

Adding New Users

This document applies to the following ERP system(s):

AccountMate	Microsoft Dynamics GP	Sage 500
Acumatica	Microsoft Dynamics SL	Sage X3v5
Alere	QAD EE	Sage X3v6
CCH	QAD SE	SAP B1
Deltek Vision	Ross	Syspro
FiresStream	Sage 300	Traverse
FIS EAS		

This guide describes the steps required to install BizInsight and BizContent for additional users in your organization.

This document presumes that BizInsight is installed and fully functioning for at least one user within your organization.

Overview

Step 1: Locate Installation Files	1
Step 2: Assign BizInsight Security to Users	3
Step 3: Assign rights in SQL Server Security	11
Step 4: Assign rights in Reporting Services	17
Step 5: Add User to Security Table	19
Step 6: Install Oracle Data Access Components (ODAC)	20
Step 7: Install BizInsight	21
Installing BizInsight for the Non-Administrative User	31
Step 8: Configure BizInsight	34
Step 9: Verify the BizInsight Installation	46
Appendices	47
Manually Installing BizContent Add-ins	48
CheckTCP/IP, SQL Browser and Firewall Exceptions	59
Assign BizInsight Security to Users	81

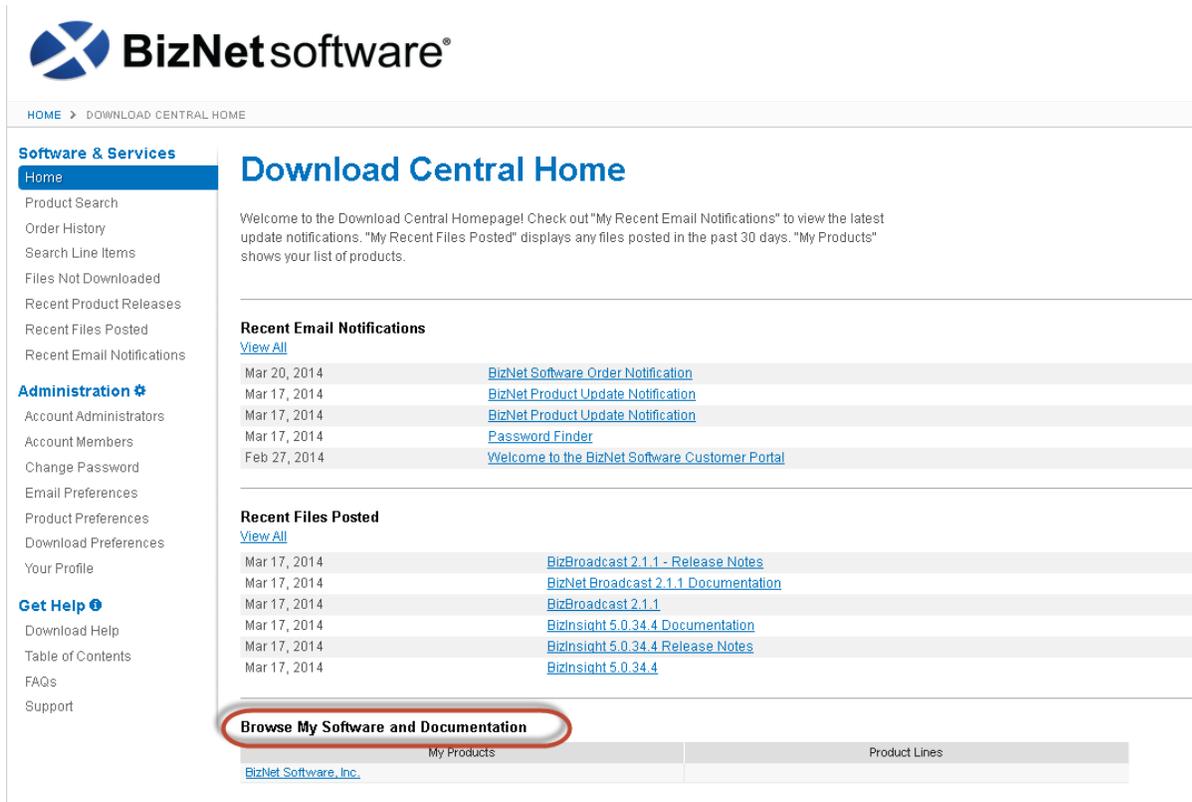
Step 1: Locate Installation Files

In preparation for installation, you need to confirm which version of BizInsight is installed on current BizInsight users' workstations so that you are sure to install the same version being run elsewhere. To do this, open Excel on an existing BizInsight user's workstation and click on the **About** button of the BizInsight Excel ribbon.

Once you have determined the current version, click on the **Application Settings** button and copy the path provided for the Configuration Path parameter, open Windows Explorer and browse to that directory. Look in that directory or in the level above for an Install Files folder or a folder for the BizInsight version that is currently installed. Where the installation files have been saved will vary from customer to customer but it is recommended in our documentation that they be saved near the BizInsight shared directory so there is a high likelihood that you will locate the necessary installer in this location or nearby.

If you are not able to locate the installer files for the currently installed BizInsight version, download the latest version from the BizNet Software customer portal, (<http://biznet.flexnetoperations.com>). If installing you must install latest version, all client workstations and the caching service must be updated to the latest version. Follow the steps in the document titled "Applying Updates" for instructions.

All files can be found under "Browse My Software and Documentation".



BizNetsoftware®

HOME > DOWNLOAD CENTRAL HOME

Software & Services

- Home
- Product Search
- Order History
- Search Line Items
- Files Not Downloaded
- Recent Product Releases
- Recent Files Posted
- Recent Email Notifications

Administration

- Account Administrators
- Account Members
- Change Password
- Email Preferences
- Product Preferences
- Download Preferences
- Your Profile

Get Help

- Download Help
- Table of Contents
- FAQs
- Support

Download Central Home

Welcome to the Download Central Homepage! Check out "My Recent Email Notifications" to view the latest update notifications. "My Recent Files Posted" displays any files posted in the past 30 days. "My Products" shows your list of products.

Recent Email Notifications

[View All](#)

Mar 20, 2014	BizNet Software Order Notification
Mar 17, 2014	BizNet Product Update Notification
Mar 17, 2014	BizNet Product Update Notification
Mar 17, 2014	Password Finder
Feb 27, 2014	Welcome to the BizNet Software Customer Portal

Recent Files Posted

[View All](#)

Mar 17, 2014	BizBroadcast 2.1.1 - Release Notes
Mar 17, 2014	BizNet Broadcast 2.1.1 Documentation
Mar 17, 2014	BizBroadcast 2.1.1
Mar 17, 2014	BizInsight 5.0.34.4 Documentation
Mar 17, 2014	BizInsight 5.0.34.4 Release Notes
Mar 17, 2014	BizInsight 5.0.34.4

Browse My Software and Documentation

My Products	Product Lines
BizNet Software, Inc.	

Following are the files you will need to download:

BizInsight 5.0.35.2

BizInsight Tools.zip - this download file contains several tools that you might need to use during implementation. It can be found with the BizInsight product download file.

BizContent - download all BizContent files to which you are entitled (required)

Step 2: Assign BizInsight Security to Users

Each BizInsight user's Windows account name must be added to a .users file in the admin shared directory in order for that user to perform any BizInsight action. You will use the License Administration Tool to perform these steps.

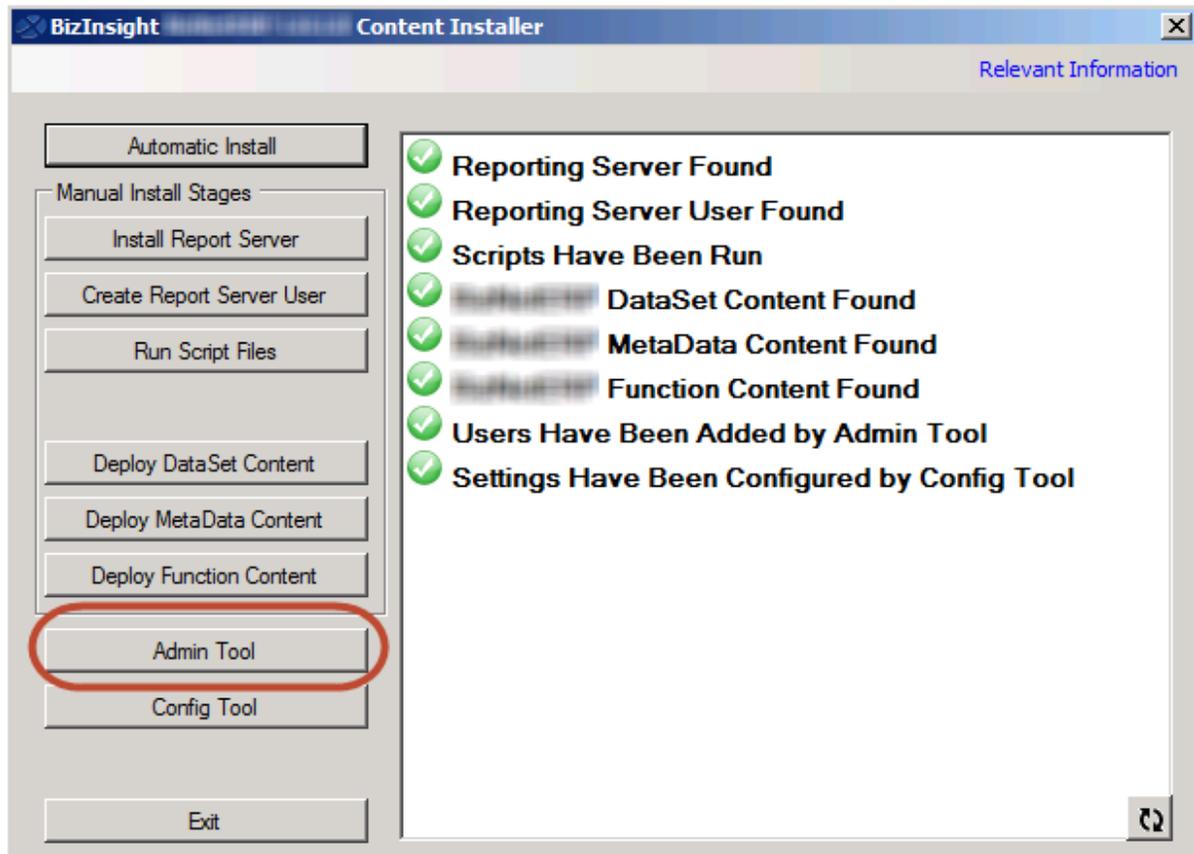
To assign BizInsight security to your users, do the following:

1. On the server, double-click any content installer desktop icon. If the content installers were installed without desktop icons, browse to the installation directory and double-click the file named "BizNet Content Installer.exe". If the content installer was uninstalled, reinstall it.



If you do not want to reinstall the content installer, see "Manual Steps" on page 9.

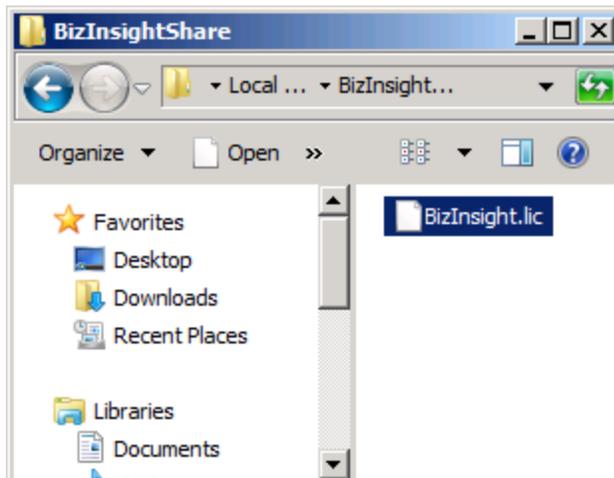
- Click on the **Admin Tool** button.



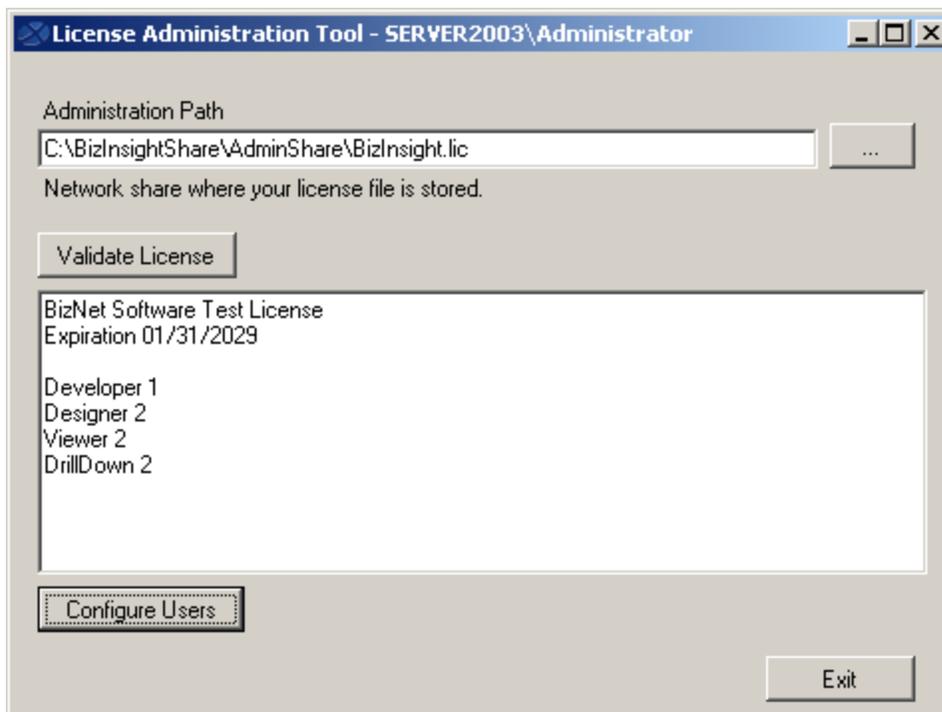
- Click on the ellipses and browse to the admin share folder of your BizInsight shared directory.



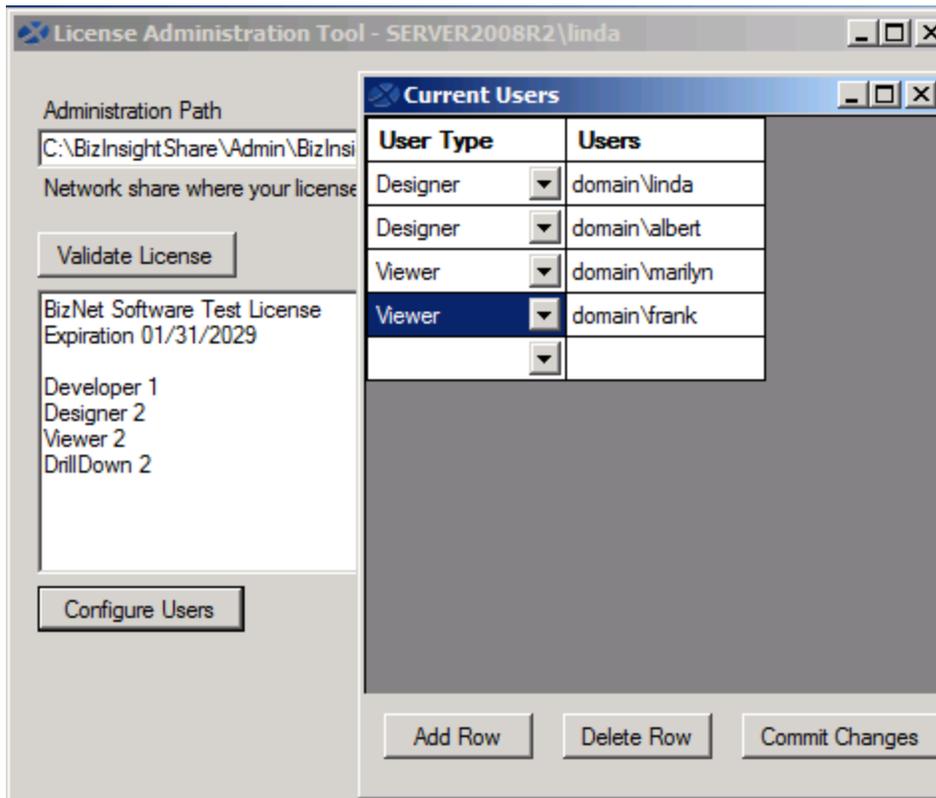
4. Select your BizInsight license file and click Open.



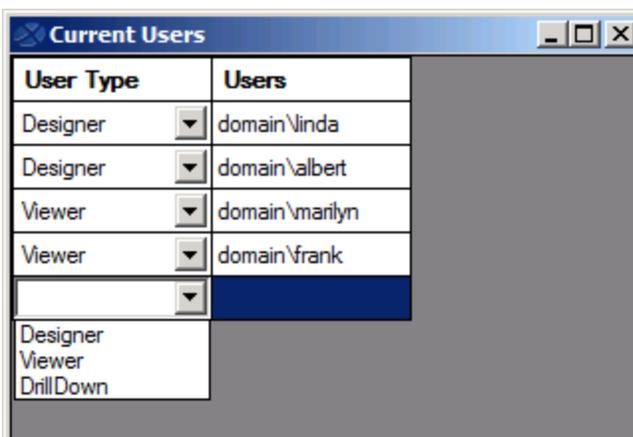
5. Click on the **Validate License** button to check how many licenses you currently have. Your current license count will be displayed.



- Click on the **Configure Users** button. The **Current Users** dialog will open.

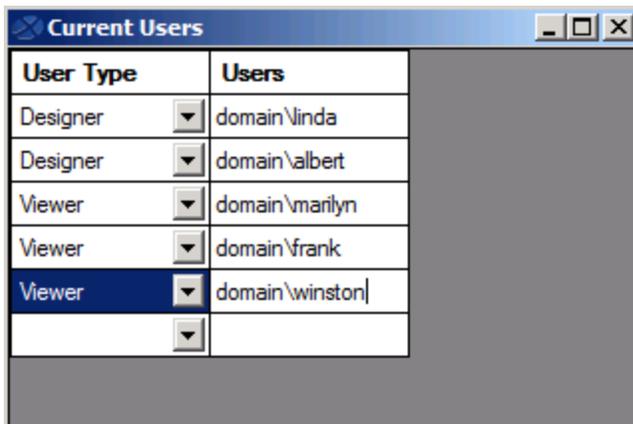


- You will now add your new BizInsight user and assign them a user type. Click on the **User Type** drop down and select the desired user type. If you want your user to be a Designer, choose Designer from the drop down list.



8. Type the user's name in the **Users** field in the format of domain\username.

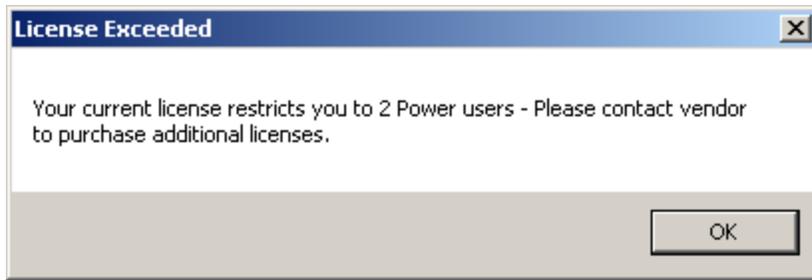
WARNING Do **not** add your own login using the Admin Tool unless you know for sure that you have another login available with sysadmin rights to the SQL Server instance. Early versions of the content installer (pre version 1.6) will remove existing permissions for users, including those with sysadmin rights. If uncertain, skip this step and confirm sysadmin access will not be lost then return to complete the Admin Tool step.



9. Click on the **Commit Changes** button when finished. You will be presented with a message asking if you want to grant the user additional security permissions. Click **Yes**.

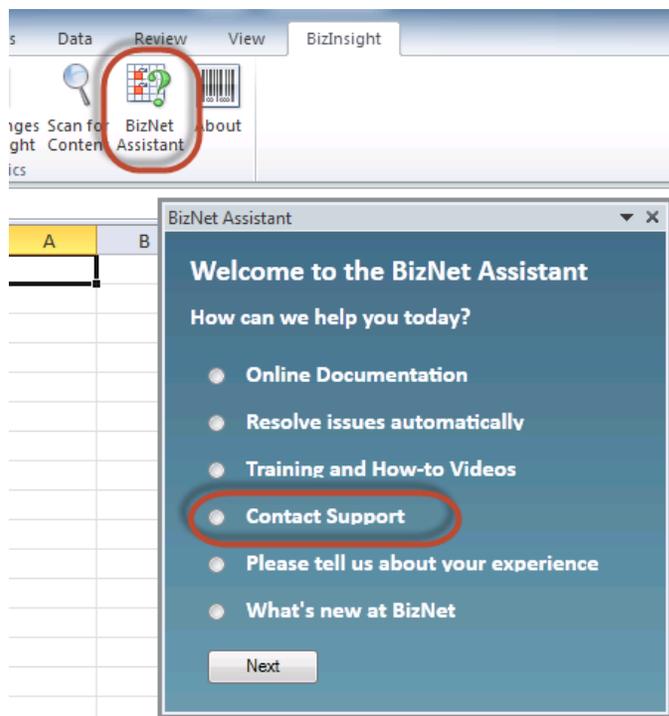


If you have entered more names for a particular user type than you have licenses, you will get an error similar to the following.



You will be returned to the **Current Users** dialog where you can remove a row so that you comply with the number of licenses your company purchased. Select the row to remove and click the **Delete Row** button.

To purchase additional licenses, use the BizNet Assistant button to open a support ticket indicating that you need to purchase additional licenses.



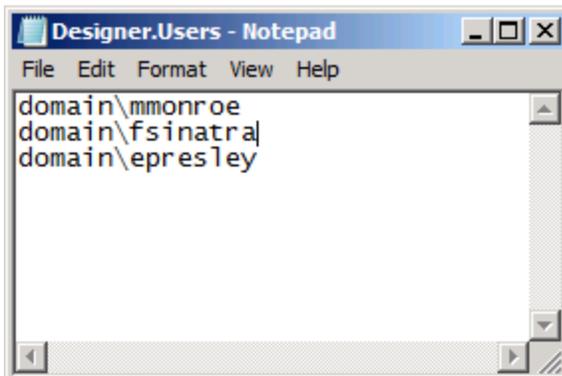
When you receive your new license, move your old license from the Administration Path shared directory and save the new license there. Do not rename the old license and leave it in the Administration Path; it must be removed from the directory in order for the new license count to take effect.

Manual Steps

1. In the Admin shared directory, open the .users file with Notepad that corresponds with the BizInsight permissions the user should have. For example, if the user should have Designer permissions, you would open the Designer.users file.

Tip If you are not sure where to find the Admin shared directory, go to an existing user's workstation, open Excel and click on the **Application Settings** button on the BizInsight ribbon and copy the path provided for the Administration Path.

2. In the .users file, add the Windows account name of the BizInsight user. For more information on the different user types, refer to the User Types section of the User Guide.



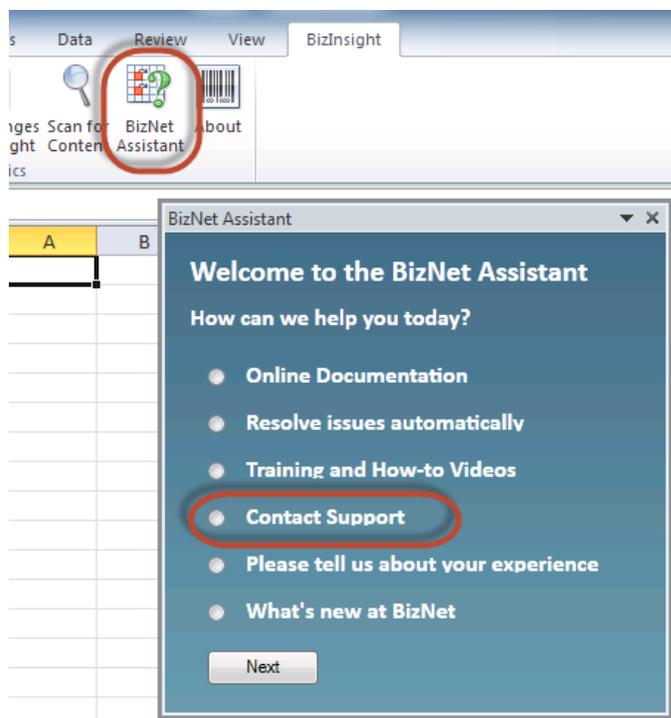
3. Save and close the file.

IMPORTANT As you add Windows account names to the .users files, add only as many as you have licenses. If you add more Windows account names than you have licenses or you have an extra line return in the file, users will get an error message similar to the following when they open Excel after BizInsight is installed.



If you are not sure how many licenses you have, open the .lic file that is in the Admin shared directory with Notepad and check how many licenses are shown for the user type you are adding.

To purchase additional licenses, use the BizNet Assistant button to open a support ticket indicating that you need to purchase additional licenses.



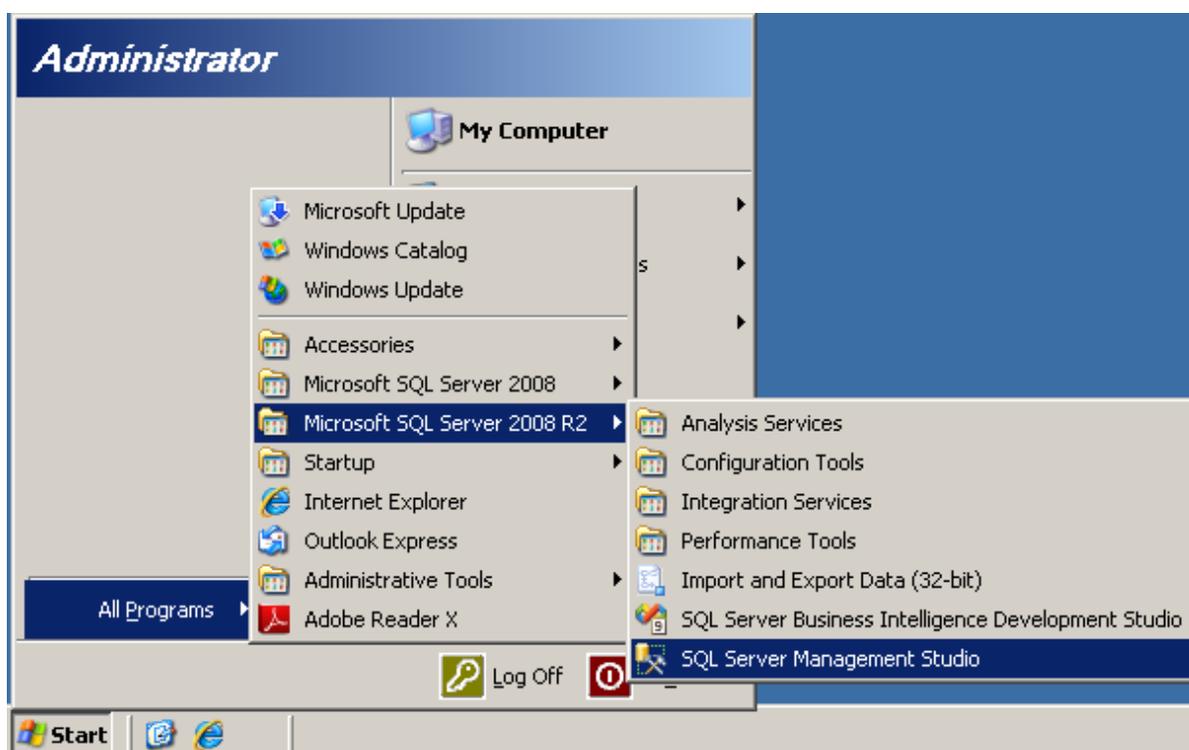
When you receive your new license, move your old license from the Administration Path shared directory and save the new license there. Do not rename the old license and leave it in the Administration Path; it must be removed from the directory in order for the new license count to take effect.

Step 3: Assign rights in SQL Server Security

BizInsight users will need permissions to retrieve data from the accounting system database. If you did not use the Content Installer Admin tool, users will also need to be given rights to the SQL MetaData databases.

NOTE If you are managing SQL Server security with an Active Directory group, just add the new BizInsight user to that Active Directory group and go to the next step.

1. Click on **Start >Programs > Microsoft SQL Server Version > SQL Server Management Studio**.



- The **Connect to Server** dialog will open. Connect to the SQL Server instance that hosts your accounting system database.

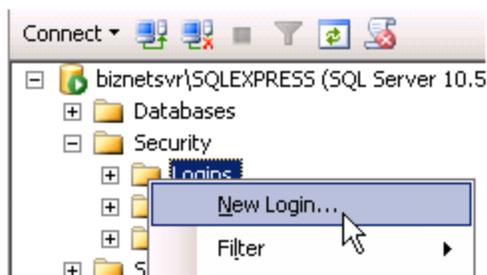


- In the left pane, expand **Security**. Look for your existing users to determine whether they have been setup to use their Windows domain account or a SQL Server account. You can tell one from the other by the presence of the domain in front of the user name.

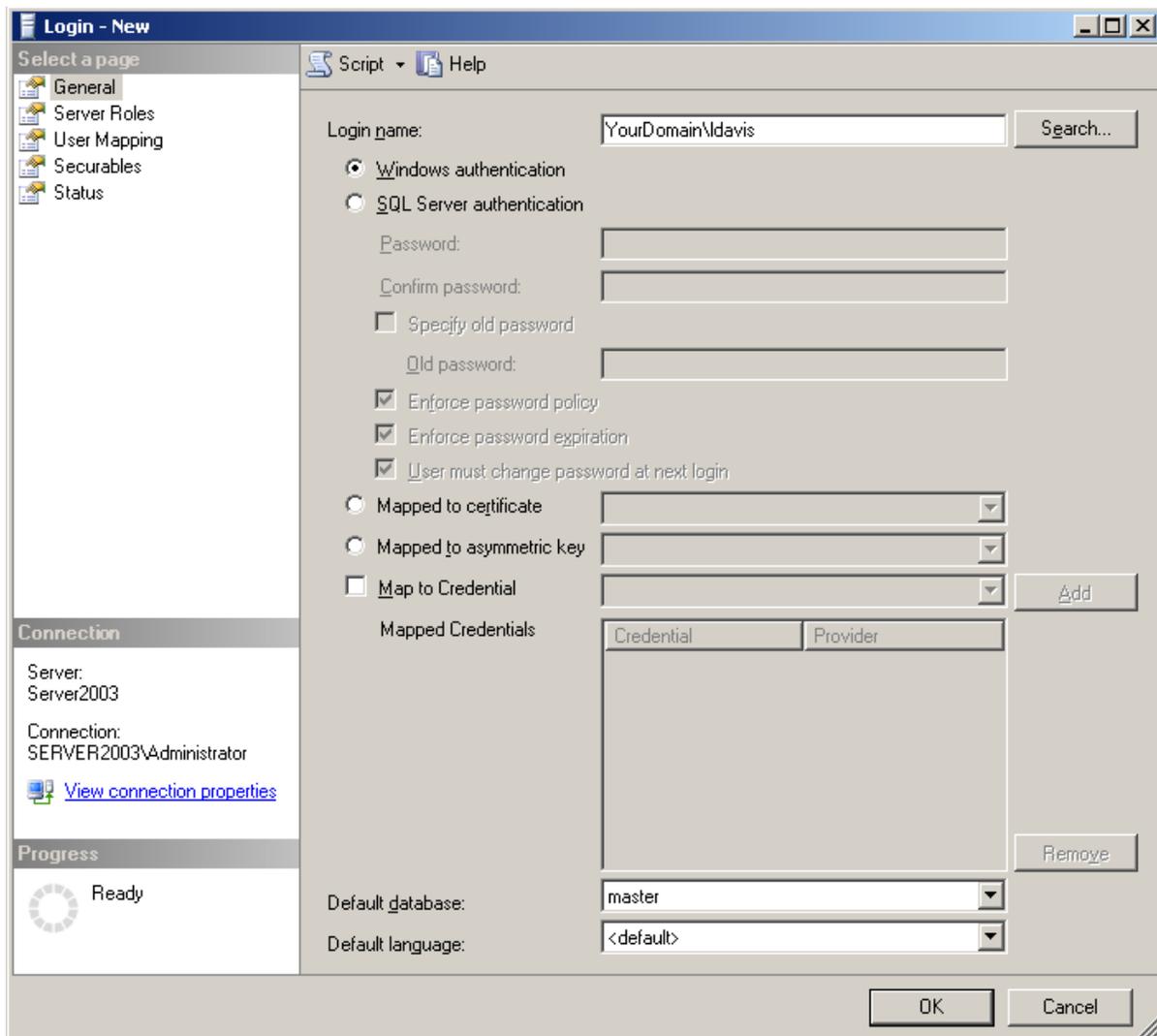


NOTE If the user's login already exists in SQL Server, right-click their login id and choose Properties. Then click [here](#) to jump to the User Mapping step.

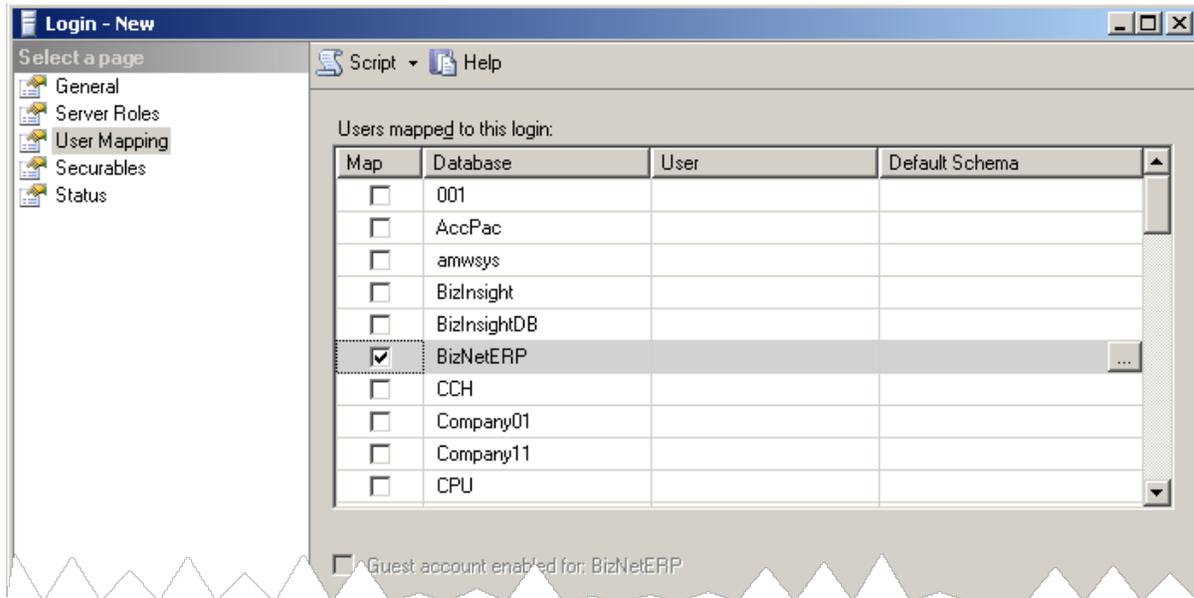
4. Right-click on Logins and click **New Login**.



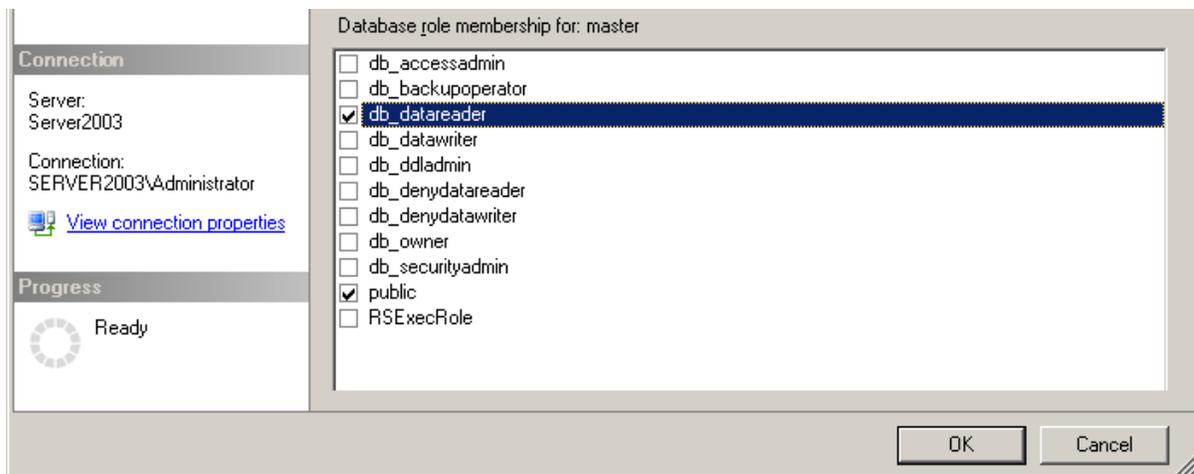
5. In the Login – New dialog box, enter the user’s name in the **Login name** field. If your existing users were setup with their Windows logins, click on **Search** to browse for an existing Windows login id. If your existing users were setup with a SQL account, type the new user’s login id and change the radio button to SQL Server authentication.



- Click on **User Mapping** in the left pane. Check the **Map** checkbox next to the accounting system database.

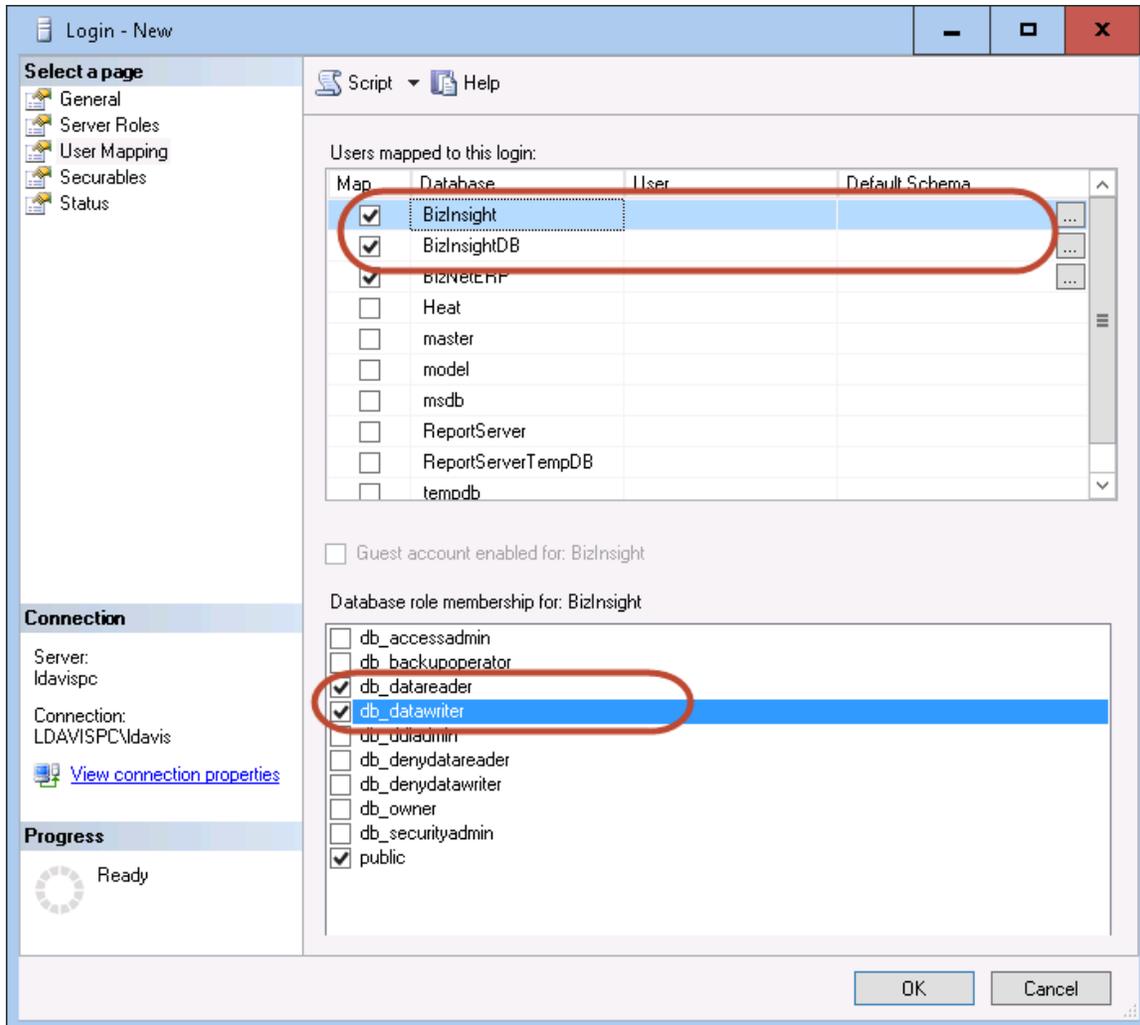


- Once the database is checked in the upper pane, check the **db_datareader** role membership in the bottom pane. Click **OK**.



- If the accounting system stores company data in separate databases, repeat the steps of checking the database and the db_datareader role for each company database.

9. If the SQL MetaData databases (BizInsight and BizInsightDB) are not checked, be sure to check both of them and give the user db_datareader and db_datawriter rights to those two databases.



Step 4: Assign rights in Reporting Services

This step probably has been addressed by the Content Installer Admin tool. In the event an error occurred while users were being assigned security rights or you did not use the Admin Tool to assign BizInsight security to the new user, follow these steps to assign them rights to the Reporting Services items.

NOTE If you are managing Reporting Services security with an Active Directory group, make sure the user is a member of that group and that group has been added to Reporting Services security.

All BizInsight users must have rights granted to them in Reporting Services. Reporting Services uses role-based security to secure access to items managed by the report server.

IMPORTANT Starting with the BizInsight build 5.0.34, the minimum pre-defined role necessary for a BizInsight user is Content Manager. A script is provided in the document titled "**Installing SQL Server and Reporting Services**" to create a custom role named "BizNetUser" that will assign only the minimum permissions required for the XMLFast feature.

SQL Server Reporting Services
New Role Assignment

Home | My Subscriptions | Site Sett
 Search for:

Use this page to define role-based security for Home.

Group or user name:

Select one or more roles to assign to the group or user.

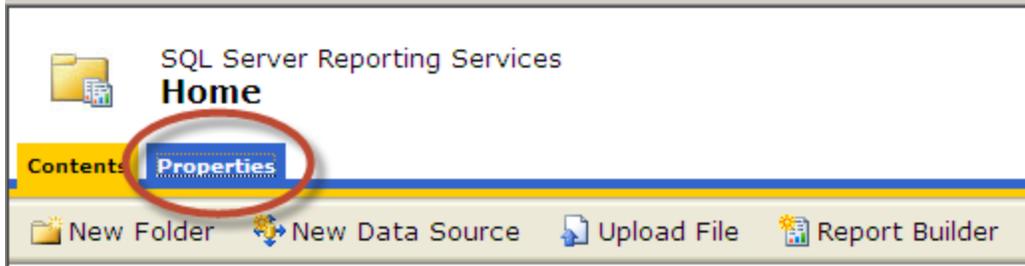
<input type="checkbox"/> Role	Description
<input type="checkbox"/> Browser	May view folders, reports and subscribe to reports.
<input type="checkbox"/> Content Manager	May manage content in the Report Server. This includes folders, reports and resources.
<input type="checkbox"/> My Reports	May publish reports and linked reports; manage folders, reports and resources in a users My Reports folder.
<input type="checkbox"/> Publisher	May publish reports and linked reports to the Report Server.
<input type="checkbox"/> Report Builder	May view report definitions.

OK Cancel New Role

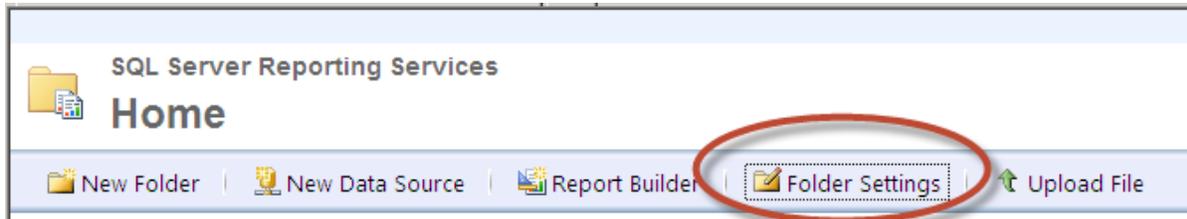
Reporting Services Security is accessed by browsing to the Reporting Services Report Manager URL (ex. <http://servername/reports>). Go to the Application Settings dialog of your currently working BizInsight user and copy the Reporting Services URL that is listed in the dialog. Modify the "reportserver" part of the URL to "reports" then paste into a browser.

IMPORTANT If Reporting Services is installed on a **Windows Server 2008 or higher** server and User Account Control ("UAC") is enabled, you must elevate your privileges when you start Internet Explorer. To do this, press **CTRL+Shift** and then right-click on Reporting Services Configuration Manager and select **Run as administrator**.

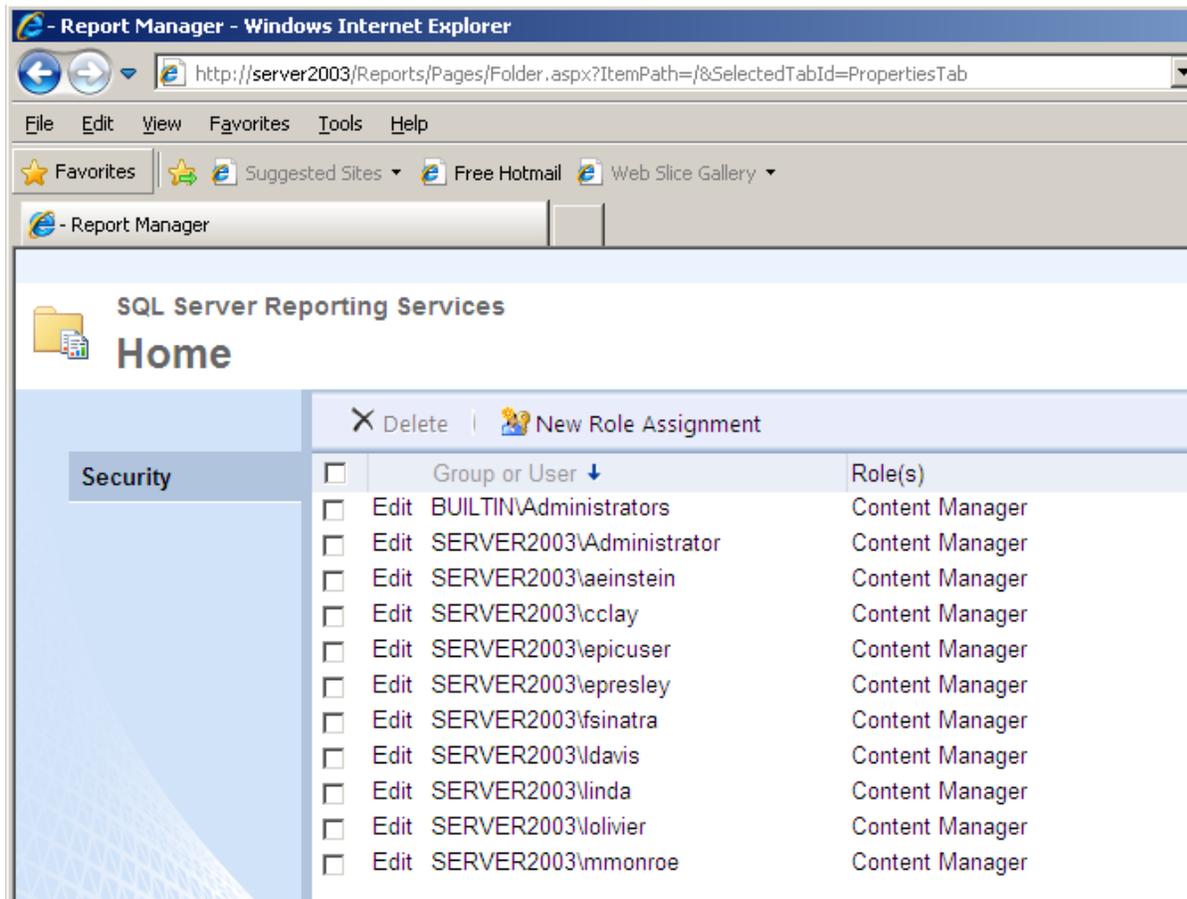
For SQL Server Reporting Services 2005 and 2008, go to the **Properties** tab:



For SQL Server Reporting Services 2008 R2, click on the **Folder Settings** button.



The following screenshot shows an example of a Reporting Service site with user security configured. The user named “linda” has been given Content Manager permissions.



Step 5: Add User to Security Table

If you have configured BizInsight's caching service to restrict users from accessing data, you will need to add the user to the security table in EAS to grant them rights to the companies to which they should have access.

If you are not sure if you are using this capability, go to the server where the caching service is installed and browse to its installation directory. If it was installed to the default path, that directory is C:\Program Files\BizNet Software\BizNet Service or C:\Program Files (x86)\BizNet Software\BizNet Service if the server is 32-bit.

Open the file named "BizNetWCFSserviceHost.exe.config" with Notepad and locate the SecureMode setting. If it is set to True, security is enabled and all new users must be granted rights to the companies from which they should be able to retrieve data.

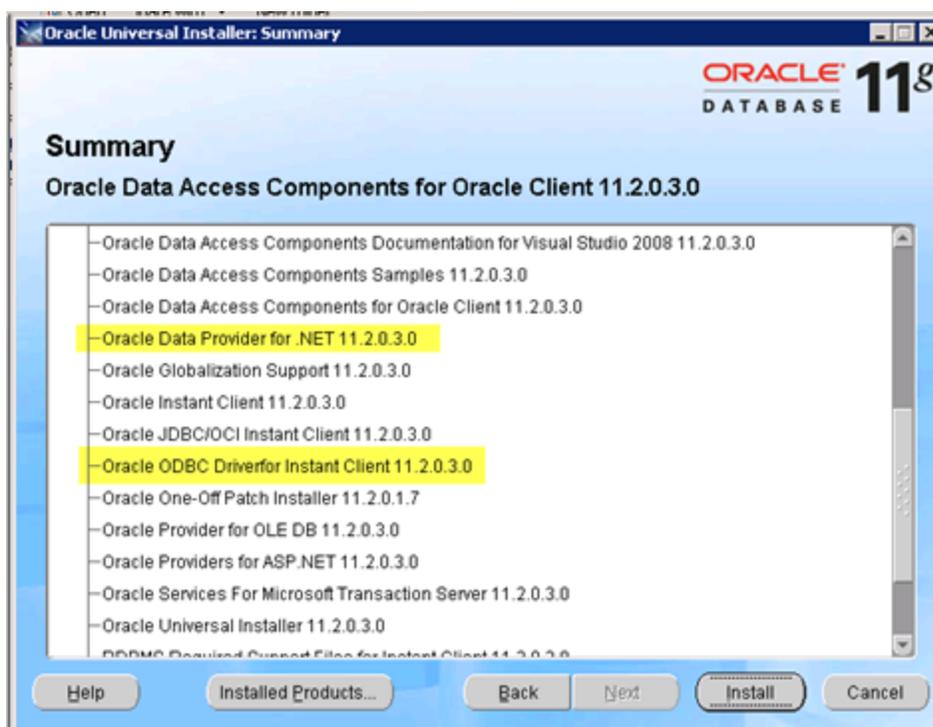
```
<value><value>/20</value></value>
</setting>
<setting name="SecureMode" serializeAs="String">
  <value>True</value>
</setting>
```

Use the following script to insert new records into the CRYSTAL_USER_COMPANY table in the EAS database. Adjust the script to provide the EAS database name, the user's Windows login id for the **userid** value and the company code to which they should be given access.

```
INSERT INTO [EAS_Database_Name] . [dbo] . [CRYSTAL_USER_COMPANY]
([USER_ID], [COMPANY_CODE])
VALUES
('userid', 'companycode')
GO
```

Step 6: Install Oracle Data Access Components (ODAC)

If your accounting system is using an Oracle database, you must install the Oracle ODBC driver and ODP.Net on each client workstation in order for BizInsight to be able to retrieve data from the Oracle database. If your accounting system does not use an Oracle database, this step can be skipped.



The version shown in the screenshot is for illustration only.
Install the ODAC version appropriate for your Oracle database



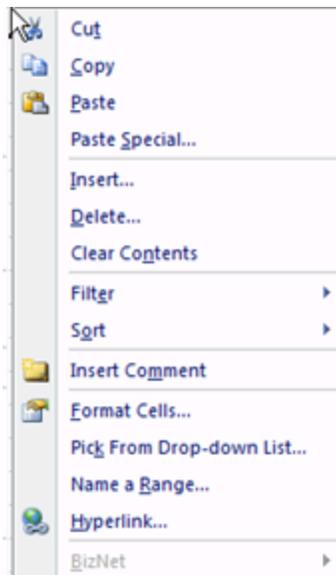
IMPORTANT

When installing the Oracle Client, it is insufficient to install the Runtime Engine as that does not install the Oracle ODBC driver.

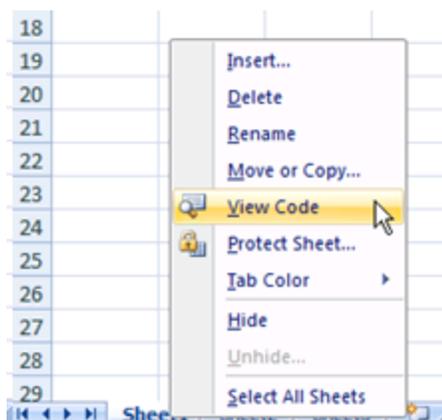
Step 7: Install BizInsight

IMPORTANT If you are using BizInsight in a Terminal Services/Citrix environment, do not perform the following installation steps because BizInsight is already installed on the server. Instead, log onto the Terminal Services/Citrix server as the new user, browse to the reg5 subdirectory of the BizInsight installation folder and double-click the file named "**Register BizInsight for Excel xxxx OnDemand.bat**". Move to the next step, "Configure BizInsight".

1. **If** you are upgrading from the earlier, BizExcelerator version, uninstall the previous BizInsight installation from **Control Panel > Programs and Features**.
2. The right-click menu for the old BizExcelerator version must be removed before installing the new product. If you are a new installation or upgrading from the BizInsight 5.5 version, go to the next step. Otherwise do the following:
 - a. Open Excel.
 - b. Right-click on a cell to verify that the BizExcelerator right-click menu is still present.



- c. Right-click on the Sheet name and choose **View Code**.



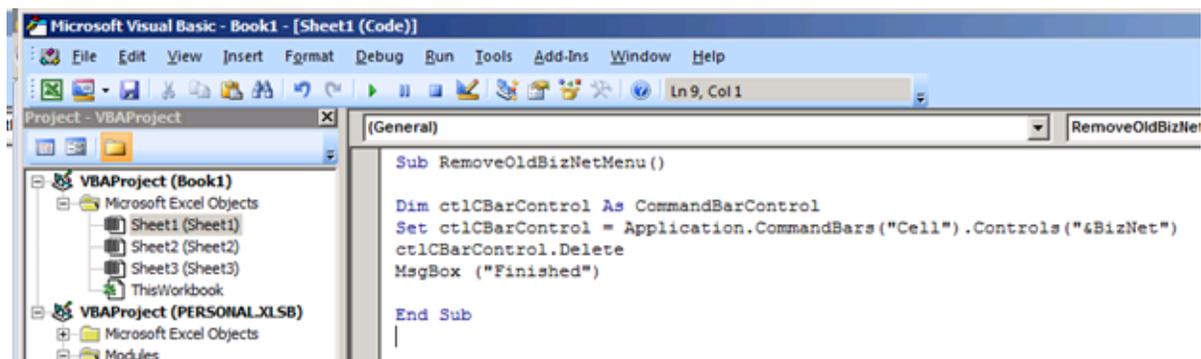
- d. Copy and paste the following text into the right pane.

```
Sub RemoveOldBizNetMenu ()

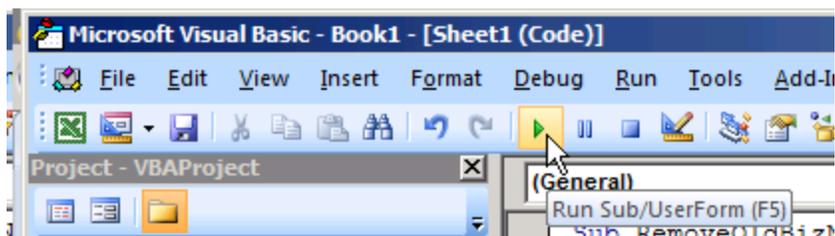
Dim ctlCBarControl As CommandBarControl
Set ctlCBarControl = Application.CommandBars("Cell").Controls("&BizNet")
ctlCBarControl.Delete
MsgBox ("Finished")

End Sub
```

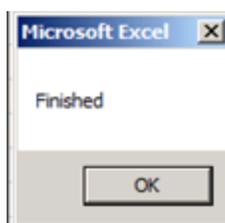
Make sure the script looks as shown below and correct any extra line returns.



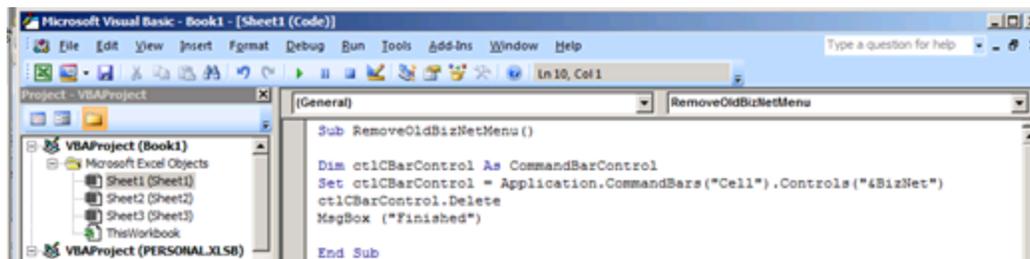
- e. Click on the Run Sub button to run the macro.



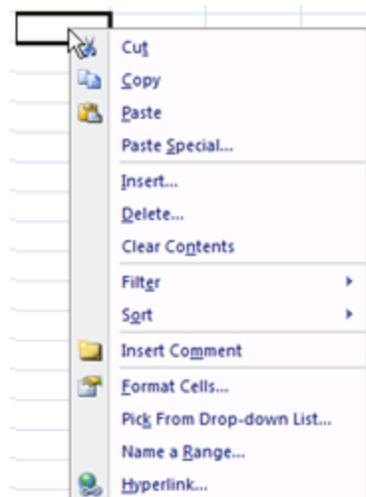
- f. Click **OK** when the Finished message is displayed.



- g. Close the Visual Basic Dialog.



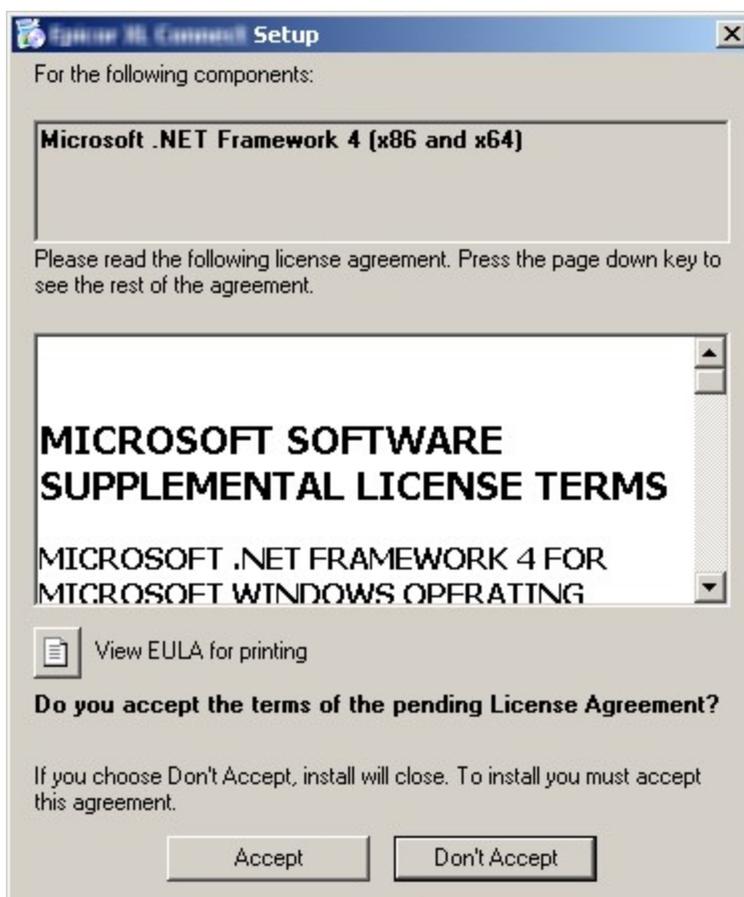
- h. Right-click on a cell again to confirm the BizNet menu is removed.



3. Locate the BizInsight product installation files that you downloaded from the portal site and extract the contents.
4. Extract the .zip contents to any directory that is accessible from the client workstation.
5. Double-click the **Setup.exe**.

NOTE As of the 5.0.35.2 release, there is a single Setup.exe for all supported Office versions.

6. The installation will check to see if Microsoft .Net Framework 4.0 is installed. If not installed, the following dialog will display. Click **Accept**.



- The installation will then check to see if the Microsoft Office Primary Interop assemblies for the installed Excel version are installed as well as a specific Microsoft Update that is necessary for proper Excel add-in functionality. If not found, the following dialog will display. Click **Install**.



8. The splash dialog will open. Click **Next** to continue.



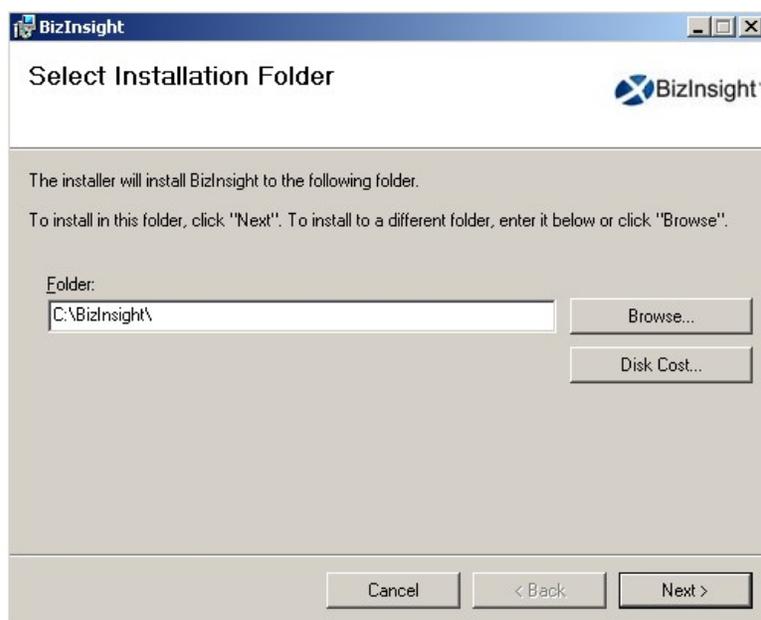
- The Welcome dialog will open. Click **Next** to continue.



- The **License Agreement** dialog will open. Read through the agreement and if you agree with the terms, click the **I agree** radio button and then click **Next**.

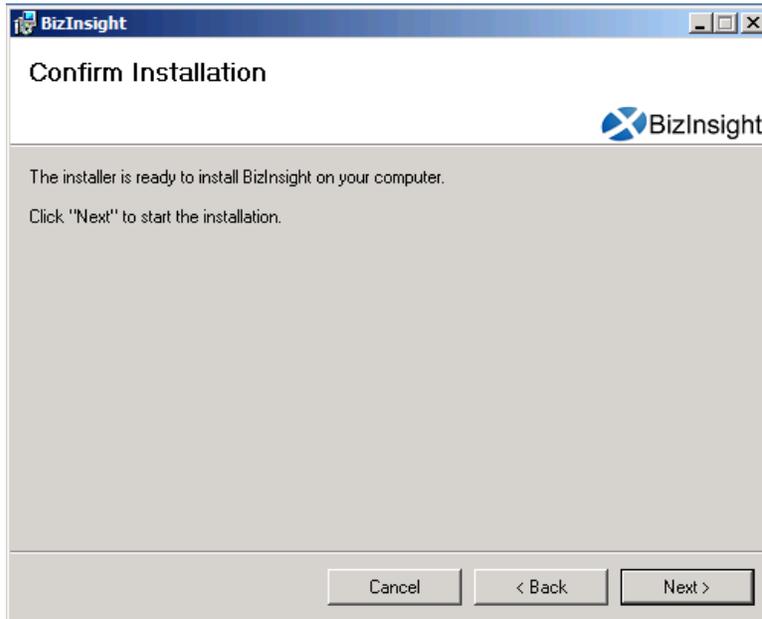


11. Accept the default installation directory or browse to a location of your choice. Click **Next**.

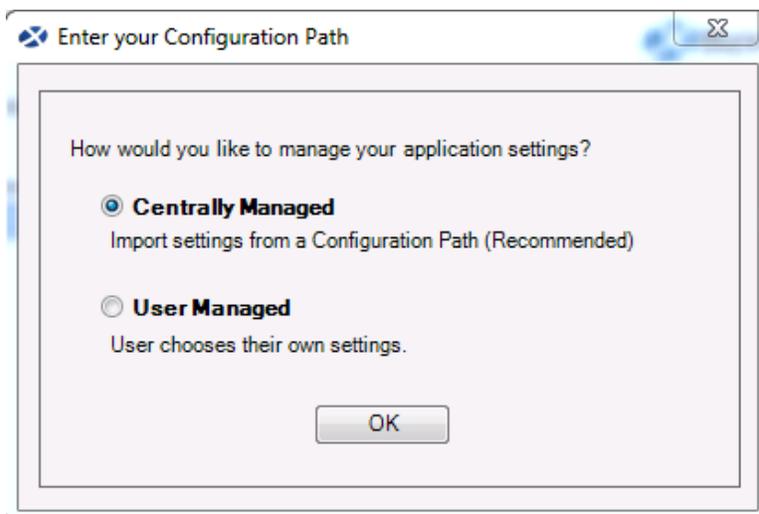


12. If you are installing a BizInsight version older than , the installer will prompt for some key paths. Leave the fields blank and click **Next**. You will enter these values in the next section.

- Click **Next** at the **Confirm Installation** dialog.

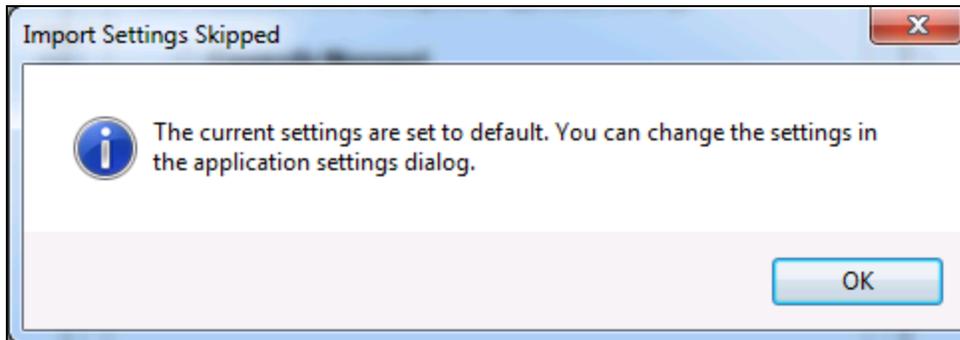


- When installing BizInsight versions or higher, the **Enter your Configuration Path** dialog will open. If you have an app.config file produced by a Content Installer in your Configuration Path, leave the default option. Click **OK**.



If you do not have a Content Installer created app.config file, choose the **User Managed** radio button to proceed. You will need to supply the key paths when

configuring BizInsight for the user. When you click OK, the Import Settings Skipped dialog will open. Click **OK**.

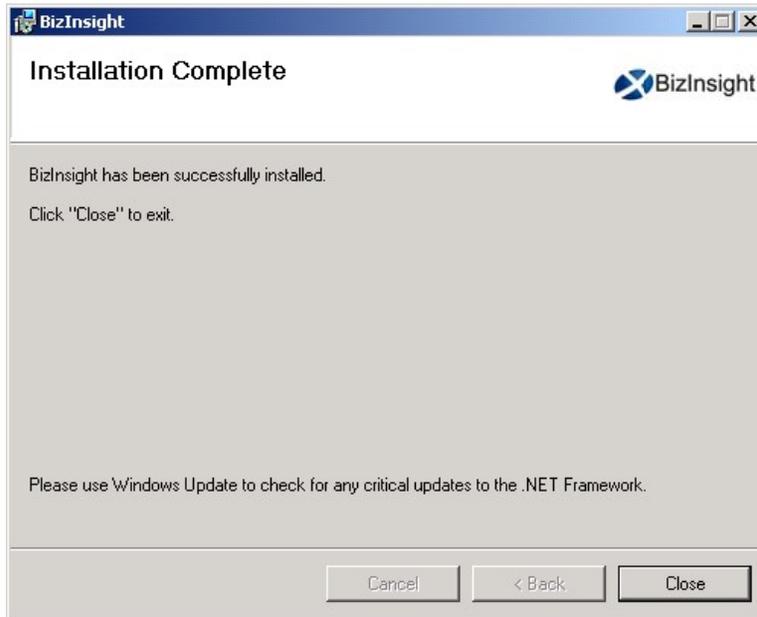


15. If the Centrally Managed option was selected, click the Browse button and browse to the Configuration Path shared directory.



Click **Import Settings**.

16. Once the installation completes, click **Close**.

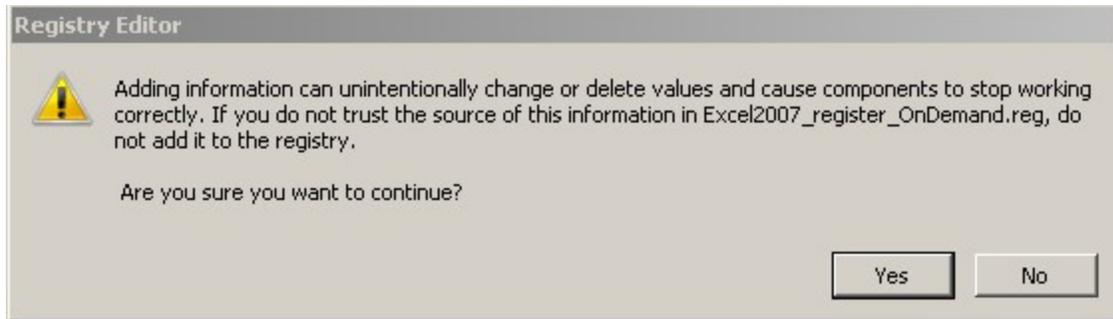


Installing BizInsight for the Non-Administrative User

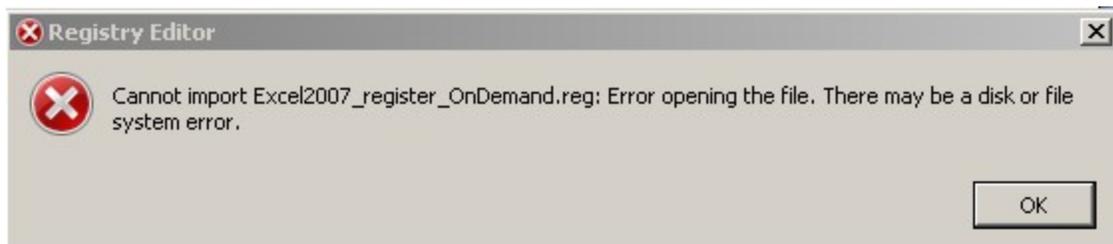
If you have installed BizInsight while logged in as a different login than the BizInsight end user, you will need to perform the following additional steps in order to get BizInsight functioning for this user.

1. After completing all of the preceding steps to install BizInsight, log out of the client workstation and log back in as the BizInsight user.
2. Open Windows Explorer and browse to the reg5 subdirectory of the BizInsight local directory.
3. Double-click the file named "**Register BizInsight for Excel xxxx OnDemand.bat**", where "xxxx" is the Excel version (2003, 2007, 2010 or 2013).

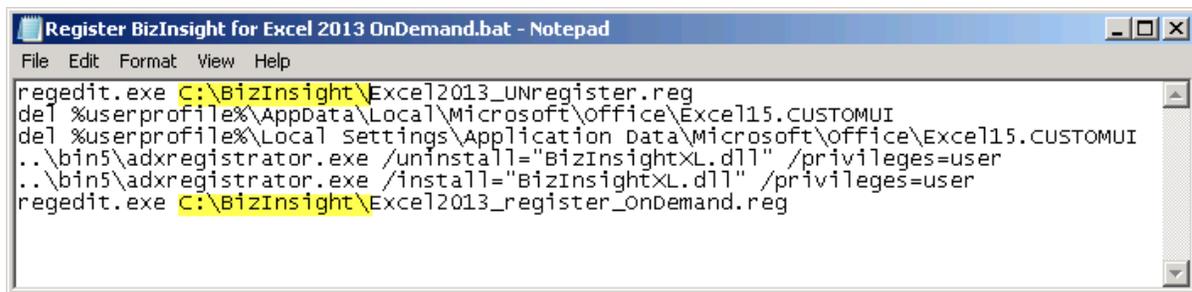
4. If the workstation is running Windows 7 with User Account Control (“UAC”) enabled, click Yes to all UAC pop-ups. Click Yes or OK to all dialogs that open.



IMPORTANT If you get the following error when running the .bat file, you must edit the file named “Register BizInsight for Excel xxxx OnDemand.bat” to add the file directory path to each regedit.exe line.



To edit the "Register BizInsight for Excel xxxx OnDemand.bat", open it with Notepad and add the file directory path to each regedit.exe entry in the file. For example:



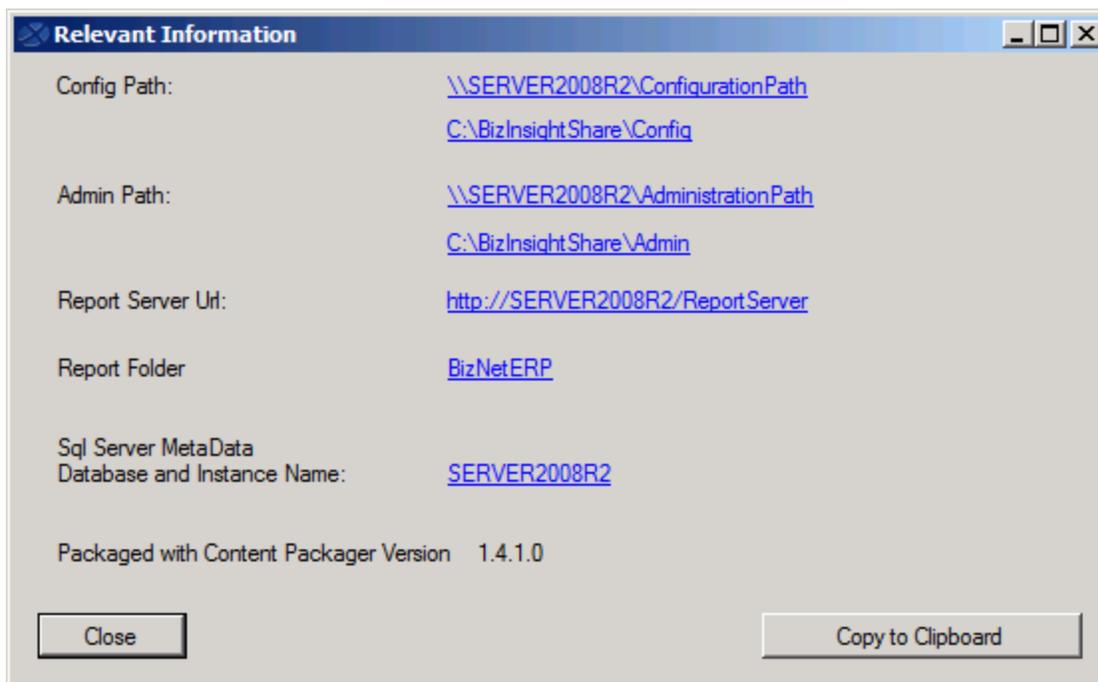
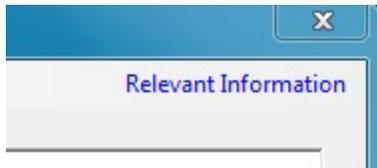
```
Register BizInsight for Excel 2013 OnDemand.bat - Notepad
File Edit Format View Help
regedit.exe C:\BizInsight\Excel2013_UNregister.reg
del %userprofile%\AppData\Local\Microsoft\Office\Excel15.CUSTOMUI
del %userprofile%\Local Settings\Application Data\Microsoft\Office\Excel15.CUSTOMUI
..\bin5\adxregistrator.exe /uninstall="BizInsightXL.dll" /privileges=user
regedit.exe C:\BizInsight\Excel2013_register_OnDemand.reg
```

5. When the .bat file completes, start Excel and continue with the next steps.

Step 8: Configure BizInsight

1. **If you used the Content Installer to create an app.config file to use for Centrally Managed settings, you can skip this step.**

You will need to know the paths for the BizInsight implementation. Go to the server and start the Content Installer. Click on the Relevant Information link and make a note of the values shown.



If you cannot find the Content Installer on the server, you can get the necessary information from an existing BizInsight workstation, if one exists. Open Excel on a workstation where BizInsight is installed, click on the **Application Settings** button on the BizInsight ribbon and copy the values provided for the **Configuration Path**, the **Administration Path**, the **Default Reporting Services Server** and the **Default Reporting Services Folder Name** fields.

Use settings from Configuration Path.

BizInsight Settings

Configuration Path

Folder or network share where the BizInsight.biz and BizInsightDB.biz are stored.

Administration Path

Network share where your license file and user files are stored.

Options

Enable Formula Editor Pop-up Persist SQL Authentication

Enable Refresh Timer

Enable Cache Information Dialog

Enable XMLFAST

Enable Startup Messages

Use Advanced Expression Editor

Reporting Services Default Settings

Default Reporting Services Server

Format: "http://server/reportserver"

Default Reporting Services Folder Name

Full name of the folder on the reporting services server where the RDLs are deployed.

Click on the **Configure SQL** button to see if the client workstation is configured for

SQL metadata databases. If this dialog is configured, make a note of the values.



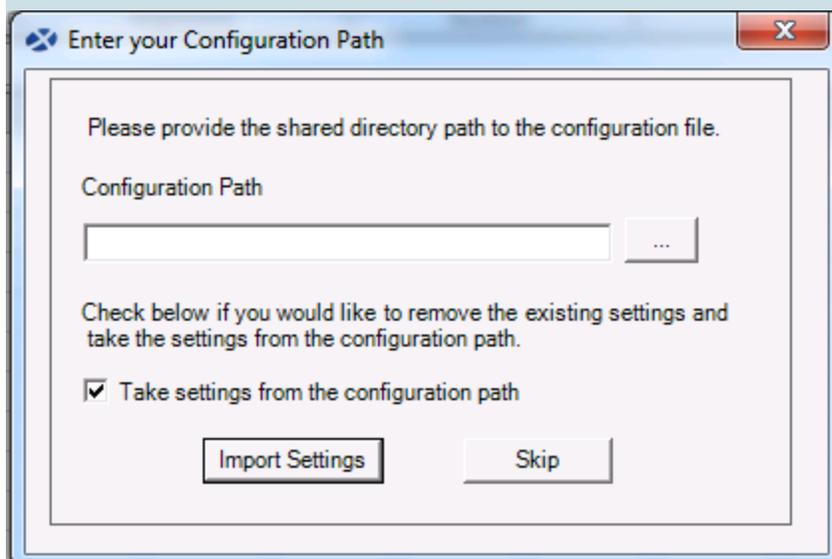
2. While logged in as the BizInsight end user, open Excel.

The next steps depend on whether you chose the Centrally Managed option at the end of the BizInsight installation or chose to manage your settings at the user level. Click [here](#) to jump to the Centrally Managed steps.

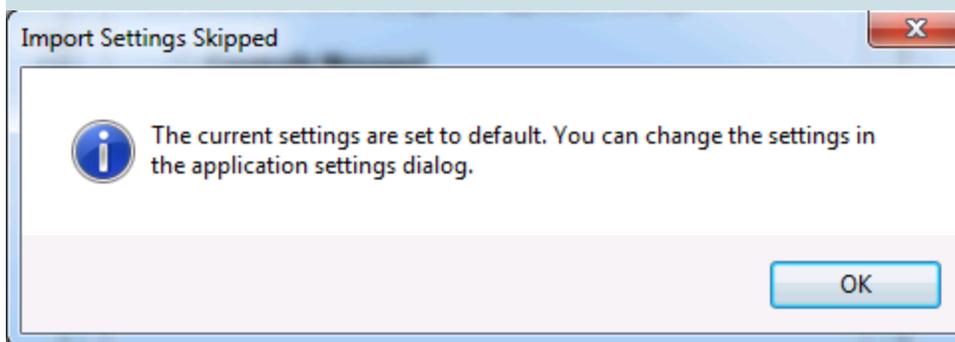
If you installed an older BizInsight version that prompted for these paths during installation, follow the User Managed Settings Steps.

User Managed Settings Steps (blue background)

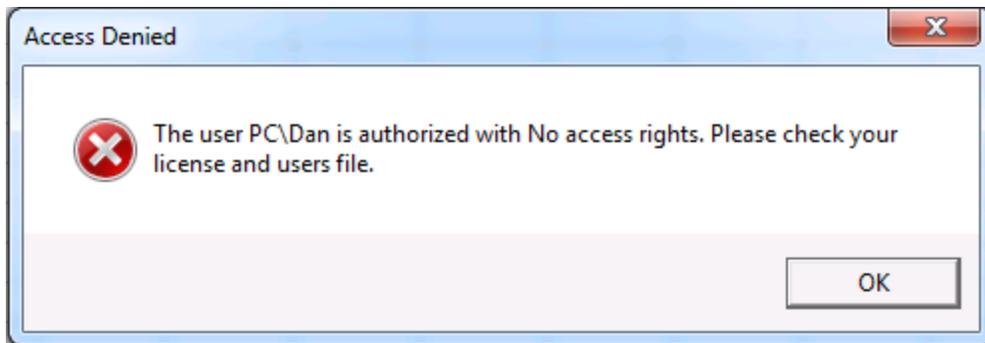
3. If you receive the following dialog, click **Skip**.



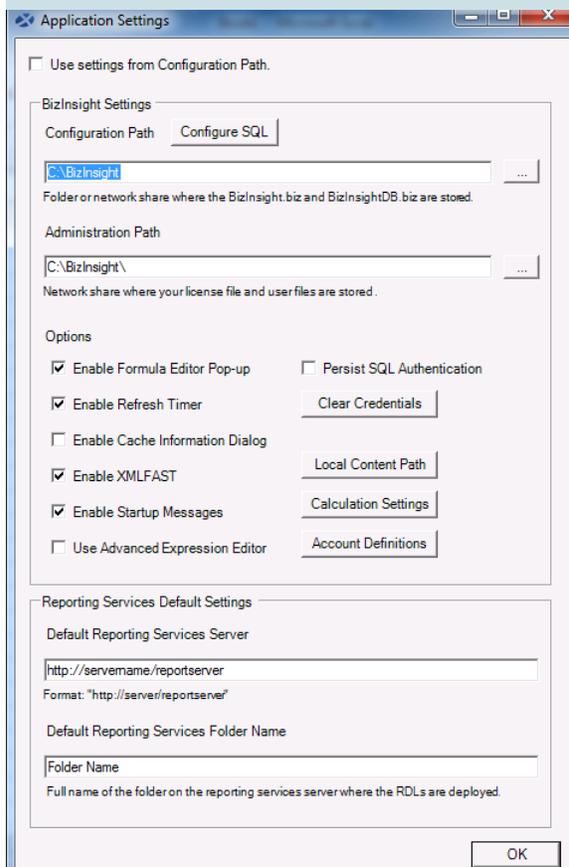
Click **OK** to the next message regarding the use of default settings.



If you receive the following error, go back to the server and grant the user BizInsight security rights, see "Assign BizInsight Security to Users" on page 81.



4. The Application Settings dialog will open. If it does not open, click on the Application Settings button on the BizInsight ribbon.



Perform the following steps:

a. Provide Essential Paths

You must provide values for the **Configuration Path**, the **Administration Path**, the **Default Reporting Services Server** and the **Default Reporting Services Folder Name** fields.

Application Settings

Use settings from Configuration Path.

BizInsight Settings

Configuration Path

C:\BizInsight

Folder or network share where the BizInsight.biz and BizInsightDB.biz are stored.

Administration Path

C:\BizInsight\

Network share where your license file and user files are stored.

Options

Enable Formula Editor Pop-up Persist SQL Authentication (Session Only)

Enable Refresh Timer Enable Startup Messages

Enable Cache Information Dialog

Enable XMLFAST

Use Advanced Expression Editor

Reporting Services Default Settings

Default Reporting Services Server

http://servename/reportserver

Format: "http://server/reportserver"

Default Reporting Services Folder Name

Folder Name

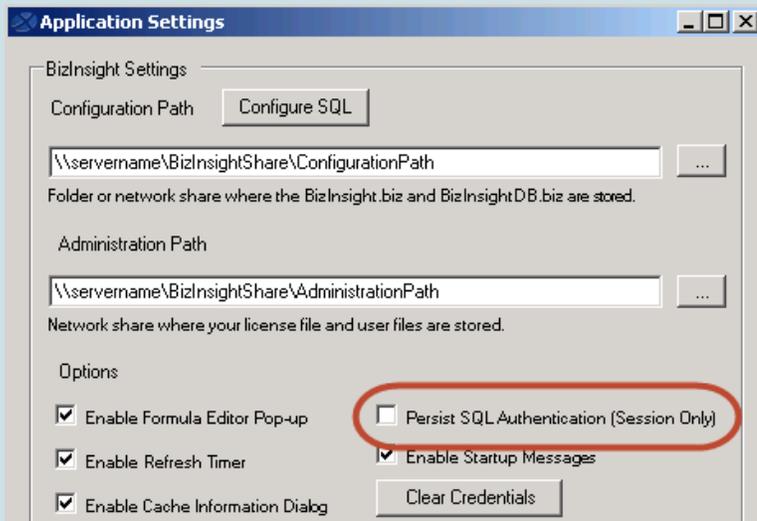
Full name of the folder on the reporting services server where the RDLs are deployed.

You should have looked up these values at the start of this section.

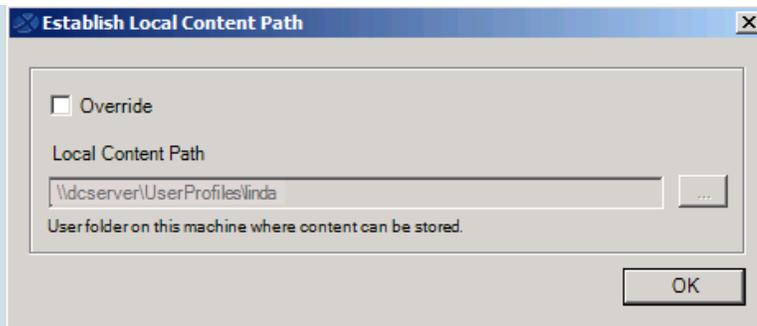
- b. **SQL Credentials Steps** (skip if not using SQL credentials for data retrieval from the Accounting database)

If you configured the Reporting Services data source to use SQL credentials during content deployment, check the **Persist SQL Authentication** checkbox.

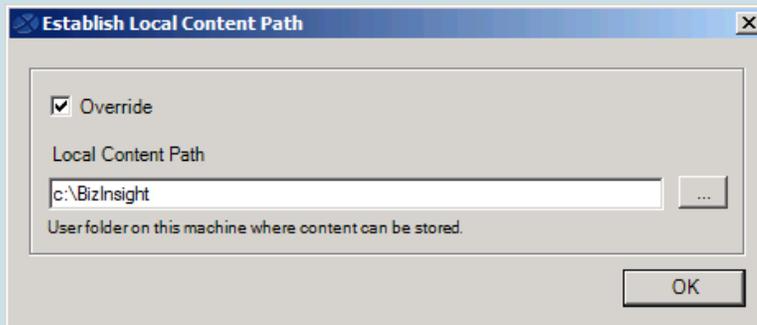
Note This step only applies to the Analysis Sets feature.



- c. Click on the Local Content button. If the default path displayed is not a local directory, click on the Override checkbox and change the path to a directory that resides on the local computer, C:\BizInsightEpicor XL Connect is suggested.



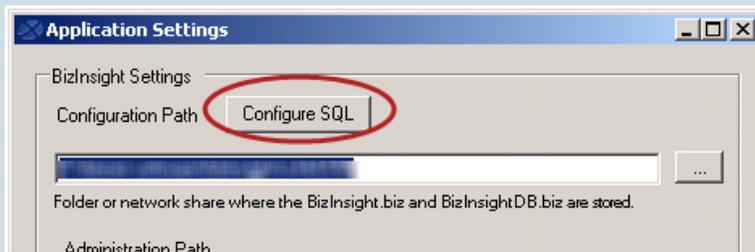
Re-directed profile directory



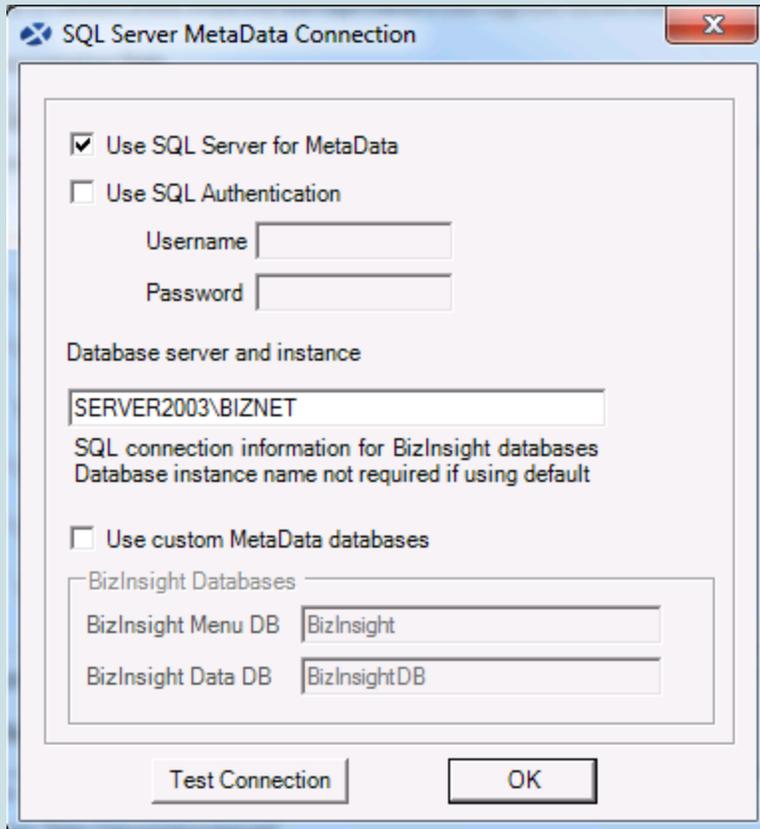
Override to local directory

d. **SQL MetaData Databases**

If the BizInsight SQL metadata databases (BizInsight and BizInsightDB) were implemented during the server setup, click on the **Configure SQL** button. If the **Application Settings** dialog does not have this button, BizInsight is not the right version. You need to uninstall and install the most current BizInsight version.



- i. Check the **Use SQL Server for MetaData** checkbox and enter the SQL Server name, and instance name if applicable, where the BizInsight SQL databases (BizInsight and BizInsightDB) are located. The format should be *servername\instancename*.



The screenshot shows a dialog box titled "SQL Server MetaData Connection". It has a blue title bar with a close button. The main area contains several options and input fields:

- Use SQL Server for MetaData
- Use SQL Authentication
 - Username
 - Password
- Database server and instance
 -
 - SQL connection information for BizInsight databases
 - Database instance name not required if using default
- Use custom MetaData databases
 - BizInsight Databases
 - BizInsight Menu DB
 - BizInsight Data DB

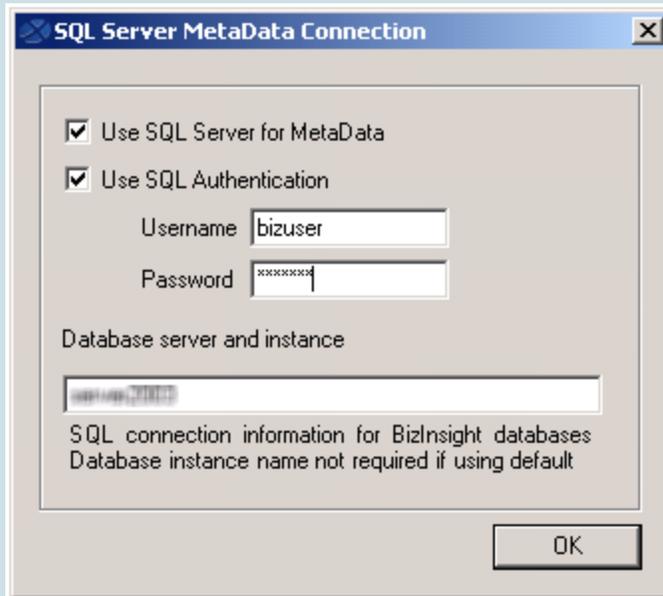
At the bottom, there are two buttons: "Test Connection" and "OK".

NOTE The **Use custom MetaData databases** option will only be used in situations where BizInsight is installed in a hosted environment and is shared by multiple customers.

- ii. If users will be connecting to the SQL metadata databases using SQL authentication, check the **Use SQL Authentication** checkbox. You will get the following Warning message indicating that the credentials provided will be stored in clear text in a configuration file in the user's profile.



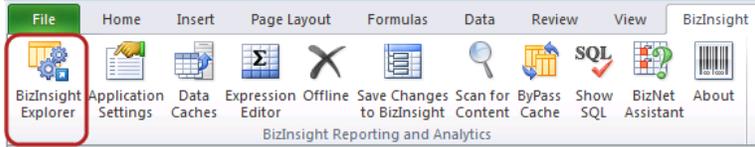
Click **OK** and enter a valid SQL login and password with appropriate rights to the SQL MetaData databases. Click **OK**.



IMPORTANT This dialog allows you to use a different method of connectivity to the BizInsight MetaData databases than for the accounting system database.

- e. Close the **Application Settings** dialog.
5. Re-start Excel.

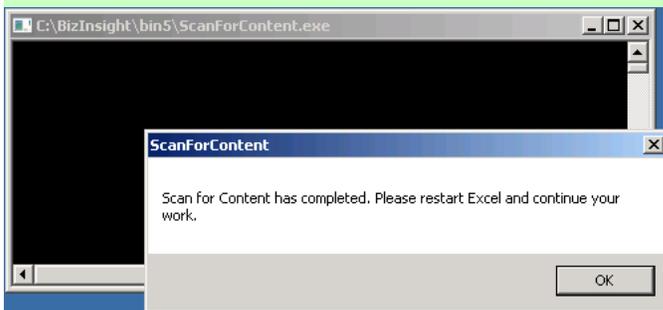
- Click on the BizInsight tab and then click on the BizInsight Explorer button to load the Navigation Pane.



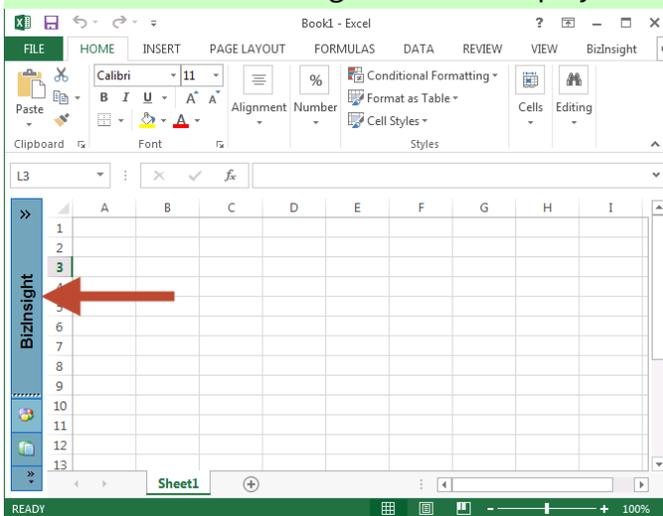
- Skip to the next white background step.

Centrally Managed User Settings (green background)

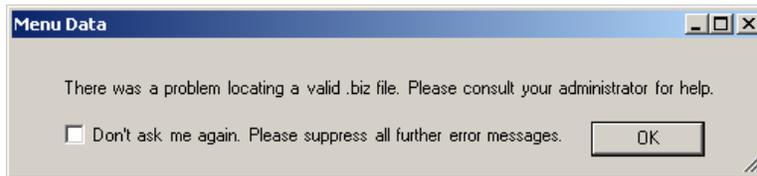
- If you are using Centrally Managed settings, you will see Scan for Content run when you first open Excel. Click **OK** and restart Excel.



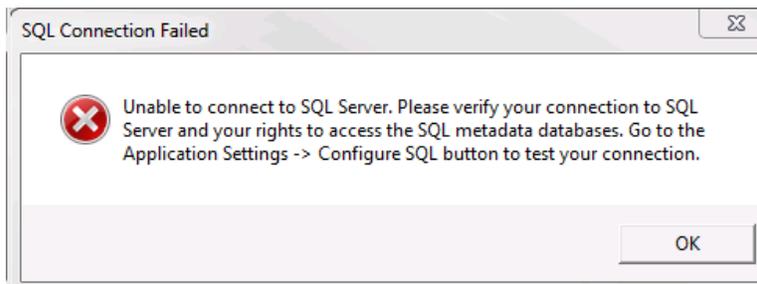
- You should see the Navigation Pane display on the left side in Excel.



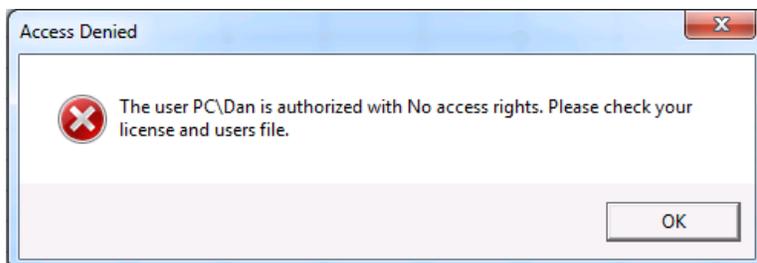
10. If you receive the following error, go back to your server and make sure all of the configuration changes have been made for XMLFast (see "CheckTCP/IP, SQL Browser and Firewall Exceptions" on page 59) and make sure the end user has the db_datareader and db_datawriter permissions to the SQL metadata databases (BizInsight and BizInsightDB).



Click **OK** to this message as well as the one that follows:



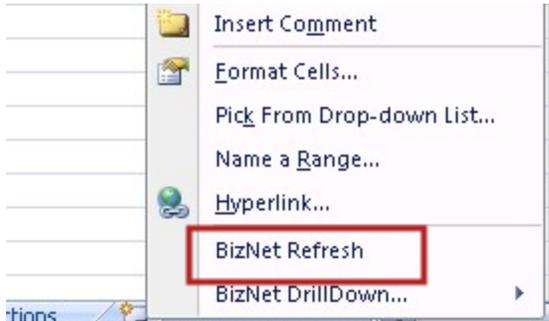
If you receive the following error, go back to the server and grant the user BizInsight security rights, see "Assign BizInsight Security to Users" on page 81.



You are now ready to test the installation. Proceed to "Verify the BizInsight Installation".

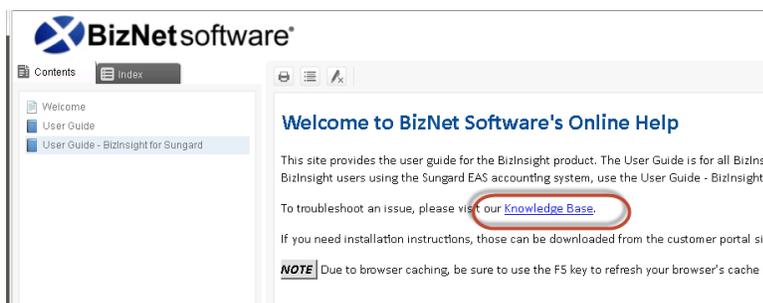
Step 9: Verify the BizInsight Installation

Locate an existing BizInsight report to use to verify the installation. Open the report, right-click anywhere in the report and choose **BizNet Refresh**.



If you receive an error, click on the BizNet Assistant button on the BizInsight ribbon, choose the **Resolve Issues automatically** option and click **Next**. Once that process finishes, refresh the report again to see if the issue is resolved.

If the issue is still not resolved, you can contact BizNet Software Support using the BizNet Assistant's **Contact Support** option. If it is after hours or you want to continue to try to troubleshoot, you can get to the BizNet knowledge base by choosing the **Online documentation** option in BizNet Assistant. Once at the online documentation site, click on the link to the BizNet knowledge base.



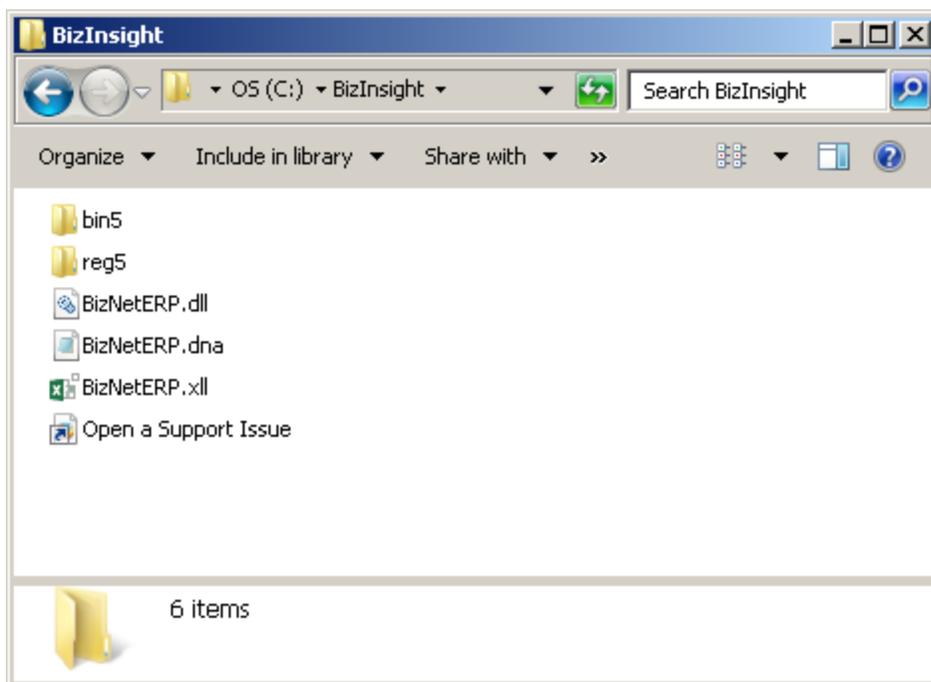
Appendices

Manually Installing BizContent Add-ins	48
CheckTCP/IP, SQL Browser and Firewall Exceptions	59
Assign BizInsight Security to Users	81

Manually Installing BizContent Add-ins

If you are using a BizInsight version that is older than 5.5 SP1, you will need to register the BizContent add-ins manually in Excel. BizNet Software recommends upgrading to the latest BizInsight version but if that is not possible, perform the following steps:

1. Browse to the BizInsight shared directory and copy the content add-in files (.dll, .xll and .dna) to the directory to which you installed the BizInsight client. If you are using separate config and admin folders, the client add-in files will be in the config folder.



The remaining steps vary based on the Office version installed:

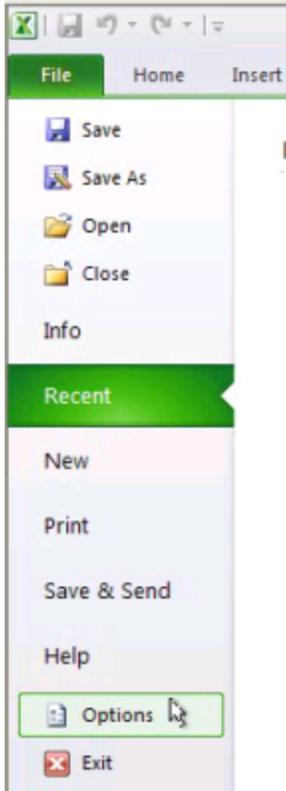
[Office 2010/2013 steps](#)

[Excel 2007 steps](#)

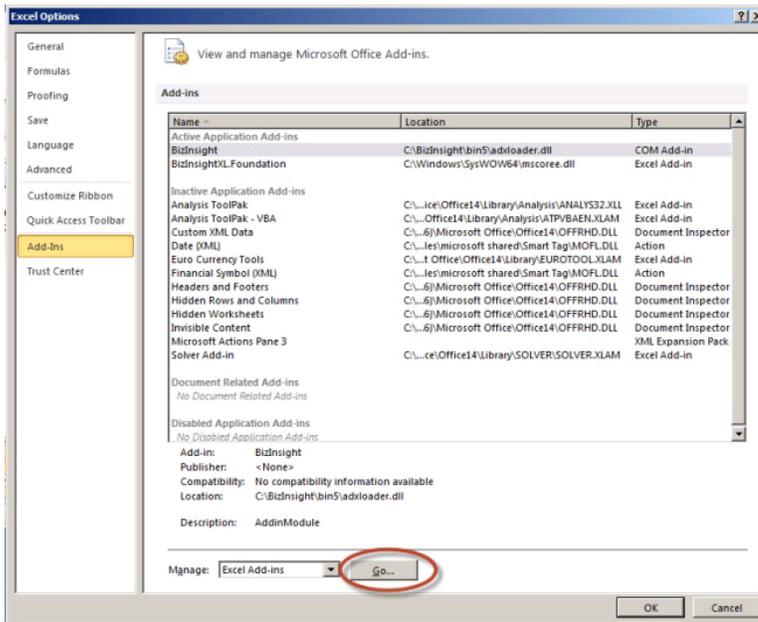
[Excel 2003 steps](#)

Excel 2010/2013

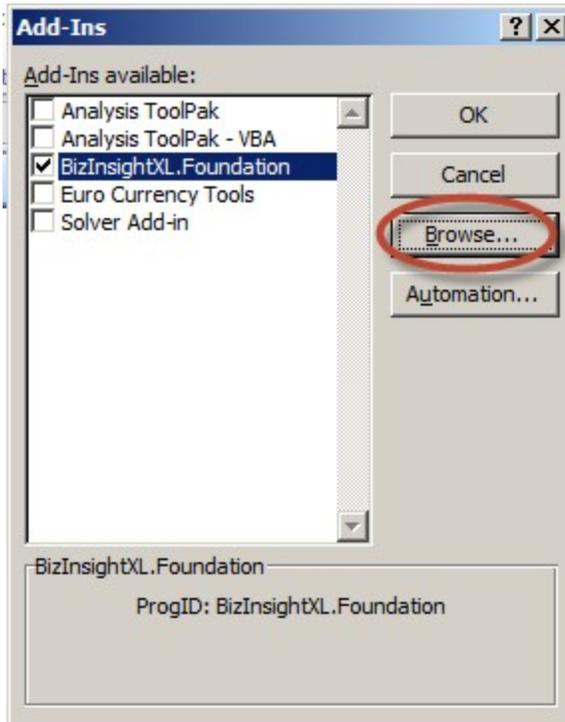
1. Click on **File > Options**.



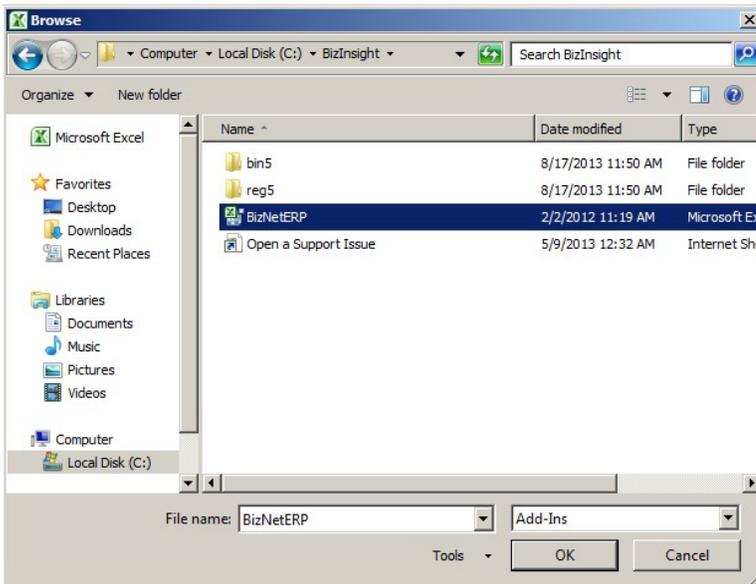
7. Click on **Add-ins** in the left pane and then click on **Go** at the bottom on the right pane.



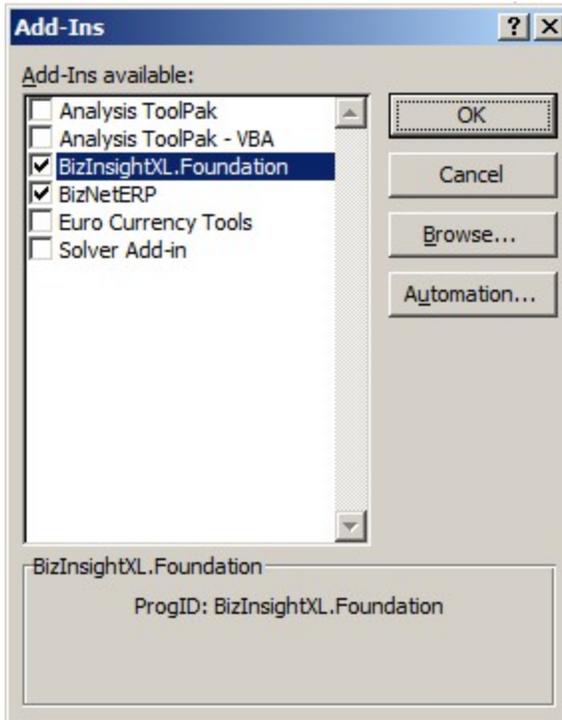
2. In the Add-ins dialog, click on the **Browse** button.



3. Browse to the directory to which you installed BizInsight and select the .xll file in that directory. Then click **OK**.



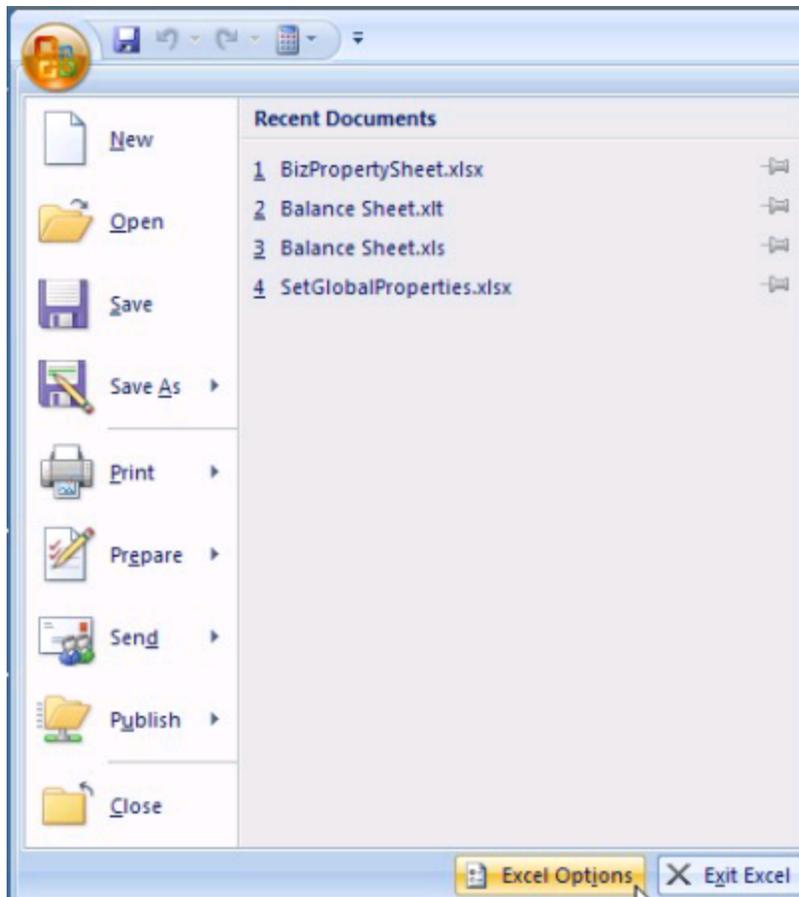
The Add-ins dialog should now look like the following:



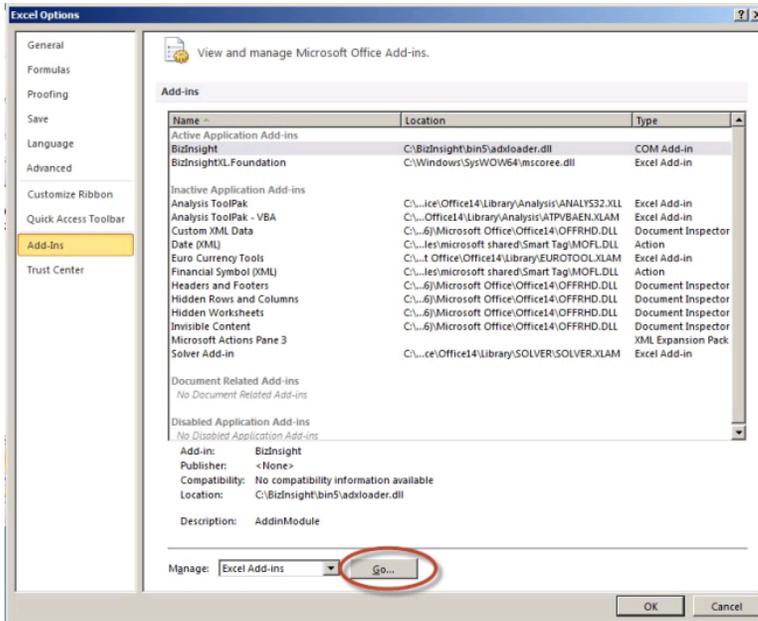
4. Click **OK**.

Excel 2007

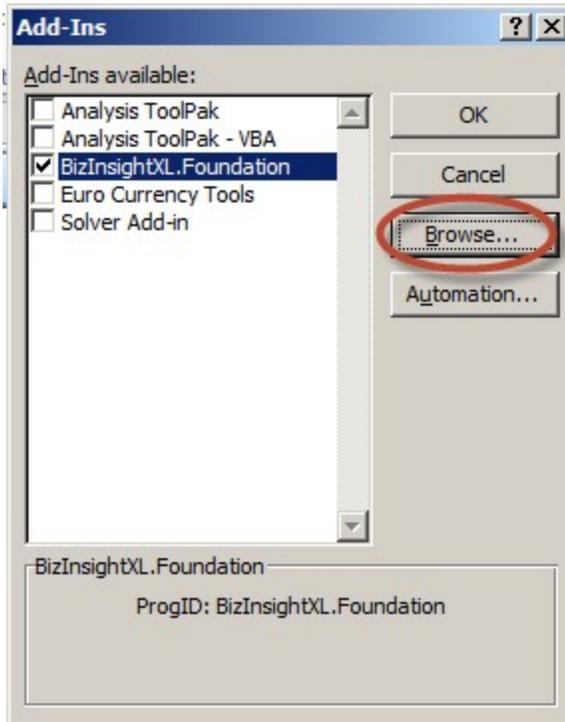
1. Click on the **Office** button and then click on the **Excel Options** button.



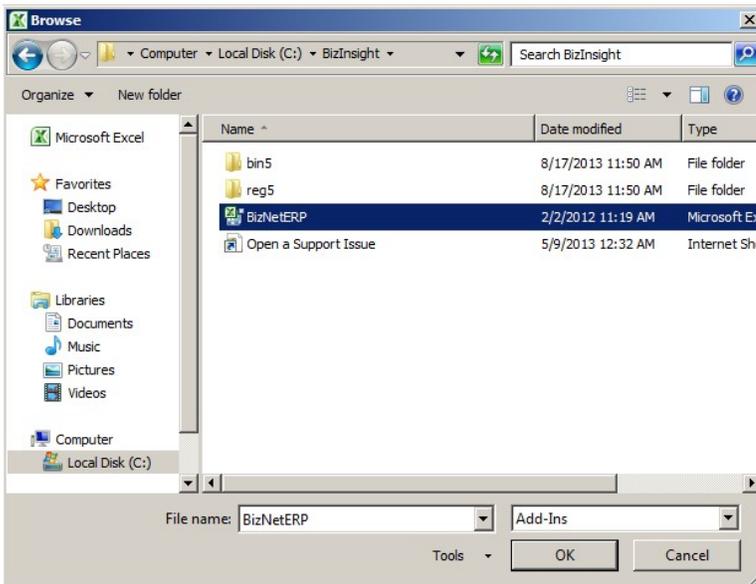
2. Click on **Add-ins** in the left pane and then click on **Go** at the bottom on the right pane.



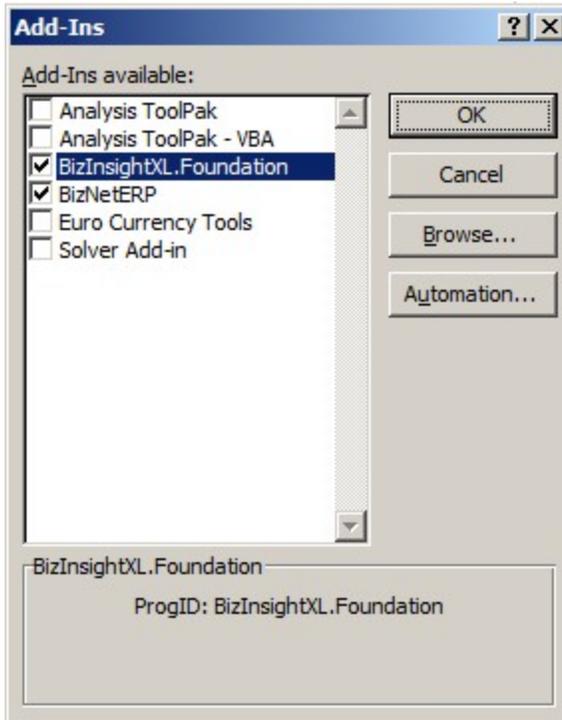
3. In the Add-ins dialog, click on the **Browse** button.



4. Browse to the directory to which you installed BizInsight and select the .xll file in that directory. Then click **OK**.



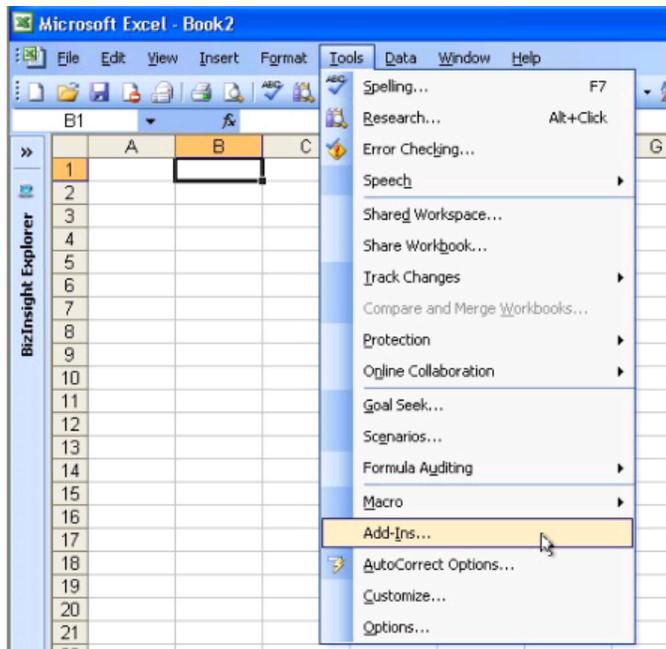
The Add-ins dialog should now look like the following:



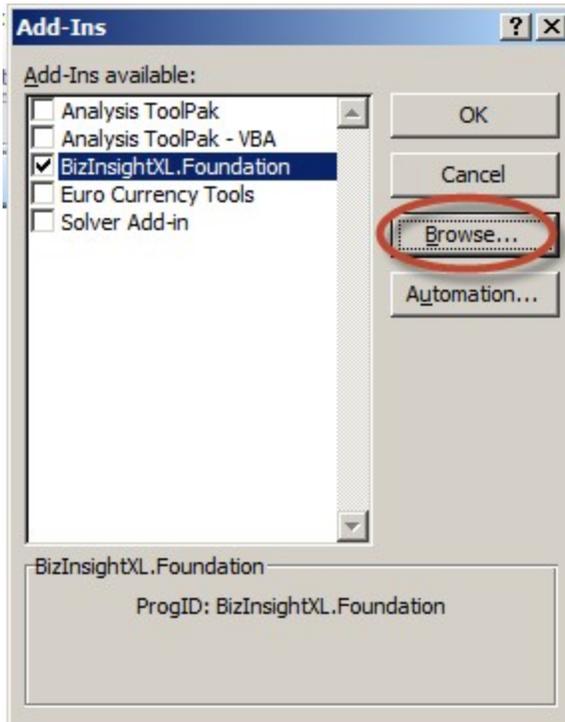
5. Click **OK**.

Excel 2003

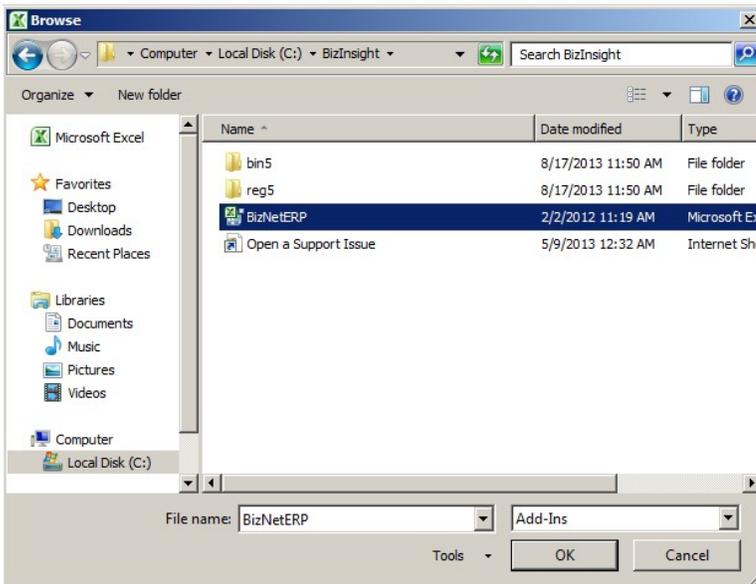
1. Click on **Tools > Add-Ins**



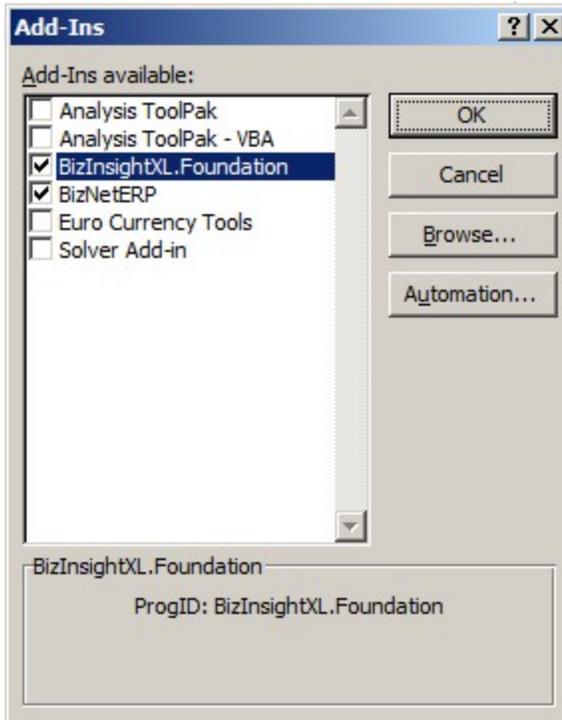
2. In the Add-ins dialog, click on the **Browse** button.



3. Browse to the directory to which you installed BizInsight and select the .xll file in that directory. Then click **OK**.



The Add-ins dialog should now look like the following:



4. Click **OK**.

CheckTCP/IP, SQL Browser and Firewall Exceptions

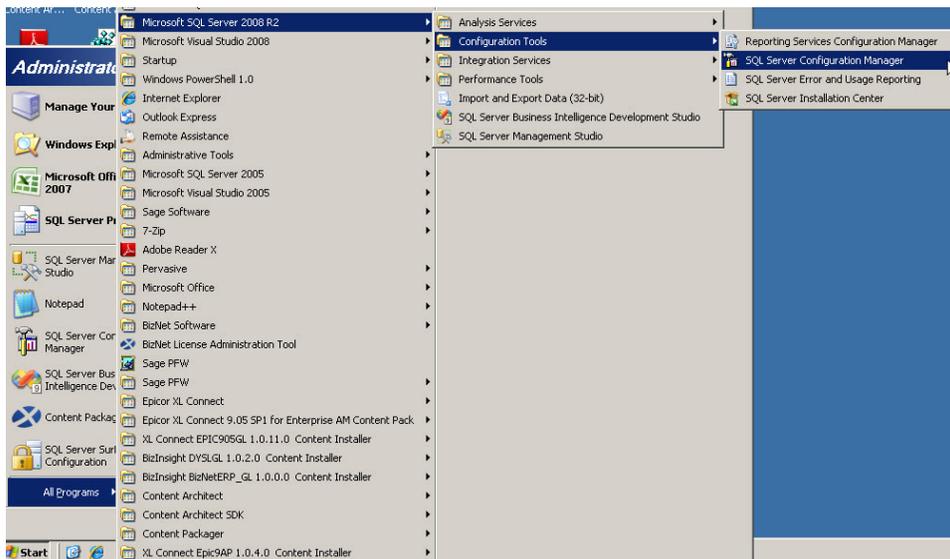
The XMLFast feature added in an earlier BizInsight build requires the following server configuration changes:

- The TCP/IP protocol must be enabled for SQL Server and the SQL Browser Service must be running. see "Enable TCP/IP" below.
- Server firewall exceptions must be added for TCP Port 1433, UDP Port 1434 and a program exception for sqlservr.exe. see "Add Windows Firewall Exceptions" on page 65

Customers are strongly encouraged to make these changes in order for the XMLFast feature to work. While the XMLFast feature can be turned off on the client workstation in Application Settings, doing so will result in significantly slower data retrieval times.

Enable TCP/IP

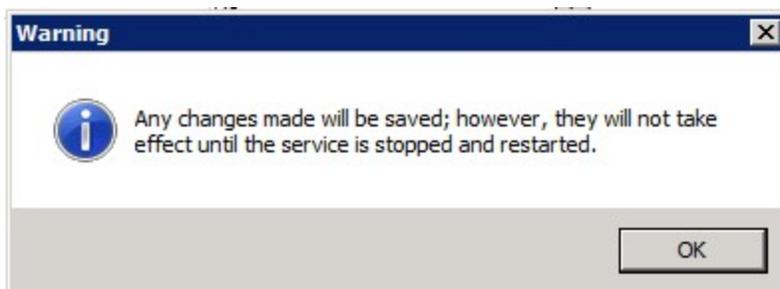
1. Click on **Start > All Programs > Microsoft SQL Server 2008 (2008 R2) > Configuration Tools > SQL Server Configuration Manager**.



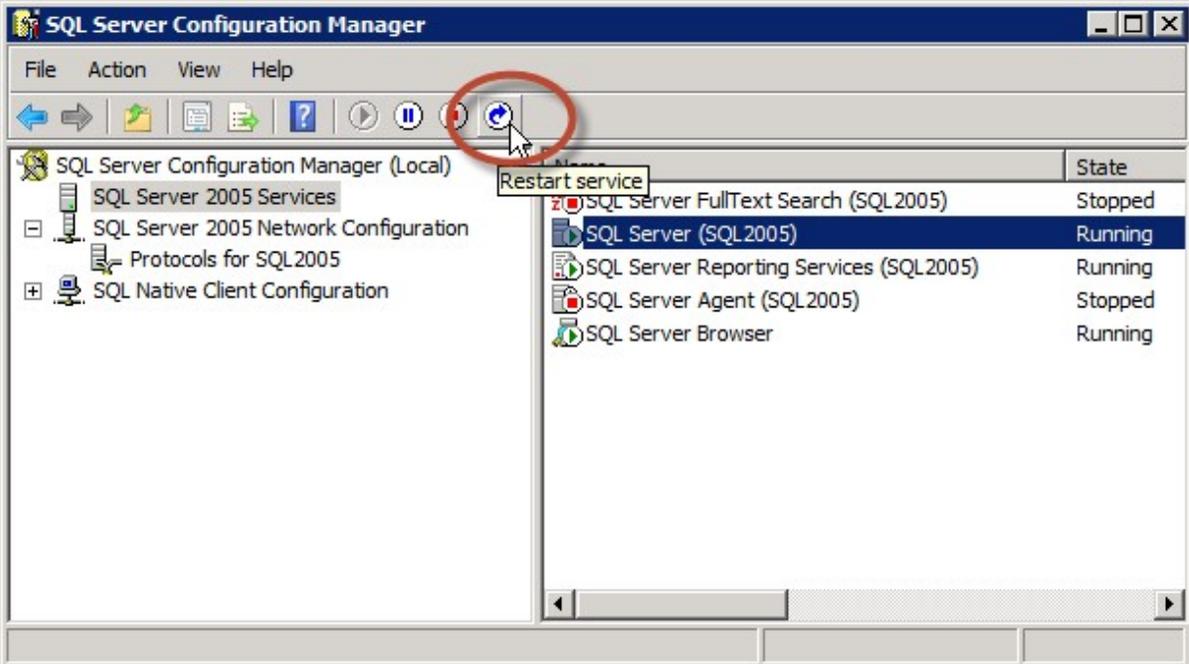
2. Expand **SQL Server Network Configuration** and select the **Protocols for InstanceName** that corresponds to the SQL Server instance that hosts the accounting system database.



3. Verify that the **TCP/IP** Protocol is "Enabled". If it is not enabled, double-click on the protocol and change its properties to enabled. You will receive a warning that the service will need to be stopped and restarted:



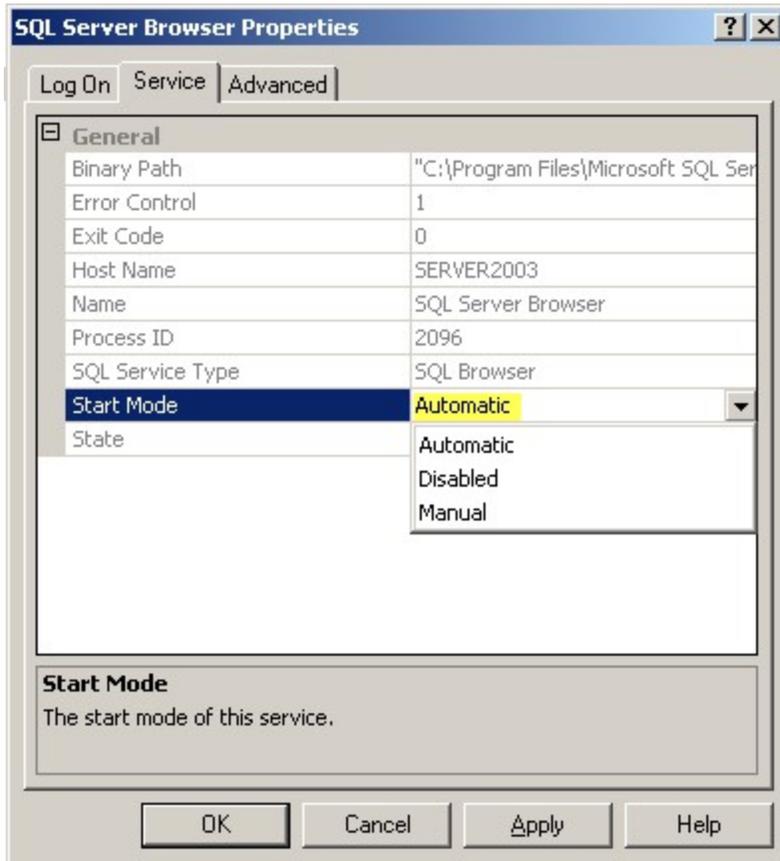
- 4. Go to the **SQL Server Services** section. Select the SQL Server service and click on the restart the service button.



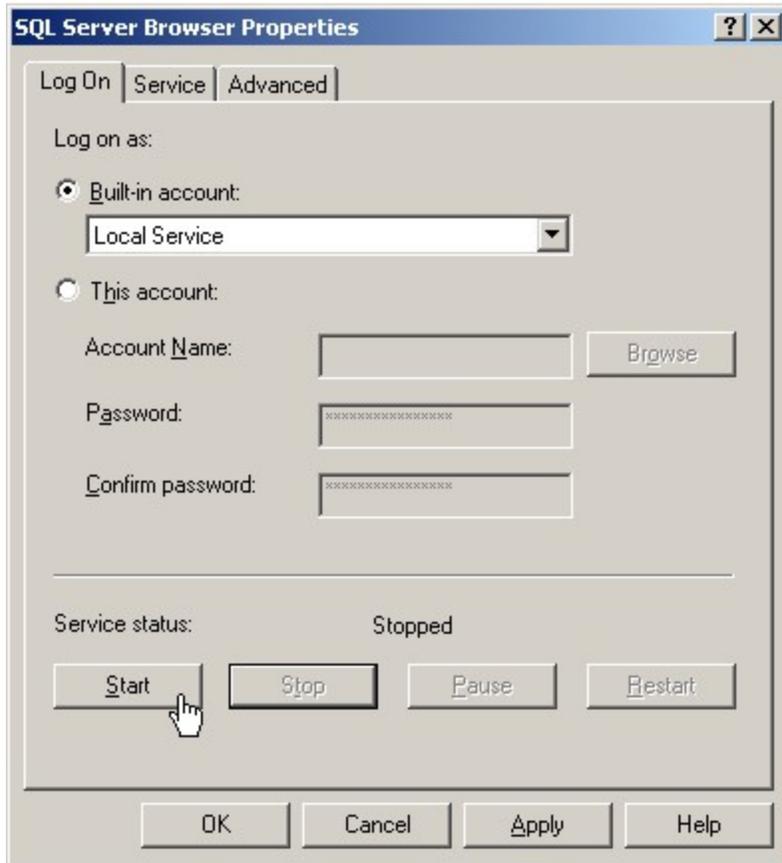
5. In the SQL Server Services section, verify that the SQL Server Browser service is started. If it is not, double-click on the service to open the service properties.



6. Click on the **Service** tab and make sure the **Start Mode** is set to "Automatic".



7. On the **Log On** tab, click on the **Start** button to start the service

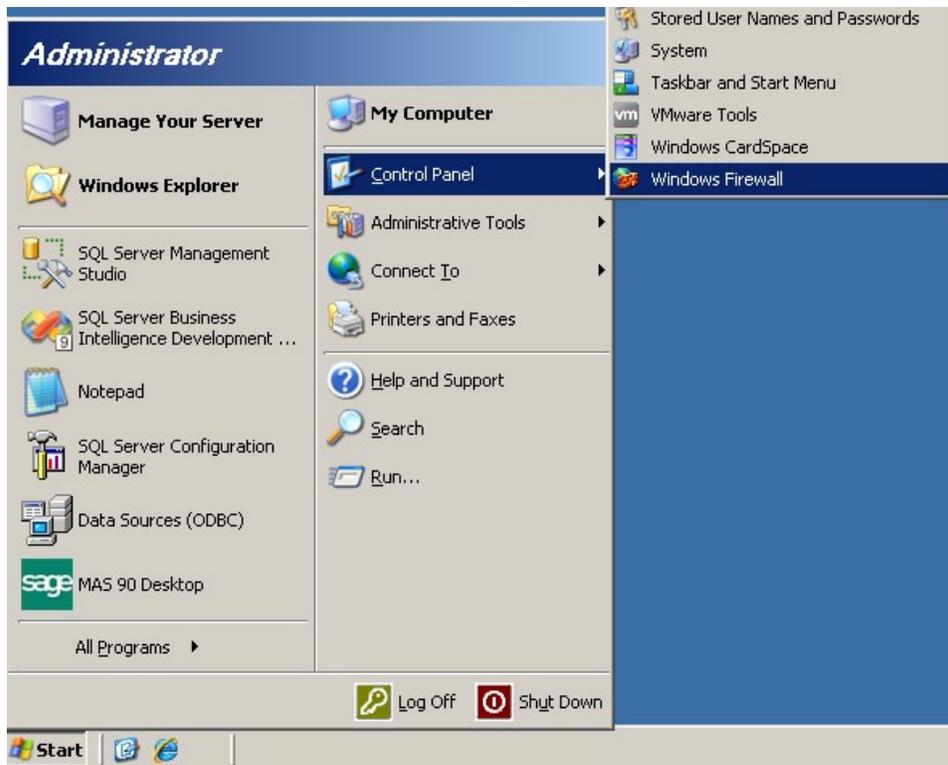


Add Windows Firewall Exceptions

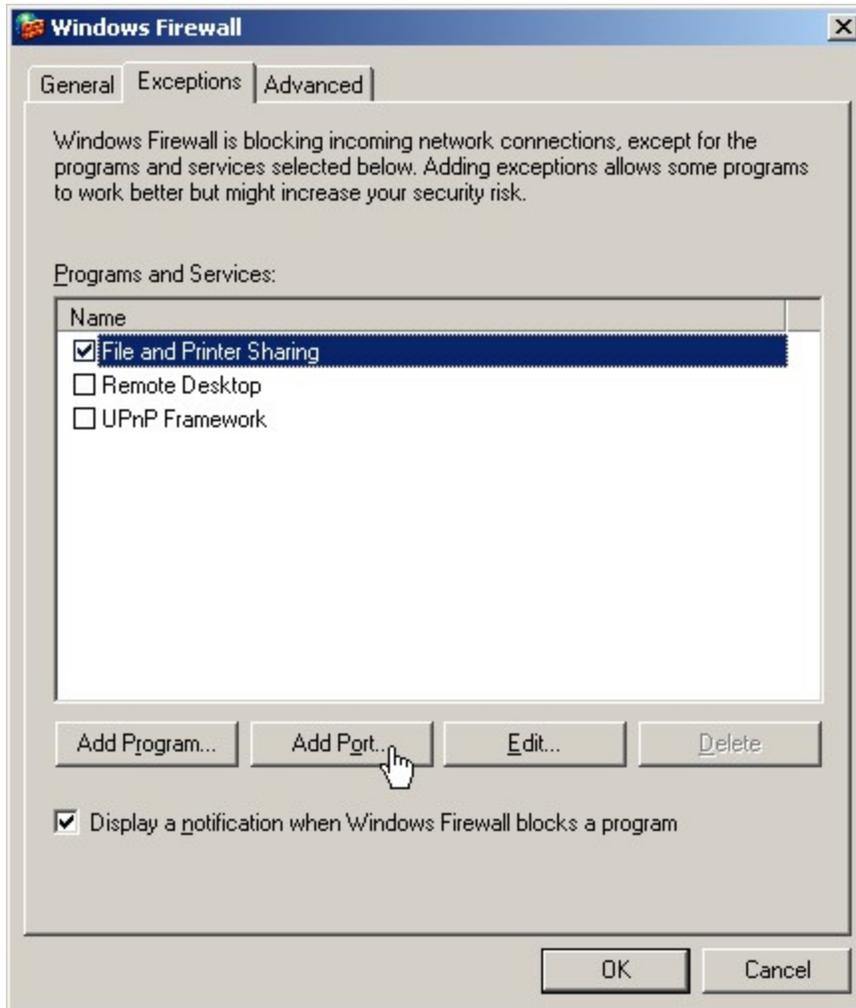
This step may not need to be performed if the Windows Firewall is turned off on the server.

Server 2003 (click [here](#) to go to the Server 2008 instructions)

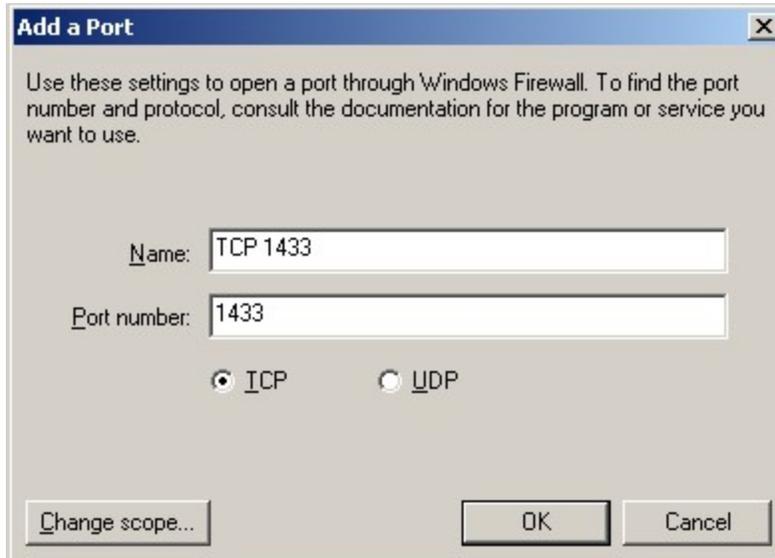
1. Click on **Start > Control Panel > Windows Firewall**



2. On the **Exceptions** tab, click the **Add Port** button.



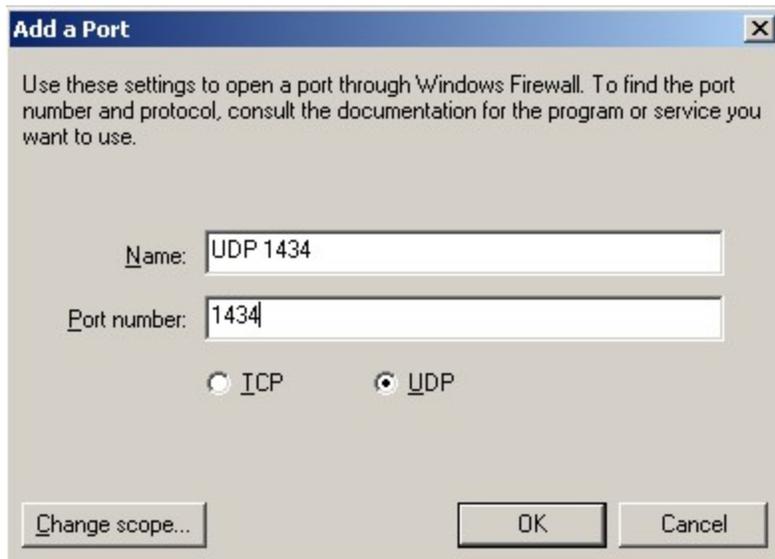
3. In the **Add a Port** dialog, enter a name for the exception entry and type "1433" for the port number. Click **OK**.



The screenshot shows the 'Add a Port' dialog box with the following fields and options:

- Name:** TCP 1433
- Port number:** 1433
- Protocol:** TCP UDP
- Buttons:** Change scope..., OK, Cancel

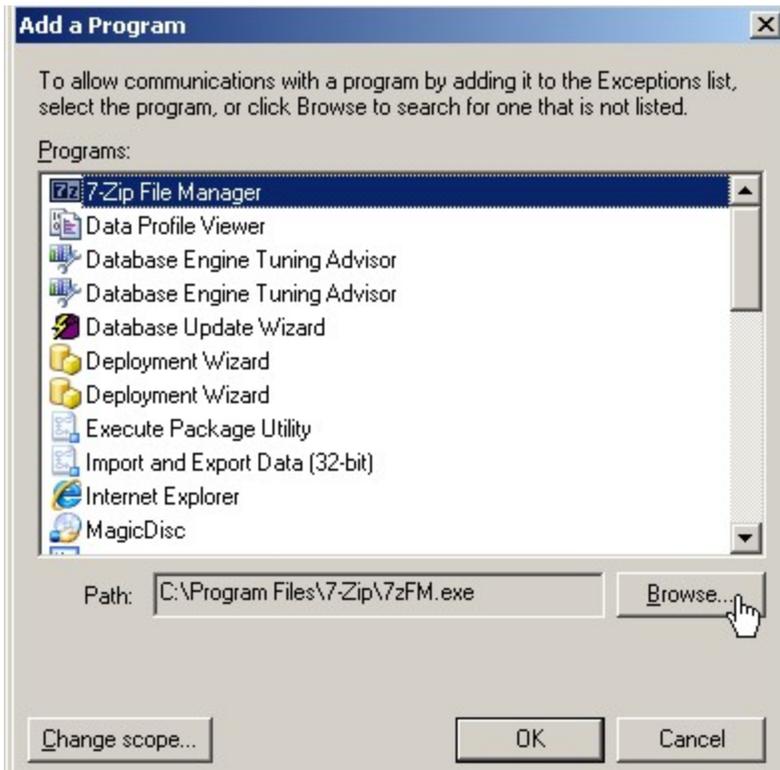
4. Add a second port exception for UDP 1434.



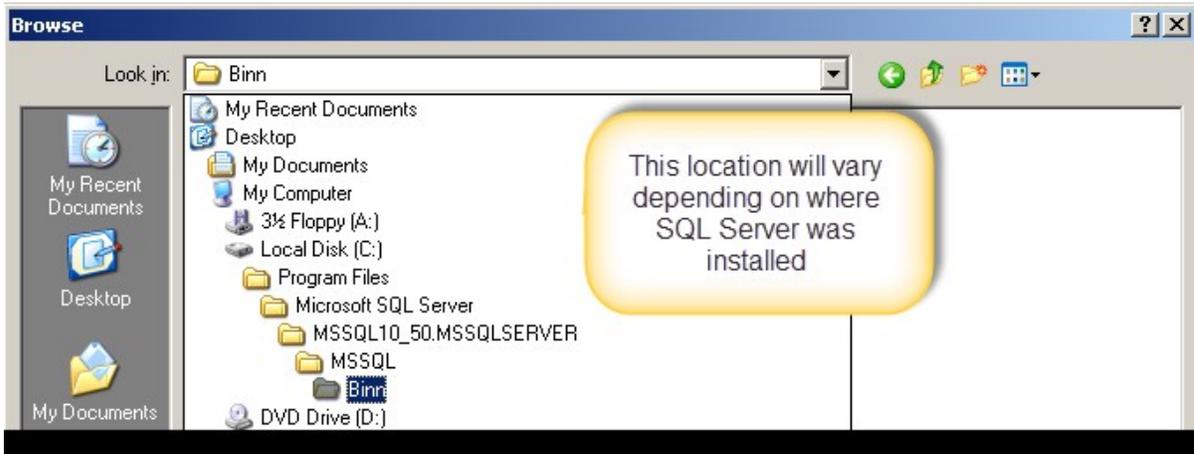
The screenshot shows the 'Add a Port' dialog box with the following fields and options:

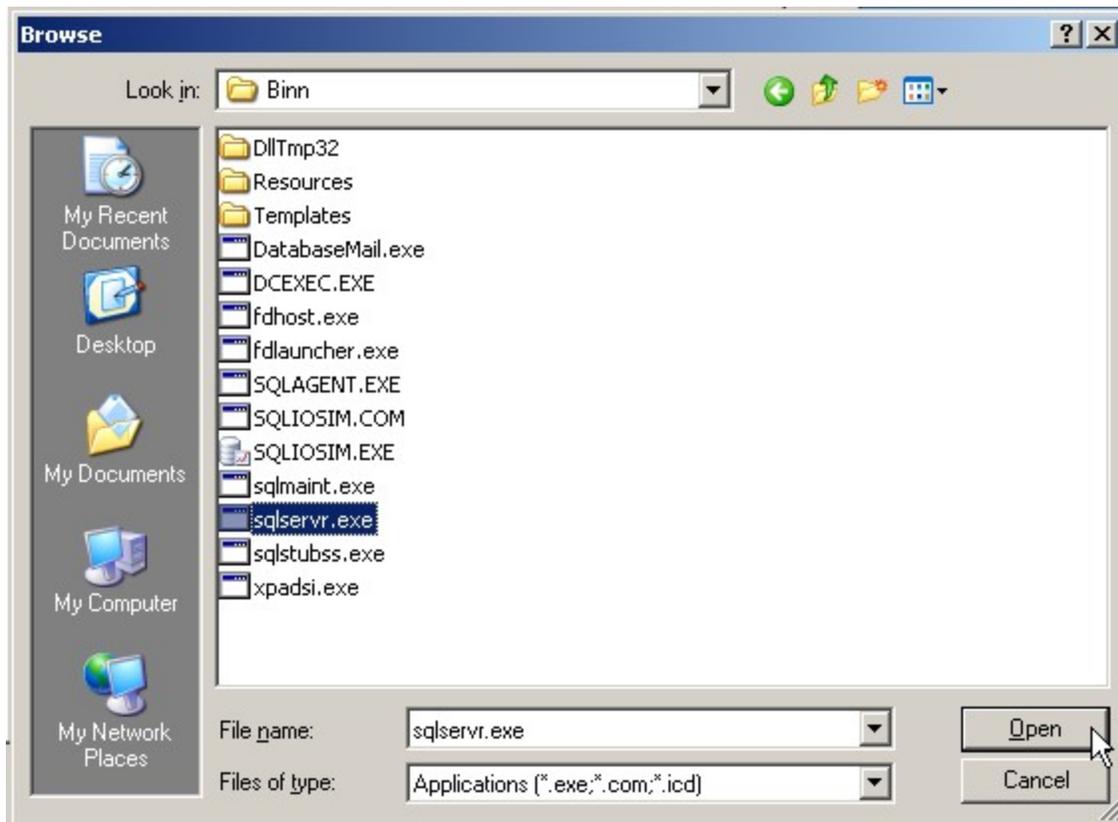
- Name:** UDP 1434
- Port number:** 1434
- Protocol:** TCP UDP
- Buttons:** Change scope..., OK, Cancel

5. Click the **Add Program** button then click the Browse button



6. Browse to the SQL Server installation's Binn directory and select **sqlservr.exe**.

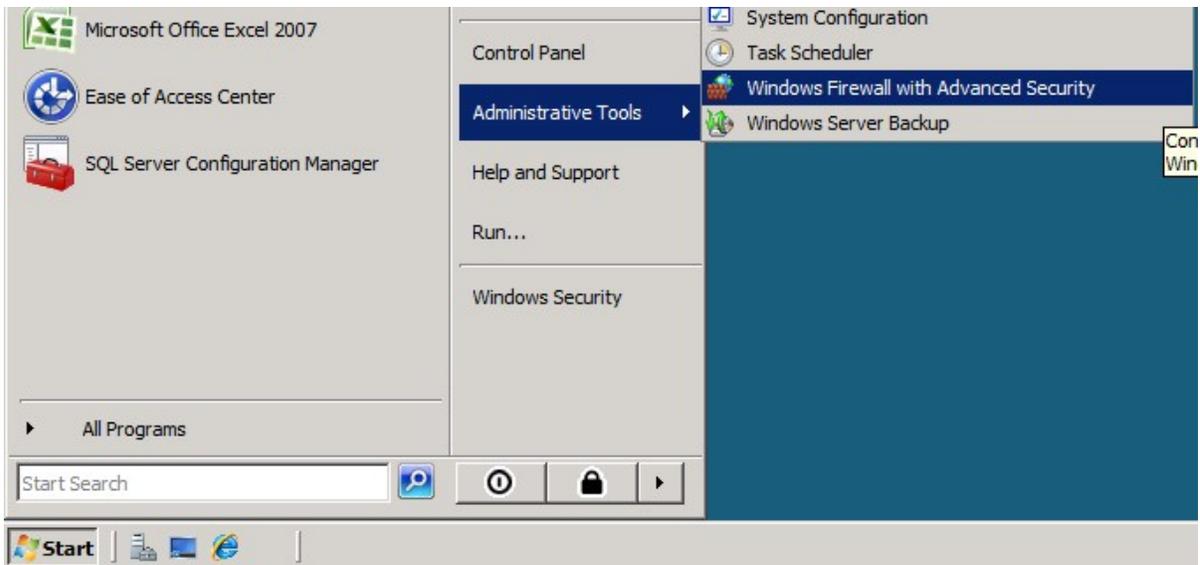




7. Close the Firewall dialog after making these additions.

Server 2008

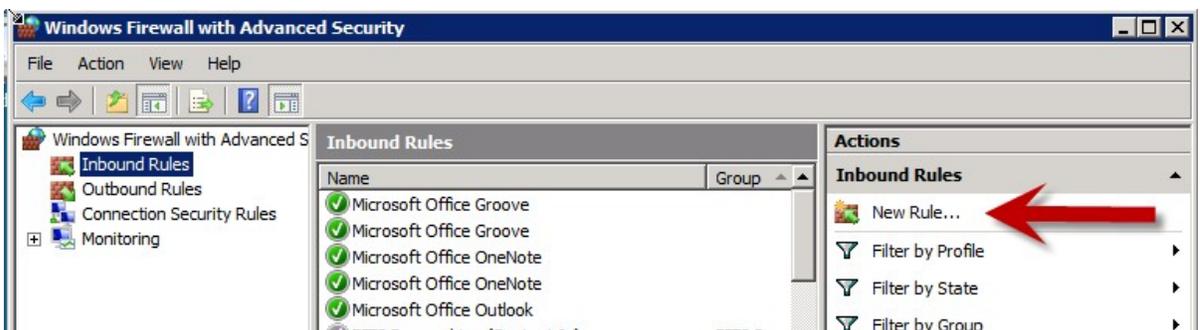
1. Click on **Start > Administrative Tools > Windows Firewall with Advanced Security**



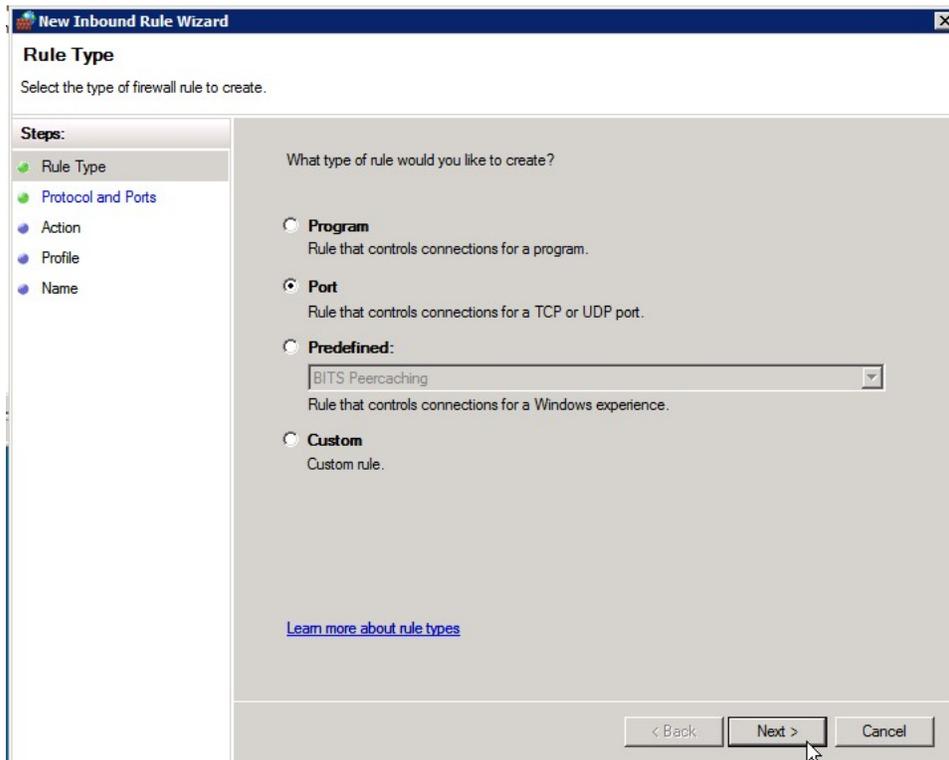
2. Click on **Inbound Rules**.



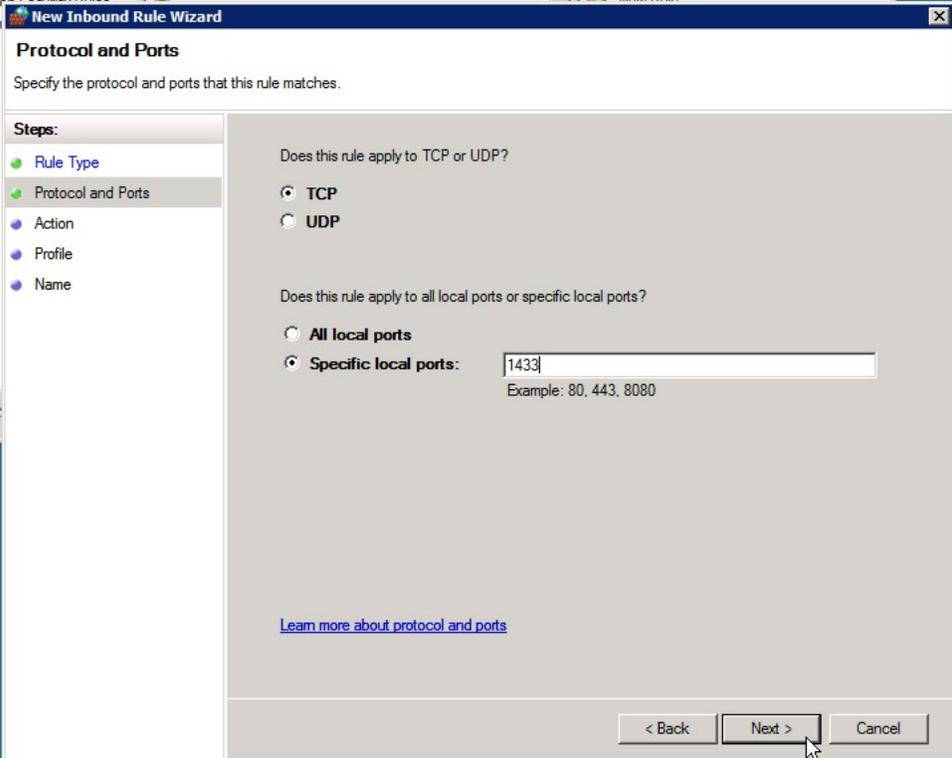
3. Click on **New Rule**.



4. Choose the **Port** radio button and click **Next**.



5. Leave the **TCP** option selected and type in port 1433. Click **Next**.



6. Leave the **Allow the connection** radio button selected and click **Next**.

The screenshot shows the 'New Inbound Rule Wizard' dialog box, specifically the 'Action' step. The title bar reads 'New Inbound Rule Wizard'. Below the title bar, the section is titled 'Action' with the instruction 'Specify the action that is taken when a connection matches the conditions specified in the rule.' On the left side, there is a 'Steps:' list with five items: 'Rule Type', 'Protocol and Ports', 'Action' (which is highlighted), 'Profile', and 'Name'. The main area of the dialog asks 'What action should be taken when a connection matches the specified conditions?' and provides three radio button options: 'Allow the connection' (selected), 'Allow the connection if it is secure', and 'Block the connection'. Under 'Allow the connection if it is secure', there are two unchecked checkboxes: 'Require the connections to be encrypted' and 'Override block rules'. At the bottom of the dialog, there are three buttons: '< Back', 'Next >', and 'Cancel'. A mouse cursor is pointing at the 'Next >' button.

Action
Specify the action that is taken when a connection matches the conditions specified in the rule.

Steps:

- Rule Type
- Protocol and Ports
- **Action**
- Profile
- Name

What action should be taken when a connection matches the specified conditions?

Allow the connection
Allow connections that have been protected with IPsec as well as those that have not.

Allow the connection if it is secure
Allow only connections that have been authenticated and integrity-protected through the use of IPsec. Connections will be secured using the settings in IPsec properties and rules in the Connection Security Rule node.

Require the connections to be encrypted
Require privacy in addition to integrity and authentication.

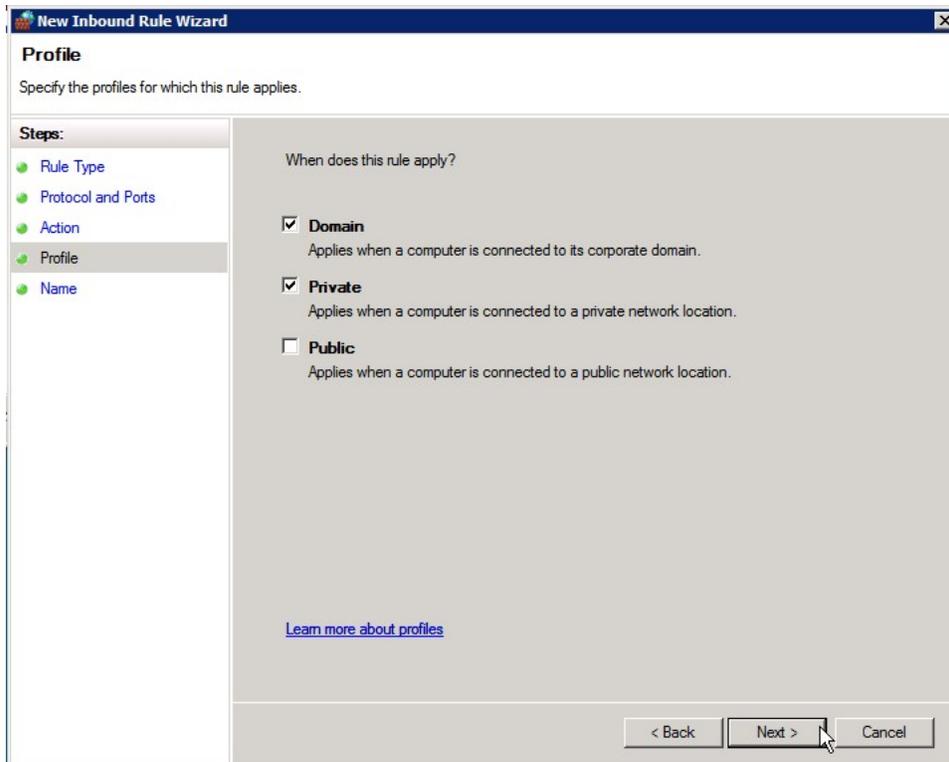
Override block rules
Useful for tools that must always be available, such as remote administration tools. If you specify this option, you must also specify an authorized computer or computer group.

Block the connection

[Learn more about actions](#)

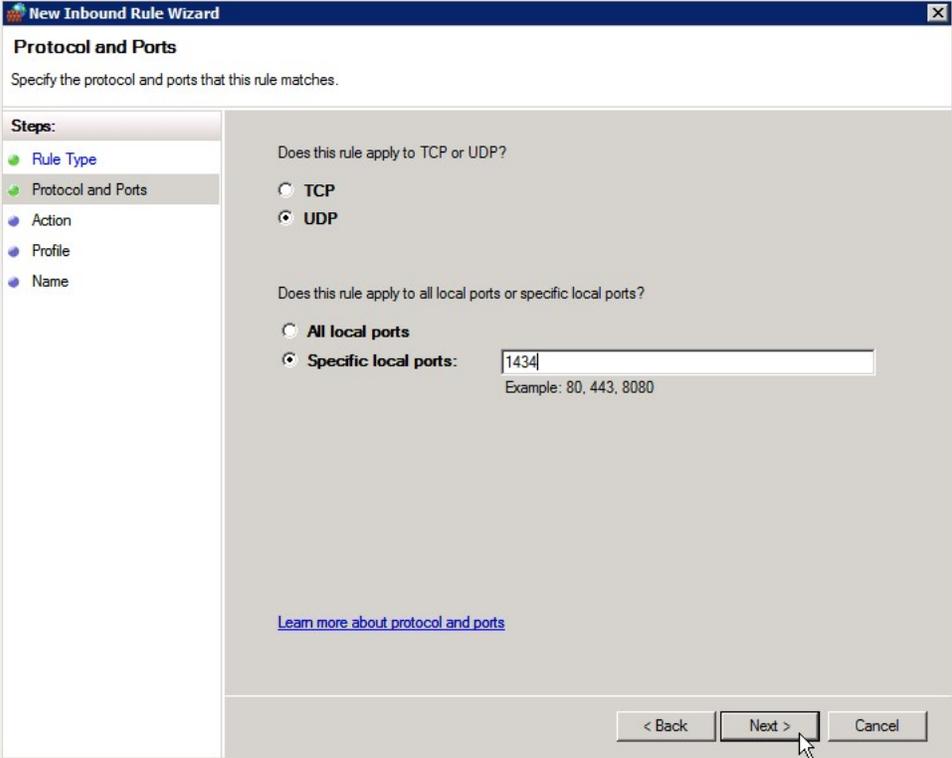
< Back Next > Cancel

7. Uncheck the **Public** checkbox (unless users are connecting using a public network location) and click **Next**.

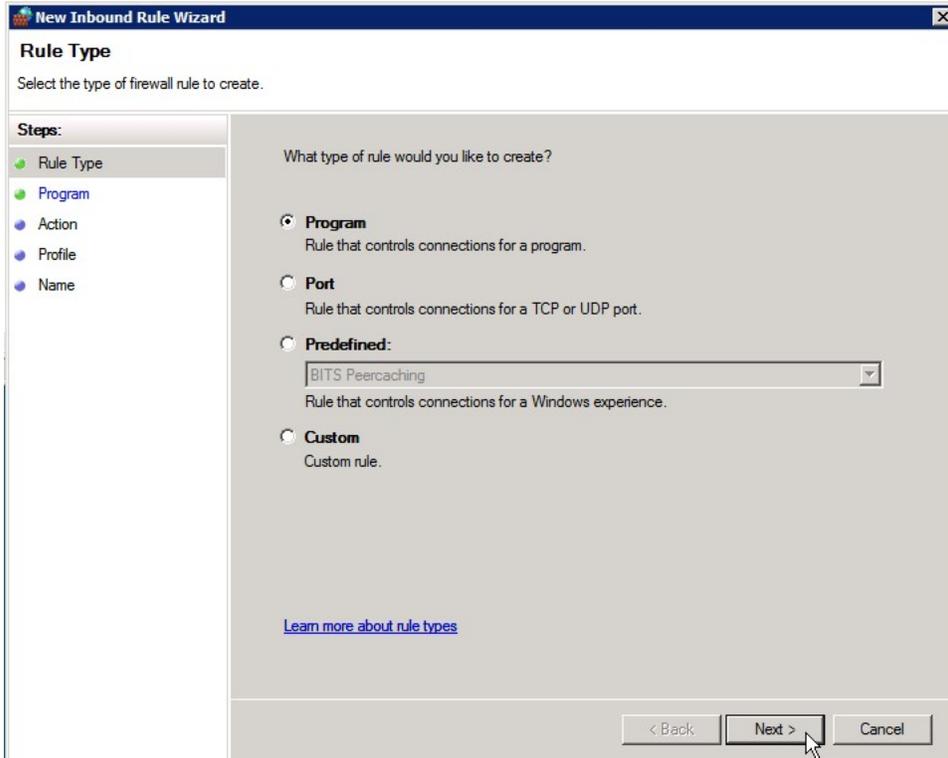


8. Type a name and description for the exception and click **Finish**.

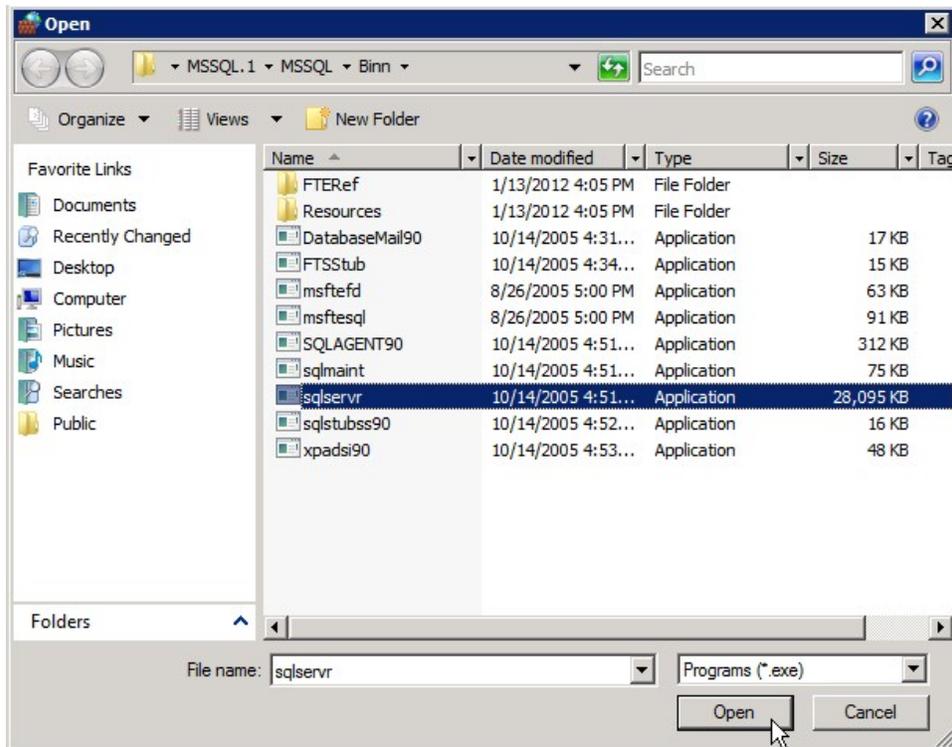
9. Repeat these steps to add a UDP port exception for port 1434.



10. Add a third new inbound rule for a program exception.



11. Click on the **Browse** button and browse to the SQL Server installation's Binn directory and select **sqlservr.exe**. Then click **Next**.



New Inbound Rule Wizard

Program

Specify the full program path and executable name of the program that this rule matches.

Steps:

- Rule Type
- Program**
- Action
- Profile
- Name

Does this rule apply to all programs or a specific program?

All programs
Rule applies to all connections on the computer that match other rule properties.

This program path:

Example: c:\path\program.exe
 %ProgramFiles%\browser\browser.exe

[Learn more about specifying programs](#)

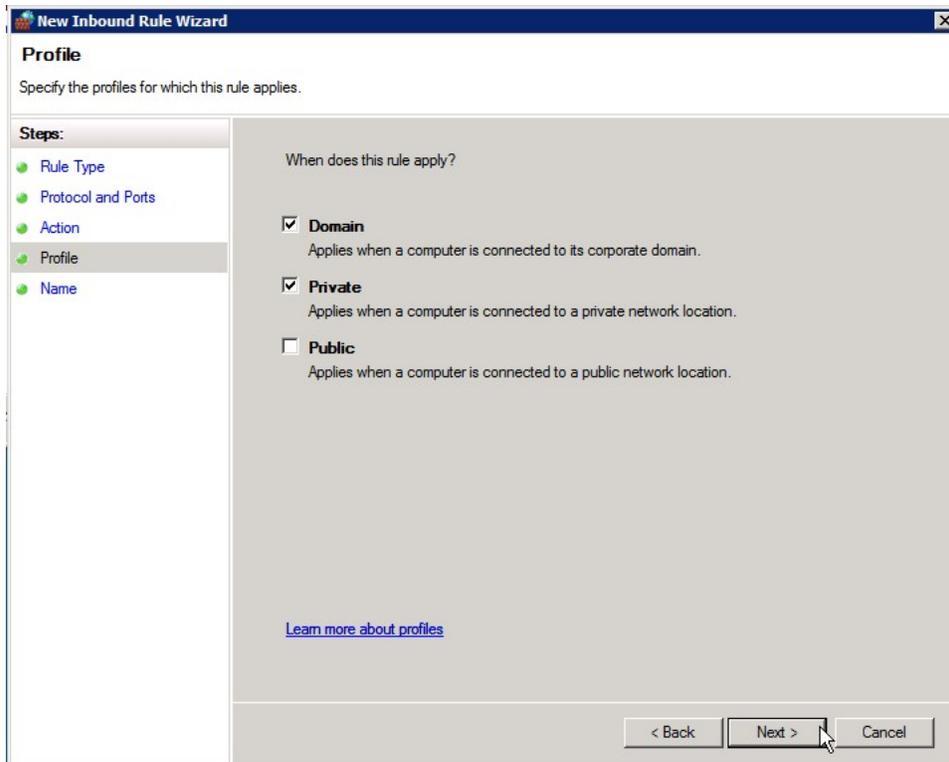
< Back Next > Cancel

This path will vary depending on where SQL Server was installed.

12. Leave **Allow the connection** selected and click **Next**.

The screenshot shows the 'New Inbound Rule Wizard' dialog box, specifically the 'Action' step. The title bar reads 'New Inbound Rule Wizard'. Below the title bar, the section is titled 'Action' with the instruction 'Specify the action that is taken when a connection matches the conditions specified in the rule.' On the left side, there is a 'Steps:' list with five items: 'Rule Type', 'Protocol and Ports', 'Action' (which is highlighted), 'Profile', and 'Name'. The main area of the dialog asks 'What action should be taken when a connection matches the specified conditions?' and offers three radio button options: 'Allow the connection' (selected), 'Allow the connection if it is secure', and 'Block the connection'. Under 'Allow the connection if it is secure', there are two unchecked checkboxes: 'Require the connections to be encrypted' and 'Override block rules'. At the bottom of the dialog, there are three buttons: '< Back', 'Next >' (with a mouse cursor pointing to it), and 'Cancel'. A blue link 'Learn more about actions' is located at the bottom left of the main content area.

13. Uncheck the **Public** checkbox (unless users are connecting using a public network) and click **Next**.



14. Type a name and description for the exception and click **Finish**.

Assign BizInsight Security to Users

Each BizInsight user's Windows account name must be added to a .users file in the admin shared directory in order for that user to perform any BizInsight action. You will use the License Administration Tool to perform these steps.

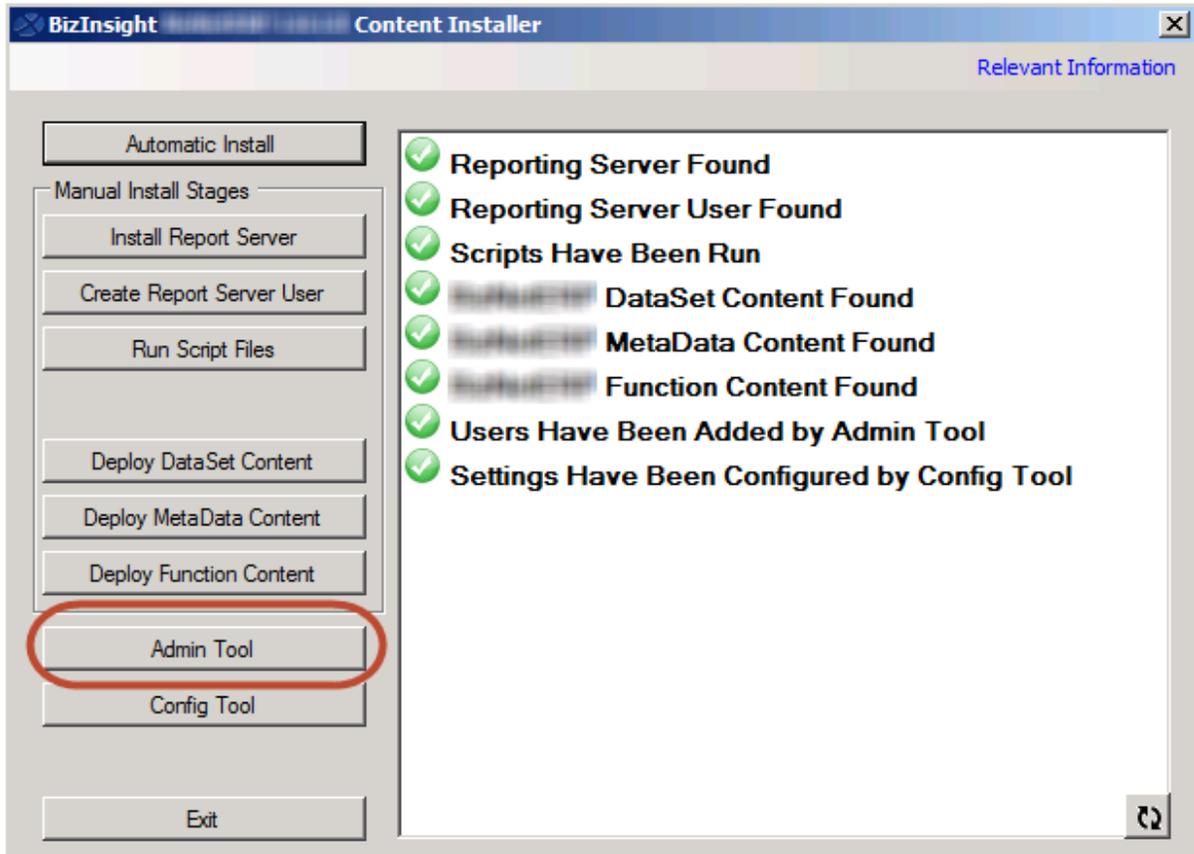
To assign BizInsight security to your users, do the following:

1. On the server, double-click any content installer desktop icon. If the content installers were installed without desktop icons, browse to the installation directory and double-click the file named "BizNet Content Installer.exe". If the content installer was uninstalled, reinstall it.



If you do not want to reinstall the content installer, see "Manual Steps" on page 87.

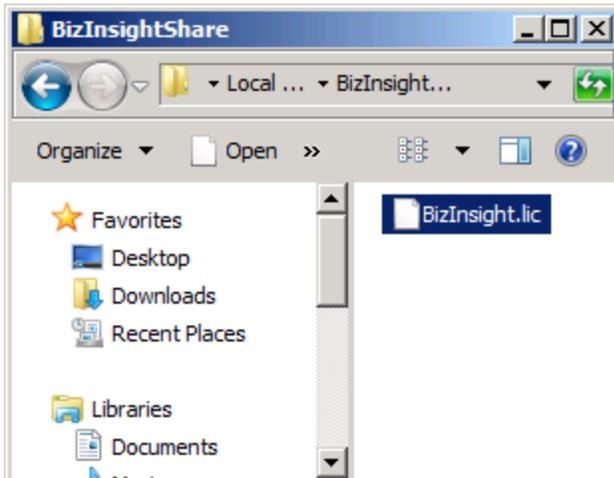
2. Click on the **Admin Tool** button.



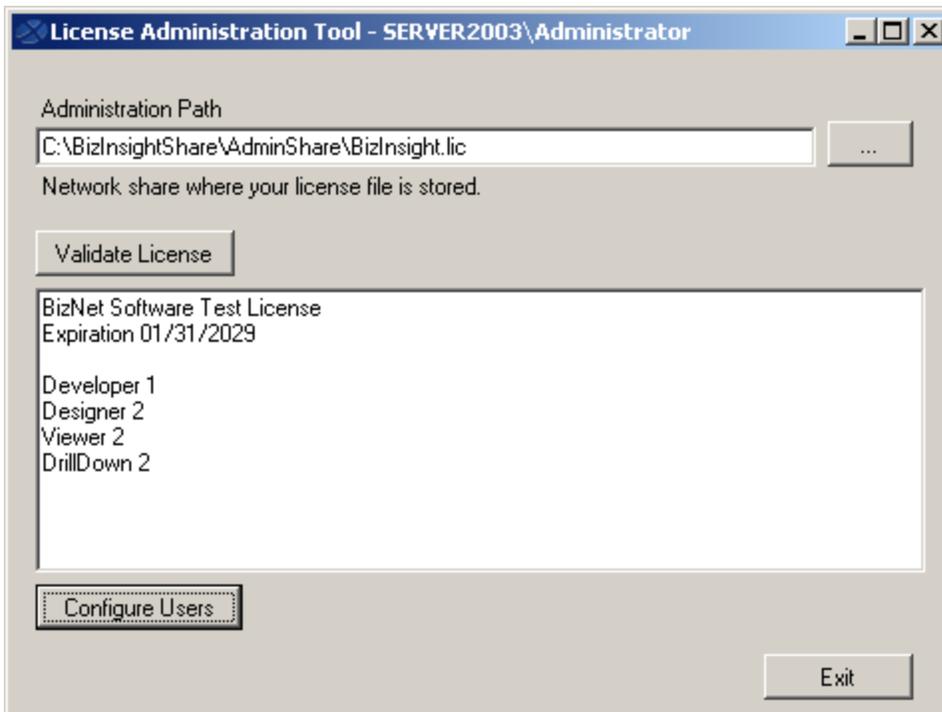
3. Click on the ellipses and browse to the admin share folder of your BizInsight shared directory.



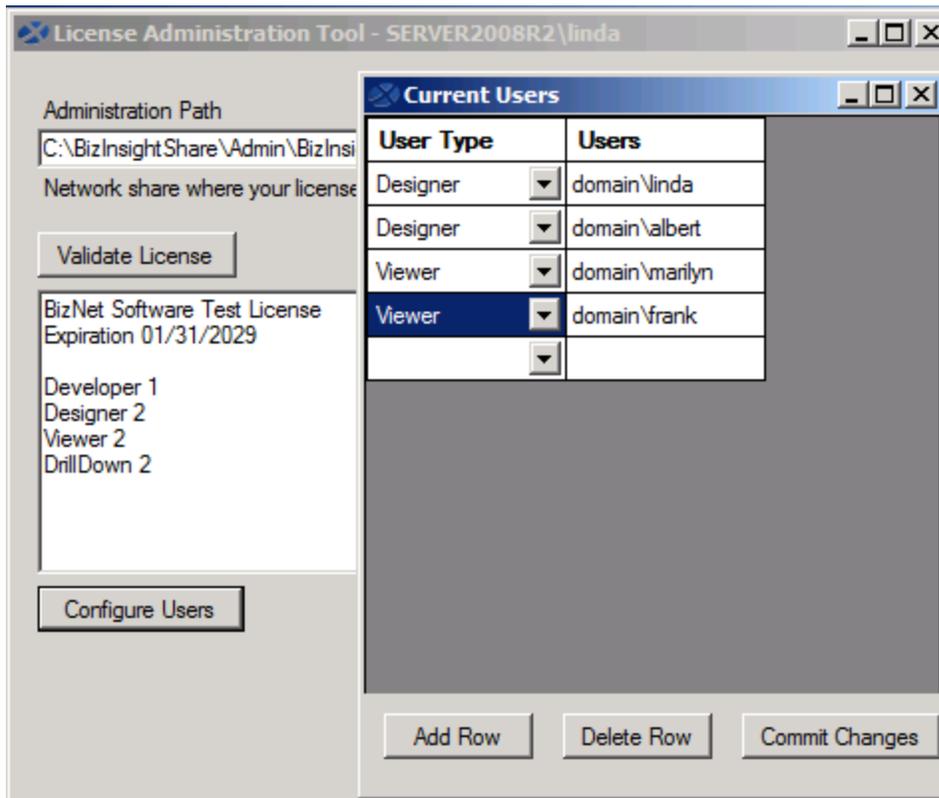
4. Select your BizInsight license file and click Open.



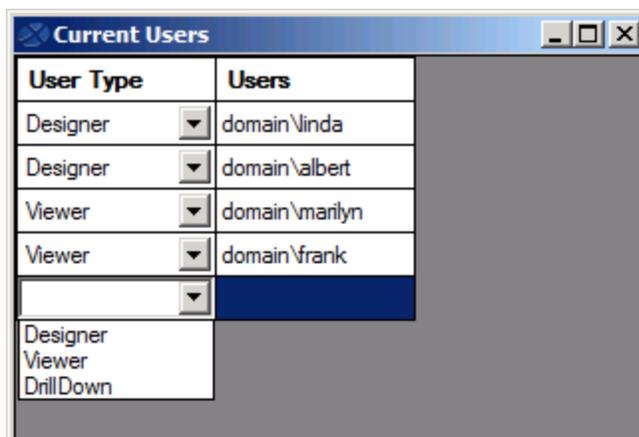
5. Click on the **Validate License** button to check how many licenses you currently have. Your current license count will be displayed.



6. Click on the **Configure Users** button. The **Current Users** dialog will open.

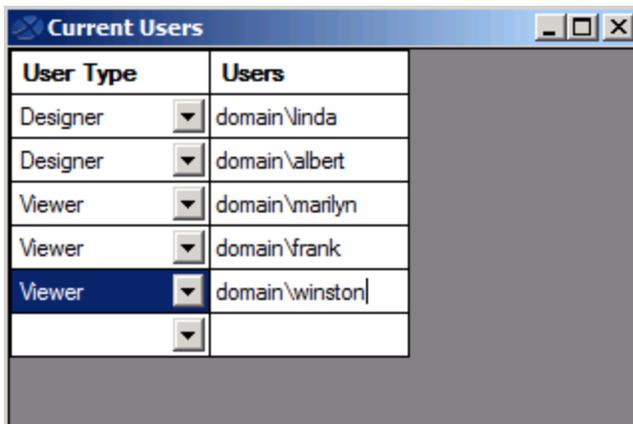


7. You will now add your new BizInsight user and assign them a user type. Click on the **User Type** drop down and select the desired user type. If you want your user to be a Designer, choose Designer from the drop down list.



8. Type the user's name in the **Users** field in the format of domain\username.

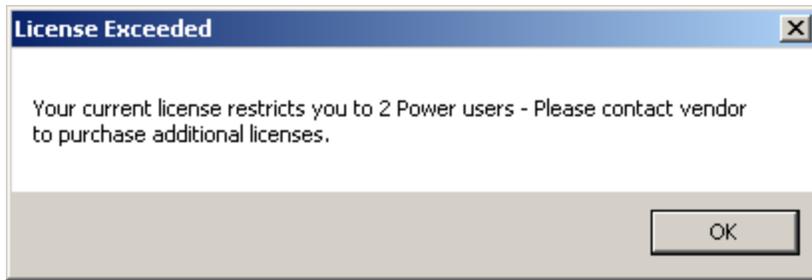
WARNING Do **not** add your own login using the Admin Tool unless you know for sure that you have another login available with sysadmin rights to the SQL Server instance. Early versions of the content installer (pre version 1.6) will remove existing permissions for users, including those with sysadmin rights. If uncertain, skip this step and confirm sysadmin access will not be lost then return to complete the Admin Tool step.



9. Click on the **Commit Changes** button when finished. You will be presented with a message asking if you want to grant the user additional security permissions. Click **Yes**.

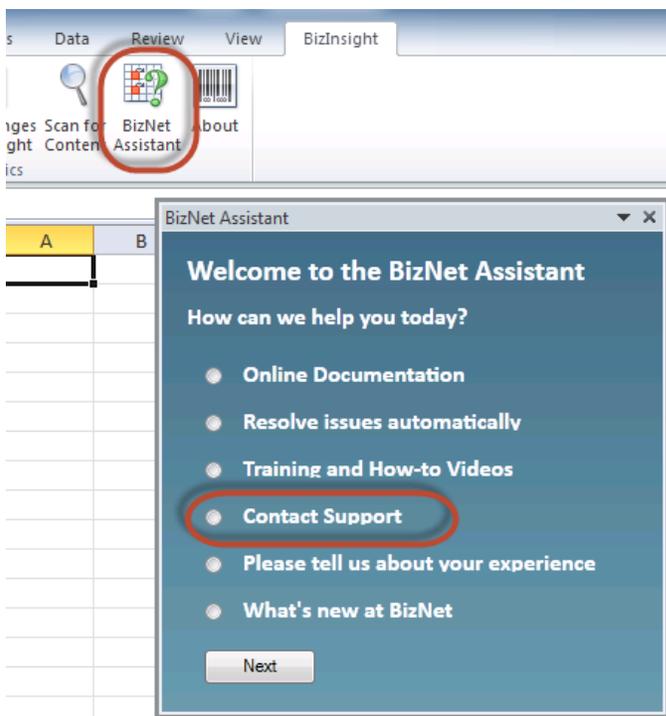


If you have entered more names for a particular user type than you have licenses, you will get an error similar to the following.



You will be returned to the **Current Users** dialog where you can remove a row so that you comply with the number of licenses your company purchased. Select the row to remove and click the **Delete Row** button.

To purchase additional licenses, use the BizNet Assistant button to open a support ticket indicating that you need to purchase additional licenses.



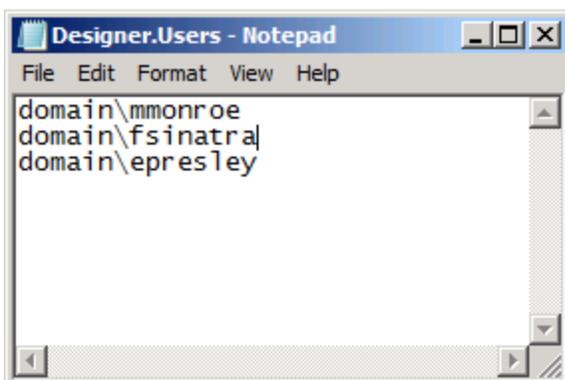
When you receive your new license, move your old license from the Administration Path shared directory and save the new license there. Do not rename the old license and leave it in the Administration Path; it must be removed from the directory in order for the new license count to take effect.

Manual Steps

1. In the Admin shared directory, open the .users file with Notepad that corresponds with the BizInsight permissions the user should have. For example, if the user should have Designer permissions, you would open the Designer.users file.

Tip If you are not sure where to find the Admin shared directory, go to an existing user's workstation, open Excel and click on the **Application Settings** button on the BizInsight ribbon and copy the path provided for the Administration Path.

2. In the .users file, add the Windows account name of the BizInsight user. For more information on the different user types, refer to the User Types section of the User Guide.



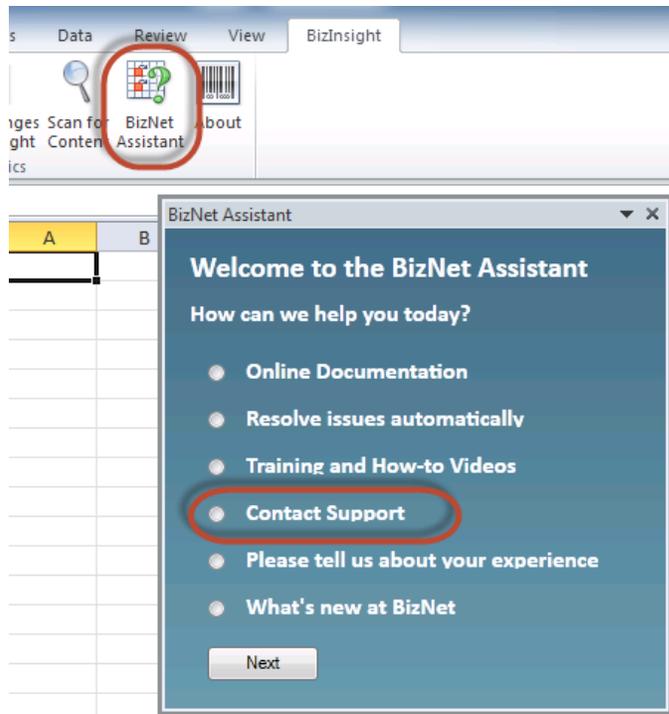
3. Save and close the file.

IMPORTANT As you add Windows account names to the .users files, add only as many as you have licenses. If you add more Windows account names than you have licenses or you have an extra line return in the file, users will get an error message similar to the following when they open Excel after BizInsight is installed.



If you are not sure how many licenses you have, open the .lic file that is in the Admin shared directory with Notepad and check how many licenses are shown for the user type you are adding.

To purchase additional licenses, use the BizNet Assistant button to open a support ticket indicating that you need to purchase additional licenses.



When you receive your new license, move your old license from the Administration Path shared directory and save the new license there. Do not rename the old license and leave it in the Administration Path; it must be removed from the directory in order for the new license count to take effect.