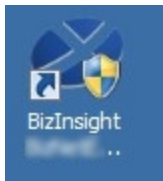


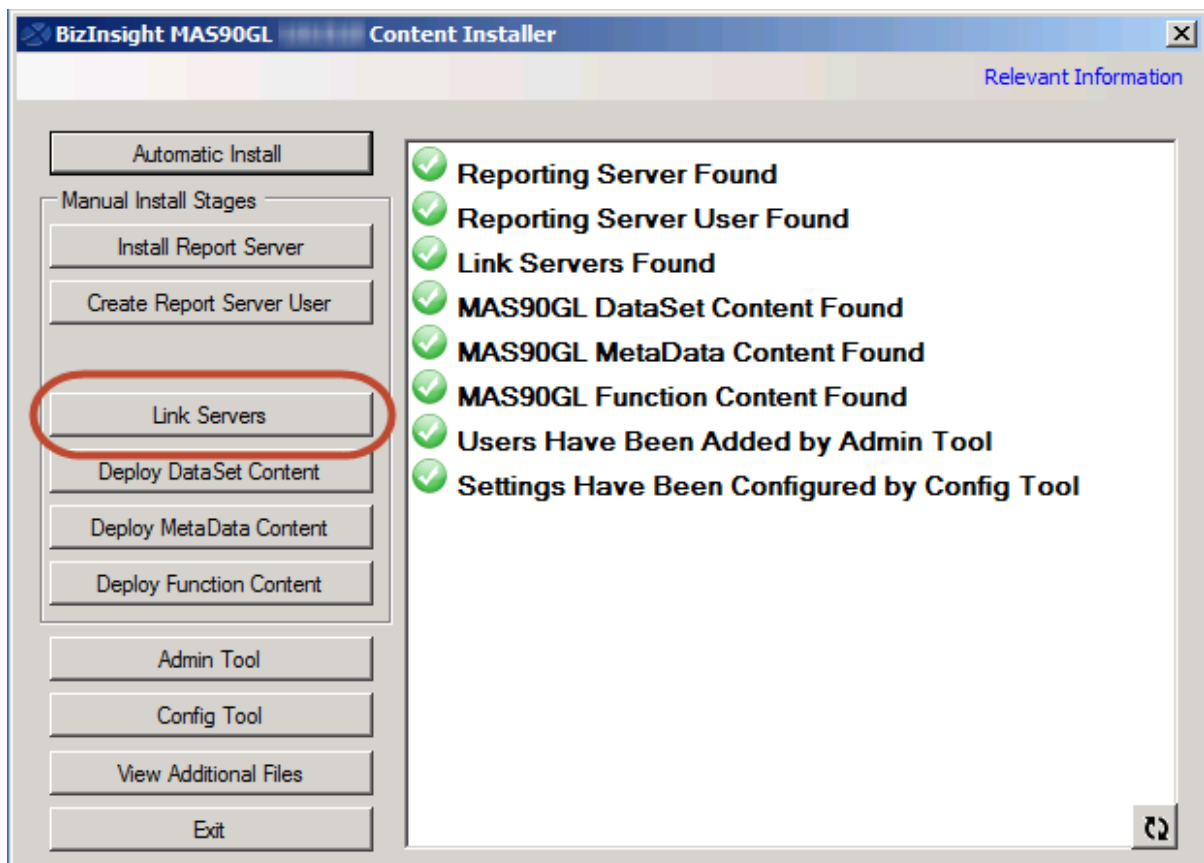
Connecting Companies to BizInsight

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.



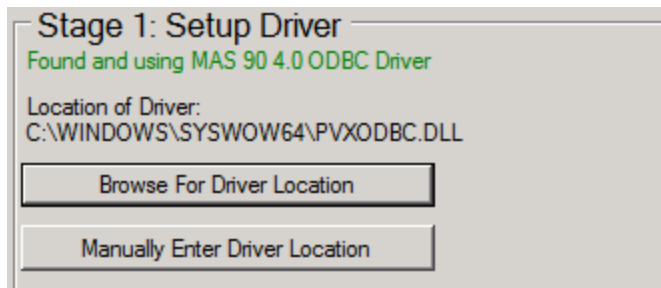
2. Click on the **Link Servers** button.



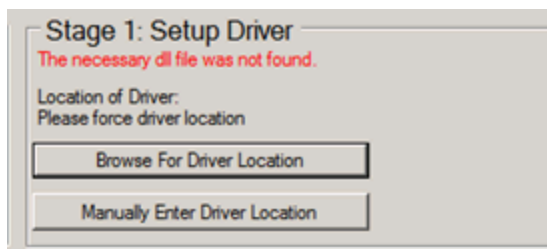
3. You will work through this dialog starting with the Stage1 section (upper left).

a. **Stage 1: Setup Driver**

The installer will try to automatically detect the ProvideX ODBC driver

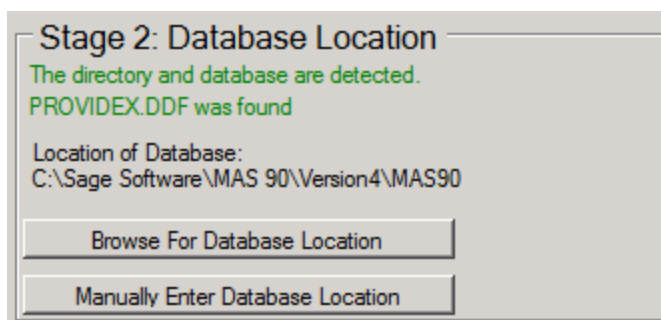


If the driver is not found, click on the Browse button to browse to the directory in which the driver is located. Or manually enter the path.



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

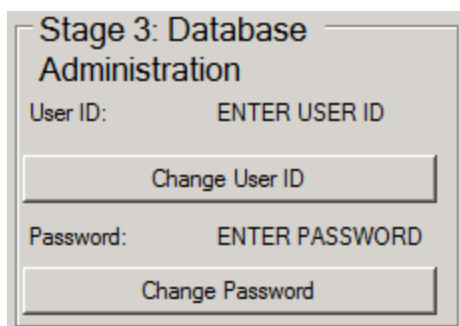
how to change the detected paths to a local directory on the server. If this installation is being done on a server that is not where the Sage 100 ProvideX data is located, you must perform the installation on the Sage 100 data server.

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.



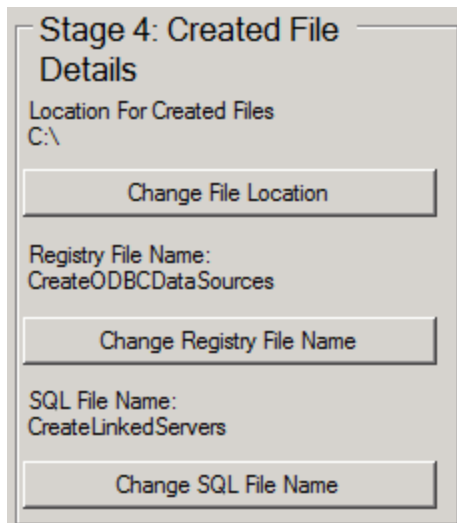
c. **Stage 3: Database Administration**

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 Details

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.

The screenshot displays a software interface with two main panes. The left pane is titled "Stage 5: Detect" and contains a list of detected company codes: ABC, ABX, EEC, and XYZ, each with an unchecked checkbox. Below this list are four buttons: "Check Database For Companies", "Add All Detected Company Codes", "Add Selected Company Codes", and "Clear Detected Codes". The right pane is titled "Stage 6: Create" and contains a large empty text area for entering company codes. The interface has a light gray background and a standard Windows-style border.

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.

The screenshot shows a software window titled "Stage 5: Detect". Inside the window, there is a section labeled "Detected Company Codes" containing a list of four items: ABC, ABX, EEC, and XYZ. Each item has a checkbox to its left. The checkboxes for ABC, ABX, and XYZ are checked, while the checkbox for EEC is unchecked. The XYZ item is highlighted with a blue background. To the left of this list is a vertical sidebar with five buttons: "Check Database For Companies", "Add All Detected Company Codes", "Add Selected Company Codes", and "Clear Detected Codes". The "Add Selected Company Codes" button is circled in red. There is also a "Stage 5: Detect" label above the buttons.

Detected Company Codes
<input checked="" type="checkbox"/> ABC
<input checked="" type="checkbox"/> ABX
<input type="checkbox"/> EEC
<input checked="" type="checkbox"/> XYZ

Stage 5: Detect

Check Database For Companies

Add All Detected Company Codes

Add Selected Company Codes

Clear Detected Codes

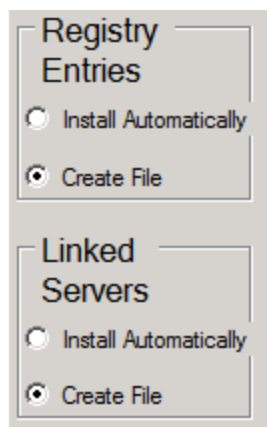
Use the **Clear Detected Codes** button to start over.

f. **Choose OS Type**

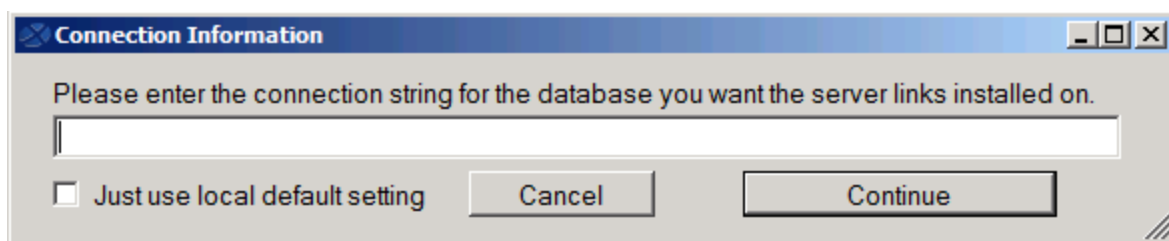
Select the appropriate radio button to indicate the bitness of the **server** hardware, 32-bit or 64-bit.

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.



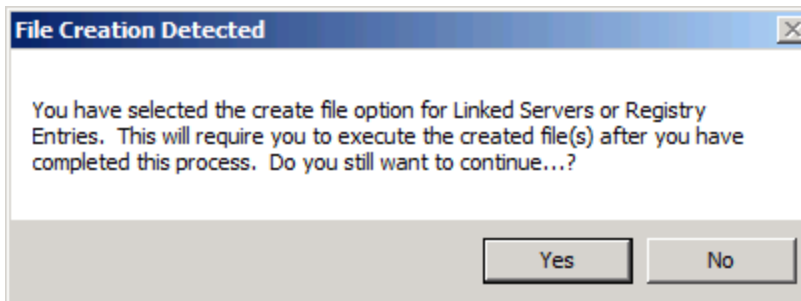
The **Install Automatically** option will automatically run the registry update file and connect to SQL Server Management Studio to run the Linked Servers script. If you choose the option to install the Linked Servers automatically, you will need to provide the connection string to the SQL Server instance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



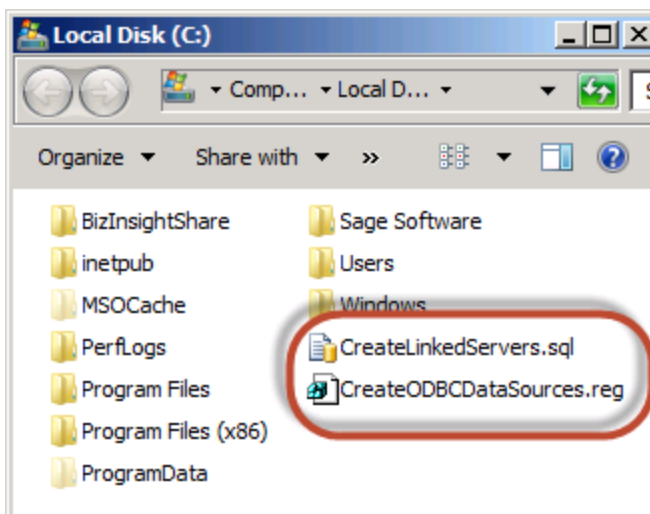
Click the **Just use local default setting** checkbox to automatically populate this field with the default connection string for the instance installed by or selected earlier during the installation. **IMPORTANT** If you are using your own instance, you **MUST** be logged in as a user with **sysadmin**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

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

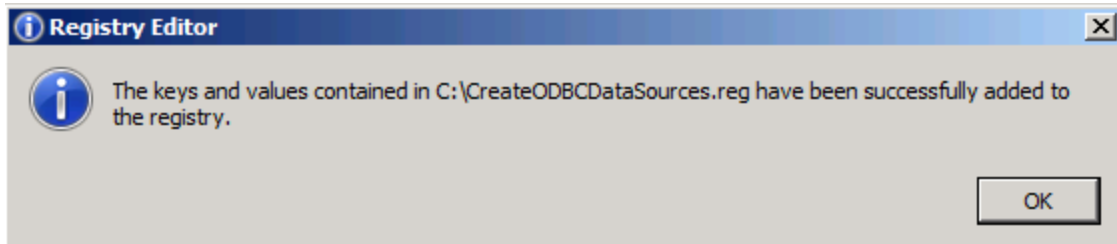
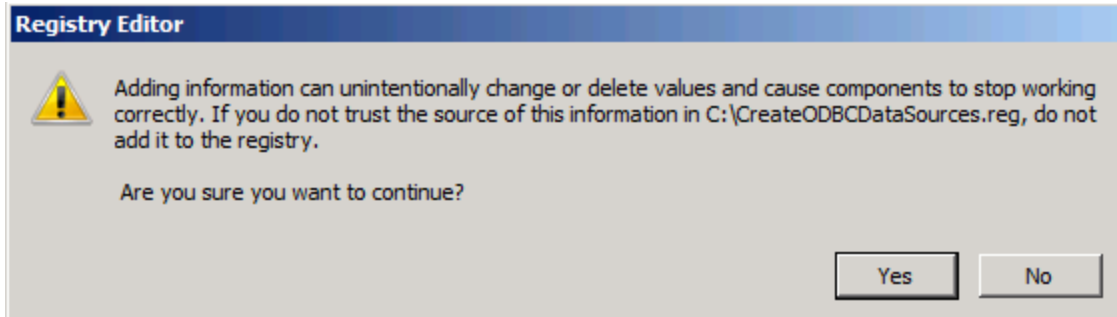
If you left the default selection to Create the files, you will receive the following message. Click **Yes**.



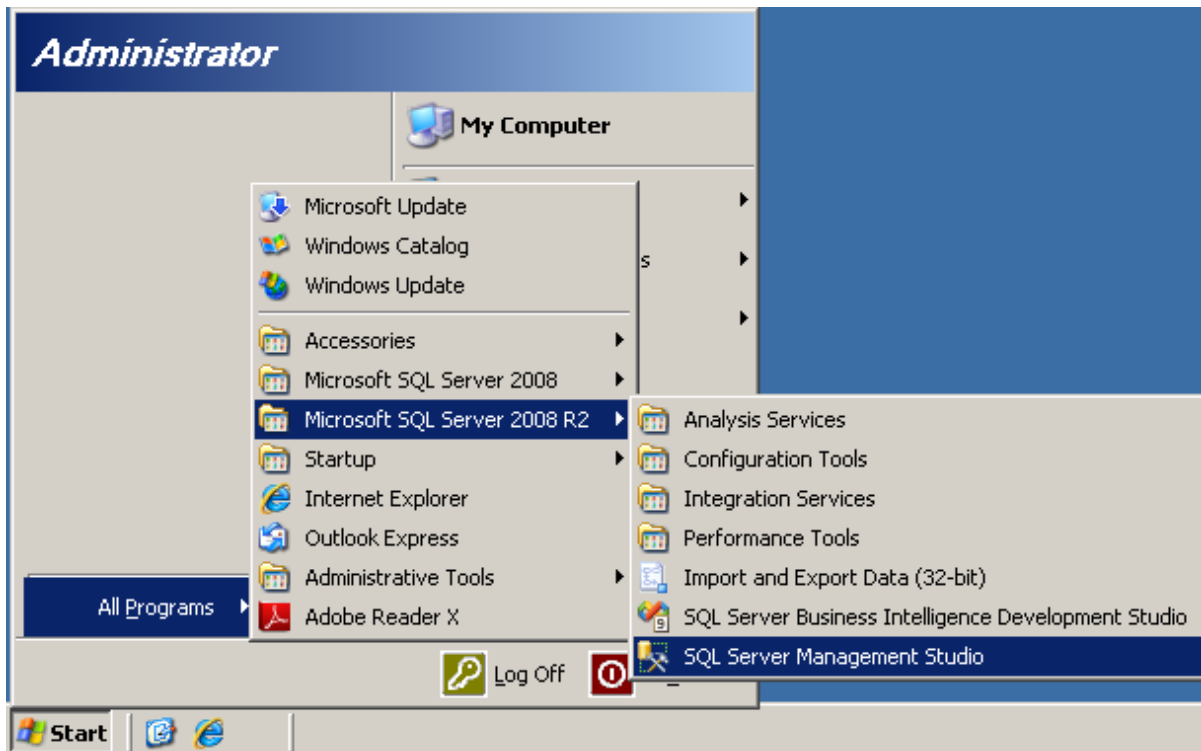
A Windows Explorer window will open to the directory containing the files that were created.



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



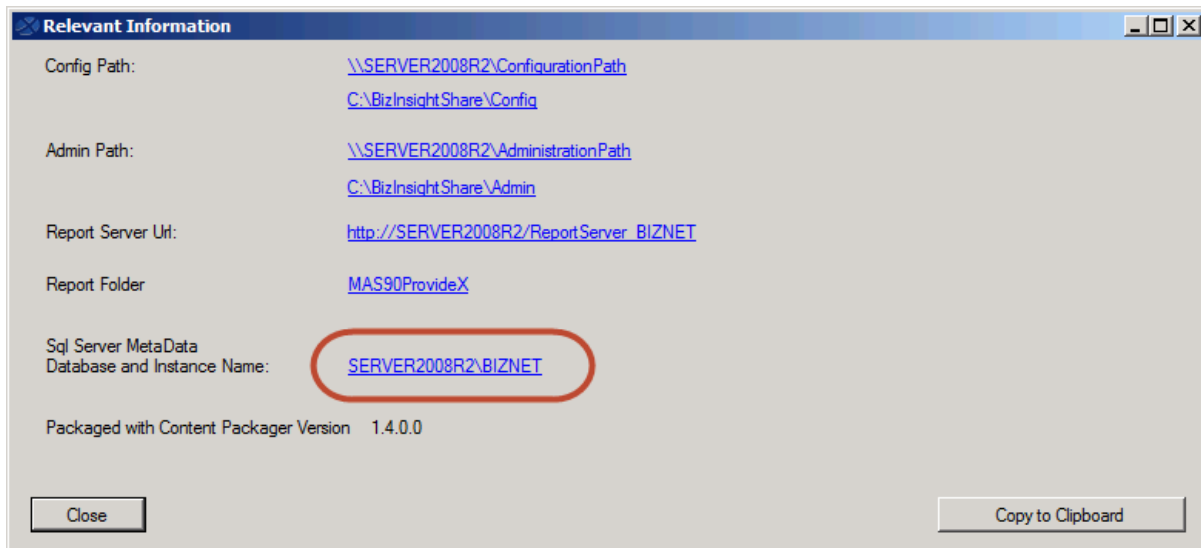
4. When the ODBC data sources and linked server setup is complete, you need to test the linked server to confirm that it will successfully retrieve data.
5. Click on **Start >Programs > Microsoft SQL Server 2008 R2 > SQL Server Management Studio**.



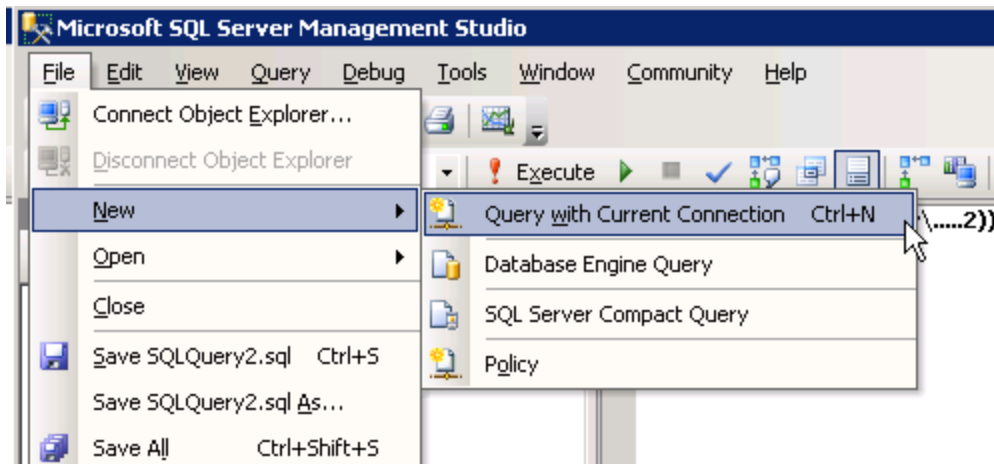
6. The **Connect to Server** dialog will open. Connect to the SQL Server instance being used for the current linked servers.



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.



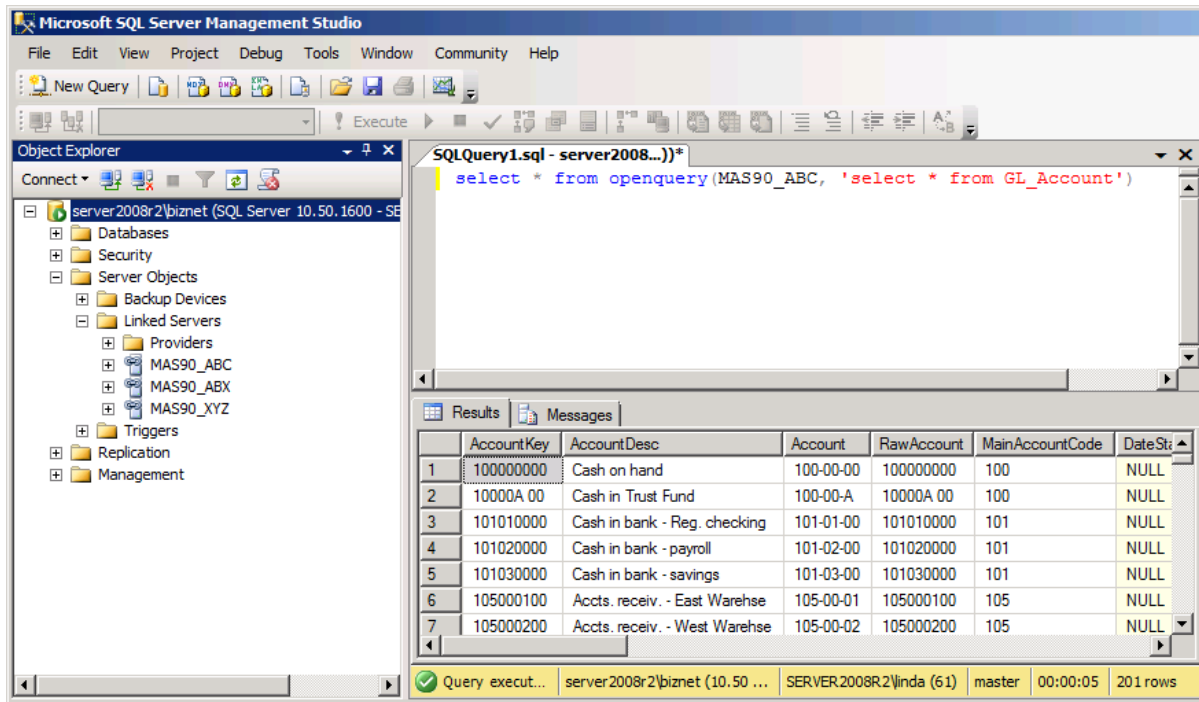
7. Click on **File > New > Query with Current Connection**.



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')
```

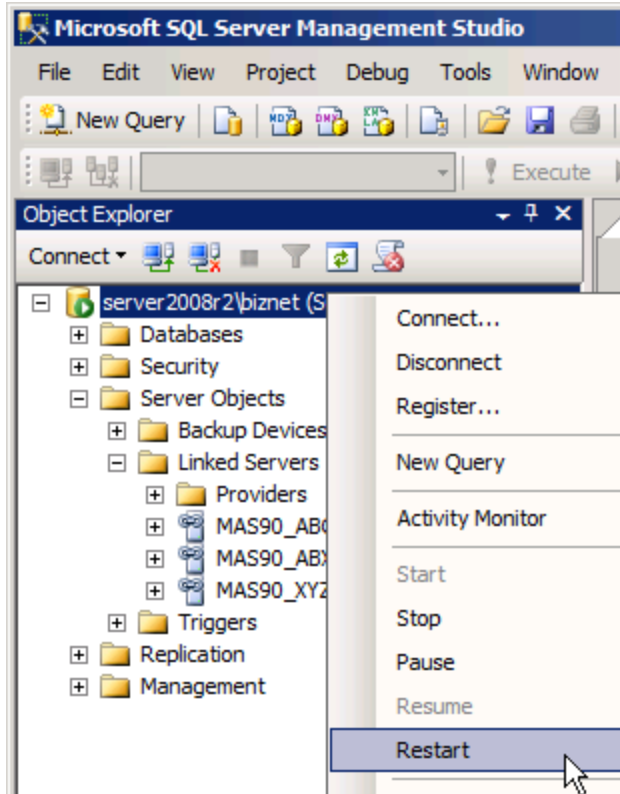
where *companycode* is the three character company code of the new company.



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.



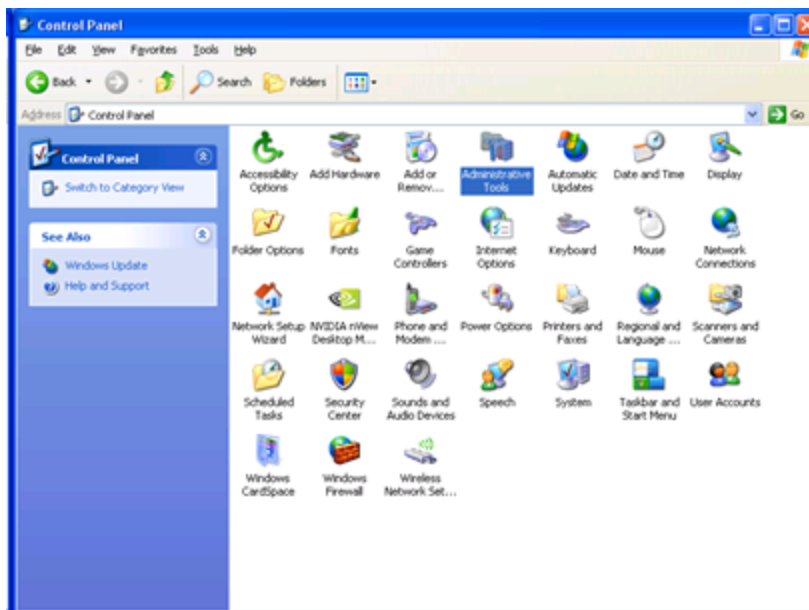
Run the test query again to confirm that data is returned by the query.

Appendices

Adjusting the Sage 100 ODBC paths

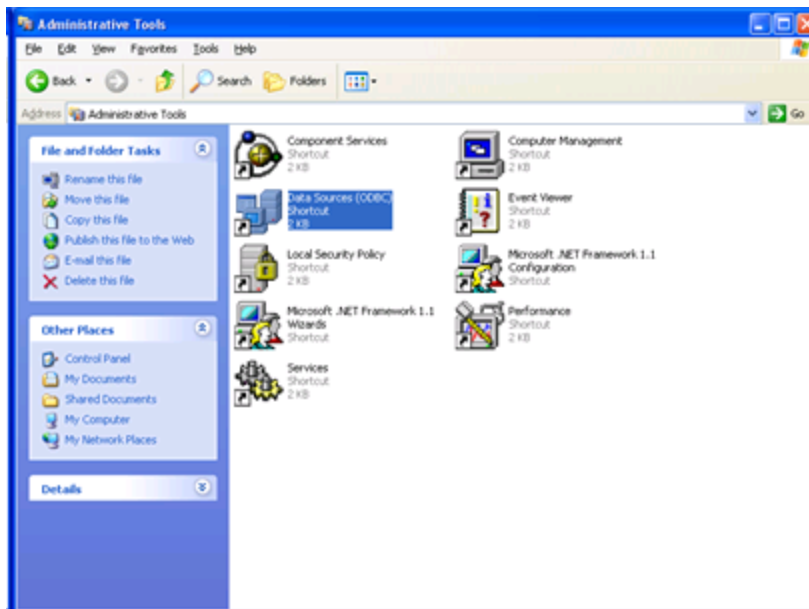
The Content Installer retrieves the paths to the Sage 100 company data directories from the SOTAMAS90 ODBC data source. If the paths in that data source are UNC or mapped drive paths, they must be changed in order for BizInsight to be able to retrieve data from the Sage 100 companies.

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

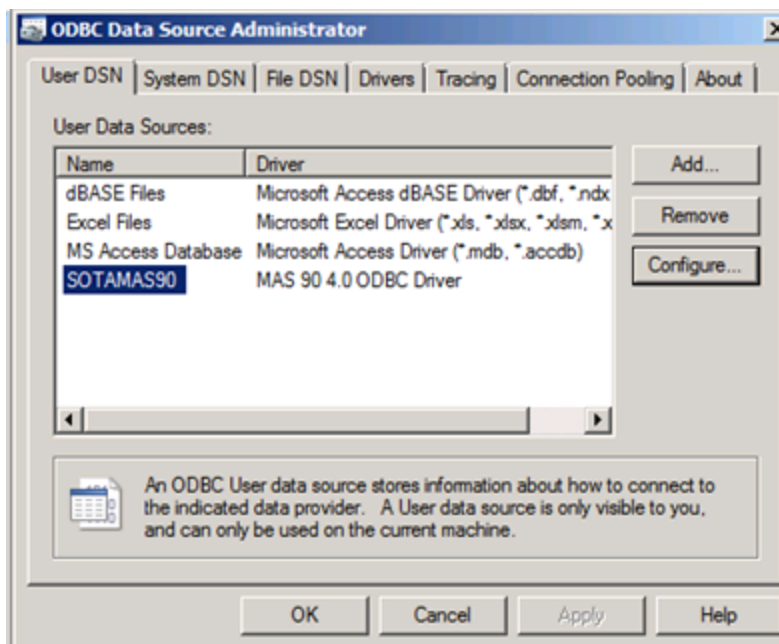


IMPORTANT For Sage 100 implementations that are using the 32-bit ODBC driver on 64-bit hardware, the 32-bit ODBC manager must be run from the %systemdrive%\Windows\SysWoW64 directory. Double-click the Odbcad32.exe and continue to the next step.

2. Double-click **Data Sources (ODBC)**.

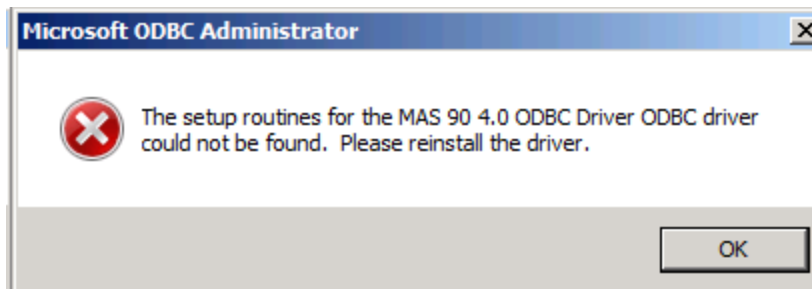


3. On the **User DSN** tab, select the **SOTAMAS90** data source and click **Configure**.

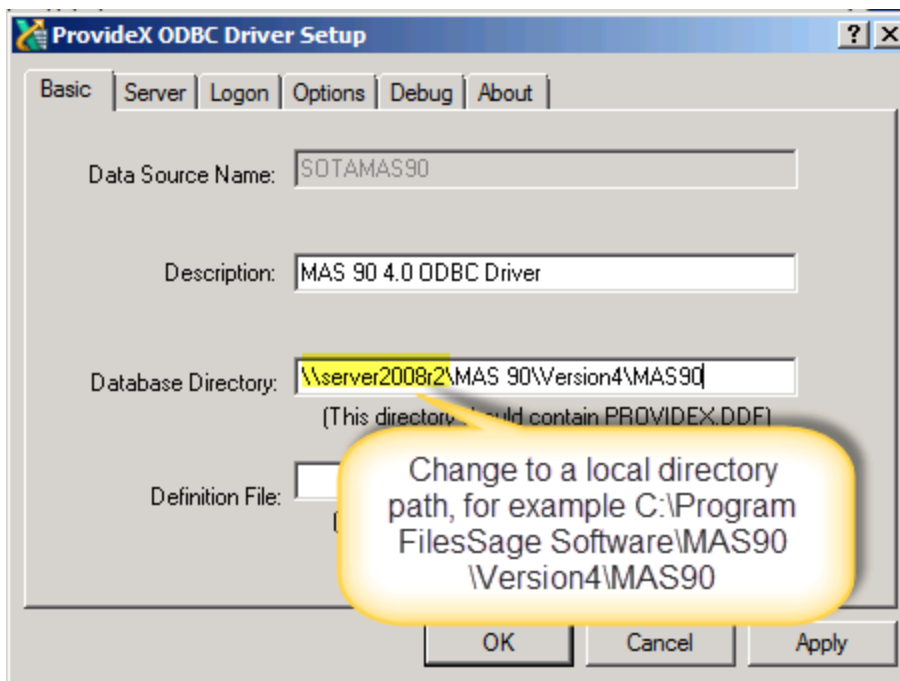


If you get the following error, you are in the 64-bit ODBC administrator and the ODBC driver is 32-bit and must be managed using the 32-bit ODBC administrator tool. Refer to

the note [earlier in this section](#) for information on where to find the 32-bit ODBC administrator tool.



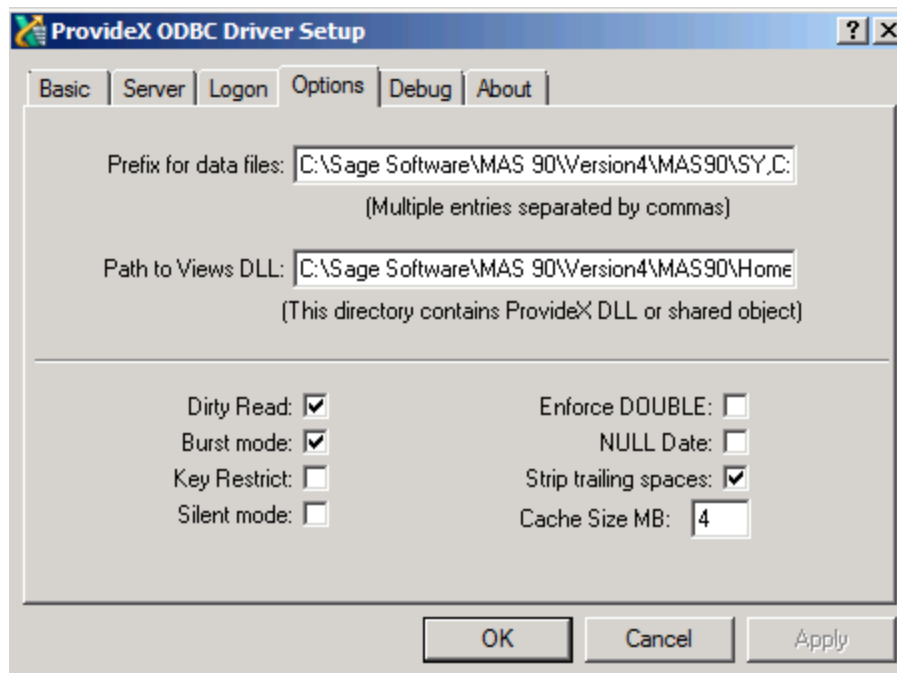
4. Change the **Database Directory** field from the UNC path (or mapped drive path) to the local directory location of the Sage 100 data.



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*



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