# **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 C	ontent Installer	
	Relevant Informa	tio
Automatic Install	Departing Conver Found	_
Manual Install Stages	Reporting Server User Found     Beporting Server User Found	
Install Report Server	Link Servers Found	
Create Report Server User	MAS90GL DataSet Content Found	
	MAS90GL MetaData Content Found	
Link Servers	MAS90GL Function Content Found	
Depley Data Sat Cantant	Users Have Been Added by Admin Tool	
Deploy DataSet Content	Settings Have Been Configured by Config Tool	
Deploy MetaData Content		
Deploy Function Content		
Admin Tool		
Config Tool		
View Additional Files		
Exit		()

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 "<u>Adjusting the Sage 100 ODBC paths</u>" 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.

Stage 3: Database				
User ID: ENTER USER ID				
Change User ID				
Password:	ENTER PASSWORD			
Change Password				

## 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.



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. Make sure the **Create File** option is selected. This will create files in the directory specified in the Stage 4 section. You will execute these files yourself when the content installer completes.

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

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

You will receive the following message when the **Create Files** option is selected. Click **Yes**.



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

🏝 Local Disk (C:)	
🕜 🖓 🛎 🕶 Comp	. 🛛 Local D 👻 🗸 🔽
Organize 🔻 Share with	• » 💠 • 🗍 😢
BizInsightShare	]] Sage Software
퉲 inetpub	] Users
MSOCache	Windows
PerfLogs	CreateLinkedServers.sql
Program Files	CreateODBCDataSources.reg
Program Files (x86)	
📔 ProgramData	

- i. Open the **CreateODBCDataSources.reg** file with Notepad.
- j. Search for **pvxodbc.dll** and check to see if there is a single back slash preceding the file name or two back slashes. If there is only a single back slash, do a search and replace of \pvxodbc.dll with \\pvxodbc.dll.

Create0	)DBCDataSourc	es.reg - Notepad				÷.	
File Edit	Format Vie	w Help					
windows "MAS90_ SAGE\S SAGE\S "Company "Compre- "Enfor	Registry "="MAS SAGE2014 SAGE2014 "="""" Replace	Editor Version 5.00 [H 90 4.0 ODBC Driver"[HKE MA590]vxvdbc.d1""Desc MA590\\sv\\; C:\\SAGE\\ 10"="""PWD"=""""""""""""""""""""""""""""""	KEY_LOCAL_M/ Y_LOCAL_MACI ription"="" SAGE2014\/M/ ""SID"="""	ACHINE\SOFTWARE\W0064 HINE\SOFTWARE\W006432 D'D'rectory'="C'\\SAGE AS90\\==\\"'ViewDLL"= LOGFI1e"="\\PVXODBC.L ads"='1""BurstMode"=' {T"="0"	I32Node\ODBC\ODBC.IN Node\ODBC\ODBC.INI L\SAGE2014\\MAS90" "C:\SAGE\SAGE2014 .0G""RemotePVKIOHost 1""KeyRestrict"="0"	I\ODBC Data Som MAS90]"Drii IniFile"="""Pri \\MAS90\\home" "="""RemotePVK "EnforceDouble	urces] * ver"="C:\ efix"="C:\ IOPort"="" "="0"
	Find what: Replace with:	\\SAGE2014\\MAS90\pvxodbc.dll \\SAGE2014\\MAS90\\pvxodbc.d	Find Next Replace Replace All				
	Match case	•	Cancel				

k. Save the file, being sure to preserve the .reg extension, then double-click to create the ODBC data sources.

 I. Open SQL Server Management Studio (Start > Programs > Microsoft SQL Server version > SQL Server Management Studio)



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

🛃 Connect to Server	×
Microsoft* SQL	<b>Server</b> "2008 R2
Server type:	Database Engine
Server name:	server2008r2\biznet
Authentication:	Windows Authentication
User name:	SERVER2008R2\linda
Password:	
	Remember password
Connec	t Cancel Help Options >>

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\BitInsightShare\Config         Admin Path:       \\SERVER2008R2\AdministrationPath C\SERVER2008R2\AdministrationPath C\SERVER2008R2\AdministrationPath C\SERVER2008R2\AdministrationPath         Report Server UH:       http://SERVER2008R2/ReportServer_BIZNET         Report Folder       MAS90ProvideX         Sql Server MetaData Database and Instance Name:       SERVER2008R2\BIZNET         Packaged wth Content Packager Version       14.0.0	S Relevant Information		
C\BitInsight Share\Config         Admin Path:       \\SERVER2008R2\AdministrationPath         C\BitInsight Share\Admin         Report Server Utl:       http://SERVER2008R2/ReportServer_BIZNET         Report Folder       MAS90ProvideX         Sql Server MetaData Database and Instance Name:       SERVER2008R2\BIZNET         Packaged with Content Packager Version       14.0.0	Config Path:	\\SERVER2008R2\ConfigurationPath	
Admin Path:       \\SERVER2008R2\AdministrationPath         C:\BizInsightShare\Admin         Report Server UH:       http://SERVER2008R2/ReportServer_BIZNET         Report Folder       MAS90ProvideX         Sql Server MetaData       SERVER2008R2\BIZNET         Packaged with Content Packager Version       1.4.0.0		C:\BizInsightShare\Config	
C:\BizInsight Share \Admin Report Server Uf: http://SERVER2008R2/ReportServer_BIZNET Report Folder MAS90ProvideX Sql Server MetaData Database and Instance Name: SERVER2008R2\BIZNET Packaged with Content Packager Version 1.4.0.0	Admin Path:	\\SERVER2008R2\AdministrationPath	
Report Server UH:     http://SERVER2008R2/ReportServer_BIZNET       Report Folder     MAS90ProvideX       Sql Server MetaData Database and Instance Name:     SERVER2008R2/BIZNET       Packaged with Content Packager Version     1.4.0.0		C:\BizInsightShare\Admin	
Report Folder     MAS90ProvideX       Sql Server MetaData Database and Instance Name:     SERVER2009R2\BIZNET       Packaged with Content Packager Version     1.4.0.0	Report Server Unl:	http://SERVER2008R2/ReportServer_BIZNET	
Sql Server MetaData Database and Instance Name: SERVER2000R2\BIZNET Packaged with Content Packager Version 1.4.0.0	Report Folder	MAS90ProvideX	
Packaged with Content Packager Version 1.4.0.0	Sql Server MetaData Database and Instance Name:	SERVER2008R2\BIZNET	
Convite Clinboard	Packaged with Content Packager \	/ersion 1.4.0.0	
Convito Cloboard			
	Close		Copy to Clipboard

n. Click on File > Open > File, browse to C:\ and select the CreateLinkedServers.sql file.

5		Open File		×
🛞 💿 🔻 🕯 📥 🖡	• Th	is PC 🕨 Local Disk (C:) 🛛 🗸 ウ	Search Local Disk (C:)	Q,
Organize 👻 New fo	lder			
5 🥵 SQL Server Manag	^	Name	Date modified	Type \land
5 - S		Packaged Content	12/17/2015 5:05 PM	File fol
4 🔆 Favorites		🎍 PerfLogs	8/22/2013 10:52 AM	File fol
Desktop		PortQryV2	5/17/2016 9:20 AM	File fol
Downloads		🌽 Program Files	10/14/2016 11:52	File fol
3 Recent places	=	鷆 Program Files (x86)	11/10/2015 8:09 AM	File fol
		🌽 ProgramData	2/2/2015 12:48 PM	File fol
4 👰 This PC		鷆 Users	3/10/2016 5:04 PM	File fol
👂 朣 Desktop		V2Share	5/27/2015 3:25 PM	File fol =
Documents		🌽 Windows	10/14/2016 11:56	File fol
Downloads	П	Vit Connect Developer	5/26/2016 10:19 AM	File fol
Þ 🎍 Music		CreateLinkedServers.sql	2/9/2015 12:49 PM	SQL Fi
Þ 📔 Pictures		CreateODBCDataSources.reg	2/9/2015 12:49 PM	Registi 🗸
Videos	v	< 111		>
Fi	ile ni	ime: v	All Files (*.*)	×
			Open 🛛 Can	vcel

If the following message is displayed, click **Yes**.

Inconsistent Line Endings							
The line endings in the following file are not consistent. Do you want to normalize the line endings? C:\CreateLinkedServers.sql							
Line ending:							
Windows (CR LF)							
	Yes	No					
Always show this dialog							

o. Click **Execute** to run the script.



100 %	• <				
🛅 Me	ssages				
Con	mand(s	) completed	successf	ully.	

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



5. 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.

Nicrosoft SQL Server Management Studio									
File Edit View Project Debug Tools Windo	w Community Help	•							
😟 New Query 📭 📸 😘 🚱 🕞 😂 📾 🕮 👼									
影 號   · · · · · · · · · · · · · · · · · ·									
Object Explorer 🚽 🗘 🗙	SQLQuery1.sql -	server2008))*				- ×			
Connect * 🛃 🛃 🔳 🝸 😰 🍒	select * :	from openquery(MAS90	ABC, 'se	elect * fr	om GL_Account	•)			
<ul> <li></li></ul>	Results M	essages				- 			
E Beolication	AccountKey	AccountDesc	Account	RawAccount	MainAccountCode	DateSt: +			
🗉 🧰 Management	1 10000000	Cash on hand	100-00-00	10000000	100	NULL			
	2 10000A 00	Cash in Trust Fund	100-00-A	10000A 00	100	NULL			
	3 101010000	Cash in bank - Reg. checking	101-01-00	101010000	101	NULL			
	4 101020000	Cash in bank - payroll	101-02-00	101020000	101	NULL			
	5 101030000	Cash in bank - savings	101-03-00	101030000	101	NULL			
	6 105000100	Accts. receiv East Warehse	105-00-01	105000100	105	NULL			
	7 105000200	Accts. receiv West Warehse	105-00-02	105000200	105	NULL			
						<u> </u>			
× >	Query execut	server2008r2\biznet (10.50	SERVER 2000	8R2\inda (61)	master 00:00:05	201 rows			

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.

🍢 Microsoft SQL Server Management Studio						
File Edit View Project	Debug Tools Window					
🔅 🔔 New Query 🛛 🛅 👘 👘	🔥 🛅 📑 📑 🖓					
: 嬰 限	✓ PExecute					
Object Explorer	- <del>7</del> ×					
Connect 🕶 📑 📑 🖉 😰 📓						
<ul> <li>□</li> <li>□</li></ul>	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.

## 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 64bit 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.

<b>5</b> 7 (	ODBC Data Source A	dministrator	2			
U	User DSN System DSN File DSN Drivers Tracing Connection Pooling About					
	User Data Sources:					
	Name	Driver	Add			
	dBASE Files	Microsoft Access dBASE Driver (*.dbf, *.ndb				
	Excel Files	Microsoft Excel Driver (*xls, *xlsx, *xlsm, *x	x Remove			
	MS Access Database	Microsoft Access Driver (*.mdb, *.accdb)	Carlan			
	SOTAMAS90	MAS 90 4.0 ODBC Driver	Configure			
	•		1			
			1			
	An ODBC User data source stores information about how to connect to the indicated data provider. A User data source is only visible to you, and can only be used on the current machine.					
	[	OK Cancel Apply	Help			

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.



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

K ProvideX ODBC Driver Setup	? ×
Basic 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			
(This direct	ory contains ProvideX DLL or shared object)			
Dirty Read: 🔽	Enforce DOUBLE:			
Burst mode: 🔽	NULL Date: 🗖			
Key Restrict: 🗖	Strip trailing spaces: 🔽			
Silent mode: 🗖	Cache Size MB: 4			
	,			
	OK Cancel Ap	ply		

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