

Installation Guide

BizInsight 7 is sold with and without a Connector to an ERP system. This guide provides the steps for performing a BizInsight 7 installation with a Connector. If you have users who will be using BizInsight without the Connector, refer to the guide named “BizInsight 7 Installation Guide” for those installation instructions.

Table of Contents

1.	Locate Installation Files	3
2.	Run scripts on Server (if applicable).....	4
3.	Installing BizInsight.....	5
4.	Verify Installation	13
5.	Installing on Citrix Terminal Services.....	16
6.	Appendix.....	19
A.	Running BizInsight 5.0 Side-by-Side	19
B.	Connector Specific Instructions	20

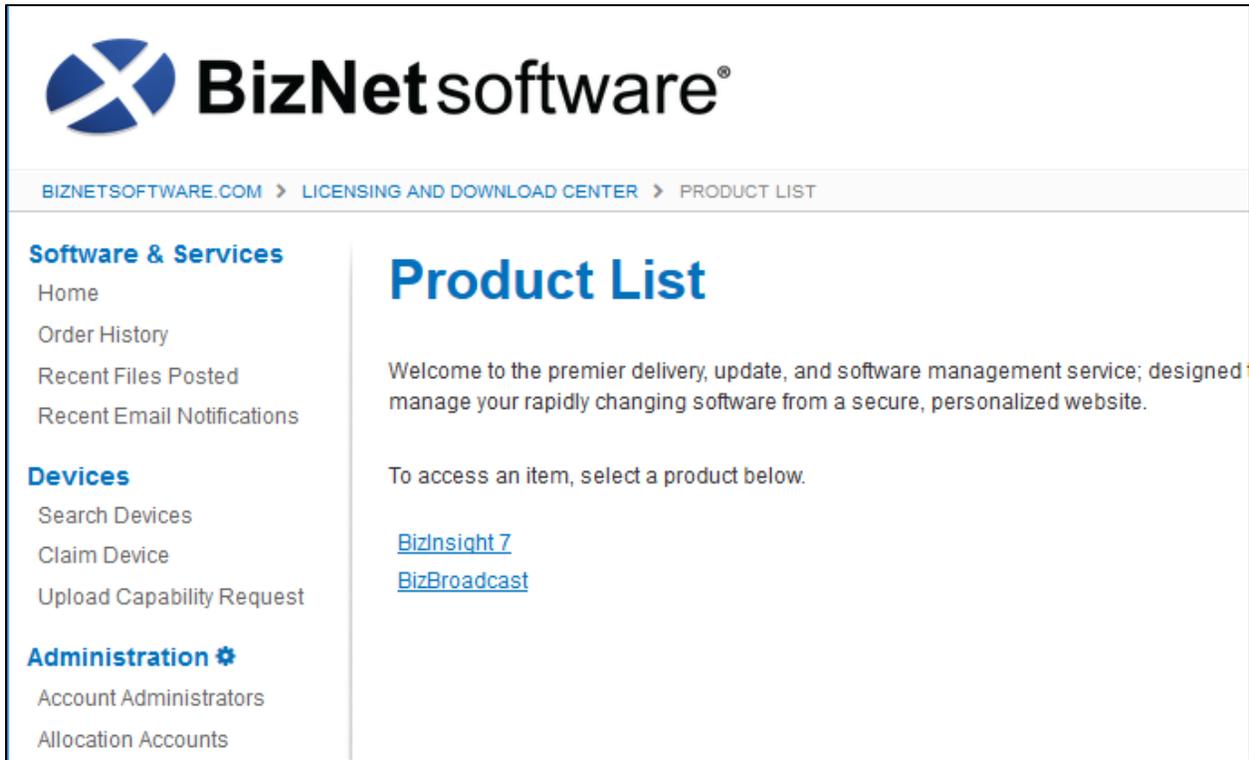
Notice: Screenshots in this document are provided as examples and may not match what you see in your environment or the values displayed in the screenshots may not be appropriate for your implementation. Be sure to read all instructions completely for guidance on what values you may need to enter.

**IMPORTANT**

- A 64 bit OS (Operating System) is required.
- BizInsight must be installed under each users profile.
- If BizInsight 7 is being installed on a Windows Server, Group Policy for Windows Installer must be Enabled and set to Never.
- If user profiles are being deleted when user logs off, BizInsight must be installed each time the user logs back in. This is because BizInsight gets installed under the users local AppData directory. All data cache will be deleted when the user logs off.

1. Locate Installation Files

In preparation for installation, download the files required for installation from your customer web portal, (<https://biznet.flexnetoperations.com>) (BizNet customers only). All files can be found under “Home”.



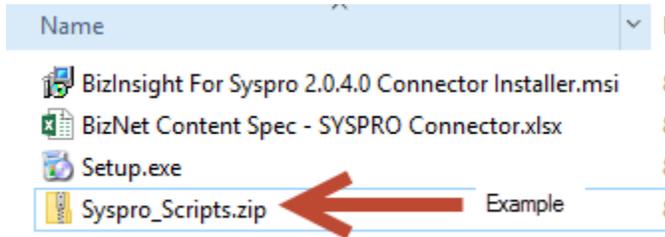
The screenshot displays the BizNet software website interface. At the top left is the BizNet software logo, consisting of a blue stylized 'X' icon followed by the text 'BizNet software®'. Below the logo is a breadcrumb trail: 'BIZNETSOFTWARE.COM > LICENSING AND DOWNLOAD CENTER > PRODUCT LIST'. The main content area is divided into two columns. The left column contains a navigation menu with three sections: 'Software & Services' (with links for Home, Order History, Recent Files Posted, and Recent Email Notifications), 'Devices' (with links for Search Devices, Claim Device, and Upload Capability Request), and 'Administration' (with a gear icon and links for Account Administrators and Allocation Accounts). The right column is titled 'Product List' and 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 message is the instruction 'To access an item, select a product below.' and two blue underlined links: '[BizInsight 7](#)' and '[BizBroadcast](#)'.

Note

Be sure to unzip/extract the contents of the downloaded files.

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 ReadMe.txt for implementation instructions.

Note

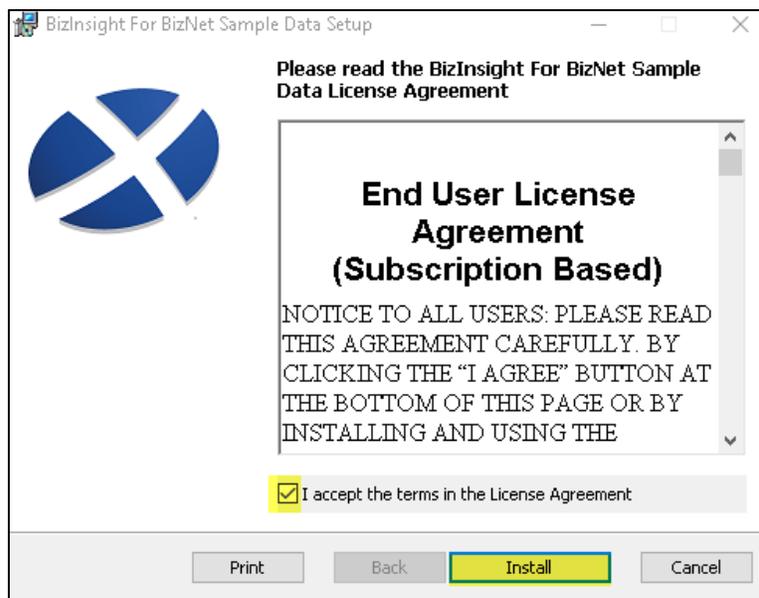
If you plan to run BizInsight 7 side-by-side with BizInsight 5, be sure to review [Appendix A – Running BizInsight 5 Side-by-Side](#).

3. Installing BizInsight

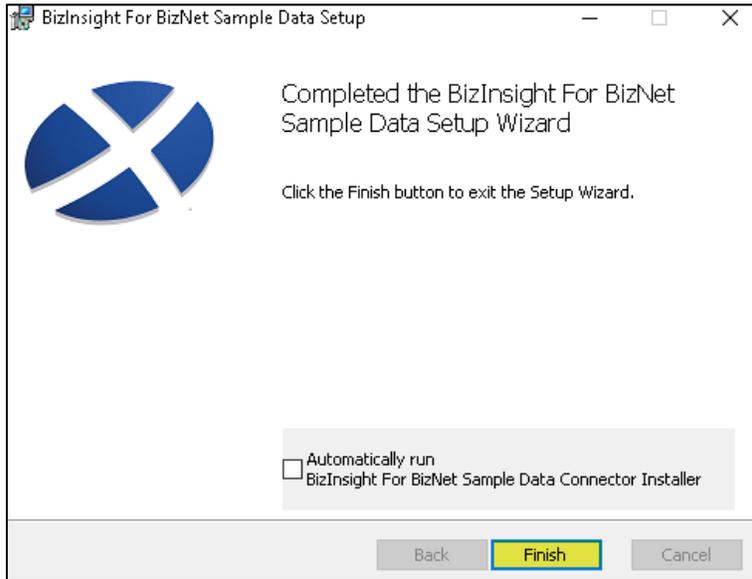
1. Double click the **Setup** file.



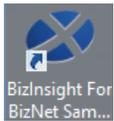
2. Read through the End User License Agreement (EULA) and if you accept the terms, check the **I accept the terms** checkbox. Click **Install**.



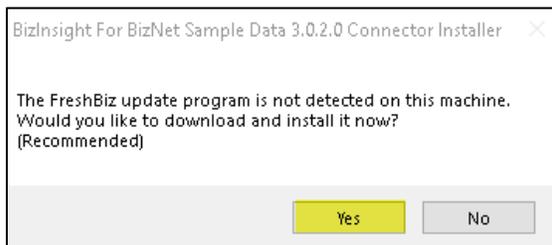
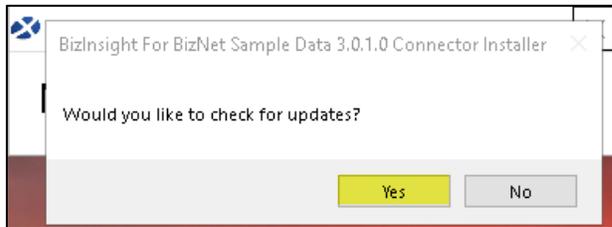
3. Click the **Finish** button.



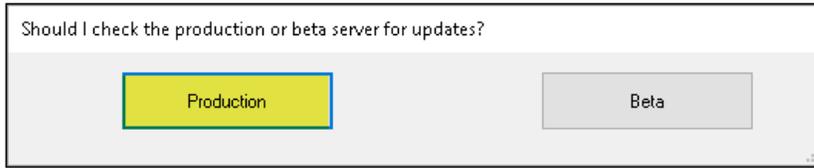
4. Double Click the Content Install to open it.



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



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



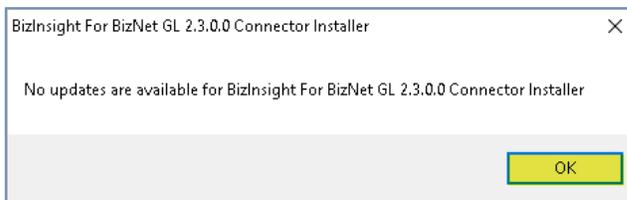
- If there are updates, the following dialog will display. Click **Update**.



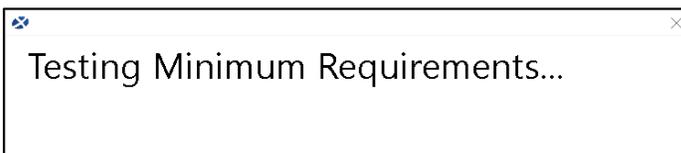
- Click **OK** when the updates are complete or if no updates were found.



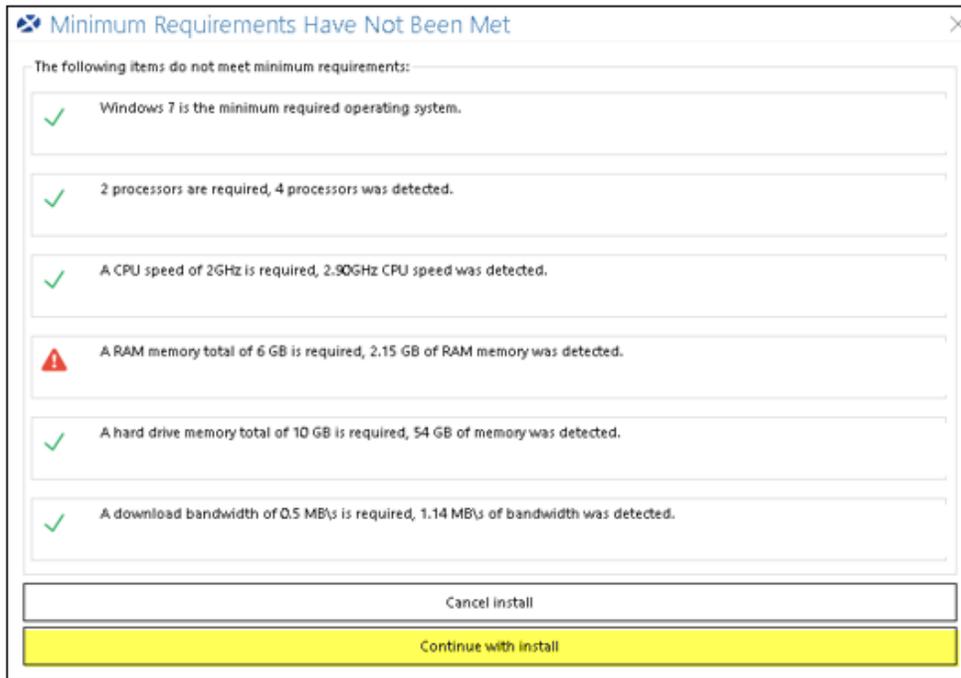
OR >>>



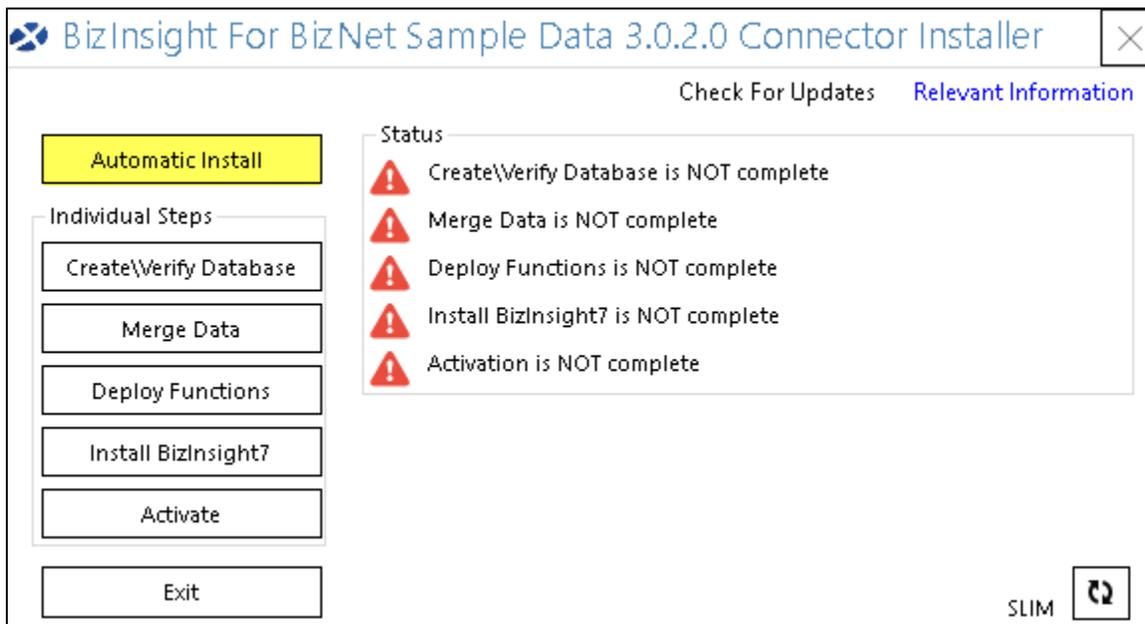
The installation will check the device to determine if minimum system requirements are satisfied.



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



- Click **Automatic Install** to begin.



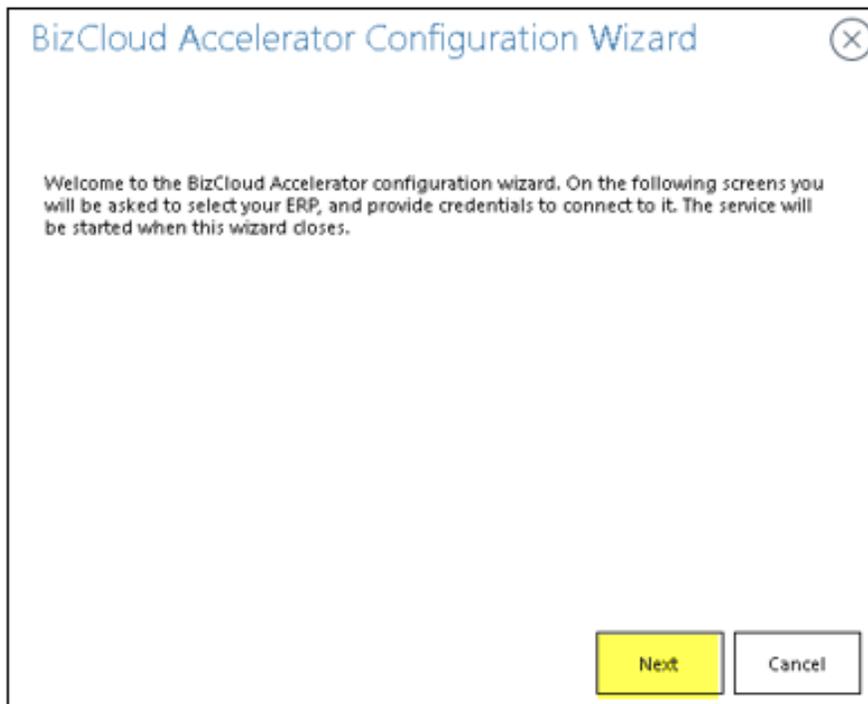
11. The Automatic Install process prompts you to confirm a folder location. Click **Ok** to accept the default setting.



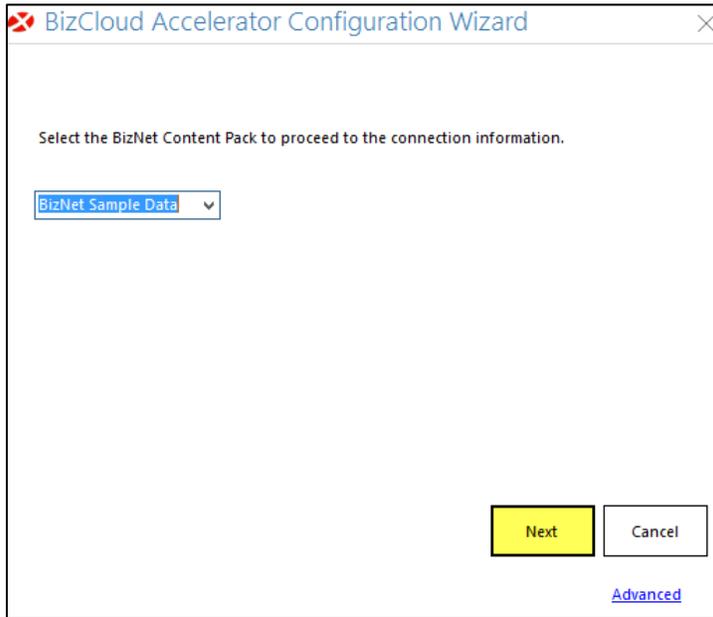
Note

Overriding this path is not recommended.

12. Click **Next**.



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

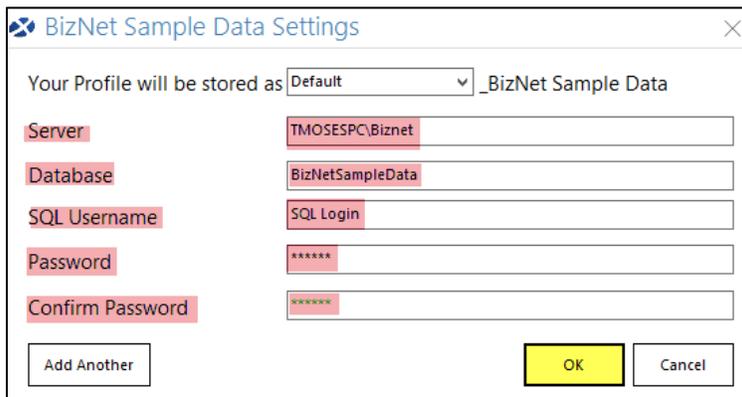


14. The next dialog that opens collects the information BizInsight needs to connect to the ERP system. The information requested will vary depending on the Connector being installed.



IMPORTANT

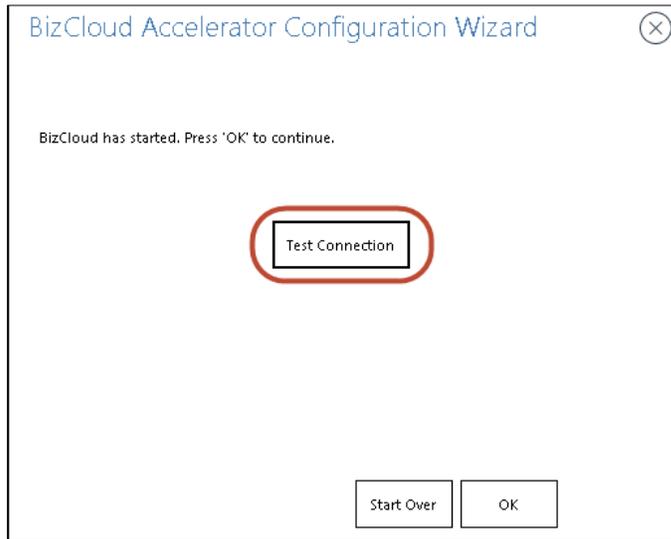
Your password cannot contain the following special characters: @ # “ > < ‘ &



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
Blackbaud FE NXT

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



If the connection fails, click **Start Over** button to go back and correct the information. Otherwise, click **OK**.

16. 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** button.



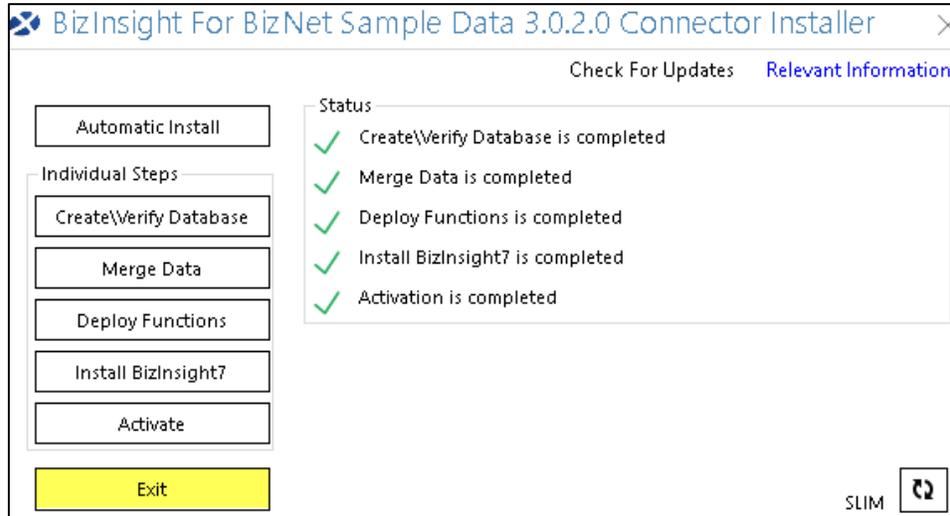
The **Activation Success** dialog will appear. Click the **OK** button to continue and then click **Close**. The Activation Success dialog only appears if an Activation ID is entered.



 **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. Key must be activated under the user's profile and there is one activation per machine per user. For further details on the license activation key see the **'Managing BizNet Product License'** guide.

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



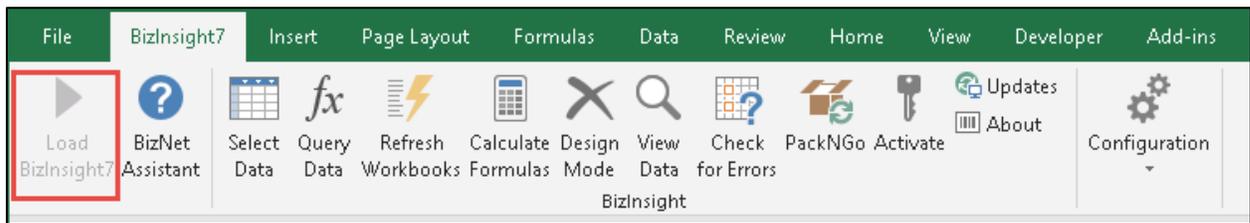
Go to the next installation step, [Verify Installation](#).

4. Verify Installation

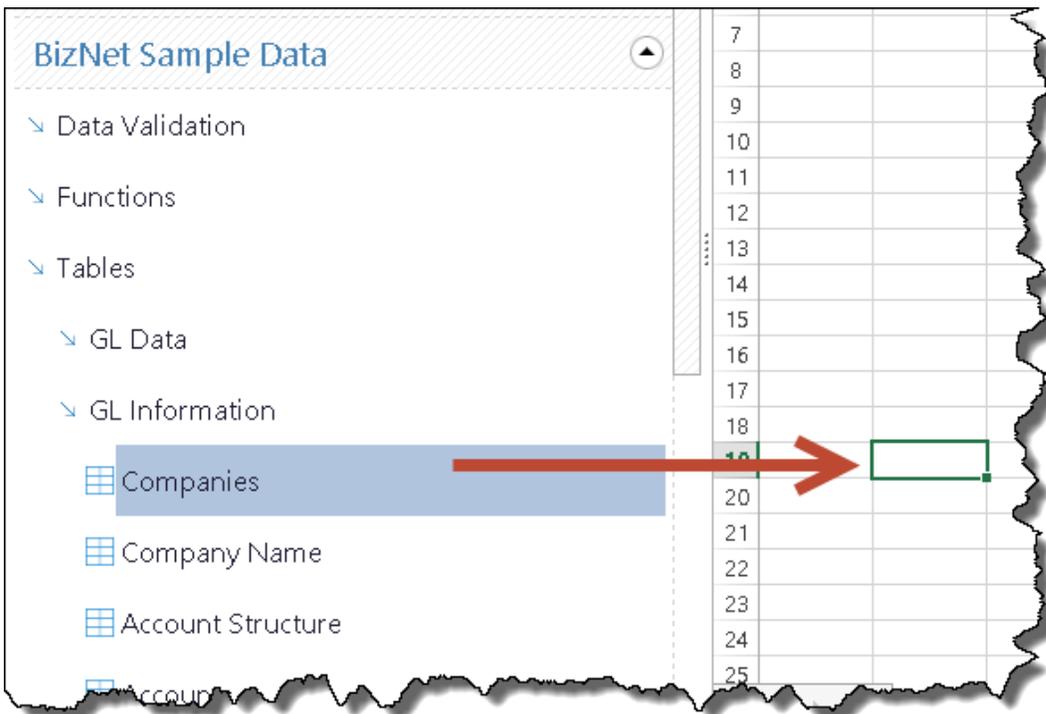
! IMPORTANT

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 that the install was successful.

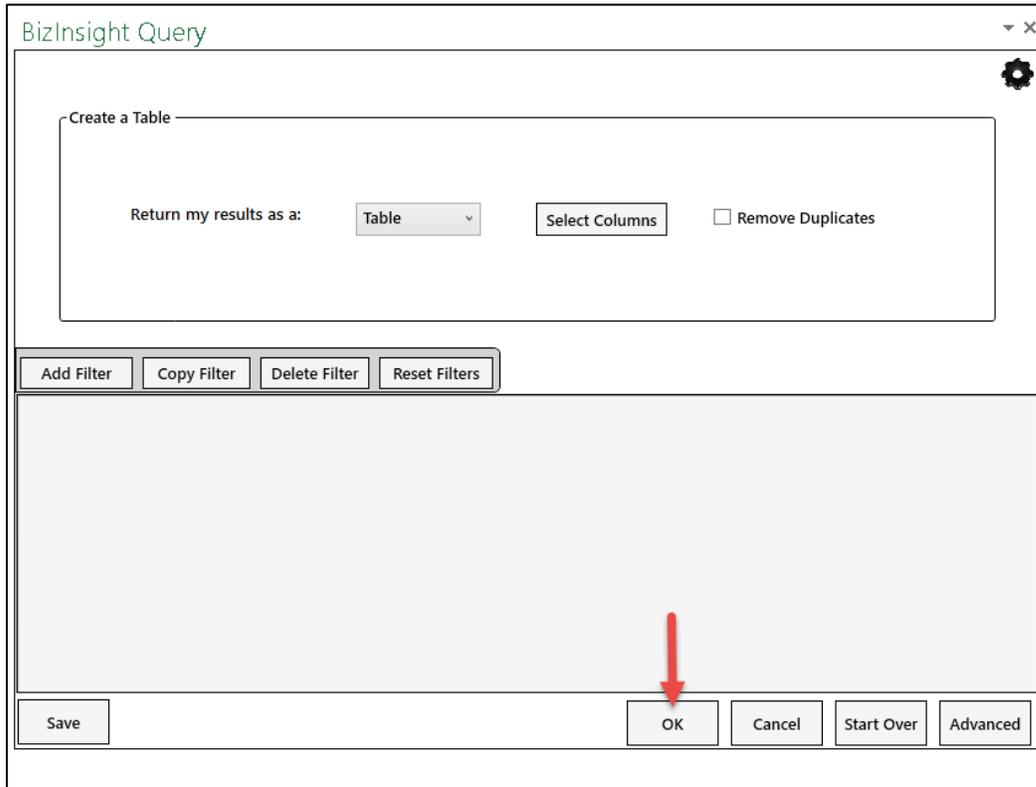
1. Launch Excel.
2. Click on the **Load BizInsight** button on the BizInsight 7 ribbon.



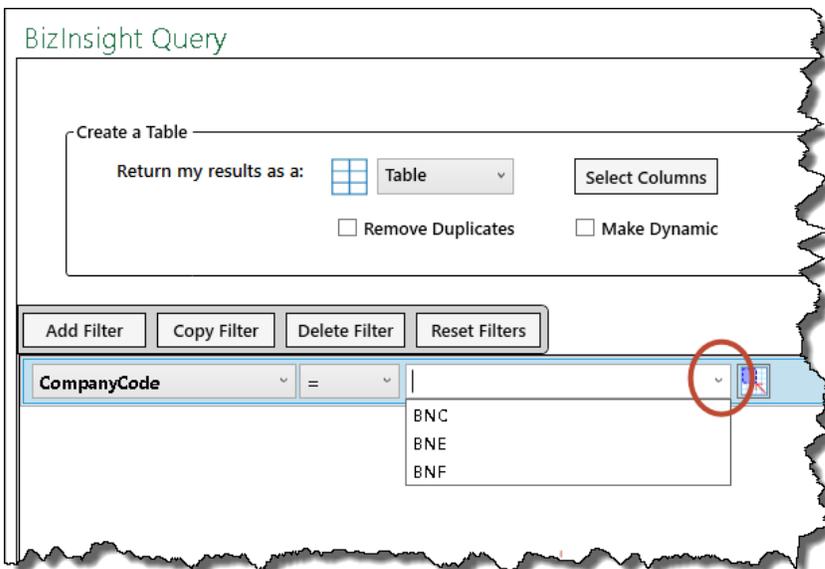
3. In the Navigation pane expand the available nodes and try to locate an Information node. The objects available under Information nodes are usually the most basic and don't require a lot of input parameters. Drag and drop any table. In this example, Companies was used.



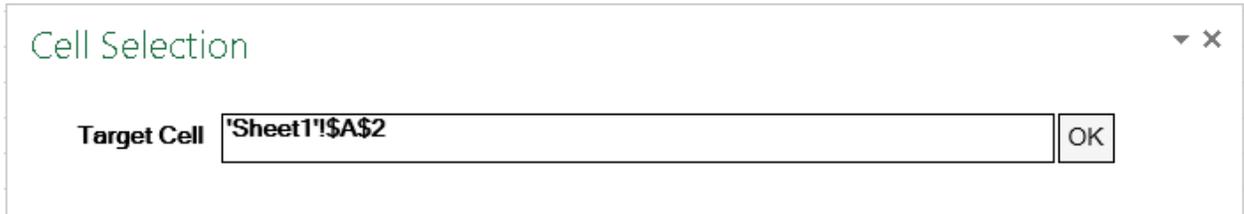
4. Click **OK** in the BizInsight Query dialog.



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.



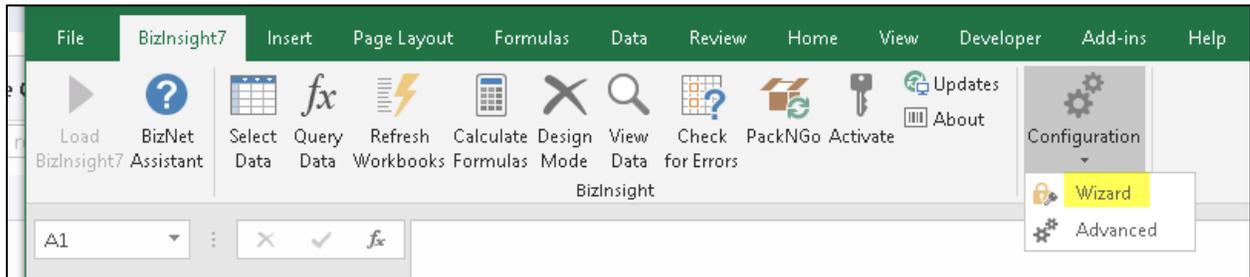
- Click **OK** to the Cell Selection dialog.



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

	A	B	C	D
1				
2	Company	CompanyName		
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 configuration wizard and verify the correct connection information was provided during installation.



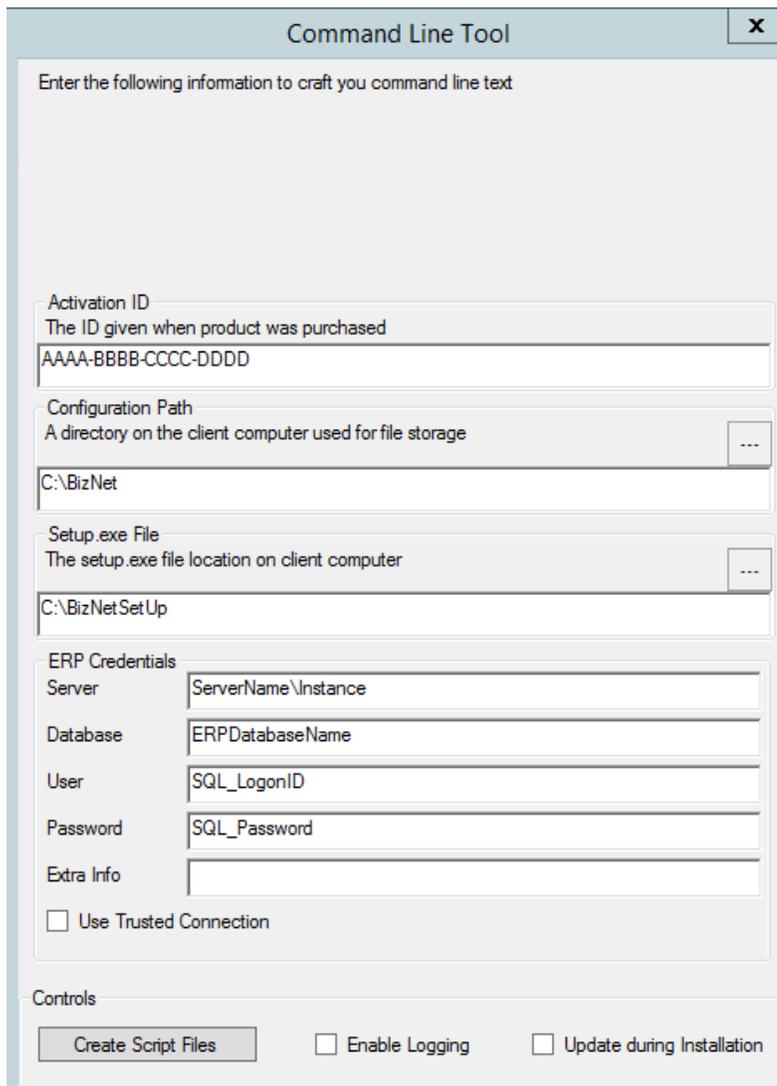
5. Installing on Citrix Terminal Services

The Command Line Tool can be used to create installation and uninstallation batch files to use in Citrix/Terminal Services installation scenarios. These batch files can be added to logon and log off scripts to help manage roaming profile situations by installing and activating the product when the user logs in and uninstalling and deactivating the product when the user logs off the machine. These batch files require the Setup.exe in order to work correctly.

1. Copy the setup.exe for the installation to the client machine.
2. Double click the CommandLineTool to open it.



3. Fill in all of the required information then click **Create Script Files**.

A screenshot of the 'Command Line Tool' application window. The window title is 'Command Line Tool' with a close button (X) in the top right corner. The main area contains the instruction 'Enter the following information to craft you command line text'. Below this are several input fields:

- Activation ID**: The ID given when product was purchased. Value: AAAA-BBBB-CCCC-DDDD.
- Configuration Path**: A directory on the client computer used for file storage. Value: C:\BizNet.
- Setup.exe File**: The setup.exe file location on client computer. Value: C:\BizNetSet Up.
- ERP Credentials**:
 - Server**: ServerName\Instance
 - Database**: ERPDatabaseName
 - User**: SQL_LogonID
 - Password**: SQL_Password
 - Extra Info**: (empty field)
- Use Trusted Connection

At the bottom, there is a 'Controls' section with three buttons:

- Create Script Files** (highlighted)
- Enable Logging
- Update during Installation

Activation ID – Type or paste in your license Activation ID.

Configuration Path – This path is used for template storage. For connectors that don't have templates, this path remains blank. This can be either a network or local directory.

Setup.exe File – This is the path to the Setup.exe file on the machine in which the batch files will be run. The browse button is useful if browsing to the file on the same machine that the client is to be installed on. NOTE: The Setup.exe is required for both the Install BizInsight and Uninstall BizInsight.

Server – The name and instance (if any) of the server on which the ERP database lives.

Database – The name of the ERP database.

User – The SQL Server username that has read permissions to the ERP database.

Password – The password of the SQL Server user.

Extra Info – This can be left blank unless there are specific instructions in the connector installer to provide this information.

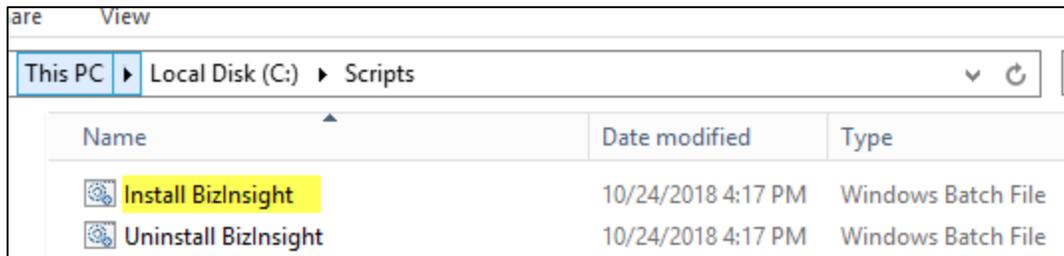
Use Trusted Connection – Check this box to use Windows Authentication against the ERP database. If this box is checked, then the User and Password fields should be left blank.

Enable Logging – During silent command-line installation, error messages are automatically suppressed. Check this box will direct the installer to log a message to a log file next to the batch file to assist the user in troubleshooting the installation issue(s).

Update during Installation – This option allows users to direct the installer to check for updates when it runs by the batch file. It is suggested that this option is only used in certain scenarios as it significantly increases the amount of time it takes to install the product. When the updates are released, it is recommended that the user download the new installation files and replace the current files with the latest.

Create Script Files – Click this button to create the script files. Two files are created (Install BizInsight.bat and Uninstall BizInsight.bat). Install BizInsight.bat will install BizInsight using the parameters provided in the Command Line Tool to include activating the product. Uninstall BizInsight.bat will uninstall BizInsight and deactivate the product.

4. The command tool will open to the file path of the script files. Double click the Install BizInsight batch file to install.



IMPORTANT

The client installation must be run as the user because BizInsight is installed under the user's local AppData directory. If profiles are deleted upon logging off the Terminal Server, the Install BizInsight batch file must be ran each time the user logs back in. Executing the uninstall script will uninstall the product and will also deactivate the license key under that user's account. If the product is not deactivated, the license key will remain in use under that session. For server farms or roaming profiles, best practice would be to have each user log off properly with the batch file tied to logon/logoff.

See [Verify Installation](#)

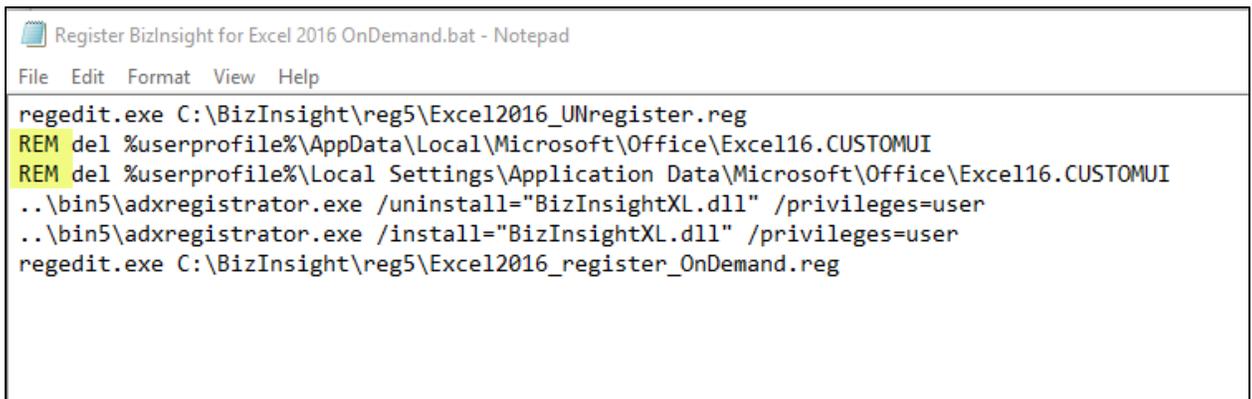
6. Appendix

A. Running BizInsight 5.0 Side-by-Side

BizInsight 7.0 can be installed side-by-side with BizInsight 5.0. BizNet Software recommends that BizInsight 5.0 be installed first and verified to be working before installing BizInsight 7. Refer to the BizInsight 5.0 Installation Guide for installation instructions if that version is not already installed.

Once BizInsight 5.0 is installed and confirmed to be functional, a small change will need to be made to the BizInsight 5.0 registration files.

1. Open Windows Explorer and browse to C:\BizInsight\reg5.
2. Open the file named “Register BizInsight for Excel 2016 OnDemand.bat” with Notepad.
3. Add REM to the two lines that delete the CustomUI file:



```
Register BizInsight for Excel 2016 OnDemand.bat - Notepad
File Edit Format View Help
regedit.exe C:\BizInsight\reg5\Excel2016_UNregister.reg
REM del %userprofile%\AppData\Local\Microsoft\Office\Excel16.CUSTOMUI
REM del %userprofile%\Local Settings\Application Data\Microsoft\Office\Excel16.CUSTOMUI
..\bin5\adxregistrator.exe /uninstall="BizInsightXL.dll" /privileges=user
..\bin5\adxregistrator.exe /install="BizInsightXL.dll" /privileges=user
regedit.exe C:\BizInsight\reg5\Excel2016_register_OnDemand.reg
```

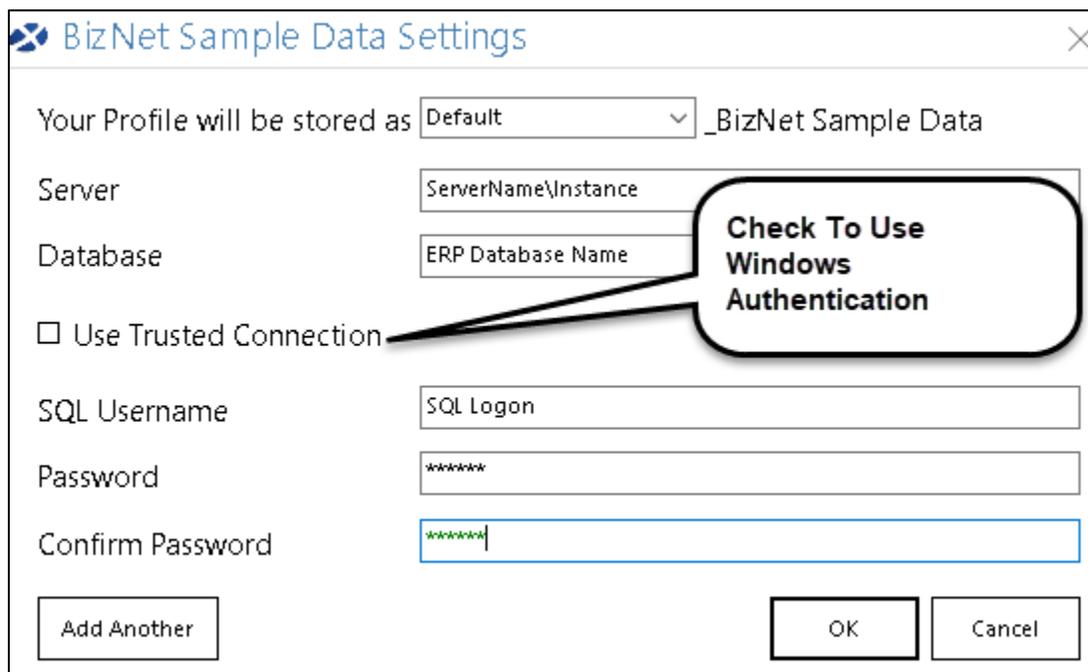
4. Save your changes.
5. Make the same change to the file named “Register BizInsight for Excel 2016.bat”.

B. 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:



Check To Use Windows Authentication

Note

If using Windows Authentication, leave the SQL Username, Password and Confirm Password fields blank.

Field	Information Needed
Server name	<p>SQL Server name and instance name if the database resides on a named instance. For example:</p> <p>Server2012\Accounting</p>
Database Name	<p>If the ERP system stores data for all companies in a single database, use that database name.</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 (Run scripts on Server) for example Syspro, enter BizNet for the database name.</p>
User id	<p>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.</p>
Password	<p>Enter the password for the user id supplied in the User id field.</p> <p> IMPORTANT</p> <p>Your password cannot contain the following special characters: @ # “ > < ‘ &</p>
Confirm Password	<p>Re-type the user id’s password. The asterisks will turn Green when the password matches the one already supplied.</p>

[Return to installation](#)

Intacct

Field	Information Needed
Company ID	<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>
Inacct Login id	<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 (Run scripts on Server) for example Syspro, enter BizNet for the database name.</p>
Password	<p>Enter the password for the user id supplied in the User id field.</p> <p> IMPORTANT Your password cannot contain the following special characters: @ # “ > < ‘ &</p>
Confirm Password	<p>Re-type the password. The asterisks will turn Green when the password matches the one already supplied.</p>

BlackBaud FE NXT

Field	Information Needed
Blackbaud Sign in	Enter the user’s sign in id (email address) to Financial Edge NXT.
Password	Enter the password for the user.  IMPORTANT Your password cannot contain the following special characters: @ # “ > < ‘ &

Financial Edge NXT Settings

Your Profile will be stored as Default _Financial Edge NXT

blackbaud

Sign in

Email

Password

enter password

Remember my email

[Forgot password?](#)

Sign in with 

Or sign up!

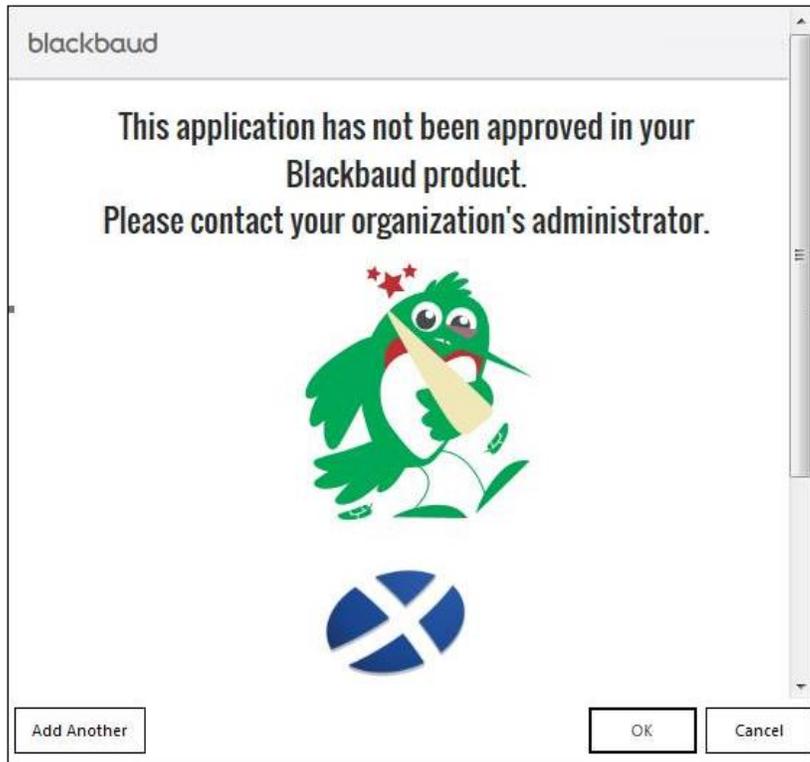
Add Another

OK

Cancel

 **IMPORTANT**

If you receive the following message, you will need to add the BizNet Application ID to your Blackbaud FE NXT system.

**Adding the BizNet Application ID:**

- Log into the Blackbaud FE NXT Control Panel
- Go to Applications Feature
- Add the BizNet Application ID which is: 35bd58e9-1b81-4af0-91f0-c5938d0ee80b

Return to the BizInsight Installation and re-run the Config Tool.

[Return to installation](#)