Connecting Companies to BizInsight

When a new company is added to Sage 100, an ODBC data source and linked server needs to be created in order for you to retrieve data from that company using BizInsight.

1. Go to the Sage 100 server and double-click on the Content Installer icon.



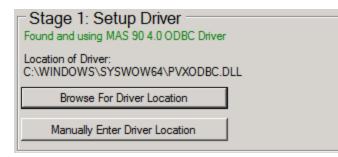
2. Click on the Link Servers button.

BizInsight MAS90GL Co	ntent Installer
	Relevant Information
Automatic Install Manual Install Stages Install Report Server Create Report Server User Link Servers Deploy DataSet Content Deploy MetaData Content Deploy Function Content Admin Tool Config Tool	 Reporting Server Found Reporting Server User Found Link Servers Found MAS90GL DataSet Content Found MAS90GL MetaData Content Found MAS90GL Function Content Found Users Have Been Added by Admin Tool Settings Have Been Configured by Config Tool
View Additional Files Exit	5

3. You will work through this dialog starting with the Stage1 section (upper left).

a. Stage 1: Setup Driver

The installer will try to automatically detect the ProvideX ODBC driver

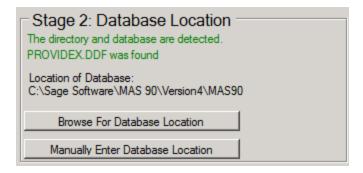


If the driver is not found, click on the Browse button to browse to the directory in which the driver is located. Or manually enter the path.



b. Stage 2: Database Location

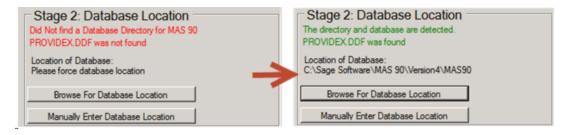
The installer will try to automatically identify the location of the MAS90 company data directories.



CRITICALLY IMPORTANT If the detected database location is a UNC path or a mapped drive path, you must go to Task Manager and end task the Content Installer. See "Adjusting the Sage 100 ODBC paths" on page 15 for instructions on

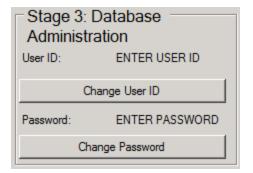
how to change the detected paths to a local directory on the server. If this installation is being done on a server that is not where the Sage 100 ProvideX data is located, you must perform the installation on the Sage 100 data server.

If the installer cannot find the directories, click on the Browse button and browse to the directory that contains the SAGE 100 company database directories (MAS_*XXX*). This location should be a local drive, not a mapped drive or a UNC path.



c. Stage 3: Database Administration

Provide a SAGE 100 login id and password with rights to all companies from which data will be retrieved using BizInsight. BizNet recommends creating a login id for BizInsight reporting purposes and using this login id instead of using an existing user's login and password that could be changed or deleted in the future.



d. Stage 4: Created File Details (Optional)

This section allows you to override the default file location and file names that the tool can create for the next installation steps.

Stage 4: Created File
Location For Created Files C:\
Change File Location
Registry File Name: CreateODBCDataSources
Change Registry File Name
SQL File Name: CreateLinkedServers
Change SQL File Name

e. Stage 5: Detect and Stage 6: Create

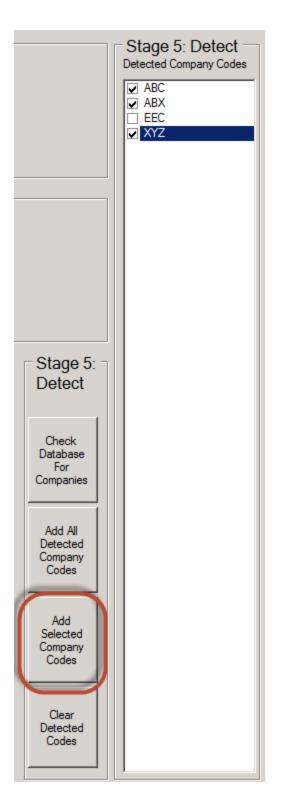
Use this section to automatically detect existing Sage 100 companies and select which ones to setup for BizInsight reporting.

	Stage 5: Detect Detected Company Codes ABC ABX EEC XYZ	Stage 6: Create
⊂ Stage 5: ¬ Detect		
Check Database For Companies		
Add All Detected Company Codes		
Add Selected Company Codes		
Clear Detected Codes		×

The **Check Database For Companies** button will load all Sage 100 companies into the **Stage 5: Detect** pane.

The **Add All Detected Company Codes** button will add all detected companies to the **Stage 6: Create** pane.

To add only certain companies for BizInsight reporting, check the checkbox next to the company code in the **Stage 5: Detect** pane and then click the **Add Selected Company Codes** button.



Use the Clear Detected Codes button to start over.

f. Choose OS Type

Select the appropriate radio button to indicate the bitness of the *server* hardware, 32-bit or 64-bit.

g. Registry Entries and Linked Servers

Use these options to control the next installation steps. The default option, **Create File** will create files in the directory specified in the Stage 4 section. You will then be responsible for executing these files yourself.

Registry Entries	
 Install Automatically 	
Create File	
Linked	
Linked Servers C Install Automatically	

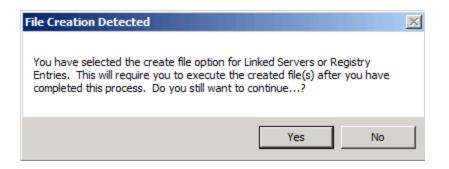
The **Install Automatically** option will automatically run the registry update file and connect to SQL Server Management Studio to run the Linked Servers script. If you choose the option to install the Linked Servers automatically, you will need to provide the connection string to the SQL Server instance that the installer connects to in order to run the Linked Server script.

Sconnection Information			IN
Please enter the connection string	g for the database you w	vant the server links installed on.	
Just use local default setting	Cancel	Continue	//

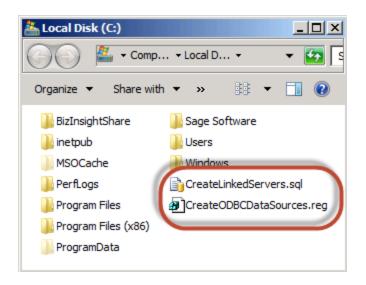
Click the **Just use local default setting** checkbox to automatically populate this field with the default connection string for the instance installed by or selected earlier during the installation. **IMPORTANT** If you are using your own instance, you **MUST** be logged in as a user with **sysadmin** rights to that SQL Server instance in order for the linked server script to be successfully run.

h. Click on the **Start Process** button.

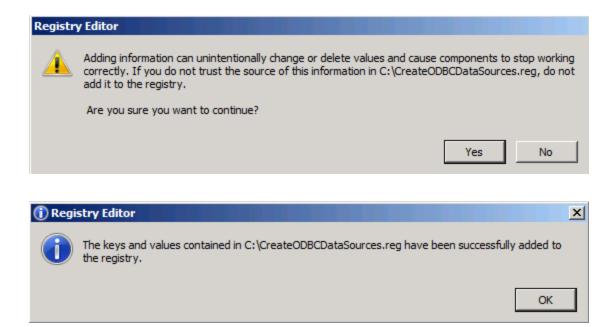
If you left the default selection to Create the files, you will receive the following message. Click **Yes**.



A Windows Explorer window will open to the directory containing the files that were created.



If you chose to automatically install the registry entries, you will get the following messages. Click **Yes** and **OK** respectively.



- 4. When the ODBC data sources and linked server setup is complete, you need to test the linked server to confirm that it will successfully retrieve data.
- 5. Click on Start >Programs > Microsoft SQL Server 2008 R2 > SQL Server Management Studio.

Administrator			
	😏 My Computer		
	 Microsoft Update Windows Catalog Windows Update Accessories Microsoft SQL Server 2008 	s +	
	Microsoft SQL Server 2008 R2 Startup Internet Explorer	Configu	s Services Iration Tools tion Services
All Des services a b	Outlook Express Administrative Tools Adobe Reader X	Perform	nance Tools and Export Data (32-bit) rver Business Intelligence Development Studio
	Log Off 🚺		rver Management Studio
赶 Start 🛛 🚱 🏉			

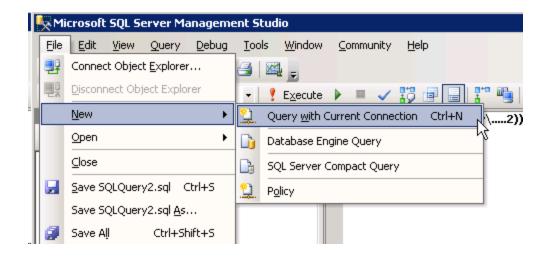
6. The **Connect to Server** dialog will open. Connect to the SQL Server instance being used for the current linked servers.

Connect to Server		×	
Microsoft*	Server "2008 R2		
Server type:	Database Engine	•	
Server name:	server2008r2\biznet	•	
Authentication:	Windows Authentication		
User name:	SERVER2008R2\linda	~	
Password:			
	Remember password		
Connec	ct Cancel Help Option	ns >>	

If you are not sure of the server name, click on the **Relevant Information** link in the Content Installer dialog. The SQL Server MetaData Database and Instance Name field will display the server/instance name being used.

🔊 Relevant Information		
Config Path:	\\SERVER2008R2\ConfigurationPath	
	C:\BizInsightShare\Config	
Admin Path:	\\SERVER2008R2\AdministrationPath	
	C:\BizInsightShare\Admin	
Report Server Url:	http://SERVER2008R2/ReportServer_BIZNET	
Report Folder	MAS90ProvideX	
Sql Server MetaData Database and Instance Name:	SERVER2008R2\BIZNET	
Packaged with Content Packager Ve	sion 1.4.0.0	
Close		Copy to Clipboard

7. Click on File > New > Query with Current Connection.



8. In the query window that opens, type in the following SELECT statement and verify that data is returned:

```
select * from openquery(MAS90_companycode, 'select * from
GL_Account')
```

K Microsoft SQL Server Management Studio							
File Edit View Project Debug Tools Windo	w Community	Help					
$\left\ \begin{array}{c} \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\$							
Execut	e 🕨 🔳 🗸 🗄	j f 8 1" % 8) % 8	1 = 4	建建 [6]。	-		
Object Explorer 🚽 🕈 🗙	SQLQuery1.	ql - server2008))*				- ×	
Connect 🕶 📑 📑 🛒 🝙 🏹	select	* from openquery (MAS90	_ABC, 's	elect * fr	om GL_Account	:')	
🖃 🐻 server 2008r 2\biznet (SQL Server 10.50.1600 - SE	·						
 Server Objects Backup Devices 							
Linked Servers							
Providers						_	
	•					⊢ ≚	
	Results	. м					
	· · ·		1	[
E Replication	Account		Account	RawAccount		DateSta	
🛨 🚞 Management	1 100000		100-00-00	10000000	100	NULL	
	2 10000A		100-00-A	10000A 00	100	NULL	
	3 101010			101010000	101	NULL	
	4 101020		101-02-00	101020000	101	NULL	
	5 101030		101-03-00	101030000	101	NULL	
	6 105000			105000100	105	NULL	
	7 105000	00 Accts. receiv West Warehse	105-00-02	105000200	105	NULL	
			1				
	Query exect	t server2008r2\biznet (10.50	SERVER200	8R2\inda (61)	master 00:00:05	201 rows	

where *companycode* is the three character company code of the new company.

If you get results back in the lower pane of the query window, the linked server is confirmed to be setup correctly.

If this test hangs and never returns result, go back to the Link Servers button of the Content Installer and make sure a valid user name and password was provided in **Stage 3: Database Administration** and verify in Sage 100 that login has rights to the new company.

If you find that the login id was either incorrect or did not have rights to the new company, repeat the Link Server steps for the company then go back in SQL Management Studio, right-click on the server name in the left pane and choose **Restart** to restart the SQL Server service.

K Microsoft SQL Server Man	agement Studio
File Edit View Project I	Debug Tools Window
🕴 🔔 New Query 🛛 🛅 📑 📸	📸 🕞 📁 🛃 🎒
	→ 🕴 Execute 🕨
Object Explorer Connect ▼	× + ×
 □ Server 2008r2\biznet (S □ Databases □ Databases □ Server Objects □ Backup Devices □ Linked Servers □ Providers □ Providers □ MAS90_AB(□ MAS90_AB) □ MAS90_XYZ □ Triggers □ Replication □ Management 	Connect Disconnect Register New Query Activity Monitor Start Stop Pause Resume
	Restart

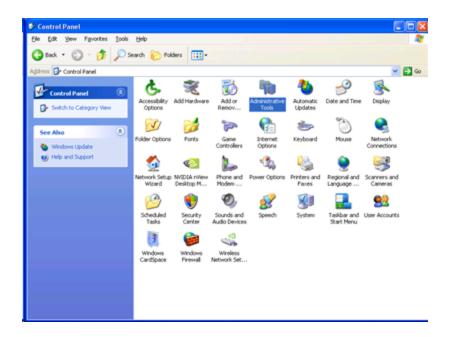
Run the test query again to confirm that data is returned by the query.

Appendices

Adjusting the Sage 100 ODBC paths

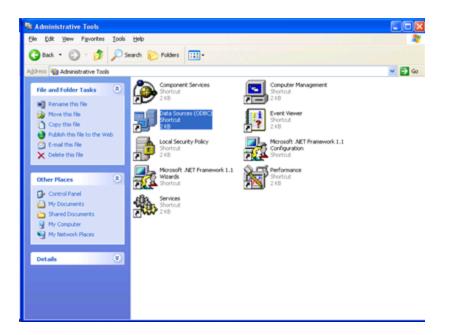
The Content Installer retrieves the paths to the Sage 100 company data directories from the SOTAMAS90 ODBC data source. If the paths in that data source are UNC or mapped drive paths, they must be changed in order for BizInsight to be able to retrieve data from the Sage 100 companies.

 Click on Start > Control Panel to open the Control Panel. Double-click on Administrative Tools.

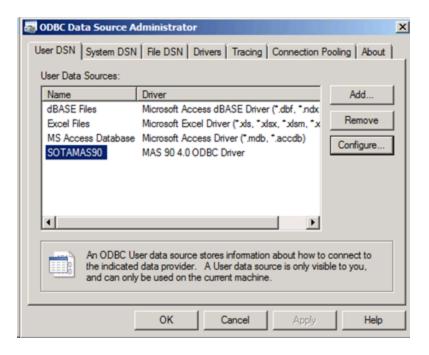


IMPORTANT For Sage 100 implementations that are using the 32-bit ODBC driver on 64-bit hardware, the 32-bit ODBC manager must be run from the %systemdrive%\Windows\SysWoW64 directory. Double-click the Odbcad32.exe and continue to the next step.

2. Double-click Data Sources (ODBC).



3. On the User DSN tab, select the SOTAMAS90 data source and click Configure.



If you get the following error, you are in the 64-bit ODBC administrator and the ODBC driver is 32-bit and must be managed using the 32-bit ODBC administrator tool. Refer to

the note <u>earlier in this section</u> for information on where to find the 32-bit ODBC administrator tool.

Microsoft	Microsoft ODBC Administrator				
8	The setup routines for the MAS 90 4.0 ODBC Driver ODBC driver could not be found. Please reinstall the driver.				
	OK				

4. Change the **Database Directory** field from the UNC path (or mapped drive path) to the local directory location of the Sage 100 data.

8	ProvideX ODBC Drive	r Setup	? ×
E	asic Server Logon	Options Debug About	
	Data Source Name:	SOTAMAS90	
	Description:	MAS 90 4.0 ODBC Driver	
	Database Directory:	\\server2008r2\MAS 90\Version4\MAS90 (This directory, `d contain PROVIDEX.DDF)	
	Definition File:	Change to a local directory path, for example C:\Program FilesSage Software\MAS90 \Version4\MAS90	
		OK Cancel	Apply

5. On the **Options** tab, change the paths to the Sage 100 ERP system files to local directories.

Prefix for data files: [Sage100 database directory path]**\SY\;**[Sage 100 database directory path]**\==**

Path to Views DLL: [Sage 100 database directory path]\Home

? ×	ProvideX ODBC Driver Setup
	Basic Server Logon Options Debug About
	Prefix for data files: C:\Sage Software\MAS 90\Version4\MAS90\SY,C:
	(Multiple entries separated by commas)
	Path to Views DLL: C:\Sage Software\MAS 90\Version4\MAS90\Home
	1
	······································
	Dirtu Bead: 🔽 Enforce DOUBLE: 🗖
	Burst mode:
	Silent mode: Cache Size MB: 4
	OK Cancel Ap
	Path to Views DLL: C:\Sage Software\MAS 90\Version4\MAS90\Home (This directory contains ProvideX DLL or shared object) Dirty Read: Image:

- 6. Click **OK** to save these settings.
- 7. Restart the Content Installer and restart the automatic installation.