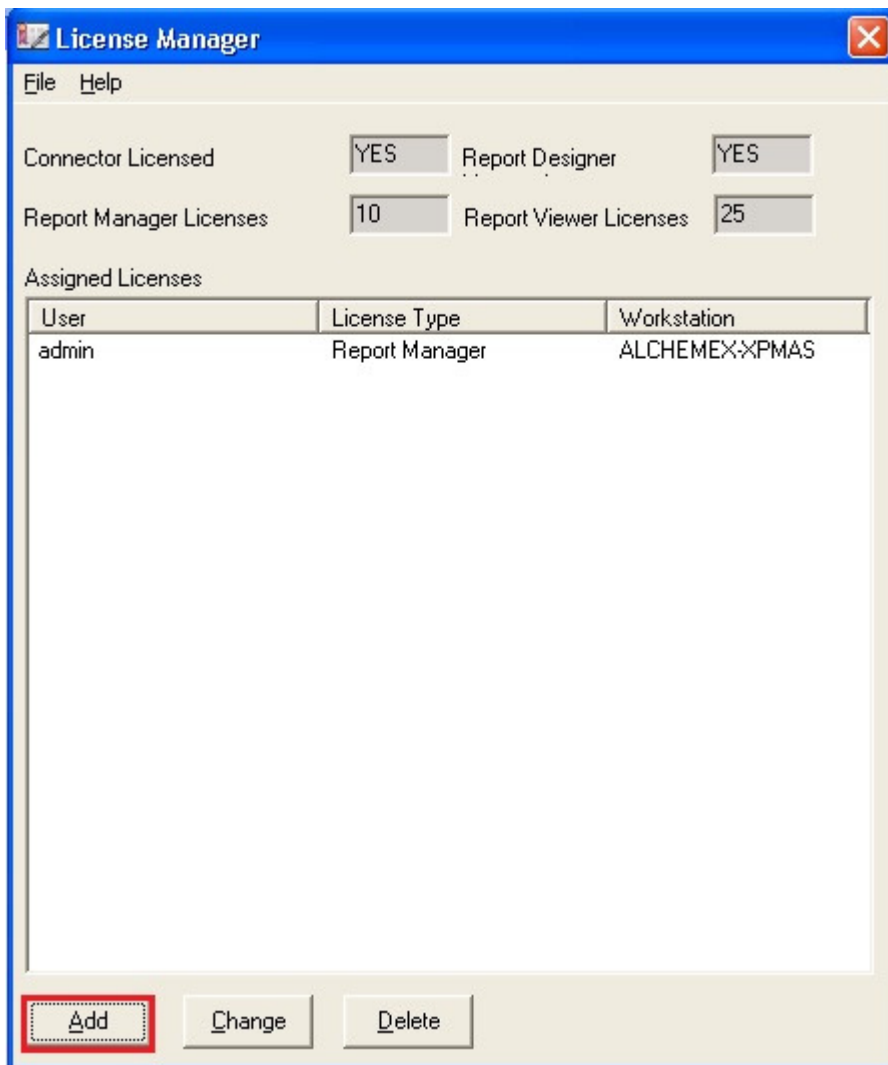
Workstation Licenses

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.

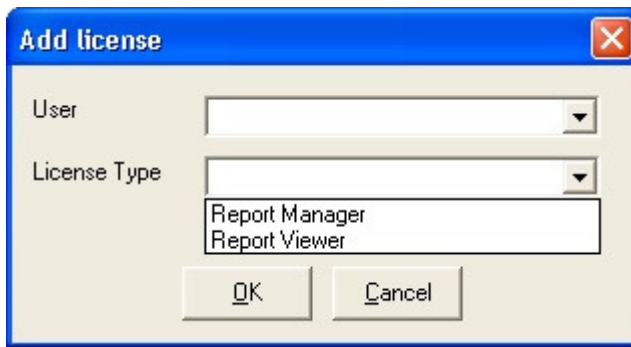
Licenses will be tied to a User Name and Workstation so the licensing is not “concurrent” licensing.

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.



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



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.