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
ССН	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.

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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, (<u>http://b-iznet.flexnetoperations.com</u>). If installing you must install latest version, all client work-stations 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".

tware & Services	Download	Central Home	
duct Search er History arch Line Items s Not Downloaded	Welcome to the Download update notifications. "My Re shows your list of products	Central Homepagel Check out "My Recent Er ocent Files Posted" displays any files posted	mail Notifications" to view the latest in the past 30 days. "My Products"
ent Product Releases	Recent Email Notificatio	nns	
ent Fines Fusieu	View All	5113	
ent Email Notifications	Mar 20. 2014	BizNet Software Order Notificat	lion
ninistration 🌣	Mar 17, 2014	BizNet Product Update Notifica	tion
ount Administrators	Mar 17, 2014	BizNet Product Update Notification	tion
ount Members	Mar 17, 2014	Password Finder	
ange Password	Feb 27, 2014	Welcome to the BizNet Softwar	re Customer Portal
ail Preferences			
duct Preferences	Recent Files Posted		
wnload Preferences	View All		
r Profile	Mar 17, 2014	BizBroadcast 2.1.1 - F	Release Notes
1110116	Mar 17, 2014	BizNet Broadcast 2.1	.1 Documentation
Help 🛛	Mar 17, 2014	BizBroadcast 2.1.1	
wnioad Help	Mar 17, 2014	BizInsight 5.0.34.4 Do	ocumentation
le of Contents	Mar 17, 2014	BizInsight 5.0.34.4 Re	elease Notes
10	Mar 17, 2014	BizInsight 5.0.34.4	
15			

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:

 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.

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

🖉 BizInsight 🛛 🗠 Co	ntent Installer
	Relevant Information
Automatic Install Manual Install Stages Install Report Server Create Report Server User Pure Seriet Files	 Reporting Server Found Reporting Server User Found Scripts Have Been Run DataSet Content Found MetaData Content Found
	Events and Content Found Events and Content Found 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	
Exit	(0)

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

License Administration Tool - SERVER2008R2\linda	
Administration Path	-0
Network share where your license file is stored.	

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.

Cicense Administration Tool - SERVER2003\Administrator	
Administration Path	
C:\BizInsightShare\AdminShare\BizInsight.lic	
Network share where your license file is stored.	
Validate License	
BizNet Software Test License Expiration 01/31/2029	
Developer 1 Designer 2	
DrillDown 2	
Configure Users	
	Exit

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

License Administration Tool	- SERVER2008R2	linda	
Administration Path	🖉 Current Users		
C:\BizInsightShare\Admin\BizInsi	User Type	Users	
Network share where your license	Designer 💌	domain∖linda	
	Designer 💌	domain \alber t	
Validate License	Viewer 💌	domain \marilyn	
BizNet Software Test License	Viewer 🗾	domain\frank	
Expiration 01/31/2029	•		
Developer 1 Designer 2 Viewer 2 DrillDown 2			,
Configure Users			
	Add Row	Delete Row	Commit Changes

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.

🖉 Current Users		
User Type	Users	
Designer	domain∖linda	
Designer	domain\albert	
Viewer	domain \marilyn	
Viewer	domain\frank	
]	
Designer Viewer DrillDown		

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.

🔊 Current Use	ers		
User Type		Users	
Designer	•	domain∖linda	
Designer	•	domain\albert	
Viewer	•	domain \marilyn	
Viewer	•	domain∖frank	
Viewer	•	domain\winston	
	•		

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.



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

Connect to Server	×		
Microsoft*	Server: 2008 82		
Q. JQL.			
Server type:	Database Engine		
Server name:	server2008r2\BizNet		
Authentication:	Windows Authentication		
User name:	SERVER2008R2\linda		
Password:			
	Remember password		
Connec	t Cancel Help Options >>		

3. 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 <u>here</u> 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.

🚪 Login - New					
Select a page	🔄 Script 👻 📑 Help				
Image Server Roles Image Server Roles Image Server Mapping	Login <u>n</u> ame:	YourDomain\Idavis		S <u>e</u> arch	
Securables	Mindows authentication				
😭 Status	O <u>SQL</u> Server authentication				
	Password:			_	
	Confirm password:			_	
	Specify old password	,			
	Old password:			_	
	Enforce password polic	y.			
	Enforce password expir	ation			
	🗵 🛛 🖉 ser must change pass	word at next login			
	Mapped to certificate			-	
	C Mapped to asymmetric key			~	
	Map to Credential			✓ <u>A</u> dd	
Connection	Mapped Credentials	Credential	Provider		
Server: Server2003			,	_	
Connection: SERVER2003\Administrator					
View connection properties					
Progress				Remo <u>v</u> e	
Ready	Default <u>d</u> atabase:	master		•	
<i>v</i> ₄ _b <i>v</i>	Default language:	<default></default>		•	
			OK	Cancel	

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

🚪 Login - New					
Select a page	🔄 Script 🤜	🛚 📑 Help			
General Server Roles	Users ma	ppe <u>d</u> to this login:			
	Мар	Database	User	Default Schema	
🚰 Status		001			
		AccPac			
		amwsys			
		BizInsight			
		BizInsightDB			
		BizNetERP			
		ССН			
		Company01			
		Company11			
		CPU			-
	∏∧Guest	account enab ^r ed for; BizNet	ERP A		
	\vee \vee	\sim			

7. Once the database is checked in the upper pane, check the **db_datareade**r role membership in the bottom pane. Click **OK**.

	Database <u>r</u> ole membership for: master
Connection Server: Server2003 Connection: SERVER2003\Administrator Image: View connection properties View connection properties Progress Ready	□ db_accessadmin □ db_backupoperator ✓ db_datareader □ db_datawriter □ db_ddladmin □ db_denydatareader □ db_denydatareader □ db_owner □ db_securityadmin ✓ public □ RSExecRole
	OK Cancel

8. 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.

📙 Login - New		-		x
Select a page Page General	🖳 Script 👻 🎼 Help			
Server Roles	Users mapped to this login:			
Chakus	Map Database User Default :	Schema		^
En Status	BizInsight			
	■ BizInsightDB			
	BIZINELE FIF			
	Heat Heat			=
	master			-
	model			
	msdb			
	ReportServer			
	ReportServerTempDB			
	T tempdb			~
	Guest account enabled for: BizInsight			
Connection				
Server: Idavispo	do_accessadmin db backupoperator			
Connection	↓ db_datawriter			
LDAVISPC\Idavis	dio_didiadimin			
View connection properties	db_denydatareader db_denydatawriter db_owner			
Progress	db_securityadmin			
C Ready	✓ public			
		IK	Cano	el "ii

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 New Role Assign	Services ment	Home My Subscriptions Site Sett Search for:
Use this	s page to define role-bas	ed security for Home.	
Group o	or user name:		
Select	one or more roles to assi	gn to the group or user.	
🗖 Rol	le↓	Description	
Bro	owser	May view folders, reports and subscribe to reports.	
	ntent Manager	May manage content in the Report Server. This includes folders, reports	and resources.
🗆 Му	Reports	May publish reports and linked reports; manage folders, reports and resou	urces in a users My Reports folder.
	<u>blisher</u>	May publish reports and linked reports to the Report Server.	
E Rep	port Builder	May view report definitions.	
ОК	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:

Contents	SQL Server Reporting Service Home	25	
🛗 New I	Folder 🛯 🍀 New Data Source	💫 Upload File	🔠 Report Builder

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

SQL HO	erver Reporting Services
🞬 New Fold	er 🛛 🧕 New Data Source 👘 🗳 Report Builder 🛛 🗹 Folder Settings 💭 🎕 Upload File

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.

🥖 - Report Manager - Windows Internet Explorer				
🕞 🕞 🗢 🙋 http://server	2003/Reports/Pages/Folder.aspx?ItemPath=/&SelectedT	abId=PropertiesTab		
<u>File E</u> dit <u>V</u> iew F <u>a</u> vorites	Tools Help			
🚖 Favorites 🛛 🚖 💋 Sugges	ited Sites 🔻 🙋 Free Hotmail 🤌 Web Slice Gallery 👻			
🤏 - Report Manager				
SQL Server Rep	oorting Services			
Home				
nonio				
	🗙 Delete 🔰 🎥 New Role Assignment			
Security	🗖 Group or User 🕹	Role(s)		
	Edit BUILTIN\Administrators	Content Manager		
	Edit SERVER2003\Administrator	Content Manager		
	Edit SERVER2003\aeinstein	Content Manager		
	Edit SERVER2003\cclay	Content Manager		
	Edit SERVER2003\epicuser	Content Manager		
	Edit SERVER2003\epresley	Content Manager		
	Edit SERVER2003\fsinatra	Content Manager		
SO32888	Edit SERVER2003\Idavis	Content Manager		
	Edit SERVER2003\linda	Content Manager		
	Edit SERVER2003\lolivier	Content Manager		
	Edit SERVER2003\mmonroe	Content Manager		

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 "BizNetWCFServiceHost.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.

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')
G0
```

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.

racle Universal Installer: Summary	_
	DATABASE 11
Summary	•
Jracie Data Access Components for Oracle Client 11.2.0.3.	.0
 Oracle Data Access Components Documentation for Visual Studio 2008 1 	1.2.0.3.0
 Oracle Data Access Components Samples 11.2.0.3.0 	
 Oracle Data Access Components for Oracle Client 11.2.0.3.0 	
-Oracle Data Provider for .NET 11.2.0.3.0	
-Oracle Globalization Support 11.2.0.3.0	
-Oracle Instant Client 11.2.0.3.0	
-Oracle JDBC/OCI Instant Client 11.2.0.3.0	
-Oracle ODBC Driverfor Instant Client 11.2.0.3.0	
-Oracle One-Off Patch Installer 11.2.0.1.7	
-Oracle Provider for OLE DB 11.2.0.3.0	
-Oracle Providers for ASP.NET 11.2.0.3.0	
-Oracle Services For Microsoft Transaction Server 11.2.0.3.0	
-Oracle Universal Installer 11.2.0.3.0	
DDDMC Desuited Current Files for Instant Client 11, 2,0,3,0	
Help Installed Products Back Next	Install Cancel

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

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.

l	者 Mi	icroso	oft Visu	ial Basic	- Book1	- [Sheet	1 (Code)]			
r١	÷ 👏	<u>F</u> ile	<u>E</u> dit	<u>V</u> iew	Insert	F <u>o</u> rmat	<u>D</u> ebug	<u>R</u> un	Tools	<u>A</u> dd-I
7		-		ХÞ	B A	19 (*	I 🕨 🗉		2 😻	۲ 😭
	Proje	ct - V	BAProj	ect		×	(Gener Run	r al) Sub/Us	erForm (F5)

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**.

🐞 💷 🗰 Canada Setup	×
For the following components:	
Microsoft .NET Framework 4 (x86 and x64)	
Please read the following license agreement. Press the page down see the rest of the agreement.	key to
	-
MICROSOFT SOFTWARE SUPPLEMENTAL LICENSE TERMS	5
MICROSOFT .NET FRAMEWORK 4 FOR MICROSOFT WINDOWS OPERATING	•
View EULA for printing	
Do you accept the terms of the pending License Agreer	nent?
If you choose Don't Accept, install will close. To install you must ac this agreement.	cept
Accept Don't Accept	

7. 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.



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



10. 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**.

Please read the follow	ing license agreement carefully	BizNet soft
End	User License A	greement
NOTICE TO AL CAREFULLY. E THE BOTTOM USING THE SO THE TERMS A AND YOU	L USERS: PLEASE RE Y CLICKING THE "I OF THIS PAGE OR I FTWARE, YOU AGRE ND CONDITIONS C AGREE THAT TH	AD THIS AGREEMENT I AGREE" BUTTON AT BY INSTALLING AND EE TO ACCEPT ALL OF DF THIS AGREEMENT IS AGREEMENT IS
	and the second second second second	

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

Select Installation Folder Select Installation Folder ['he installer will install BizInsight to the following folder. [o install in this folder, click "Next". To install to a different folder, enter it below or click "Browse". Eolder: [C:\BizInsight\] Browse	BizInsight	
The installer will install BizInsight to the following folder. To install in this folder, click "Next". To install to a different folder, enter it below or click "Browse". Eolder: C:\BizInsight\	Select Installation Folder	BizInsight
Fo install in this folder, click "Next". To install to a different folder, enter it below or click "Browse". Eolder: C:\BizInsight\ Browse	The installer will install BizInsight to the following folder.	
Eolder: C:\BizInsight\ Browse	To install in this folder, click "Next". To install to a different fo	der, enter it below or click "Browse".
C:\BizInsight\ Browse	<u>F</u> older:	
	C:\BizInsight\	Browse
Disk Cost		Disk Cost
	Cancel	< Back 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.

13. Click Next at the Confirm Installation dialog.



14. 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**.

2	Enter your Configuration Path
	How would you like to manage your application settings?
	User Managed User chooses their own settings.
	ОК

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**.

Import Settings Skipped	3
The current settings are set to default. You can change the settings in the application settings dialog.	
ОК	

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

S Enter your Configuration Path							
	Please provide the shared directory path to the configuration file. Configuration Path \lambda servername \ConfigurationPath Check below if you would like to remove the existing settings and take the settings from the configuration path. \lambda Take settings from the configuration path Import Settings Skip						
L							

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.

OK



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. \bin5\adxregistrator.exe /uninstall="BizInsightxL.dll" /privileges=user \bin5\adxregistrator.exe /install="BizInsightxL.dll" /privileges=user regedit.exe C:\BizInsight\Excel2013_register_OnDemand.reg	CUSTOMUI

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.



🖉 Relevant Information			<u>- 🗆 ×</u>		
Config Path:	\\SERVER2008R2\Configuration	nPath			
	C:\BizInsightShare\Config				
Admin Path:	\\SERVER2008R2\Administratio	nPath			
	C:\BizInsightShare\Admin				
Report Server Url:	http://SERVER2008R2/ReportS	Server			
Report Folder	<u>BizNetERP</u>				
Sql Server MetaData Database and Instance Name:	SERVER2008R2				
Packaged with Content Packager Version 1.4.1.0					
Close		Copy to Clipboar	d		

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.
Application Settings	
Use settings from Configuration Path.	
BizInsight Settings	
Configuration Path Configure SQL	
SERVER2000R2\ConfigurationRath	
Folder or network share where the BizInsight.biz	z and BizInsightDB.biz are stored.
Administration Path	
\\SERVER2008R2\AdministrationPath	
Network share where your license file and user f	iles are stored .
Options	
Enable Formula Editor Pop-up	Persist SQL Authentication
Enable Refresh Timer	Clear Credentials
Enable Cache Information Dialog	
	Local Content Path
	Calculation Settings
Enable Startup Messages	
Use Advanced Expression Editor	Account Definitions
Reporting Services Default Settings	
Default Reporting Services Server	
http://SERVER2008R2/ReportServer	-
Default Departing Services Folder Name	
Default Reporting Services Folder Name	
SunGard Analysis	- conversities the PDI core declared
r unname of the rolder 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.

SQL Server MetaData Connection	×
	_
✓ Use SQL Server for MetaData	
Use SQL Authentication	
Username	
Password	
Database server and instance	
server2003\biznet	
SQL connection information for BizInsight databases Database instance name not required if using default	
OK	

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 <u>here</u> 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.

Import Set	tings Skipped
i	The current settings are set to default. You can change the settings in the application settings dialog.
	ОК

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.
Dialasisht Sattinga
Configuration Bath Configure SQ1
C:\BizInsight
Folder or network share where the bizinsight biz and bizinsightUB biz are stoled.
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)
M Enable Startup Messages
Clear Credentials
Enable Cache Information Dialog
Enable XMLFAST Calculation Settings
Use Advanced Expression EditorAccount Definitions
Reporting Services Default Settings
Default Reporting Services Server
http://servemame/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.
ОК

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.

Application Settings	
BizInsight Settings	
Configuration Path Configure SQL	
\\servername\BizInsightShare\ConfigurationPath	
Folder or network share where the BizInsight.biz and BizInsightDB.biz are stored.	
Administration Path	
\\servername\BizInsightShare\AdministrationPath	
Network share where your license file and user files are stored.	
Options	
Enable Formula Editor Pop-up 🥼 Persist SQL Authentication (Session C)nly)
Enable Refresh Timer Enable Startup Messages	
Enable Cache Information Dialog	

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.

Override	
Local Content Path	
\\dcserver\UserProfiles\linda	
Jserfolder on this machine where content can be stored.	
	OK
	UK
Re-directed profile directory	
Re-directed profile directory	
Re-directed profile directory stablish Local Content Path	X
Re-directed profile directory stablish Local Content Path	X
Re-directed profile directory stablish Local Content Path Override	×
Re-directed profile directory stablish Local Content Path Override Local Content Path	X
Re-directed profile directory stablish Local Content Path Override Local Content Path c:\BizInsight	X
Re-directed profile directory Stablish Local Content Path Override Local Content Path c:\BizInsight Jserfolderon this machine where content can be stored.	X
Re-directed profile directory stablish Local Content Path Override Local Content Path c:\BizInsight Jserfolder on this machine where content can be stored.	X

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.

SQL Server MetaData Connection
✓ Use SQL Server for MetaData
Use SQL Authentication
Username
Password
Database server and instance
SERVER2003\BIZNET
SQL connection information for BizInsight databases Database instance name not required if using default
Use custom MetaData databases
BizInsight Databases
BizInsight Menu DB BizInsight
BizInsight Data DB BizInsightDB
Test Connection 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**.

🛿 SQL Server MetaData Connection	×
☑ Use SQL Server for MetaData	
🔽 Use SQL Authentication	
Username bizuser	
Password ******	
Database server and instance	
om-om/2003	
SQL connection information for BizInsight databases Database instance name not required if using default	
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.

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



7. Skip to the next white background step.

Centrally Managed User Settings (green background)

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

🔝 C:\BizInsight\l	pin5\ScanForContent.exe	<u> </u>	
			
	ScanForContent		×
	Scan for Content has completed. Please restart Excel and co work.	ontinue your	
•		ОК]

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



 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, rightclick 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

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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.

🗶 🔄 47 - C4 - -	
File Home	Insert
🛃 Save	
Save As	
💕 Open	
📬 Close	
Info	
Recent	
New	
Print	
Save & Send	
Help	
Doptions 🞝	
🔀 Exit	

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

 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.

🚡 Sql Server Configuration Manager			
<u>File Action View H</u> elp			
😵 SQL Server Configuration Manager (Local)	Protocol Name	Status	
SQL Server Services	🕉 Shared Memory	Enabled	
SQL Server Network Configuration	🕉 Named Pipes	Disabled	
Protocols for MSSQLSERVER	TCP/IP	Enabled	
Protocols for SQL2005	VIA 🕈	Disabled	
H			

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:

Warning			×
1	Any changes made will be sa effect until the service is sto	aved; however, they will not take upped and restarted.	
		ОК	

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

🙀 SQL Server Configuration Manager		_ 🗆 ×
File Action View Help		
🗢 🔿 🖄 🖾 🗟 🛛 🖉 🔍		
SQL Server Configuration Manager (Local)	tart service	State
SQL Server 2005 Services	20 SQL Server FullText Search (SQL2005)	Stopped
SQL Server 2005 Network Configuration	SQL Server (SQL2005)	Running
Protocols for SQL2005	SQL Server Reporting Services (SQL2005)	Running
표 🚆 SQL Native Client Configuration	SQL Server Agent (SQL2005)	Stopped
	SQL Server Browser	Running
	•	Þ

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.

SQL Server Browser Properties	? ×
Log On Service Advanced	
Log on as: Built-in account: Local Service This account: Account Name: Password: Verseeweereereere Confirm password:	3
Service status: Running <u>Start Stop P</u> ause <u>R</u> estart	
OK Cancel Apply H	elp

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

Bin	hary Path	"C:\Program Files\Microsoft SQL Se
Err	ror Coptrol	
-	I OF CONCION	1
EX	it Code	0
Ho	ost Name	SERVER2003
Na	ime	SQL Server Browser
Pro	ocess ID	2096
SQ	L Service Type	SQL Browser
Sta	art Mode	Automatic
Sta	ate	Automatic Disabled Manual

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

SQL Server Browser Properties	? ×
Log On Service Advanced	
Log on as: ● Built-in account: Local Service ▼ ● This account: Account Name: Password: Xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	Br <u>o</u> wse
Confirm password:	<u>B</u> estart
OK Cancel Apply	Help

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.

😻 Windows Firewall	×
General Exceptions Advanced	
Windows Firewall is blocking incoming network connections, except for the programs and services selected below. Adding exceptions allows some pro- to work better but might increase your security risk.	grams
Programs and Services:	
Name	
✓ File and Printer Sharing	
Add Program Add Port	:
Display a notification when Windows Firewall blocks a program	
ОК С	ancel

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

Add a Port Use these settings number and protoc want to use.	to open a po ol, consult the	rt through Windo e documentation	ws Firewall. To for the program	find the port n or service you
<u>N</u> ame:	TCP 1433			
<u>P</u> ort number:	1433	C UDP		
<u>C</u> hange scope	(• <u>1</u> CP		ок	Cancel

4. Add a second port exception for UDP 1434.

Add a Port		<
Use these settings number and protoc want to use.	o open a port through Windows Firewall. To find the port of, consult the documentation for the program or service you	
<u>N</u> ame:	UDP 1434	
Port number:	1434	
	C ICP	
Change scope	OK Cancel	

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

Add a Program	×
To allow communications with a program by adding it to the Exceptions list, select the program, or click Browse to search for one that is not listed.	
Programs:	
70 7-Zip File Manager	•
Data Profile Viewer	
Improvementation and the second secon	
Implementation and the second	
💋 Database Update Wizard	
Deployment Wizard	
Contract Con	
Execute Package Utility	
Import and Export Data (32-bit)	
E Internet Explorer	
MagicDisc .	-
Path: C:\Program Files\7-Zip\7zFM.exe Browse	.
	m I
	-
Change scope OK Cancel	

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

E	Browse			<u>?</u> ×
	Look jn:	🗁 Binn	🔽 🔇 🕼 📂 🆽 -	
	My Recent Documents	My Recent Documents Desktop My Documents My Computer 3½ Floppy (A:) Coal Disk (C:) Program Files	This location will vary depending on where SQL Server was installed	
	Desktop My Documents	Microsoft SQL Server MSSQL10_50.MSSQLSERVER MSSQL MSSQL DVD Drive (D:)		

Browse				? ×
Look jn:	🗀 Binn	•	3 🕫 🖻 🖽-	
My Recent Documents Desktop My Documents My Computer	DIITmp32 Resources DatabaseMail.e DCEXEC.EXE fdhost.exe SQLAGENT.EXE SQLIOSIM.COM SQLIOSIM.EXE sqlmaint.exe sqlstubss.exe xpadsi.exe	xe		
My Network Places	File <u>n</u> ame:	sqlservr.exe	•	<u>Open</u>
	Files of type:	Applications (*.exe;*.com;*.icd)	-	Cancel

7. Close the Firewall dialog after making these additions.

Server 2008

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

Microsoft Office Excel 2007	Control Panel	System Configuration Task Scheduler
Ease of Access Center	Administrative Tools	Windows Firewall with Advanced Security Windows Server Backup Con Win
	Run Windows Security	
All Programs		
Start Search	0 • •	

2. Click on Inbound Rules.



3. Click on New Rule.


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

💮 New Inbound Rule Wizar	d 🛛
Rule Type Select the type of firewall rule to	create.
Steps: Protocol and Ports Action Profile Name	What type of rule would you like to create?
	< Back Next > Cancel

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.



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.

🎆 New Inbound Rule Wiza	rd 🗙
Rule Type Select the type of firewall rule t	o create.
Select the type of firewall rule t Steps: Rule Type Program Action Profile Name	 what type of rule would you like to create? Program Rule that controls connections for a program. Pot Rule that controls connections for a TCP or UDP port. Predefined: BITS Peercaching Rule that controls connections for a Windows experience. Custom Custom rule.
	Learn more about rule types < Back Next > Cancel

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

Organize Image: MSSQL.1 * MSSQL * Binn * Organize Image: New Folder Favorite Links Documents Documents Recently Changed Desktop Desktop Desktop Pictures Pictures Searches Public Music Searches Public Folders Amage: Amag	艜 Open				×
Organize Image: Size Favorite Links Documents Recently Changed Desktop Computer Pictures Music Searches Public Folders Name Image: Desktop	- MSSQL.1	. ▼ MSSQL ▼ Binn ▼	- 🛃	Search	
Favorite Links Name / Date modified / Type / Size / Tag Documents FTERef 1/13/2012 4:05 PM File Folder Recently Changed DatabaseMail90 10/14/2005 4:31 Application 17 KB Computer DatabaseMail90 10/14/2005 4:31 Application 15 KB Pictures msftefd 8/26/2005 5:00 PM Application 63 KB Music sglmaint 10/14/2005 4:51 Application 312 KB Searches sglmaint 10/14/2005 4:51 Application 75 KB Selstubss90 10/14/2005 4:51 Application 16 KB Systems sglstubss90 10/14/2005 4:53 Application 48 KB	🕒 Organize 👻 📗 Views	🔻 📑 New Folder			0
Folders	Favorite Links Documents Recently Changed Desktop Computer Pictures Music Searches Public	Name A FTERef Resources DatabaseMail90 FTSStub msftefd SQLAGENT90 SQLAGENT90 sqlmaint Sqlsevvr sqlstubss90 xpadsi90	▼ Date modified ▼ 1/13/2012 4:05 PM 1/13/2012 4:05 PM 1/13/2012 4:05 PM 10/14/2005 4:31 10/14/2005 4:34 8/26/2005 5:00 PM 8/26/2005 5:00 PM 10/14/2005 4:51 10/14/2005 4:51 10/14/2005 4:51 10/14/2005 4:51 10/14/2005 4:53	Type File Folder File Folder Application Application Application Application Application Application	▼ Size ▼ Tag 17 KB 15 KB 63 KB 91 KB 312 KB 75 KB 28,095 KB 16 KB 48 KB
File name: sqlservr	Folders File name	sqlservr	2	Programs (*	exe)



12. Leave Allow the connection selected and click Next.



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.

🖉 BizInsight Co	ntent Installer
	Relevant Information
Automatic Install	
Manual Install Stages	
Install Report Server	Scripts Have Been Run
Create Report Server User	DataSet Content Found
Run Script Files	MetaData Content Found
	Function Content Found
	Visers Have Been Added by Admin Tool
Deploy DataSet Content	Settings Have Been Configured by Config Tool
Deploy MetaData Content	
Deploy Function Content	
Admin Tool	
Exit	0

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

License Administration Tool - SERVER2008R2\linda	<u>_ </u>
Administration Path	-0
Network share where your license file is stored.	

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.

License Administration Tool - SERVER2003\Administrator	
Administration Path	
C:\BizInsightShare\AdminShare\BizInsight.lic	
Network share where your license file is stored.	
Validate License	
BizNet Software Test License Expiration 01/31/2029	
Developer 1 Designer 2 Viewer 2	
DrillDown 2	
Configure Users	
	Exit

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

🐝 License Administration Tool	- SERVER2008R2	linda	<u>_ ×</u>
Administration Path	🖉 Current Users		
C:\BizInsightShare\Admin\BizInsi	User Type	Users	
, Network share where your license	Designer 💌	domain∖linda	
	Designer 💌	domain \albert	
Validate License	Viewer 💌	domain \marilyn	
BizNet Software Test License	Viewer 🗾	domain\frank	
Expiration 01/31/2029	•		
Developer 1 Designer 2 Viewer 2 DnillDown 2 Configure Users			-
	Add Row	Delete Row	Commit Changes

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.

🕙 Current Users		<u> </u>
User Type	Users	
Designer 💌	domainVinda	
Designer 💌	domain\albert	
Viewer 💌	domain \marilyn	
Viewer 💌	domain\frank	
•		
Designer Viewer DrillDown		

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.

🕙 Current Users	;	
User Type	Users	
Designer 🖉	domain∖linda	
Designer 🖉	domain\albert	
Viewer	domain\marilyn	
Viewer	domain\frank	
Viewer 🔽	domain\winston	
•	1	

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.