# 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".

BizNet software <sup>®</sup>				
BIZNETSOFTWARE.COM > LICEN	NSING AND DOWNLOAD CENTER > PRODUCT LIST			
Software & Services Home Order History Recent Files Posted Recent Email Notifications	Product List Welcome to the premier delivery, update, and software management service; designed manage your rapidly changing software from a secure, personalized website.			
<b>Devices</b> Search Devices Claim Device Upload Capability Request	To access an item, select a product below. BizInsight 7 BizBroadcast			
Administration 🌣 Account Administrators Allocation Accounts				

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.

Name	~	l
뤻 BizInsight For Syspro 2.0.4.0 Connector Installer.msi		£
🗐 BizNet Content Spec - SYSPRO Connector.xlsx		ł
🔂 Setup.exe		8
Syspro_Scripts.zip Example		8

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 <u>Appendix C – BizInsight 7 Only Installation</u>.

# MPORTANT

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

3. 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.

谩	BizInsight For BizNet GL Setup – 🗆	×
	Please read the BizInsight For BizNet GL Licens Agreement	e
	End User License Agreement (Subscription Based)	^
	NOTICE TO ALL USERS: PLEASE READ THIS AGREEMENT CAREFULLY. BY CLICKING THE "I AGREE" BUTTON AT THE BOTTOM OF THIS PAGE OR BY INSTALLING AND USING THE	\$
	✓ I accept the terms in the License Agreement	
	Print Back Install Cancel	

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

谩	BizInsight For BizNet GL Setup 🛛 – 🗖 🗙
	Completed the BizInsight For BizNet GL Setup Wizard Click the Finish button to exit the Setup Wizard.
	✓ Automatically run BizInsight For BizNet GL Connector Installer
	Back <b>Finish</b> Cancel

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



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

Should I check t	he production or beta :	server for updates?		
	Production		Beta	

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

Connector Updates Available			
Program:	New Version	Update Information:	
Content Installer	3.2.8	No information is currently available.	
BizNet API	1.0.8	No information is currently available.	
BizCloud Accelerator	1.4.10	No information is currently available.	
BizInsight7	7.3.1	No information is currently available.	
BizNet ERP	2.3.1.0	No information is currently available.	
Update			Don't Update

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



BizInsight For BizNet GL 2.3.0.0 Connector Installer	$\times$
No updates are available for BizInsight For BizNet GL 2.3.0.0 Connector Installer	
ОК	

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



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

🐼 Mir	nimum Requirements Have Not Been Met	$\times$
The fol	lowing items do not meet minimum requirements:	
$\checkmark$	Windows 7 is the minimum required operating system.	
~	2 processors are required, 4 processors was detected.	
~	A CPU speed of 2GHz is required, 2.90GHz CPU speed was detected.	
	A RAM memory total of 6 GB is required, 2.15 GB of RAM memory was detected.	
$\checkmark$	A hard drive memory total of 10 GB is required, 54 GB of memory was detected.	
$\checkmark$	A download bandwidth of 0.5 MB\s is required, 1.14 MB\s of bandwidth was detected.	
	Cancel install	
	Continue with install	٦
		_

11. 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**.

BizInsight For BizNet	GL 2.3.0.0 Connector Installer 🛛 🛞	
	Check For Updates Relevant Information	
Automatic Install	BizCloud Accelerator not found	
Manual Install Stages	BizNet GL MetaData content found	
Install BizCloud Accelerator	BizNet GL Function content found	
Deploy MetaData Content	BizInsight not found	
Deploy Function Content	BizInsight settings have been configured	
	BizInsight has been activated	
Install BizInsight	Relevant Information	$(\times)$
Config Tool		$\smile$
Activate Products	Config Path: <u>CABizInsight Content</u> Packaged with Content Packager Version 1.7.4.0	
	- ₩	
Exit	Close Reset Install Status Convito Clinhoard	

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.

Pre Installation Question		$\otimes$
<ul> <li>Configuration</li> <li>Please choose a directory location for the Configuration Path:</li> </ul>	:\BizInsight	Browse
		Override Configuration Path
Ok		Cancel

🔰 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 <u>Appendix b</u>. When the 30-day trial period has ended, please see *Activating BizInsight 7.0* in <u>Appendix a</u>.

LicenseActivation	$\otimes$
Basic Advanced	
Online Activation	
Enter the Activation ID(s)	
Activate	
Add Clear All	
Online Deactivation Deactivate the current activation. Deactivate	
Close	

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.

BizCloud Accelerator Configuration Wizard	9
Welcome to the BizCloud Accelerator configuration wizard. On the following screens you will be asked to select your ERP, and provide credentials to connect to it. The service will be started when this wizard closes.	
	_
Next Cancel	

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

BizCloud Accelerator Configuration Wizar	d 🔇
Select the BizNet Content Pack to proceed to the connection information	۱.
BizNet GL V	
New	Cancel
	Cancer

19. 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.

😵 BizNet Sample Data S	Settings		$\times$
Your Profile will be stored as	Default	✓ _BizNet Sample Data	
Server			
Database			
SQL Username			
Password			
Confirm Password			
Add Another		OK Cancel	

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

ERP System
Sage 500, Blackbaud RE, Blackbaud FE, Syspro (On-Premise SQL Database)
Intacct

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

BizCloud Accelerator Configuration Wizard	$\otimes$
BizCloud has started. Press 'OK' to continue.	
Test Connection	
Start Over OK	

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, <u>Verify Installation</u>.

# 3.2 Updating BizInsight

# MPORTANT

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:



BizInsight For BizN	et GL 2.3.0.0 Connector Installer 🔗
	Check For Updates Relevant Information
Automatic Install	✓ BizCloud Accelerator found
Manual Install Stages	✓ BizNet GL MetaData content found
Install BizCloud Accelerator	✓ BizNet GL Function content found
Deploy MetaData Content	✓ BizInsight found
Deploy Function Content	BizInsight settings have been configured
Install BizInsight	<ul> <li>BizInsight has been activated</li> <li>Settings have been configured by Config Tool</li> </ul>
Config Tool	
Activate Products	[5]
Exit	

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 > Eocarbisk (c.) > Programmies (xoo)	> Diznec Software > Diz	zivet sample bata nzio.	· ·
Name	Date modified	Туре	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	
💐 BIZNET Content Installer.exe	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	

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

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.

Connector Updates Available			
Program:	New Version	Update Information:	
Content Installer	3.2.8	No information is currently available.	
BizNet API	1.0.8	No information is currently available.	
BizCloud Accelerator	1.4.10	No information is currently available.	
<b>D</b> (1) (1) <b>D</b>	7.04		
Bizinsight/	7.3.1	No information is currently available.	
BizNet ERP	2310	No information is currently available	
	2.0.1.0	no momedonis curenzy available.	
Undate		Don't	Undate
00000		Dont	opdato

#### The updates will be downloaded and installed automatically.

Connector Installer		
Save to: C:\Users\linda\Documents\BizNet Update\Content Installer.zip		
File Size: 5935.6 KB		
		Cancel
Downloaded 1566.93 KB of 5935.6KB (26%)		
Updating Occurring		
BizInsight for BizNet ERP 2.3.0.0 Connector Installer	×	
BizInsight for BizNet ERP 2.3.0.0 Connector Installer has been updated to the latest version.		
ок		

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

😵 BizInsight for BizNet I	ERP 2	.3.1.0 Connector Installer >	$\times$
		Check For Updates Relevant Information	n
Automatic Install			
Manual Install Stages	$\checkmark$	BizCloud Accelerator found	
Install BizCloud Accelerator	$\checkmark$	Intacct MetaData content found	
Deploy MetaData Content	$\checkmark$	Intacct Function content found	
Deploy Function Content	$\checkmark$	BizInsight found	
Install BizInsight	$\checkmark$	BizInsight settings have been configured	
Config Tool	$\checkmark$	BizInsight has been activated	
Activate Products	$\checkmark$	Settings have been configured by Config Tool	
Exit		[7]	2
			(

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

BizInsight For BizNet GL 2.3.0.0 Connector Installer	Х
No updates are available for BizInsight For BizNet GL 2.3.0.0 Connector Installer	
ОК	

# 4. Verify Installation

### A 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.

BizInsight Query	r X
c Create a Table	¢
Return my results as a: Table × Select Columns CRemove Duplicates	
Add Filter Copy Filter Delete Filter Reset Filters	
Save OK Cancel Start Over Advance	ed

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.

BizInsight Query	
	5
Create a Table	>
Return my results as a: Table × Select Columns	>
Remove Duplicates Make Dynamic	>
	Σ
	}
Add Filter Copy Filter Delete Filter Reset Filters	Γ.
CompanyCode · = ·	2
BNC	₹
BNE	ſ
BNF	5
	\$
	2
the second management of the second of the second s	

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

Cell Selectio	n	- ×
Target Cell	'Sheet1'!\$A\$2	ОК

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

	А	В	С	D	
1					
2	Company	Companyl	Name		
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.



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 (<u>http://biznet.flexnetoperations.com</u>).

- 1. Perform this step for multi-user and roaming profile environments:
  - 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 XXXXxXX.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: <u>What version ofOffice am I using?</u>

- 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.

55	Name	^	Date modified
* ds *	AEinstein		10/28/2016 3:49 10/28/2016 3:49
nts 🖈	MMonroe Templates TSCitrix C BizInsight	Copy here Move here Create shortcuts here Cancel	/28/2016 3:56 /28/2016 3:45 /28/2016 3:57 /28/2016 3:49

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

i. Execute the "Register\_BizInsightTS Office XXXXXXX.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

### 🔨 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. 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.



- LicenseActivation – ×
  Basic Advanced
  Online Activation
  Enter the Activation ID(s)
  Activate ID(s)
  Add
  Clear All
  Online Deactivation
  Deactivate the current activation.
  Deactivate
  Close
- 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

#### A 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:



 If you are unable to locate that email, the Activation ID can also be found on the customer portal: <u>https://biznet.flexnetoperations.com</u>. 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.

)rder History
Ited below are your orders. To view the details of a particular order, click on the order number. Canceled
rder Number
T
T T
Order Detail
Order Detail
Order Detail Click on the "Download" link next to the product to download it (only available when applicable).
Order Detail Click on the "Download" link next to the product to download it (only available when applicable). Order Number:
Order Detail Click on the "Download" link next to the product to download it (only available when applicable). Order Number: Order Number: Order Date: Oct 27, 2015
Order Detail Click on the "Download" link next to the product to download it (only available when applicable). Order Number: Order Date: Oct 27, 2015 PO Number:
Order Detail Click on the "Download" link next to the product to download it (only available when applicable). Order Number: Order Date: Oct 27, 2015 PO Number:
Order Detail Click on the "Download" link next to the product to download it (only available when applicable). Order Number: Order Date: Oct 27, 2015 PO Number:
Order Detail Citck on the "Download" link next to the product to download it (only available when applicable). Order Number: Order Date: Oct 27, 2015 PO Number: Manufacturer Part Number Qty 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 (<u>biznet.flexnetoperations.com</u>) and extract the contents.
- 2. Double-click the setup.exe.



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

📸 AllNets Setup	Х
The following components will be installed on your machine:	
BizNet API 1.0.3	
Do you wish to install these components?	
If you choose Cancel, setup will exit.	
Install Cancel	

4. 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.



5. Click Finish.

闄 BizInsight7 Setup		_		×
<b>Siz</b> Insight <sup>™</sup>	Completed the BizInsight7	' Setu	o Wiza	rd
	Click the Finish button to exit the Setu	p Wizard	l.	
	Back Finish		Cano	el

### 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**.

Q Services						-
File Action View	Help					
	🗟 🛃 🖬 🕨 🔳 🕪					
🧟 Services (Local)	🔕 Services (Local)	_				
	BizCloud	Name 🔺	Description	Status	Startup Type	Log On As
		🔍 Base Filtering Engine	The Base F	Started	Automatic	Local Service
	Stop the service	🔍 BitLocker Drive Enc	BDESVC ho		Manual	Local System
	Restart the service	🔍 BizCloud	BizCloud A	Start	natic	Local System
		🤹 Block Level Backup	The WBEN	Ston	al	Local System
	Description:	🤹 Bluetooth Support	The Blueto	Perice	al	Local Service
	BizCloud Accelerator service provides	🤹 BranchCache	This servic	Resume	al	Network S
	shared data caching	🧟 Certificate Propaga	Copies use	Restart	al	Local System
		🔍 CNG Key Isolation	The CNG k	Robeare	al 📃	Local System
		🔍 COM+ Event System	Supports S	All Tasks	natic	Local Service
		🔍 COM+ System Appl	Manages t	Refresh	al	Local System
		🧟 Computer Browser	Maintains a	Korrosin	al	Local System
		🥋 Credential Manager	Provides s	Propertie	es al	Local System
		强 Cryptographic Serv	Provides fo	Help	natic	Network S
		💁 DCOM Server Proc	The DCOM	noip	natic	Local System
		🔍 Deskton Window M	Provides D	Started	Automatic	Local System

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

Uninstall or change a program To uninstall a program, select it from the list and then click Uninstall, Change, or Repair.				
Organize 💌				
Name Publisher				
BizCloud Accelerator	BizNet Software			
🐼 BizInsight For BizNet Sample Data 🛛 🛛 Biznet Software				
🐼 BizInsight7 BizNet Software, Inc.				
🐼 BizNet API BizNet Software				
😻 BizNet Update Engine 🥒	BizNet Software			

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

Name
🐼 BizInsight - Desktop Edition <
🐼 BizInsight For BizNetERP_GL
🐼 BizInsight Suite <del>&lt;</del>
🐼 BizNet API
🕰 CCleaner
1 Minute of Office DEE Due Diversion

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.

<b>1</b>	BizInsight For BizNet GL Setup 🛛 – 🗖 🗙			
	Please read the BizInsight For BizNet GL License Agreement			
	End User License Agreement (Subscription Based)			
	NOTICE TO ALL USERS: PLEASE READ THIS AGREEMENT CAREFULLY. BY CLICKING THE "I AGREE" BUTTON AT THE BOTTOM OF THIS PAGE OR BY INSTALLING AND USING THE			
	$\checkmark$ I accept the terms in the License Agreement			
Print Back Install Cancel				

- BizInsight for BizNet ERP 2.3.0.0 Setup
   –
   ×

   Completed the BizInsight For BizNet Sample Data Setup Wizard
   Completed the Finish button to exit the Setup Wizard

   Click the Finish button to exit the Setup Wizard
   Click the Finish button to exit the Setup Wizard

   Example Data Setup Vizard
   Example Data Setup Wizard

   Example Data Setup Vizard
   Example Data Setup Vizard

   Example Data Setup Vizard
   Example Data Setup Vizard

   Example Data Setup Vizard
   Example Data Setup Vizard
- 4. 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.



6. 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.

闄 BizNet API	_		×
Select Installation Folder			
The installer will install BizNet API to the following folder.			
To install in this folder, click "Next". To install to a different folder, enter it be	low or	click "Br	owse".
<u>F</u> older:			
C:\Program Files\BizNet Software\BizNet API\		Browse	
		Disk Co:	st
Cancel < Back		Ne	ext >

9. Click Next.



10. Click Close.

	×
Clo	ose
	Cid

11. Double-click the icon on the desktop and then return to the regular installation steps, <u>Resume</u> <u>Installation Steps</u>.



### 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:

😵 BizNet Sample Data :	5ettings		$\times$
Your Profile will be stored as	Default	✓ _BizNet Sample Data	
Server			
Database			
SQL Username			
Password			
Confirm Password			
Add Another		OK Cancel	

Field	Information Needed
Server name	SQL Server name and instance name if the database resides on a named instance. For example: Server2012\Accounting
Database Name	<ul> <li>If the ERP system stores data for all companies in a single database, use that database name.</li> <li>If the ERP system stores data for companies in separate databases, provide the name of the Control or System database here.</li> <li>If the Connector comes with scripts (<u>Run scripts on Server</u>) for example Syspro, enter BizNet for the database name.</li> </ul>
User id	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.

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

Return to installation

#### Intacct

Intacct Settings		$\times$
Your Profile will be stored as	Default ~	_Intacct
What Company ID to use?		
Intacct Login Name		
Password		
Confirm Password		
Add Another	ОК	Cancel

Field	Information Needed
Company ID	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. BizInsight will not work with slide-in logins. The login must exist at the company level, not the console level.
Inacct Login id	<ul> <li>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.</li> <li>If the ERP system stores data for companies in separate databases, provide the name of the Control or System database here.</li> <li>If the Connector comes with scripts (<u>Run scripts on Server</u>) for example Syspro, enter BizNet for the database name.</li> </ul>
Password	Enter the password for the user id supplied in the User id field.
Confirm Password	Re-type the password. The asterisks will turn <b>Green</b> when the password matches the one already supplied.

Return to installation