

# Installation Guide

BizInsight 7 is installed on each user’s workstation. If you’ve purchased a Connector, BizInsight 7 and the Connector will be packaged and installed by the same installer. If you have purchased BizInsight 7 by itself (for example, a Connector does not exist for the data you plan to report on), there is a BizInsight 7 installer that just installs BizInsight 7.

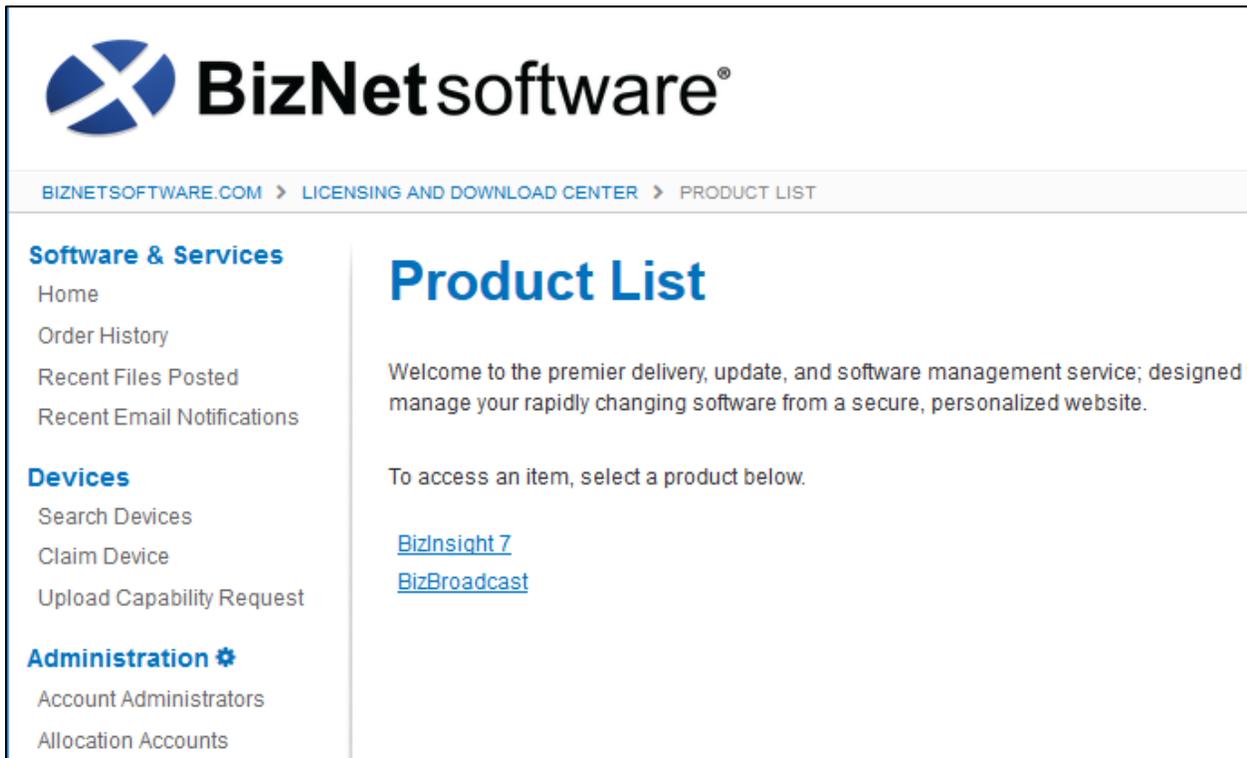
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**Notice** Screenshots in this document are provided as examples and may not exactly match what you see in your environment or the values displayed in the screenshots may not be appropriate for your implementation. Be sure to read all instructions completely for guidance on what values you may need to enter.

## 1. Locate Installation Files

In preparation for installation, download the files that will be required for installation from the BizNet Software portal, (<http://biznet.flexnetoperations.com>). All files can be found under “Home”.

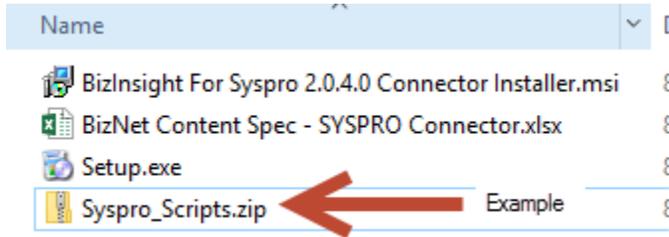


The screenshot shows the BizNet software portal's Product List page. The header features the BizNet software logo and the text "BizNet software®". Below the header is a breadcrumb trail: "BIZNETSOFTWARE.COM > LICENSING AND DOWNLOAD CENTER > PRODUCT LIST". The page is divided into two main sections. On the left is a navigation menu with the following items: "Software & Services" (with sub-items: Home, Order History, Recent Files Posted, Recent Email Notifications), "Devices" (with sub-items: Search Devices, Claim Device, Upload Capability Request), and "Administration" (with sub-items: Account Administrators, Allocation Accounts). On the right is the main content area titled "Product List". It contains a welcome message: "Welcome to the premier delivery, update, and software management service; designed to manage your rapidly changing software from a secure, personalized website." Below this is a prompt: "To access an item, select a product below." and two links: "[BizInsight 7](#)" and "[BizBroadcast](#)".

Extract the contents of all downloaded files to any network location that is accessible from the client workstations.

## 2. Run scripts on Server (if applicable)

Some BizConnectors require scripts to be run on the database server. To determine whether scripts are needed for the BizConnector you are installing, check the folder to which the content installer was extracted for a Scripts .zip file.



If a scripts zip file exists, extract the contents and open the file named BizContentScriptReadMe.txt for implementation instructions.

## 3. Installing or Updating BizInsight

The next steps depend on whether BizInsight 7 is already installed. This section will provide the steps for new and existing BizInsight 7 + **Connector** installations. If BizInsight 7 has been purchased without a Connector, the installation steps can be found in [Appendix C – BizInsight 7 Only Installation](#).

### **IMPORTANT**

Before proceeding, confirm that you have administrator rights to your workstation or application server. If you do not, you must temporarily be given administrator rights for this installation. Also, a 64 bit OS (Operating System) is required.

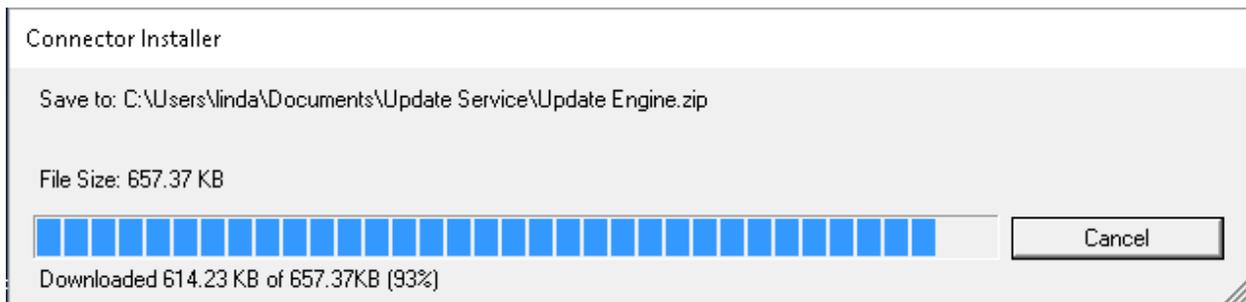
Click [here](#) to jump to the steps for updating an existing BizInsight 7 installation.

### 3.1 New BizInsight 7 Installation

1. Double click the **Setup** file.



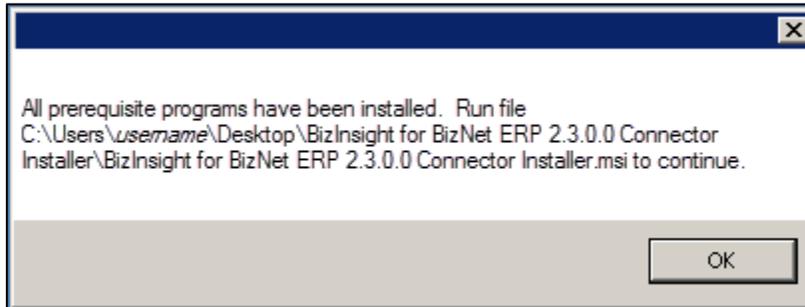
2. The setup will download and install prerequisite software needed for BizInsight 7.



### **IMPORTANT**

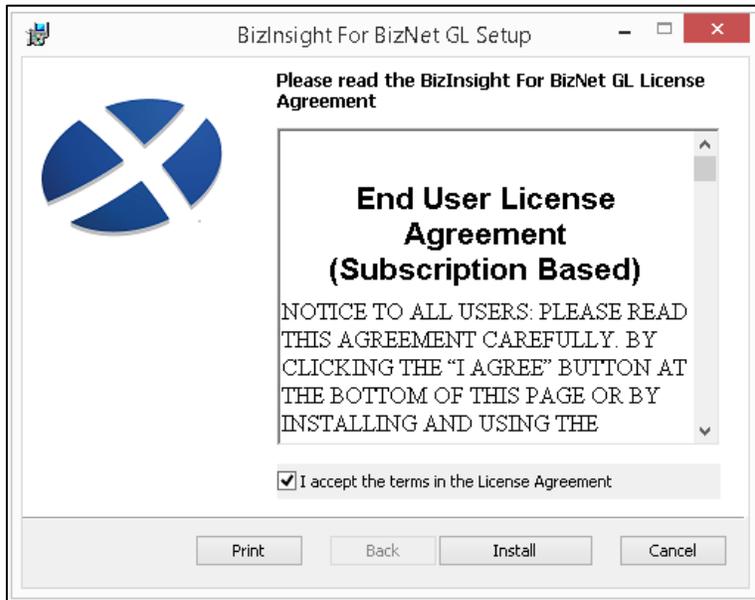
If this steps fails, you must perform the pre-requisite installations manually. Follow the steps in [Manual BizInsight Installation/Update](#).

If the operating system on the client workstation is Windows 7, you will get this message:

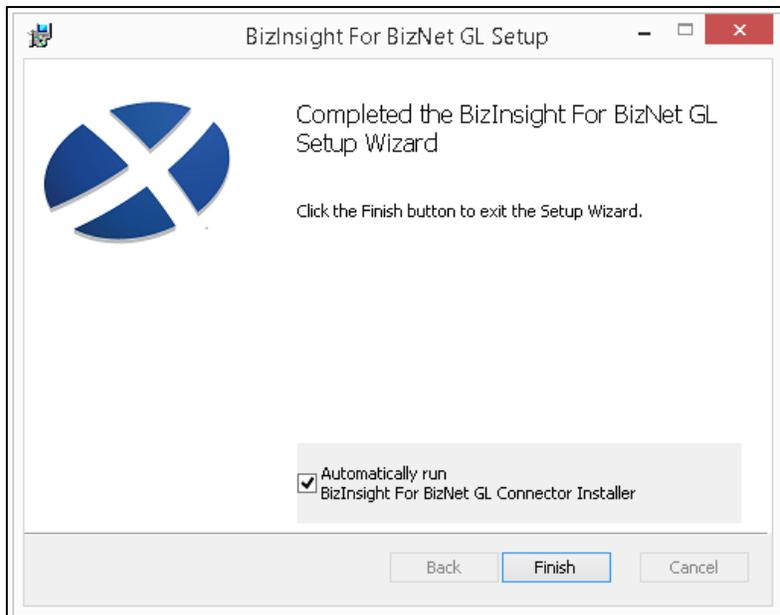


Browse to the directory displayed in the message on the client workstation and double-click the Connector Installer.msi

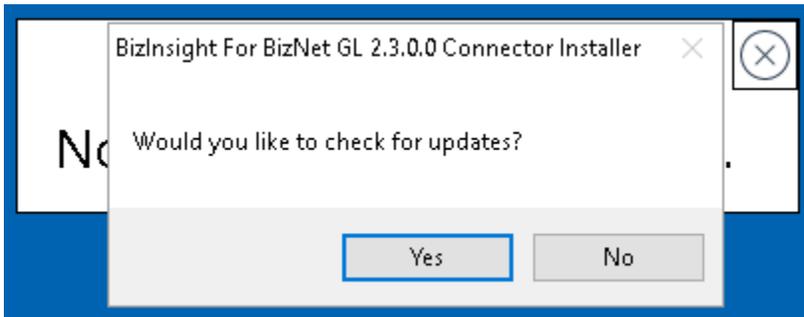
- Once the prerequisites are installed, the End User License Agreement (“EULA”) dialog will open. Read through the EULA and if you accept these terms, check the **I accept the terms** checkbox. Click **Install**.



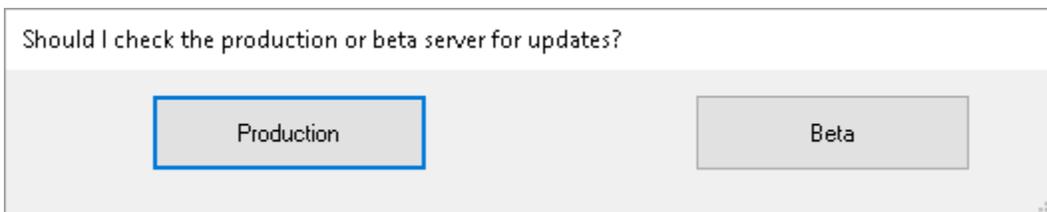
- Check the **Automatically run** checkbox, then click the **Finish** button.



- The Connector installer will prompt to check for updates. Click **Yes** to ensure you are installing the latest versions of the BizInsight components.



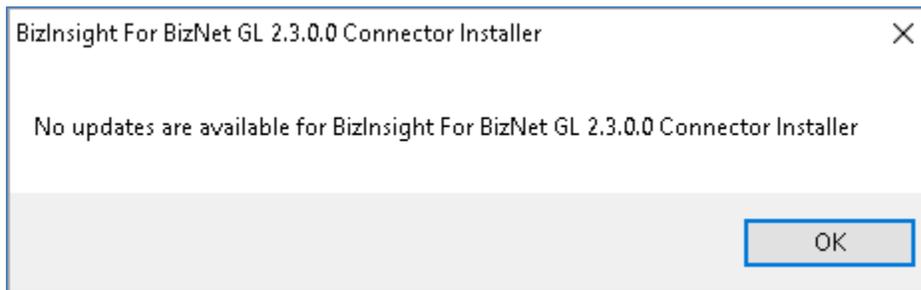
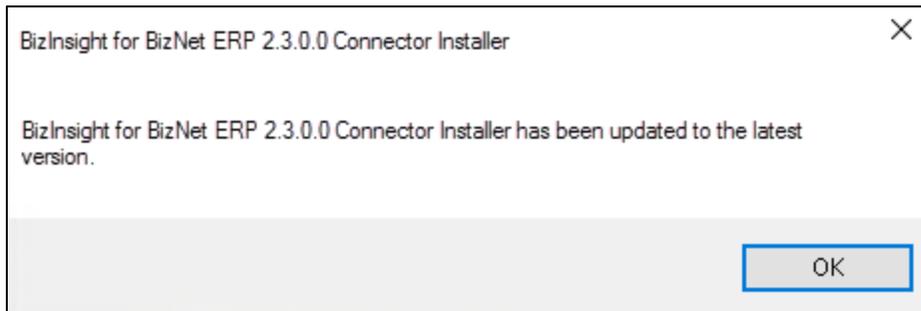
- If provided the option to choose between Production or Beta, choose **Production**.



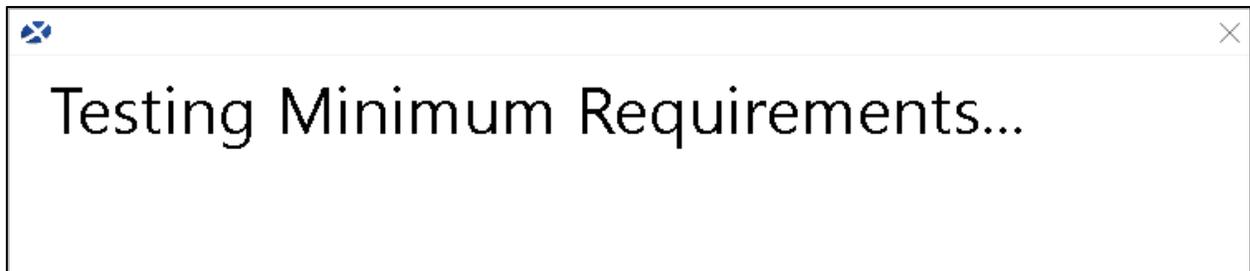
- If there are updates, the following dialog will display. Click **Update**. The installer will download the newer versions.



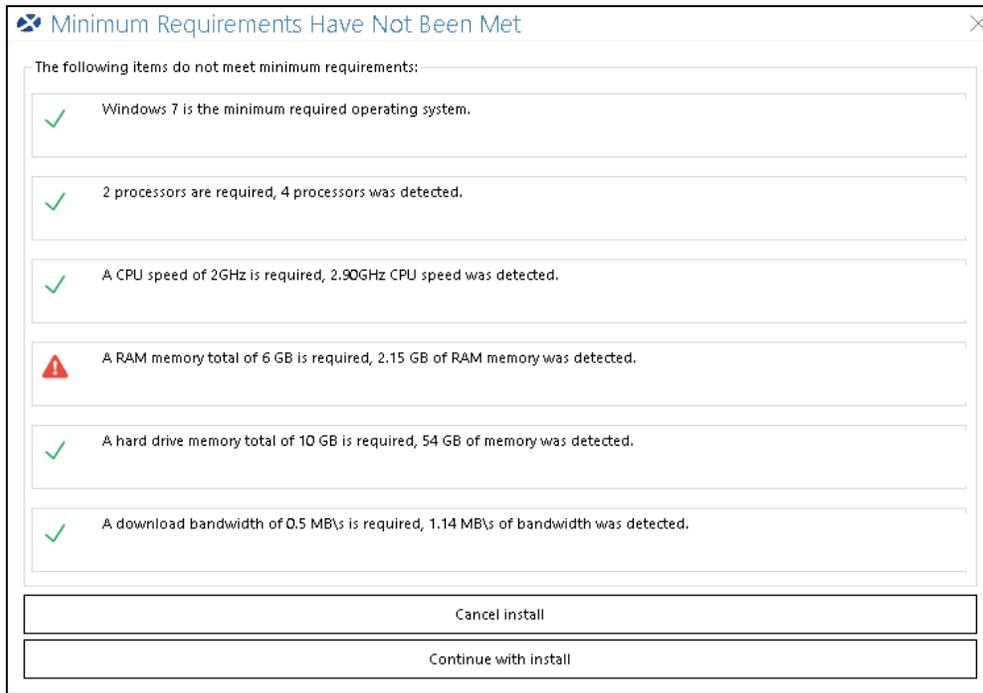
- Click **OK** when the updates are complete or if no updates were found.



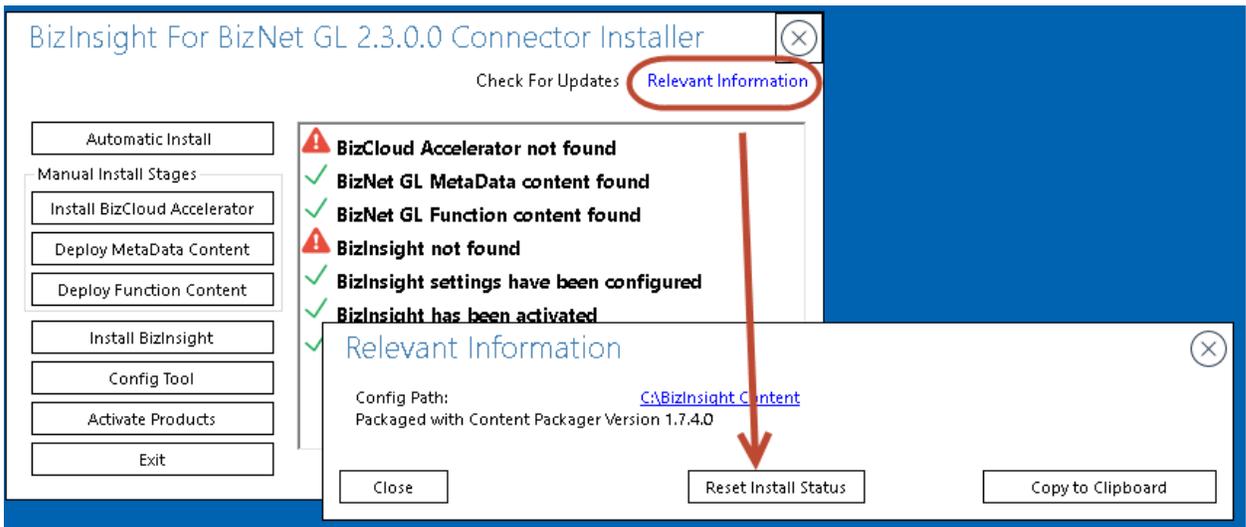
- The installation will check the workstation to determine whether minimum system requirements are satisfied.



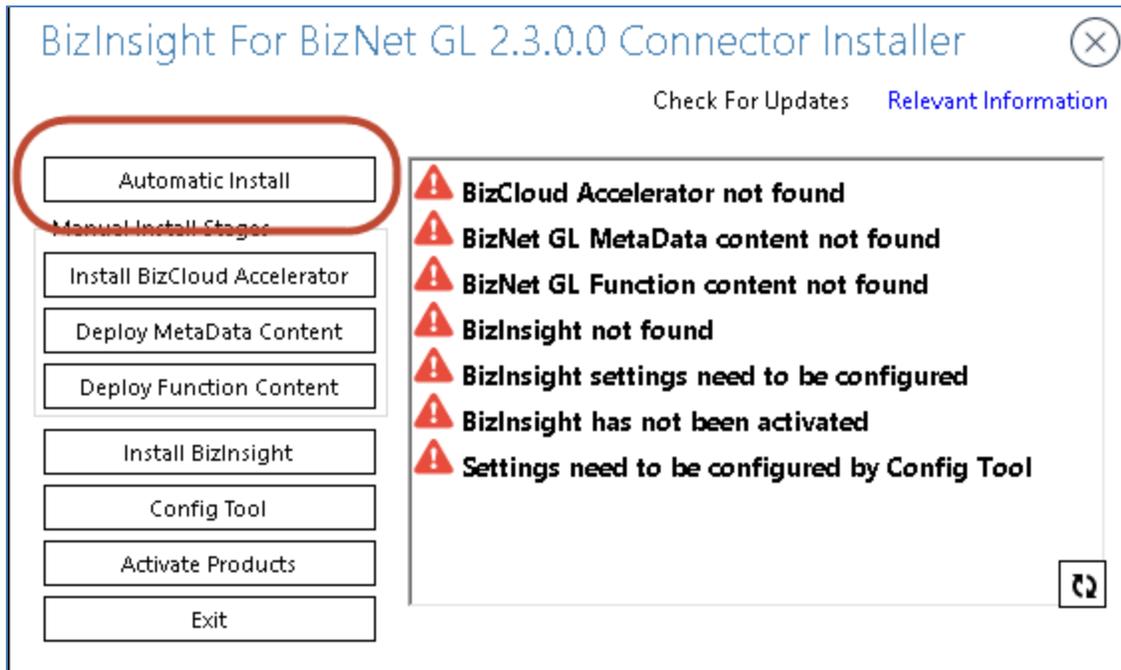
- Click Continue with install but if any system requirements are not met, these should be addressed to ensure optimal product performance.



- When the Connector Installer starts, the application checks for any previously run Connector Installer settings. If any are detected, click on **Relevant Information** > **Reset install Status**.



12. Click **Automatic Install** to begin.



13. The Automatic Install process prompts you to confirm a folder location. Click **Ok** to accept the default setting.



 **Note**

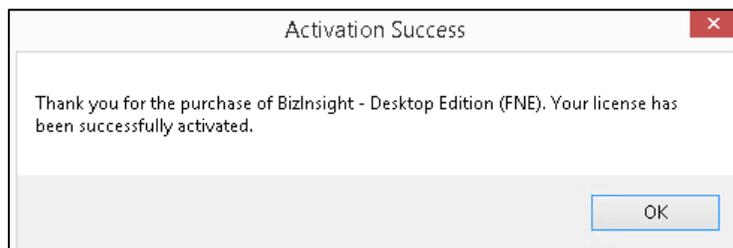
Overriding this path is not recommended.

14. BizInsight 7 is offered with a 30-day trial period. If you are evaluating the product, you can bypass the “LicenseActivation” step by clicking the **Close** button at the bottom right of the window. The installation will continue to the next step. If you have purchased the product and have an Activation ID, type or paste your Activation ID and then click the **Activate ID(s)** button.

If you do not know your Activation ID, see *Finding your Activation ID* in [Appendix b](#).  
When the 30-day trial period has ended, please see *Activating BizInsight 7.0* in [Appendix a](#).

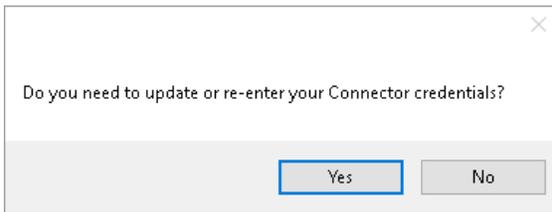


15. The **Activation Success** dialog will appear. Click the **OK** button to continue and then click **Close**.

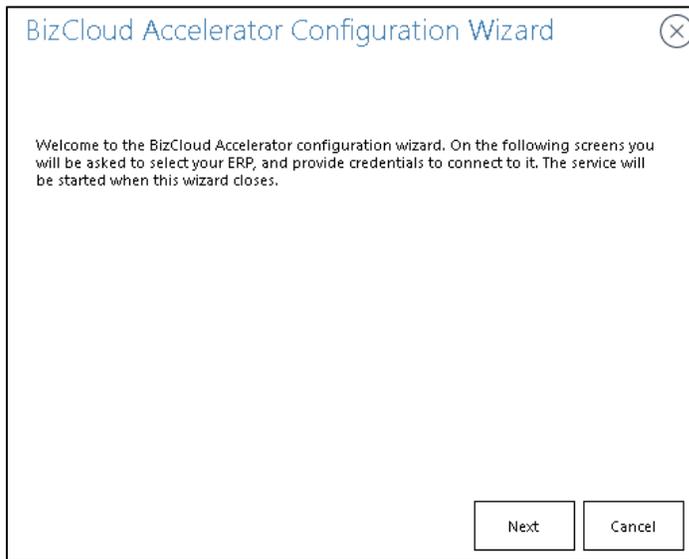
**Note**

The Activation Success dialog only appears if an Activation ID is entered.

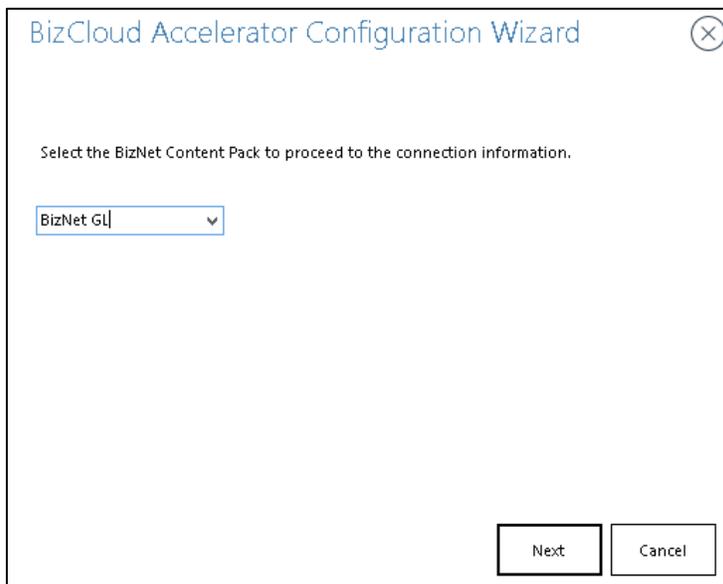
16. If you receive the below prompt, click **Yes** to continue with the installation.



17. Click **Next**.



18. Select the **BizNet Content Pack** being installed and then click **Next**.

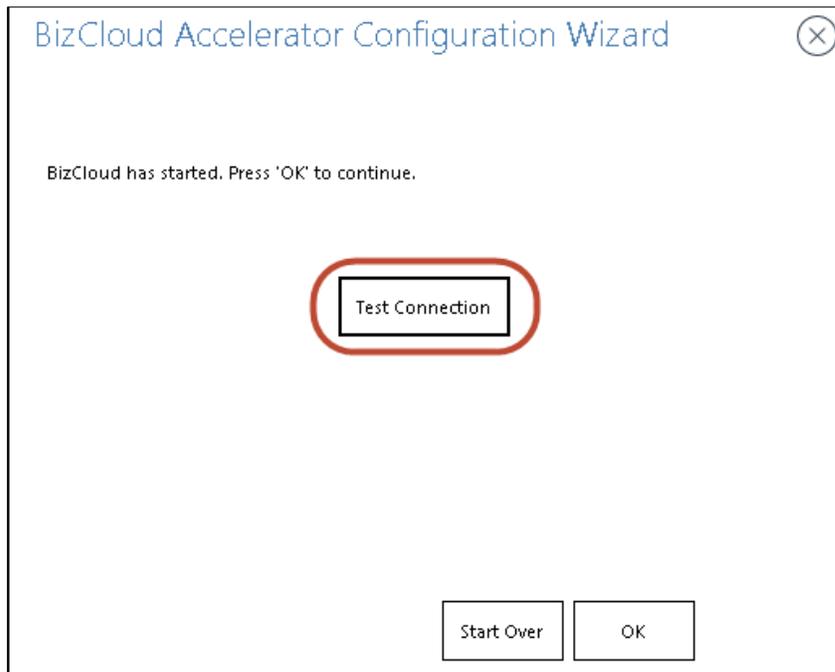


- The next dialog that opens collects the information BizInsight needs to connect to the ERP system. The information requested will vary depending on the Connector being installed.

For Connector specific instructions, click on the link that corresponds to the ERP you use:

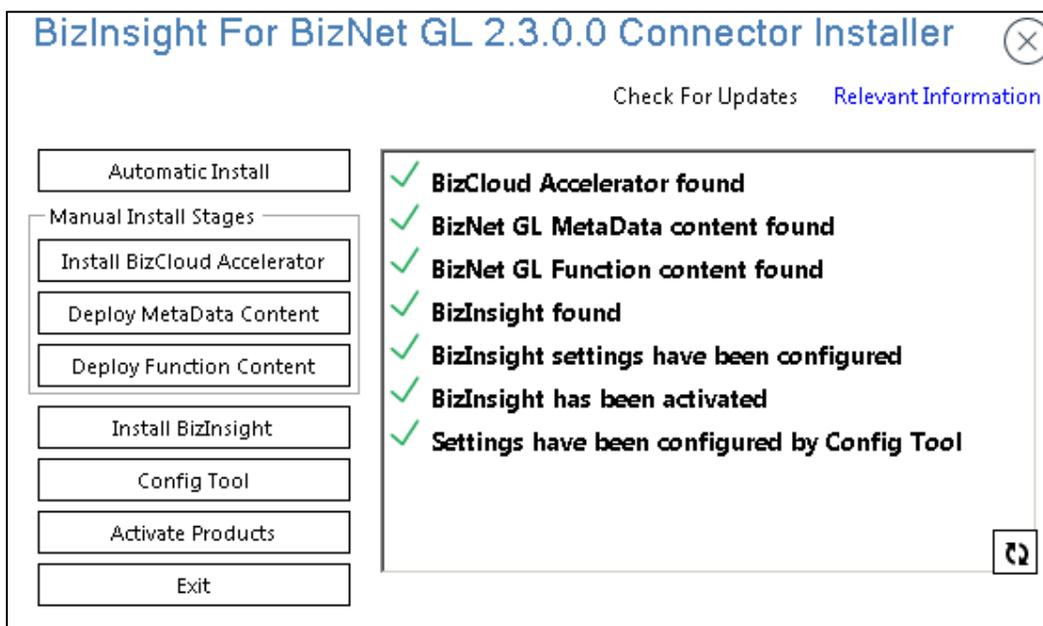
ERP System
<a href="#">Sage 500, Blackbaud RE, Blackbaud FE, Syspro (On-Premise SQL Database)</a>
<a href="#">Intacct</a>

20. When the Configuration Wizard is finished, click on **Test Connection**.



If the connection fails, click **OK** to return to the Installer dialog and click the **Start Over** button to go back and correct the information entered.

21. The install is complete when all steps have green check marks. Click the **Exit** button to close and exit the installer.



Go to the next installation step, [Verify Installation](#).

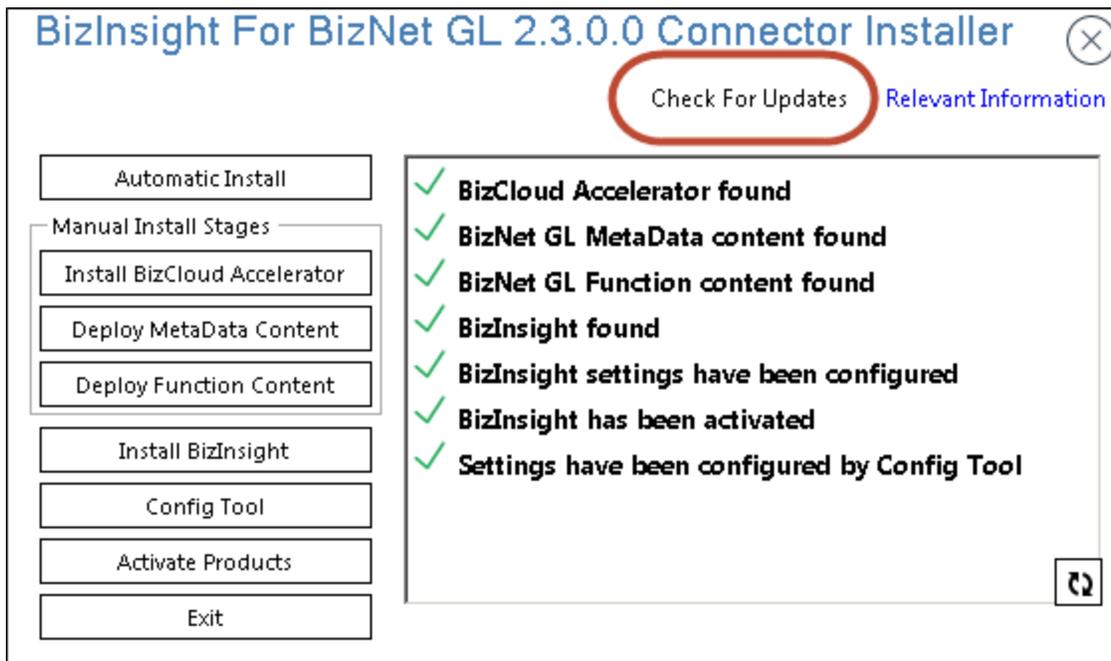
## 3.2 Updating BizInsight



### IMPORTANT

Confirm that you have administrator rights to your workstation or application server. If you do not, you must temporarily be given administrator rights for this installation. Also, a 64 bit OS (Operating System) is required.

1. If BizInsight 7 is already installed on the workstation, double-click the installer icon on the desktop and click on the **Check for Updates** link:



If there isn't a content installer icon on the desktop, browse to C:\Program Files (x86)\BizNet Software\*Content Name* and double-click the BIZNET Content Installer.exe.

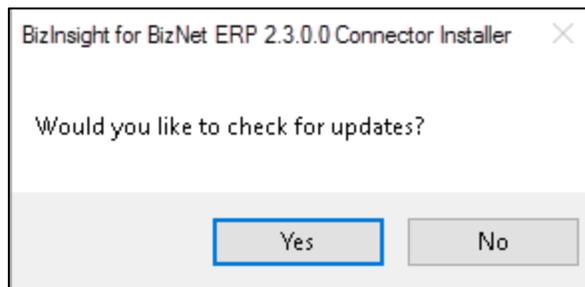
PC > Local Disk (C:) > Program Files (x86) > Biznet Software > BizNet Sample Data 1.2.0.0 >

Name	Date modified	Type	Size
BizInsight Installation Files	12/5/2016 3:18 PM	File folder	
BizNetServer Installation Files	12/5/2016 3:18 PM	File folder	
Content	12/5/2016 3:18 PM	File folder	
AccessToSQL.dll	11/15/2016 10:50 ...	Application extens...	
AccessToSQL.dll.config	11/15/2016 10:50 ...	CONFIG File	
AppConfigTool.exe	11/15/2016 10:50 ...	Application	
AppConfigTool.exe.config	11/15/2016 10:50 ...	CONFIG File	
BizInsight.sdf	11/15/2016 10:50 ...	SQL Server Comp...	
BIZNET Admin Tool.exe	11/15/2016 10:50 ...	Application	
BIZNET Admin Tool.exe.config	11/15/2016 10:50 ...	CONFIG File	
<b>BIZNET Content Installer.exe</b>	11/15/2016 10:50 ...	Application	
BIZNET Content Installer.exe.config	11/15/2016 10:50 ...	CONFIG File	
BizNet.API.Helper.dll	11/15/2016 10:50 ...	Application extens...	

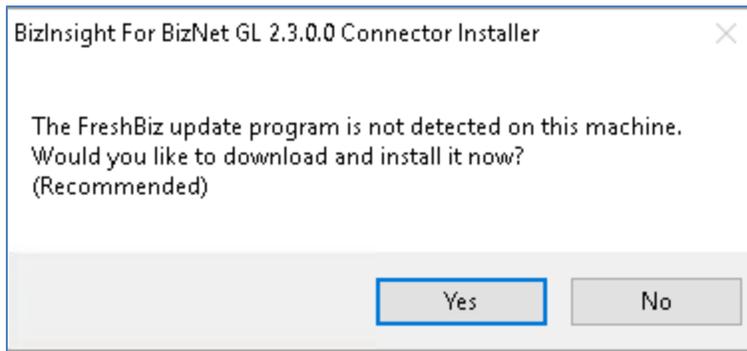
If this directory and file do not exist, start Excel, go to the **BizInsight 7** tab, click on the **Load BizInsight 7** button and click on the **Updates** button.



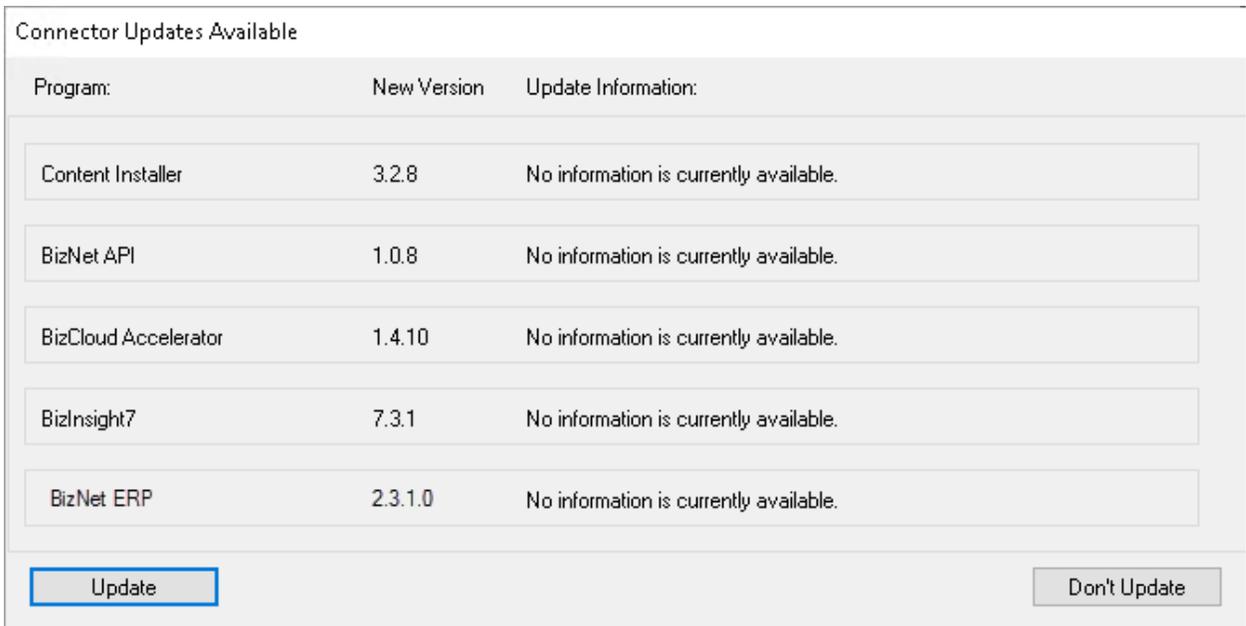
2. Click **Yes** to the next dialog.



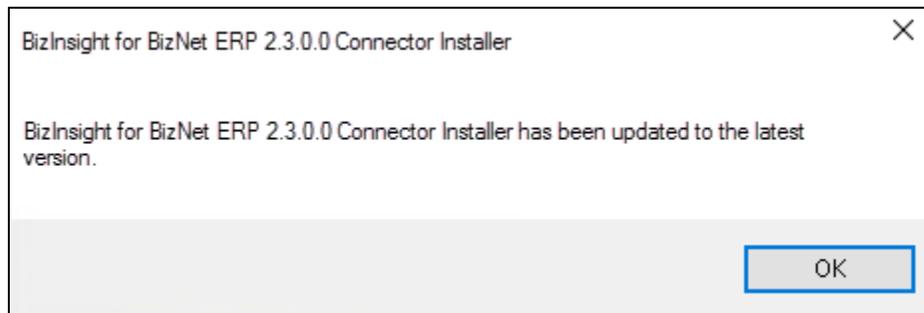
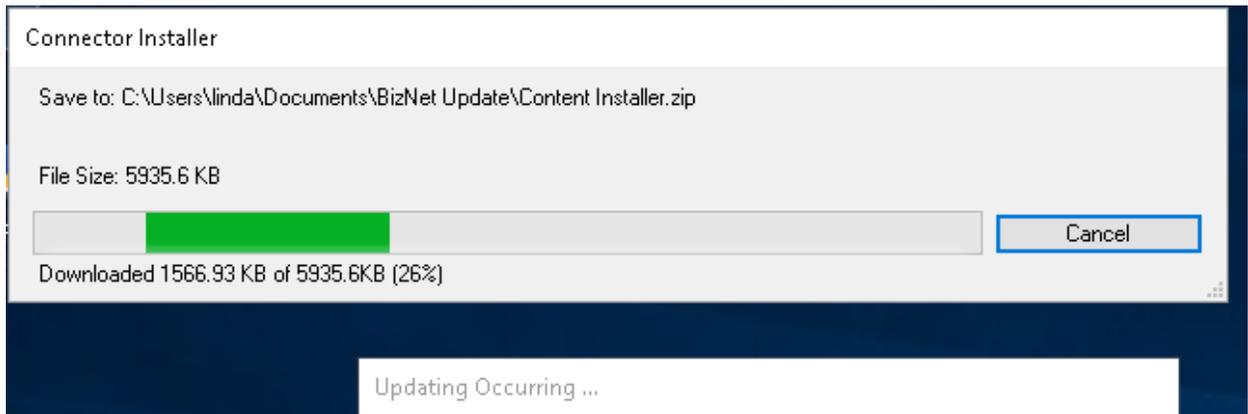
3. You may be prompted to install a supporting application named “FreshBiz”. Click **Yes**.



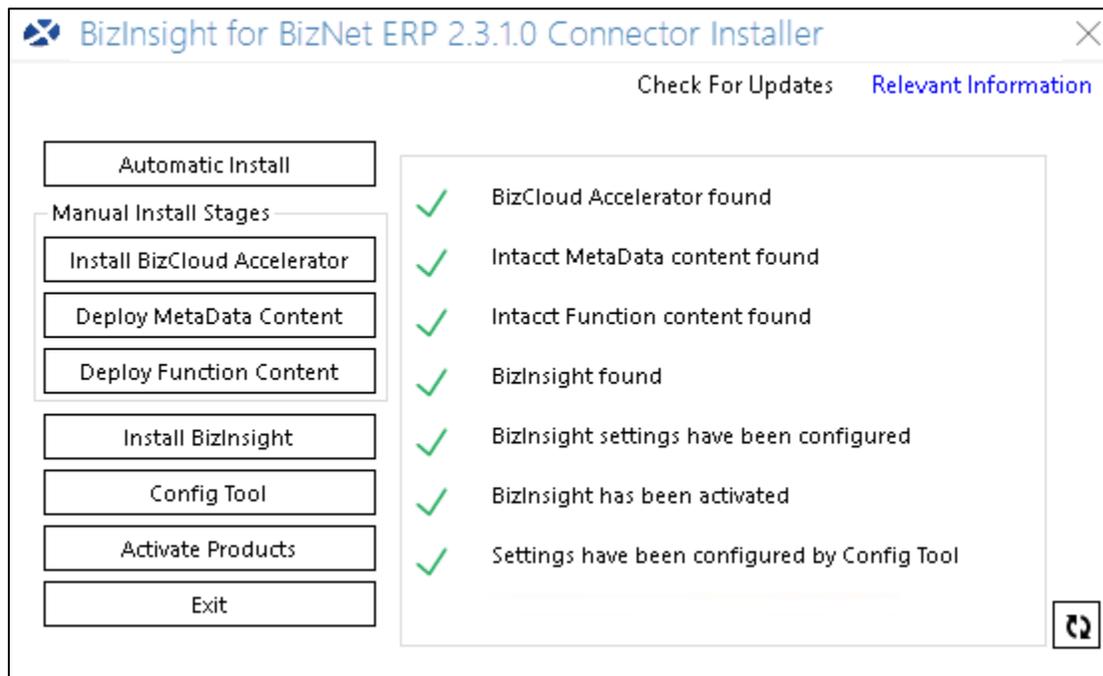
If there are new versions available, the following dialog will open. Click **Update** to continue.



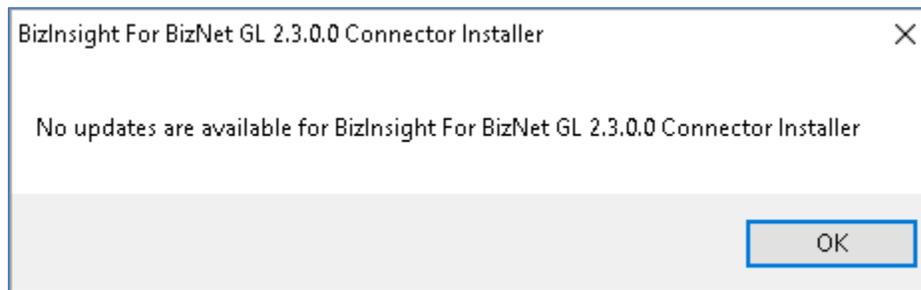
The updates will be downloaded and installed automatically.



The Content Installer dialog will open. Click **Exit**.



If no updates are found, the following message will display. Click **OK** to continue with the installation.

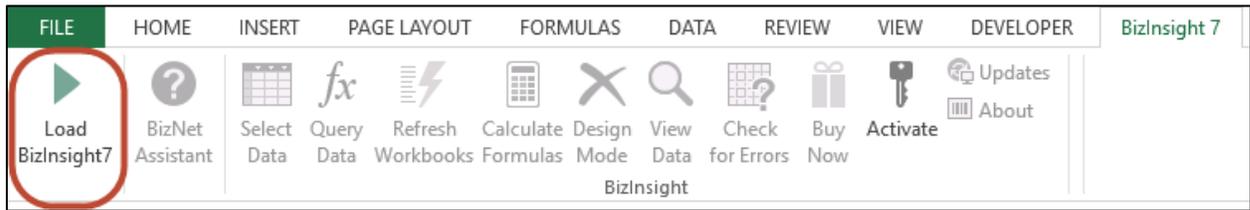


## 4. Verify Installation

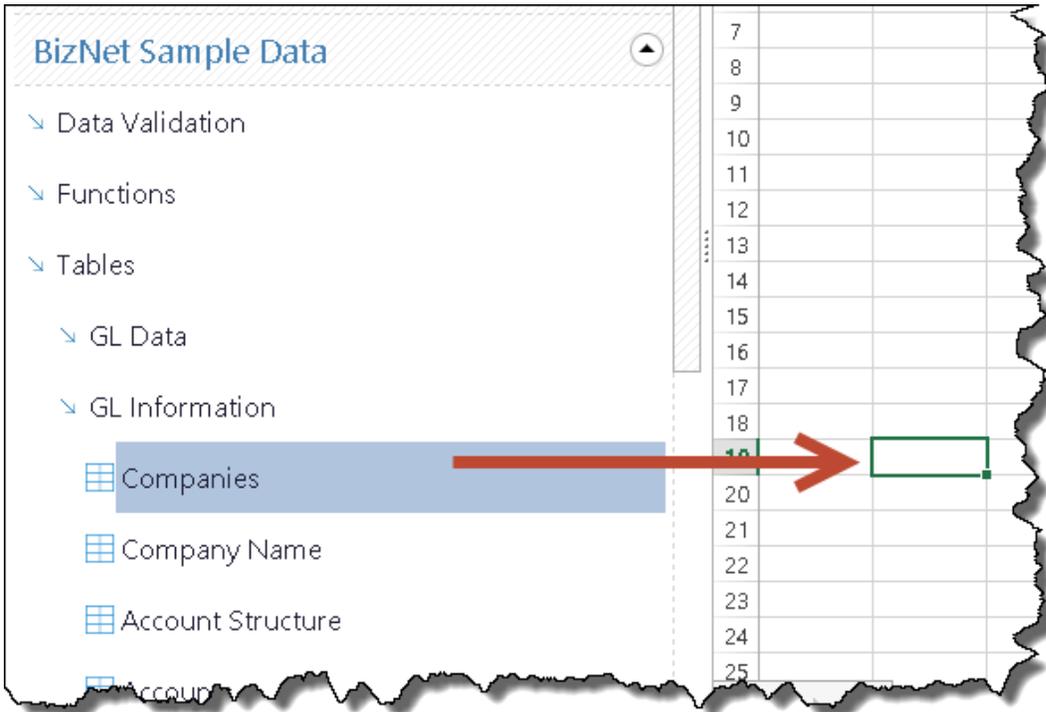
**! IMPORTANT**

The following is just an example. The objects available in the Navigation Pane will vary for each ERP Connector. The following is just to test that data is being returned and the install was successful.

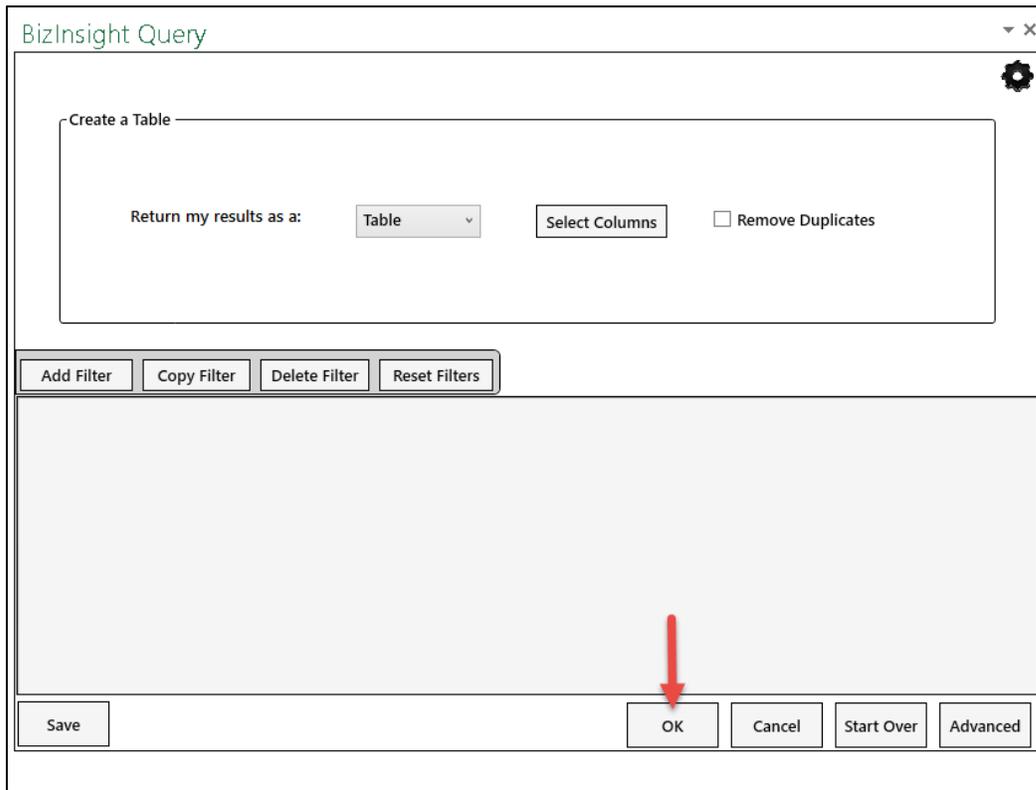
1. Launch Excel.
2. Click on the **Load BizInsight** button on the BizInsight 7 ribbon.



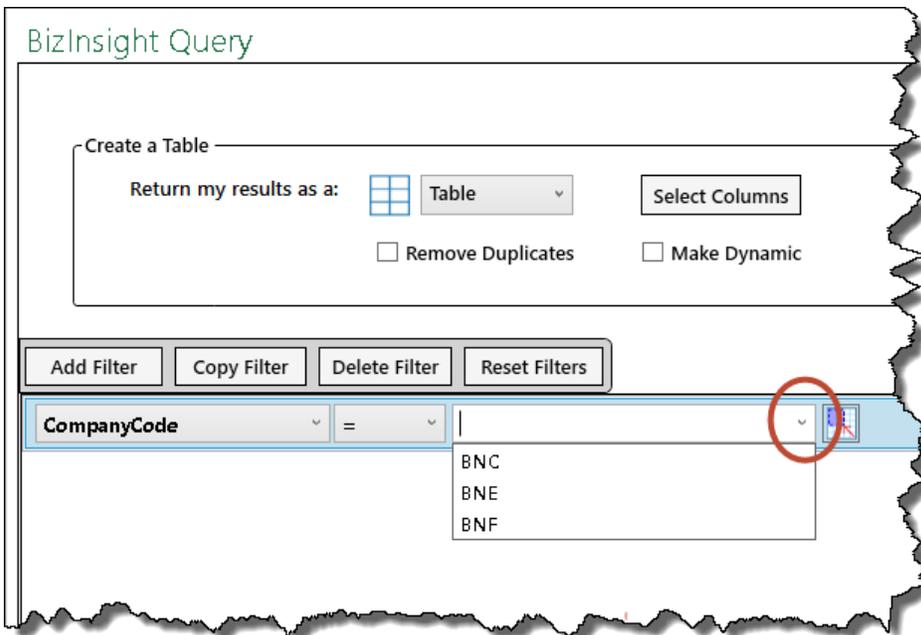
3. In the Navigation pane expand the available nodes and try to locate an Information node. The objects available under Information nodes are usually the most basic and don't require a lot of input parameters. Drag and drop any table. In this example, Companies was used.



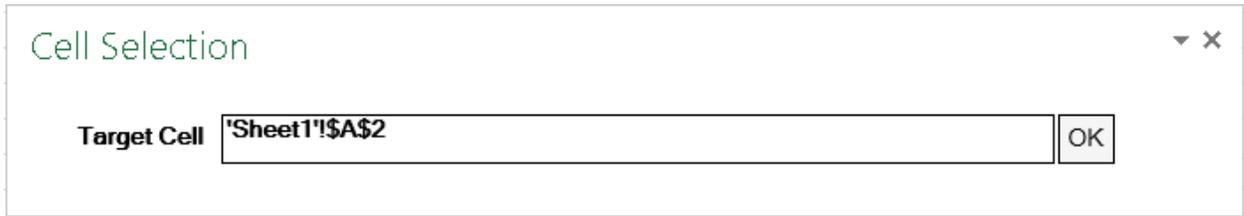
- 4. Click **OK** in the BizInsight Query dialog.



If the table asks for a parameter, use the drop down to see if there are values you can choose. If the drop down is empty, cancel out of the dialog and try a different table. The objective at this point is to test the installation and make sure it works.



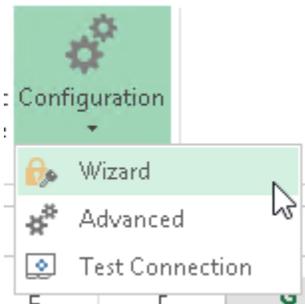
- Click **OK** to the Cell Selection dialog.



If BizInsight 7 is installed correctly, data should be returned.

	A	B	C	D
1				
2	<b>Company</b>	<b>CompanyName</b>		
3	BNC	BizNet Enterprises Canada		
4	BNE	BizNet Enterprises		
5	BNF	BizNet Financial		
6				

If no data is returned, click on **Configuration > Wizard** to re-launch the BizCloud Accelerator configuration wizard and verify the correct connection information was provided during installation.



## 5. Additional Steps for Multi-User or Roaming Profile Environments

You will need to perform the additional steps if the environment being used for BizInsight is:

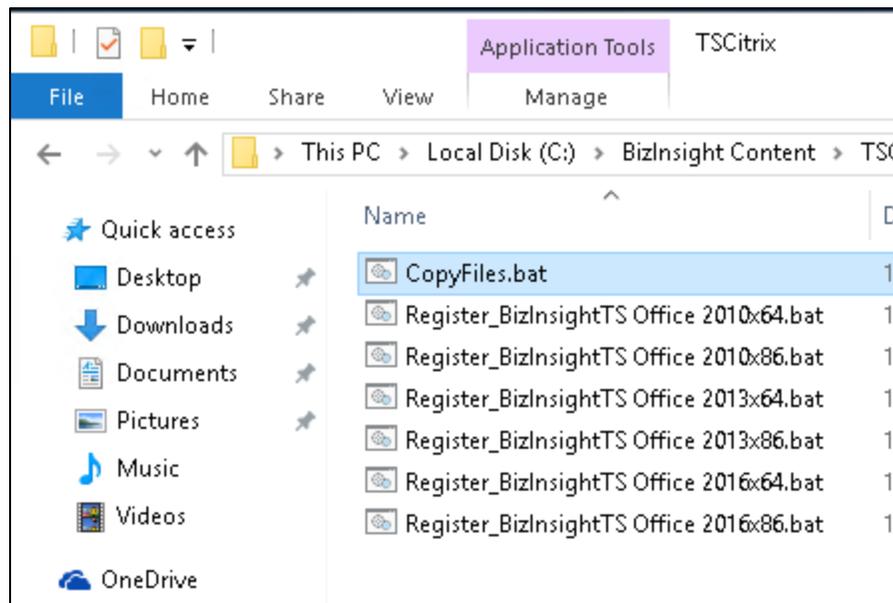
- a multi-user environment such as Citrix or Terminal services, or
- if your company uses roaming profiles **and** locally cached copies of the profile are deleted on logoff. Deleting locally cached profiles is a group policy managed in Active Directory Users and Computers > Computer Configuration > Administrative Templates > System > Logon > Delete cached copies of roaming profiles.



### Note

The following steps use .bat files that are not currently laid down by the product installer. If you are not able to locate the files described, please download the BizInsight Tools from the customer portal (<http://biznet.flexnetoperations.com>).

1. Perform this step for multi-user and roaming profile environments:
  - a. Browse to the C:\BizInsight Content\TSCitrix and double-click the file named CopyFiles.bat. This batch file will copy the BizInsight installation files to C:\BizInsight Content. This location can be changed but it will have to be changed in this .bat file as well as the next one. Be sure to backup any .bat file that is modified.



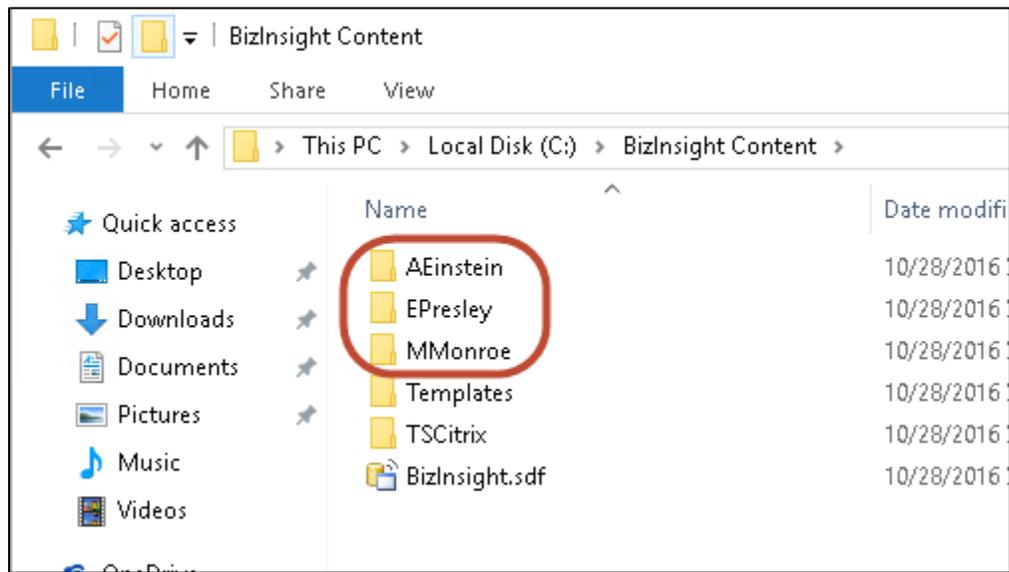
- b. Double-click the “Register\_BizInsightTS Office **XXXXXX**.bat” file that corresponds with the Excel version and bitness of the Excel installation. If you are not sure whether Excel

is 32-bit or 64-bit, the bitness can be found in with the Excel version. To find that information, refer to this Microsoft Support article: [What version of Office am I using?](#)

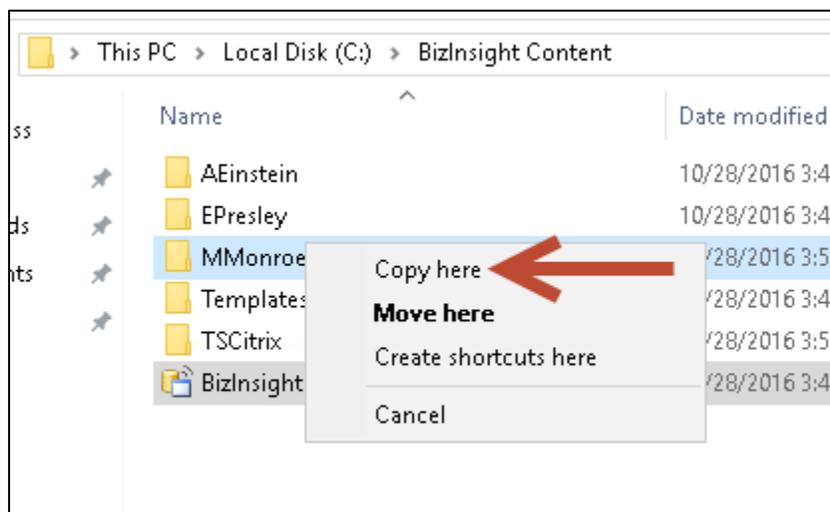
- c. Re-verify the installation to make sure BizInsight still works.

2. The remaining steps apply to **multi-user implementations only**.

- a. Create a subdirectory under C:\BizInsight Content for each BizInsight user.

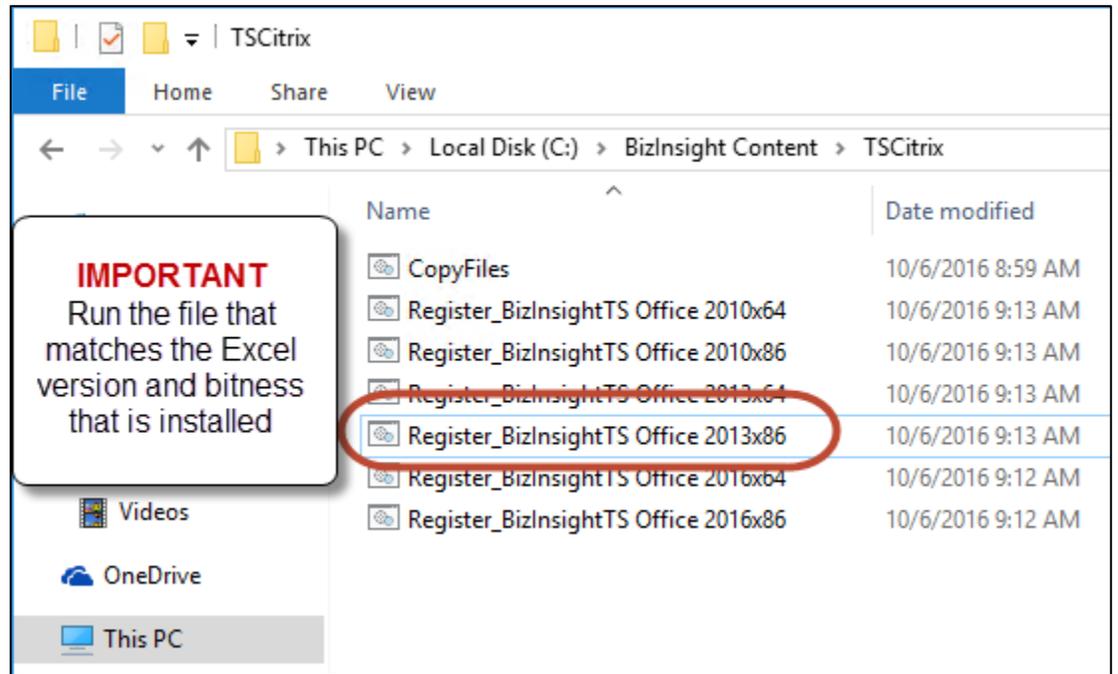


- b. Copy the BizInsight.sdf from C:\BizInsight Content into each user’s directory.

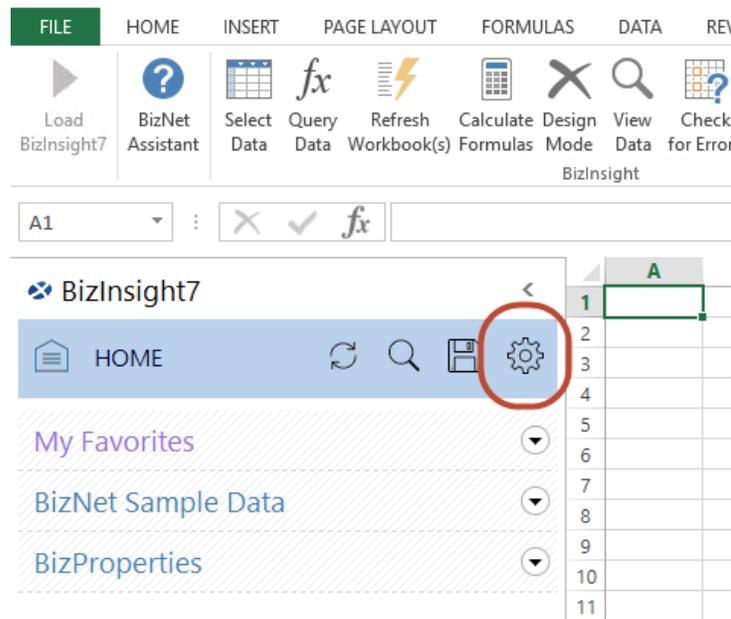


- c. Log in as each BizInsight user and perform the following steps:

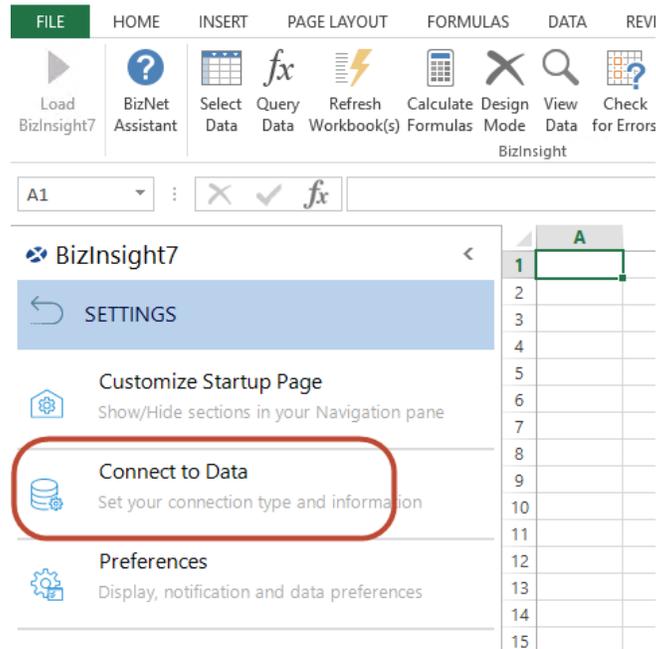
- i. Execute the “Register\_BizInsightTS Office XXXXX.XX.bat” in the C:\BizInsight Content\TSCitrix directory.



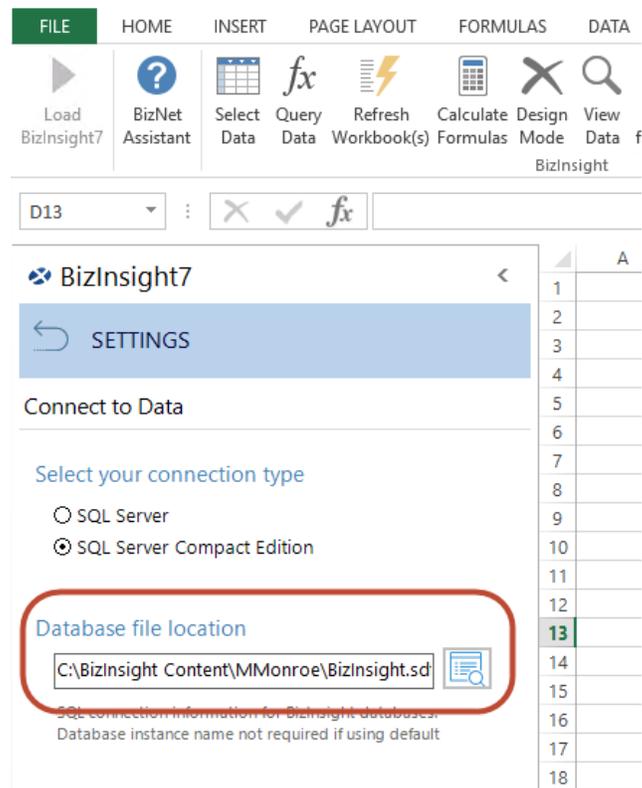
- ii. Start Excel
- iii. Click on the Settings button in the Navigation Pane.



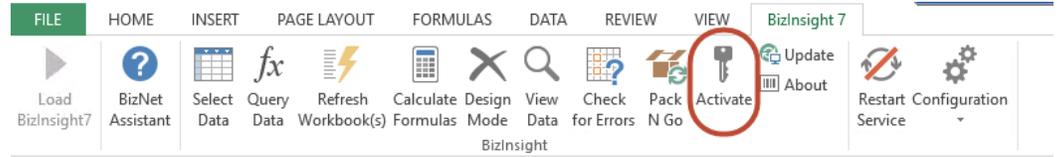
- iv. Click on **Connect to Data**.



- v. Browse to the user's directory under C:\BizInsight Content and select their BizInsight.sdf.



- vi. Click **Apply** to commit the change.
- vii. Click on the Activate button on the BizInsight 7 ribbon and enter your product Activation ID.



- viii. Run through the Verify Installation steps (Step 5).
- ix. Repeat these steps for each BizInsight user.

## 6. Appendix

### A. Activating BizInsight 7

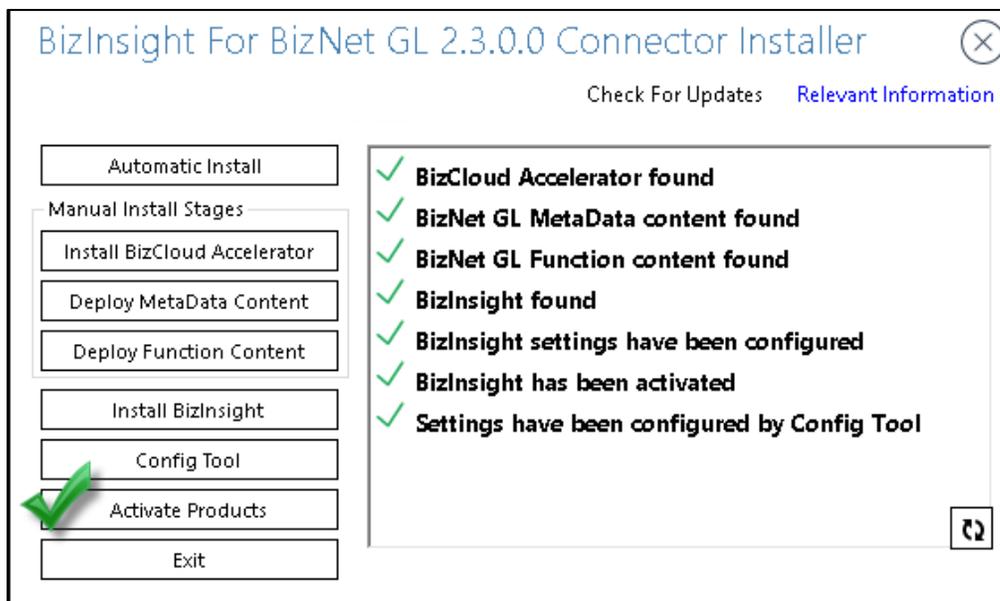


License activation requires internet access. If internet access is not available or the activation call is being blocked, the License Activation dialog will not open.

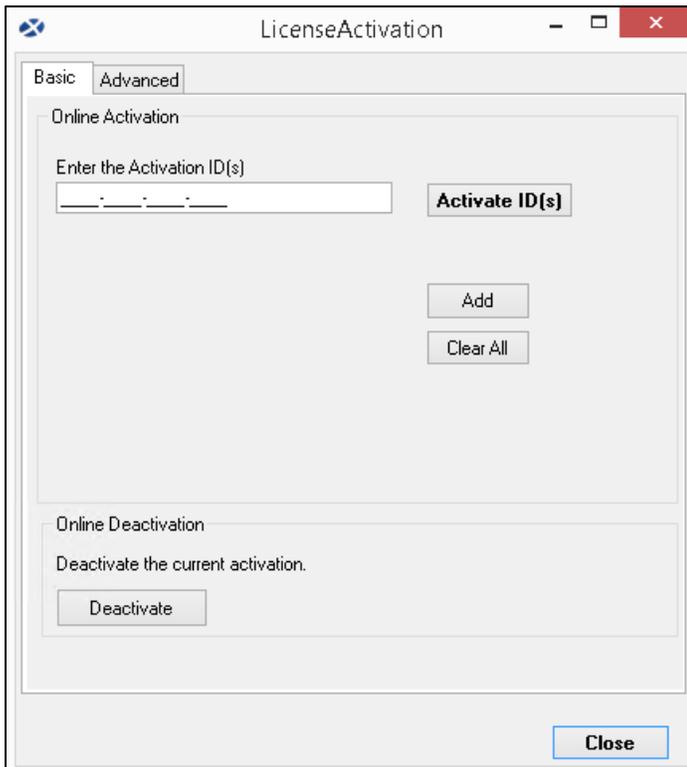
1. Click on the **Buy Now** button from the BizInsight ribbon.
2. The **Buy Now** button will redirect you to the BizNet Software website to complete the transaction.
3. When the transaction is complete, you will receive an email with the Activation ID.
4. To finish the activation, double-click the BizInsight Content Installer icon on your desktop.



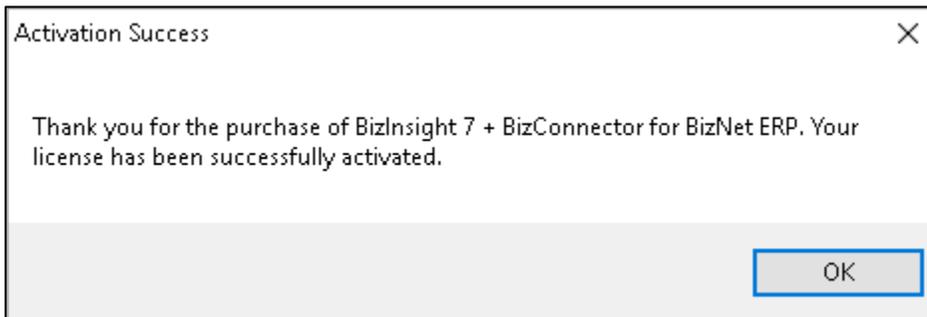
5. Click on the **Activate Products** button.



6. Type or paste your Activation ID and then click the **Activate ID(s)** button.



7. The Activation Success dialog will appear. Click the OK button to continue and then click Close.

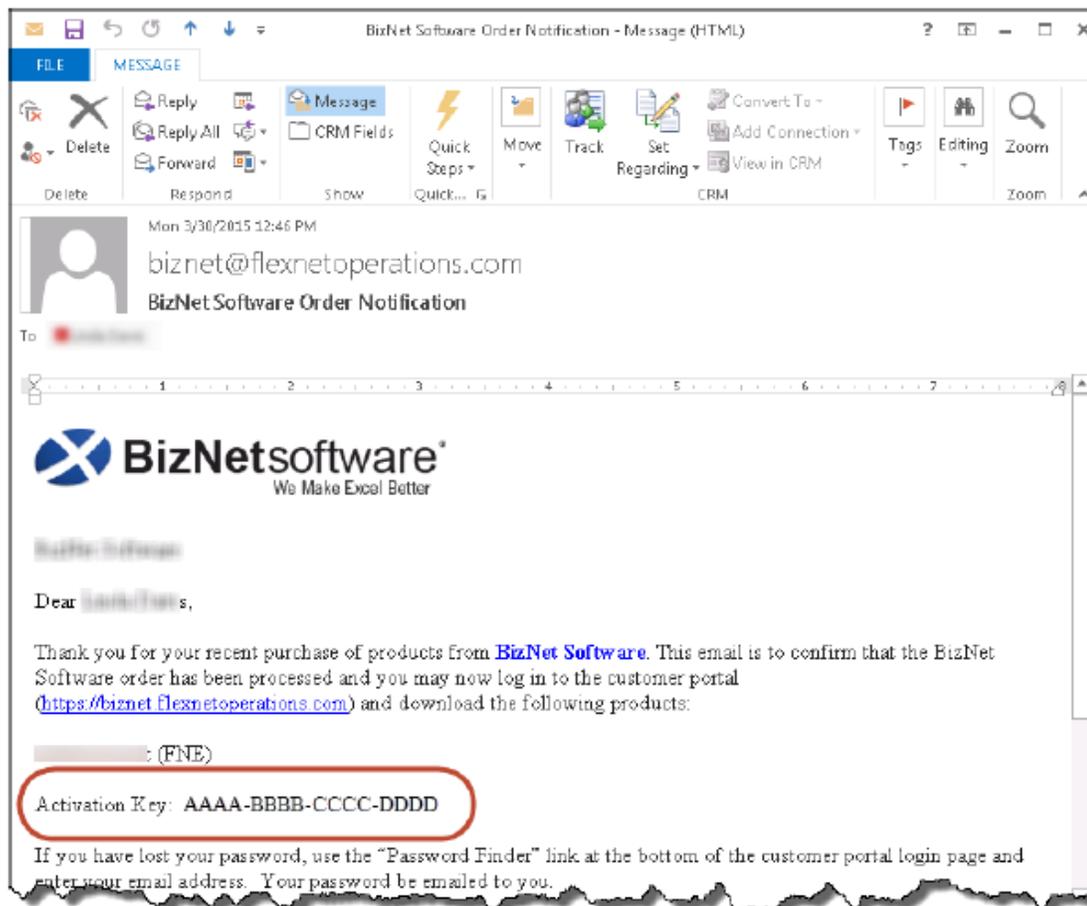


## B. Finding your Activation ID

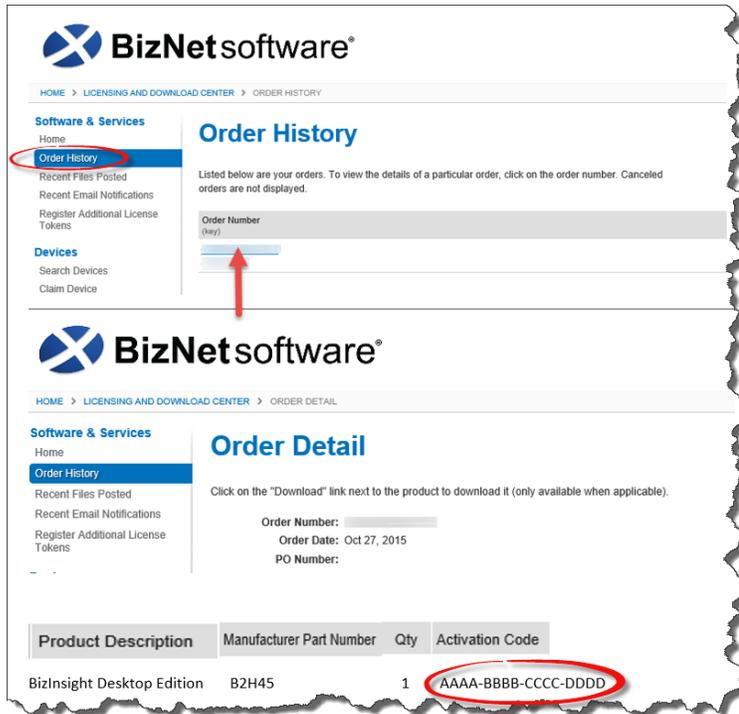
### IMPORTANT

License activation requires internet access. If internet access is not available or the activation call is being blocked, the License Activation dialog will not open

1. When a BizInsight 7 order is processed, the license Activation ID is emailed to the individual named on the order:



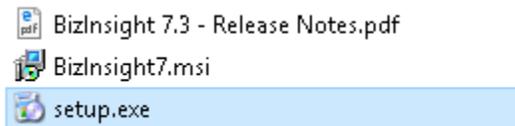
2. If you are unable to locate that email, the Activation ID can also be found on the customer portal: <https://biznet.flexnetoperations.com>. Once logged into the portal, click on **Order History** on the left pane. Click the Order number link and copy the BizInsight Desktop Edition Activation Code.



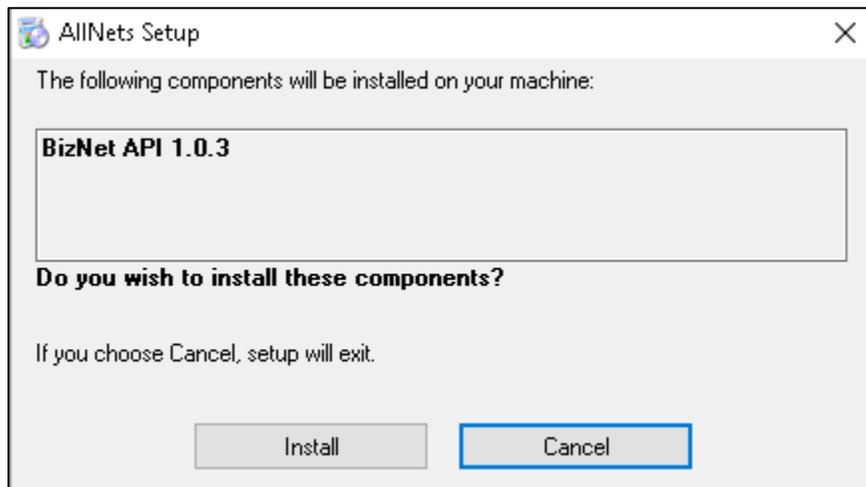
### C. BizInsight 7 Only Installation

If BizInsight 7 has been purchased without a connector, the installation steps are as follows:

1. Download BizInsight 7 from the customer portal site ([biznet.flexnetoperations.com](http://biznet.flexnetoperations.com)) and extract the contents.
2. Double-click the setup.exe.



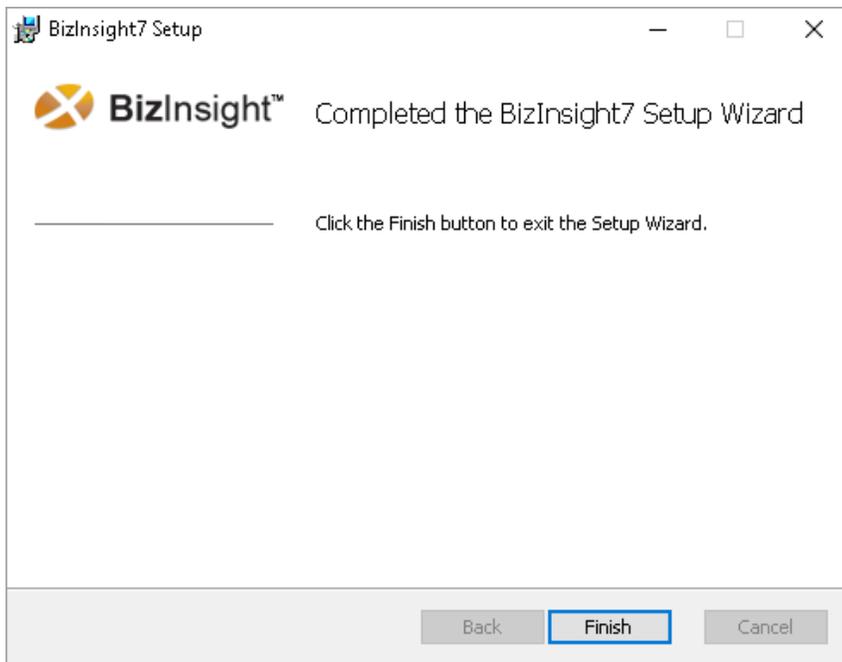
3. Click **Install** to install the BizNetAPI prerequisite program.



- The End User License Agreement (“EULA”) dialog will open. Read through the EULA and if you accept these terms, check the **I accept the terms** checkbox. Click **Install**.



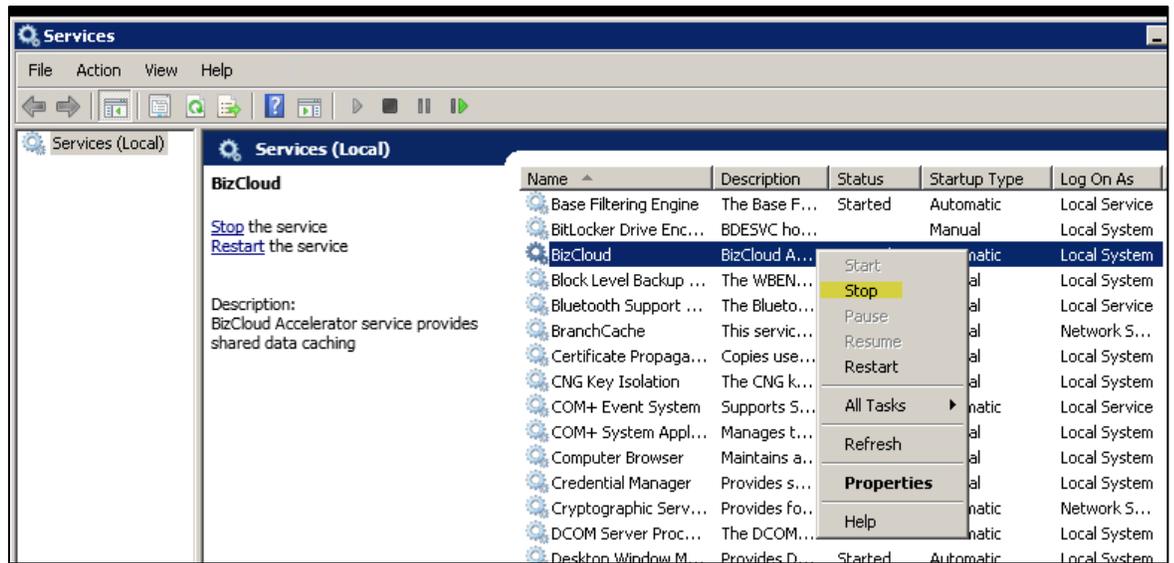
- Click **Finish**.



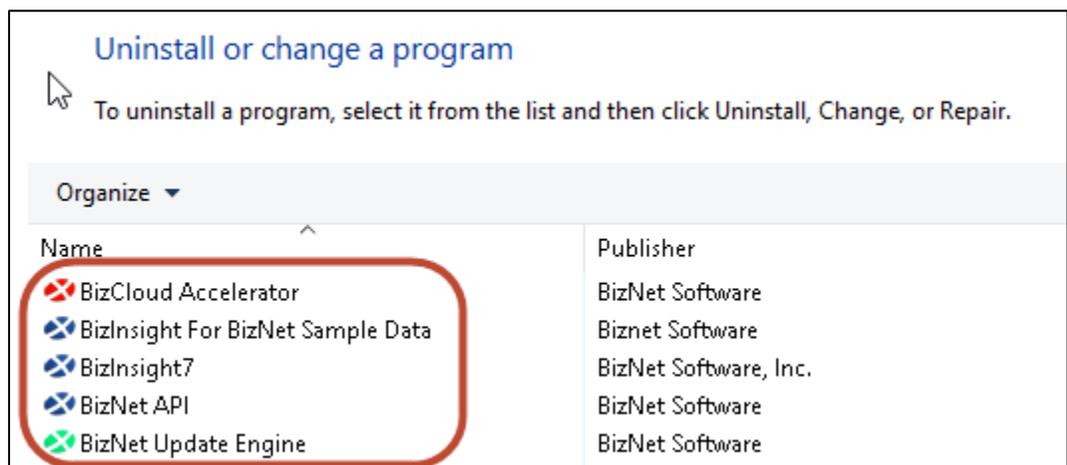
### D. Manual BizInsight Installation/Update

In some environments, the network configuration or Anti-virus software may prevent our content installer from being able to connect to the update service, download new versions and install them. In those situations, the product can be manually installed as follows.

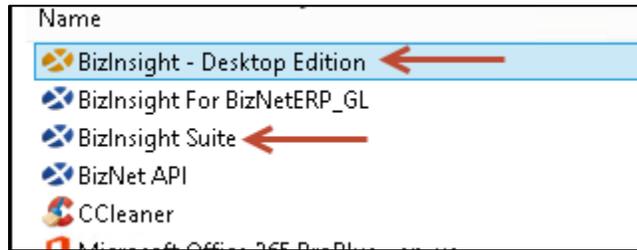
1. Uninstall previous BizInsight versions.
  - a. Stop the BizCloud service from **Control Panel > System and Security > Administrative Tools > Services**.



- b. Go to **Control Panel > Programs and Features** and uninstall all BizInsight items. Uninstall from top down.



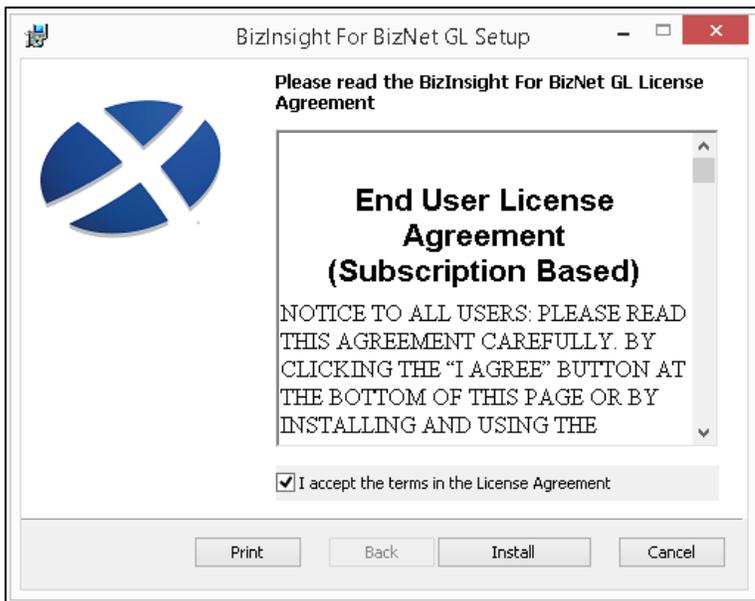
Uninstall BizInsight – Desktop Edition and BizInsight Suite if they are listed instead of BizInsight 7.



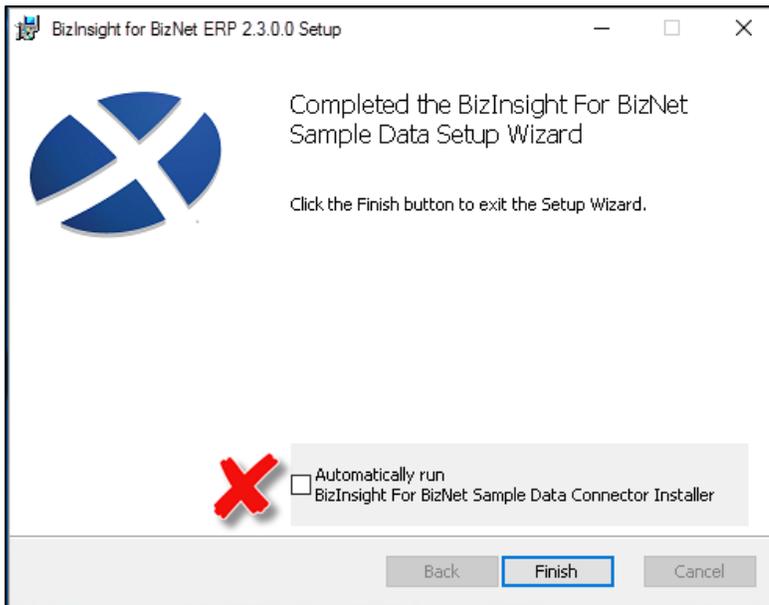
2. Double click the **BizInsight for XXX Connector Installer.msi** file.



3. Read through the EULA and if you accept these terms, check the **I accept the terms** checkbox. Click **Install**.



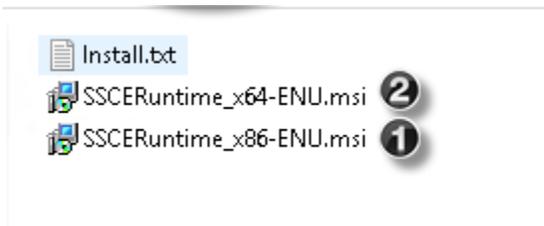
- Click the **Finish** button. Do **not** check the Automatically run checkbox.



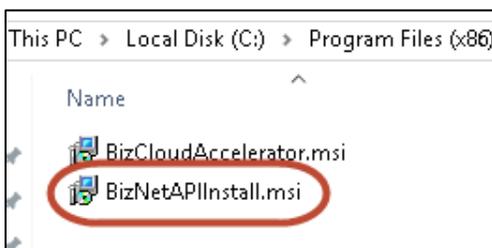
- Download and install the 32 and 64-bit SQL Compact Edition installers (both versions are needed and contained within a single self-extracting download file that can be downloaded from Microsoft:

<https://www.microsoft.com/en-us/download/details.aspx?id=5783>

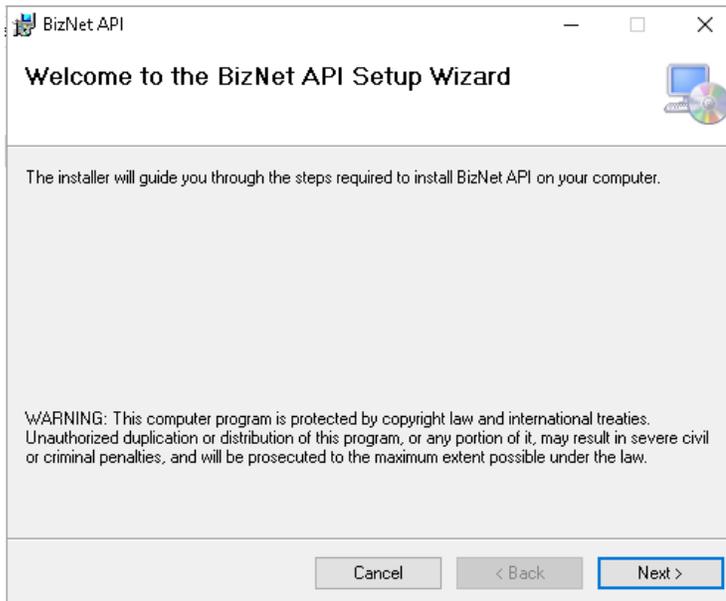
Install the 32-bit version before the 64-bit version.



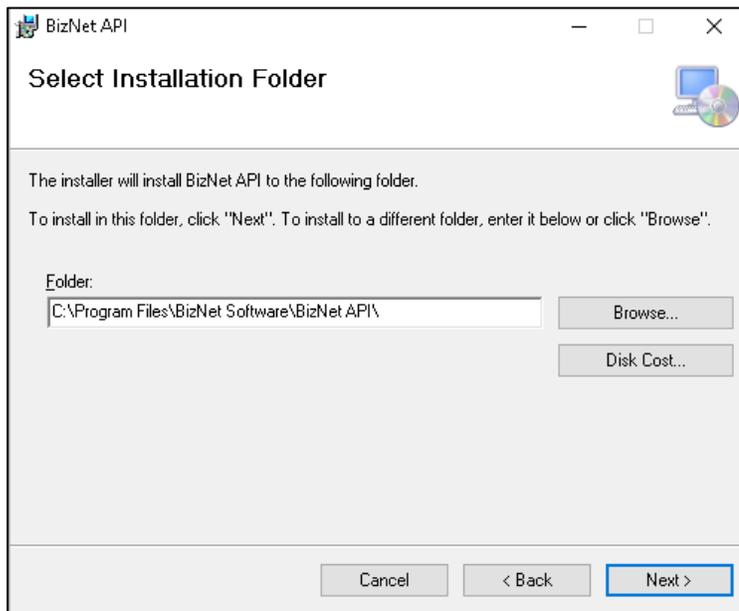
- Open Windows Explorer and browse to C:\Program Files (x86)\Biznet Software\ERP Name and Version\BizNetServer Installation Files. Double-click the BizNetAPIInstall.msi.



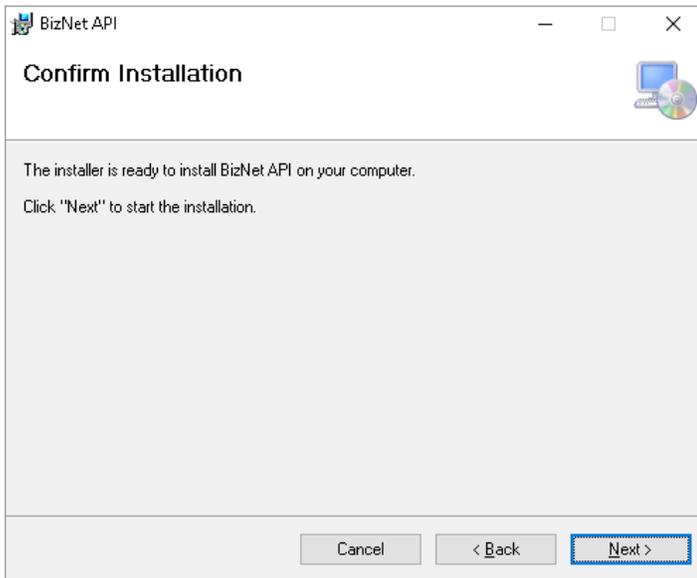
7. Click **Next**.



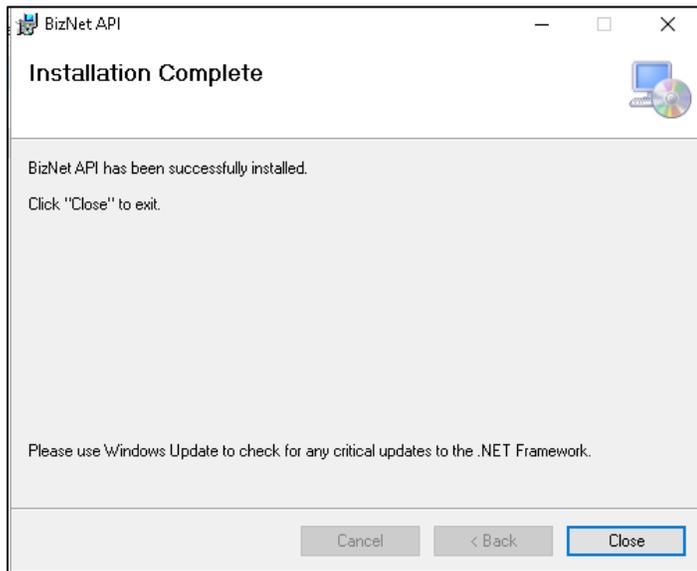
8. Click **Next**. Do not change the default directory.



9. Click **Next**.



10. Click **Close**.



11. Double-click the icon on the desktop and then return to the regular installation steps, [Resume Installation Steps](#).



## E. Connector Specific Instructions

This section provides specific instructions for the information needed during Connector installation. The information that needs to be provided will vary depending on the type of system from which the Connector will be retrieving data.

### On-Premise SQL Database

Connectors that will be retrieving data from an On-Premise SQL database will require the following information:

Field	Information Needed
<b>Server name</b>	SQL Server name and instance name if the database resides on a named instance. For example:  Server2012\Accounting
<b>Database Name</b>	If the ERP system stores data for all companies in a single database, use that database name.  If the ERP system stores data for companies in separate databases, provide the name of the Control or System database here.  If the Connector comes with scripts ( <a href="#">Run scripts on Server</a> ) for example Syspro, enter BizNet for the database name.
<b>User id</b>	Enter a SQL login with db_datareader permissions to the database supplied in the Database Name field. BizInsight does not support the use of Windows Authentication and requires a SQL login.

<b>Password</b>	Enter the password for the user id supplied in the User id field.
<b>Confirm Password</b>	Re-type the user id’s password. The asterisks will turn <b>Green</b> when the password matches the one already supplied.

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**Intacct**

Field	Information Needed
<b>Company ID</b>	<p>Enter the Intacct company id, paying careful attention to the character case and spacing. Intacct is case sensitive. The company id Company A is not the same CompanyA or company A.</p> <p>BizInsight will not work with slide-in logins. The login must exist at the company level, not the console level.</p>
<b>Inacct Login id</b>	<p>Enter the user’s Intacct login id, paying careful attention to the character case. Intacct is case sensitive. The login id SJones is not the same as sjones.</p> <p>If the ERP system stores data for companies in separate databases, provide the name of the Control or System database here.</p> <p>If the Connector comes with scripts (<a href="#">Run scripts on Server</a>) for example Syspro, enter BizNet for the database name.</p>
<b>Password</b>	Enter the password for the user id supplied in the User id field.
<b>Confirm Password</b>	Re-type the password. The asterisks will turn <b>Green</b> when the password matches the one already supplied.

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