Installing Additional Content Packs

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		

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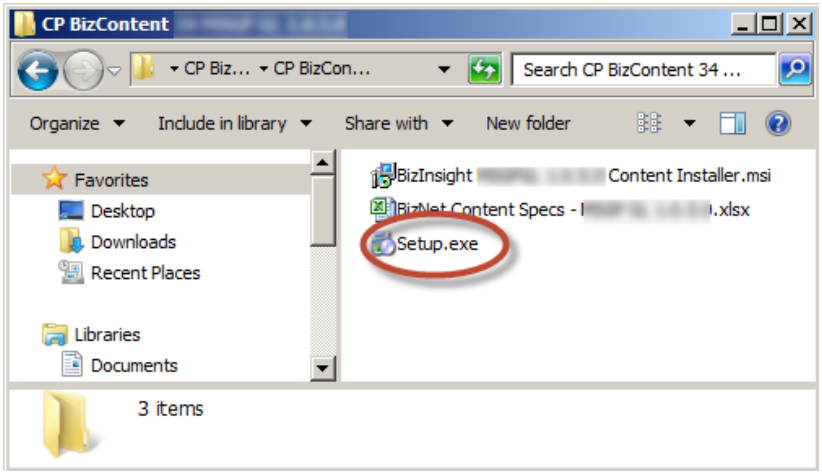
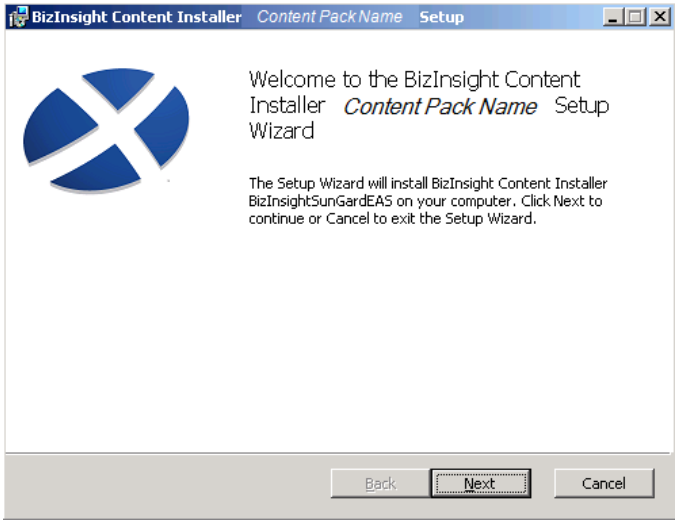
Step 1: Run Content Installer for Additional Content Pack(s)

1. If you have not done so already, download any additional content pack installer (s) from the customer portal, http://biznet.flexnetoperations.com
2. Extract the contents of the .zip to any location that is accessible from both the server and the client workstations.
3. Browse to the extract directory and double-click on the file named **setup.exe**.

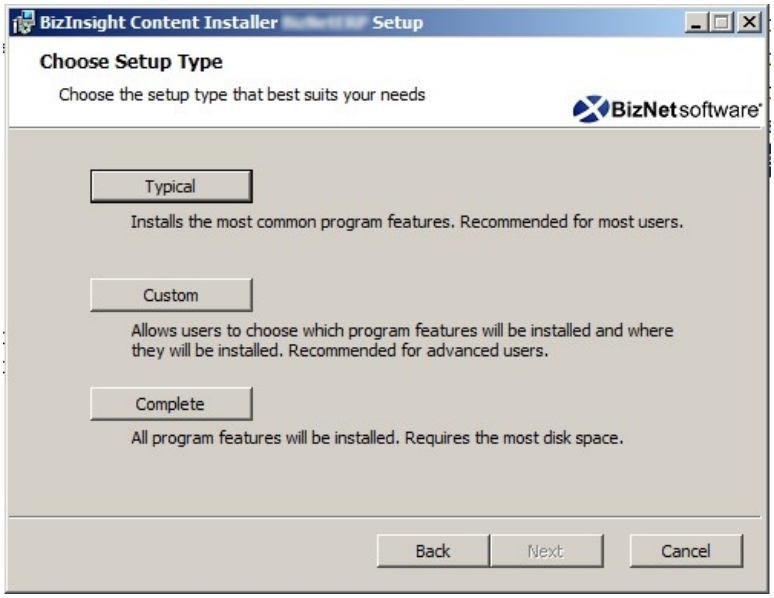


4. The **Welcome** dialog will open. Click **Next**.

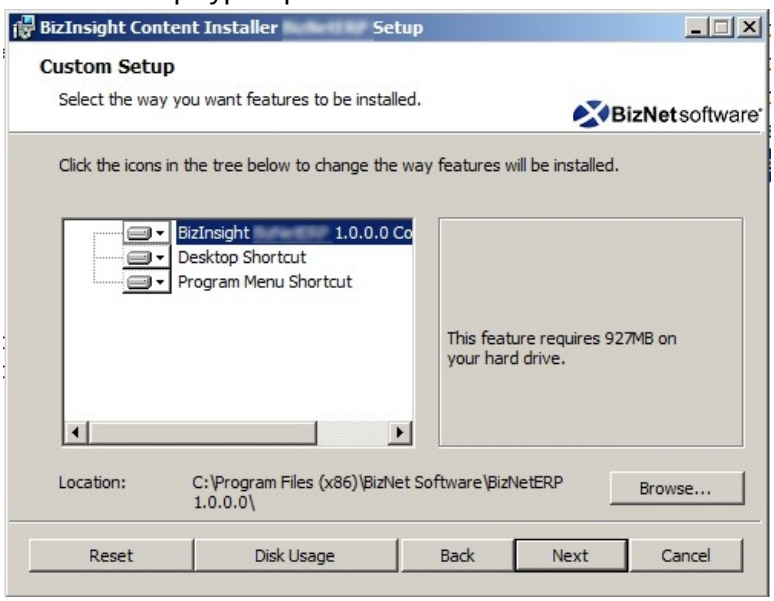


5. Review the End User License Agreement and if you agree to the terms, check the **I accept the terms in the License Agreement** checkbox and click **Next**.

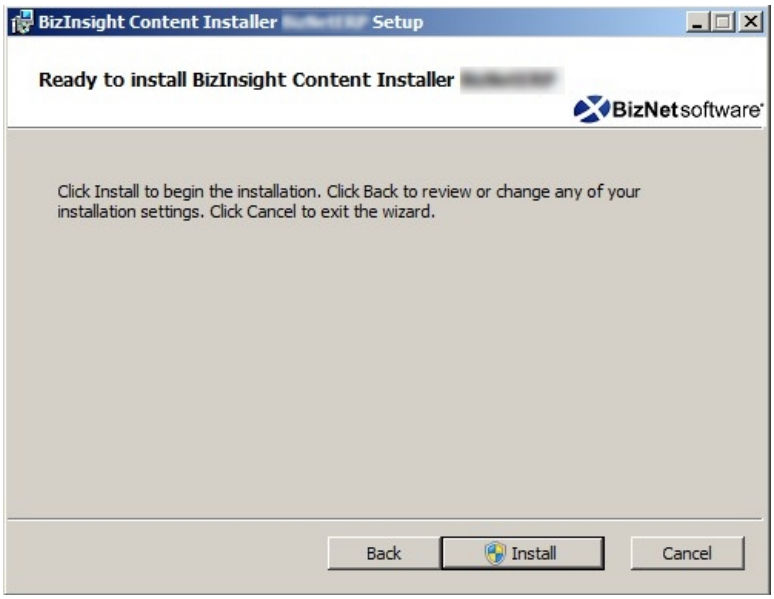
6. Click on the desired **Setup Type** button.



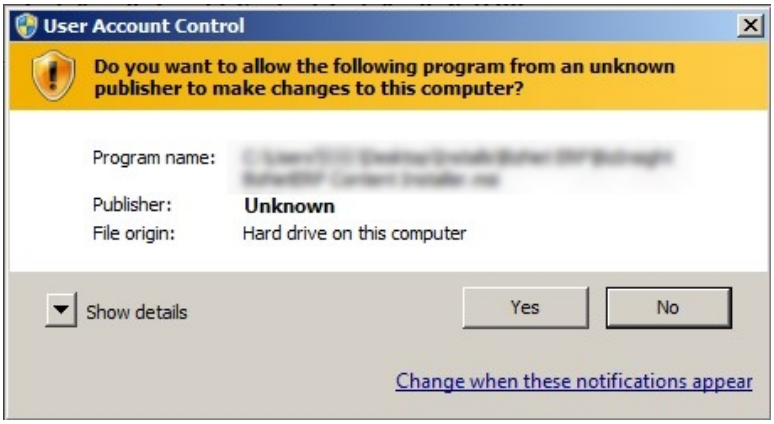
Custom setup type options that are available:



7. Click **Install**.



8. Click **Yes** to any User Account Control messages.

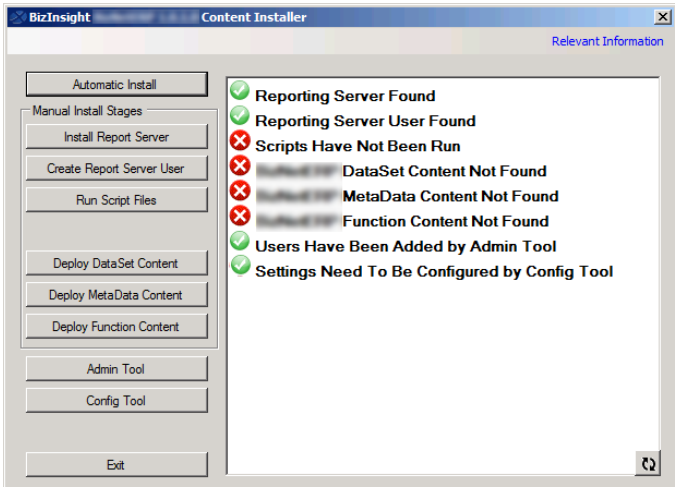


9. When the installer completes, an icon will exist on the desktop if you did not disable the creation of shortcuts.

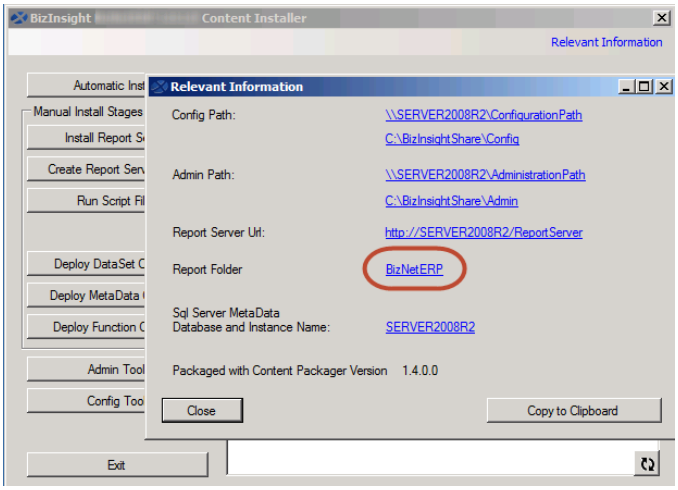
10. Double-click the shortcut on the desktop to launch the content installer. If you chose a Custom installation and disabled the creation of shortcuts, you must

browse to the directory to which the content installer files were extracted and double-click the BizNet Content Installer.exe. If you installed to the default directory location, that directory can be found in C:\Program Files (x86)\BizNet SoftwareEpicor.

11. The content installer will inspect the server and determine what elements already exist and indicate their presence with a green check mark.



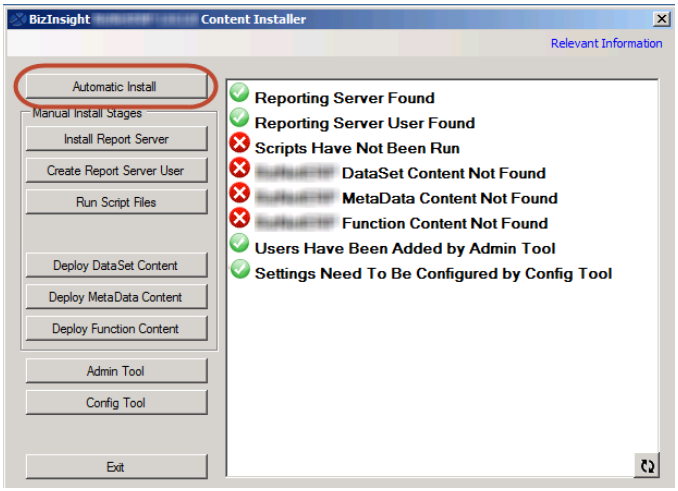
12. Click on the **Relevant Information** link in the upper right corner and make a note of the **Report Folder** name:



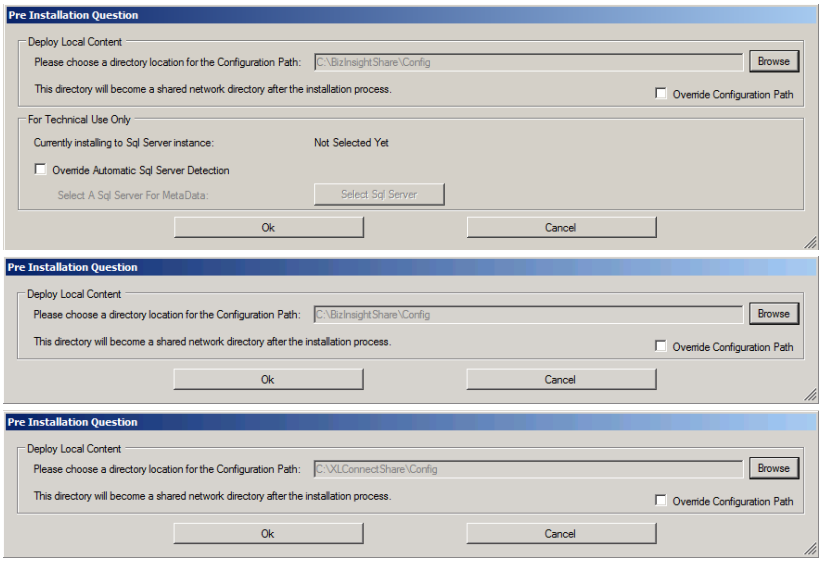
Note If the Relevant Information dialog does not contain any information and

BizInsight is already installed, go to a workstation where BizInsight is installed. Open Excel on the workstation, 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.

13. Click **Automatic Install**.



14. The content installer will deploy the MetaData and function content. The path will be automatically defaulted to the path last used. Click **OK**.

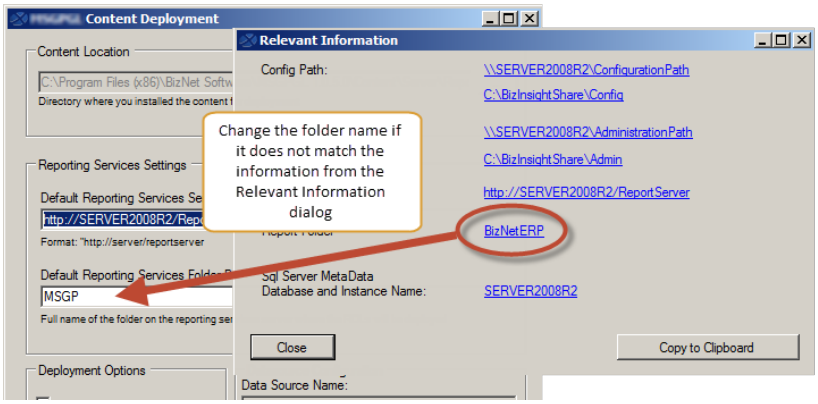


NOTE Do not check the Override Automatic SQL Server Detection checkbox to

ensure the meta data is installed to the same meta data databases as your other content.

15. The content installer will open the content deployment dialog. Most paths will not need to be changed. But you must check the following to make sure they are correct:

    a. Make sure the folder name is the folder name currently being used. If the folder is not the same as shown in the Relevant Information dialog, change that field to match the folder that is currently being used.

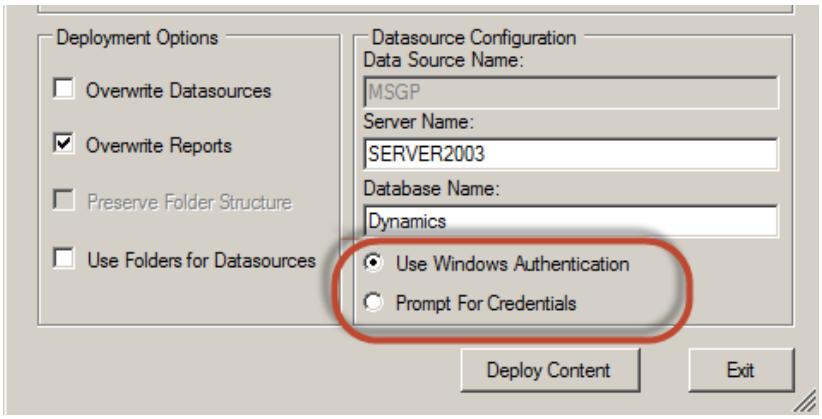


    b. Adjust the **Server Name** field if your accounting system database is on another server. ***NOTE*** The server name will default to the last server used. This may not be the right server for the content pack being deployed.

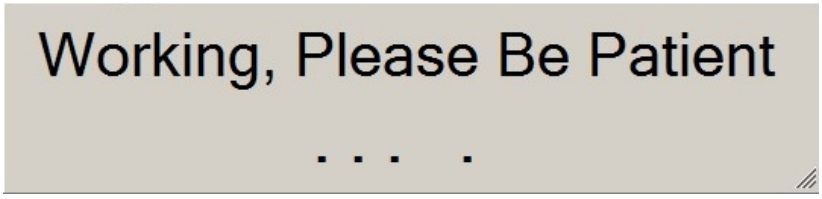
    c. Adjust the **Database Name** field to point to your accounting system database. If your accounting software uses a system or control database, provide the name of that database rather than a company database name. ***NOTE*** The database name will default to the last database used. This may not be the right database for the content pack being deployed.

16. Select the desired authentication method – Windows authentication or Prompt for Credentials.

    IMPORTANT You must use the same authentication method as selected for other content packs.

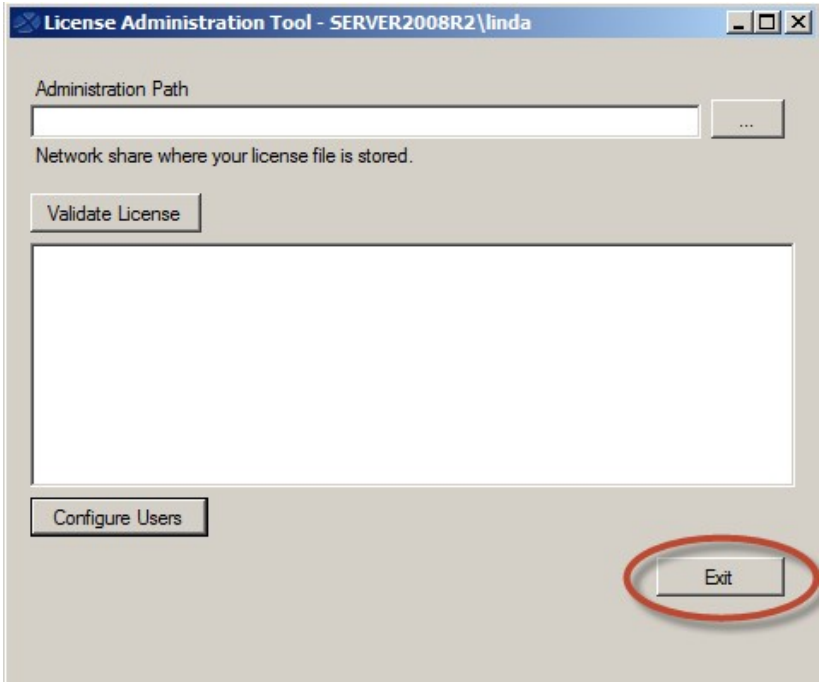


17. Click **Deploy Content**.
18. The content installer will display a status message to indicate that it is working.



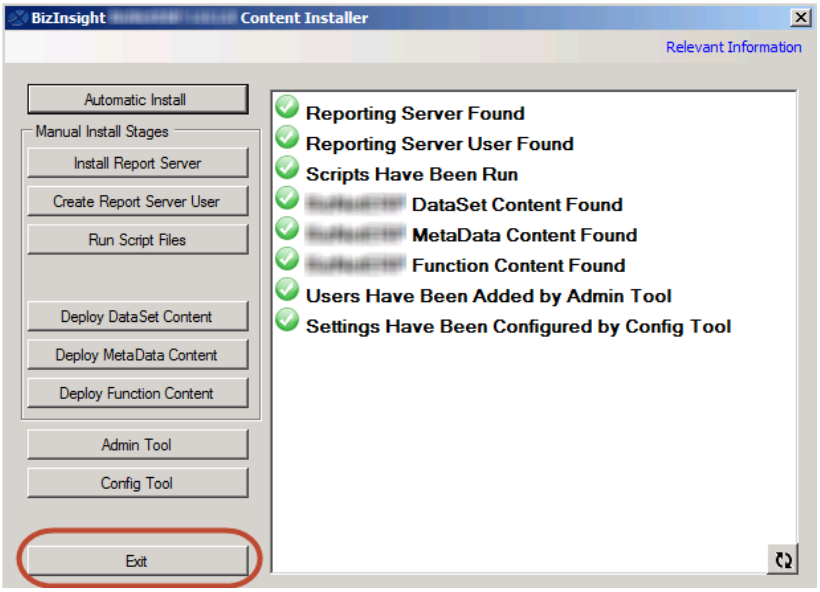
19. Once complete, the installer will display links to the Reporting Services sites. Click **OK** to continue with the installation.

20. The **License Administration Tool** will open. Unless you need to add new users, click **Exit**.



21. The content installer window will display the results of the automatic install. Click **Close.**

22. Click **Exit** to close the content installer.



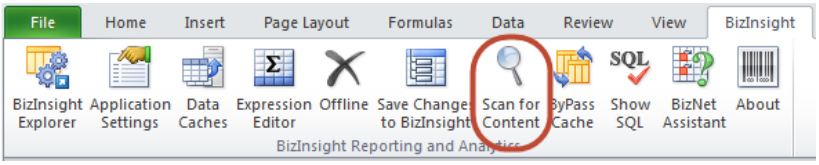
23. Repeat the above steps for each content pack that needs to be installed.

Step 2: Updating Client Workstations

Once all BizContent updates have been updated on the server, each client workstation installation needs to be updated with the new content add-in files and BizInsight Desktop Edition installed if the new content pack is a System Connector.

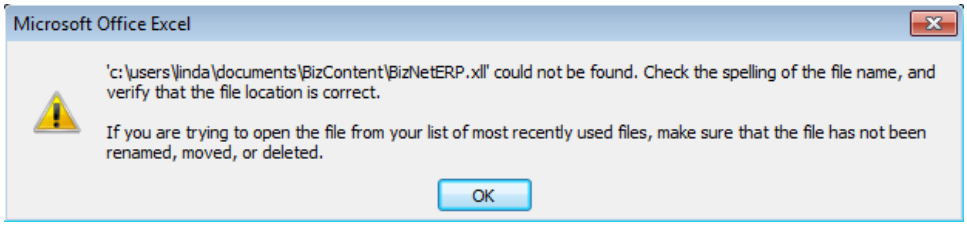
If BizInsight is being used in a Citrix/Terminal Services environment, see "Implementing Additional BizInsight Content on a Citrix/Terminal Services Server" on page 13.

If BizInsight is installed on individual workstations, instruct all BizInsight users to click on the **Scan for Content** button on the BizInsight ribbon in Excel to update their workstations with the new content.



If the users report that the Scan for Content button is missing, they may not have the most current BizInsight version. The Scan for Content button was added in version 5.5 SP1. BizNet Software recommends downloading and installing the latest BizInsight version but if you must use an older version, see "Manually Installing BizContent Add-ins" on page 14.

If your users report an error similar to the following when opening Excel again, see "Resolving ".xll could not be found" errors" on page 26 for steps to resolve.



Appendices

Implementing Additional BizInsight Content on a Citrix/Terminal Services Server **13**

Manually Installing BizContent Add-ins **14**

Resolving ".xll could not be found" errors **26**

Implementing Additional BizInsight Content on a Citrix/Terminal Services Server

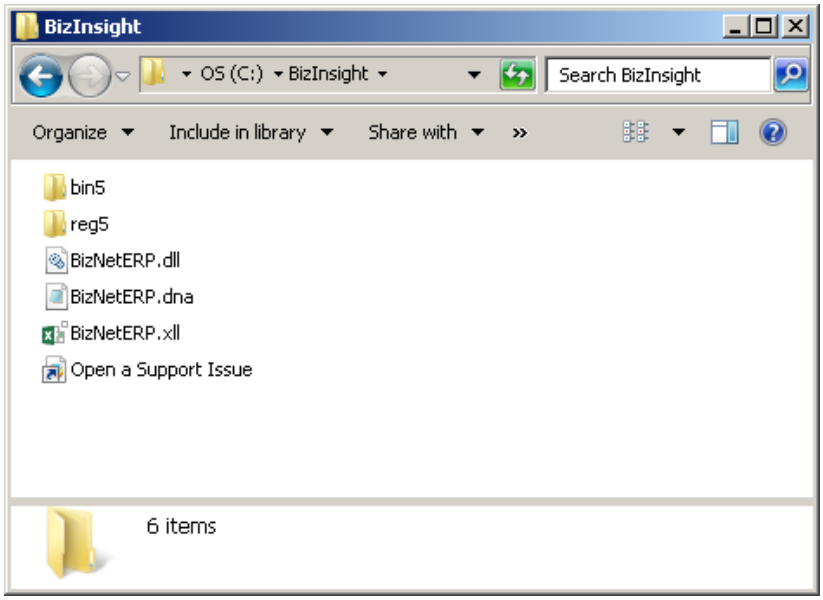
1. Copy all new BizContent add-in files (.dll, .dna and .xll) from the Configuration Path to the local BizInsight directory. If you do not know the location of the Configuration Path, launch the Content Installer on the server and click on the Relevant Information link in the upper right of the dialog.
2. Browse to the reg5 subdirectory of the local BizInsight directory. Open the file named "**Excelxxxx_register_OnDemand.reg**" with Notepad.
3. Copy the last **Open*n*** entry in this file and paste directly below. Increment the Open*n* and change the name to the new BizContent .xll file name. Repeat for each new content .xll file until all are represented in the file. For example:

   "OPEN"="/A \"BizInsightXL.Foundation\""
4. Save your changes to the file.
5. Browse to the reg5 subdirectory of the BizInsight directory and execute the "**Register BizInsight for Excel *xxxx* OnDemand.bat**" file to make sure it runs without error.
6. Have each BizInsight user execute the "Register BizInsight for Excel *xxxx* OnDemand.bat" to register the additional content for their login.

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.

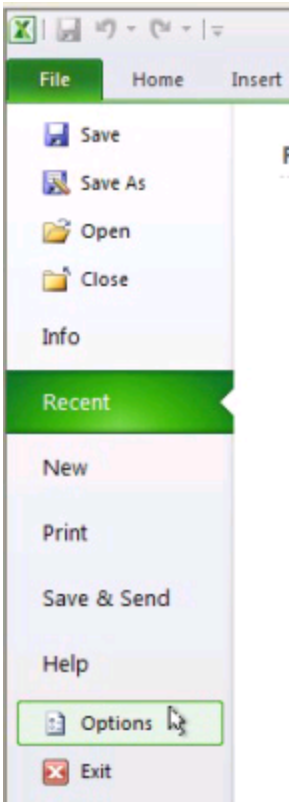


The remaining steps vary based on the Office version installed:

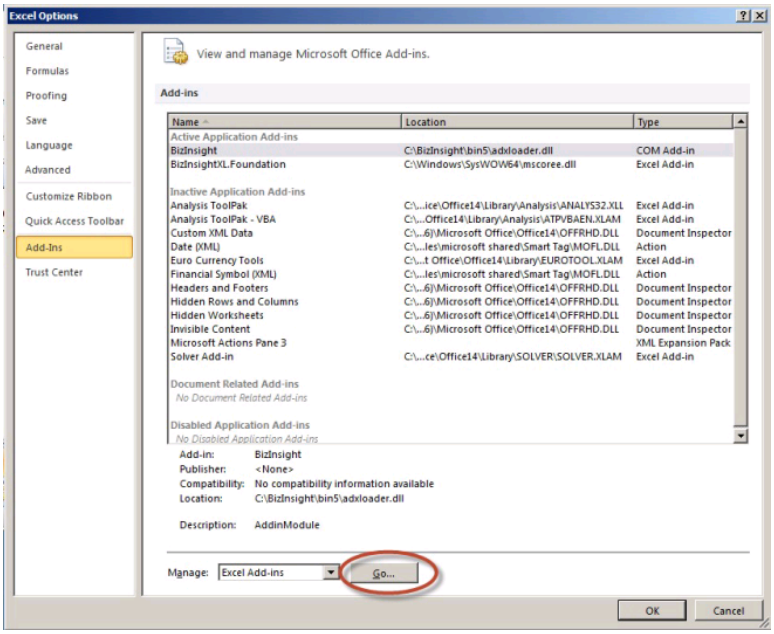
Office 2010/2013 steps
Excel 2007 steps
Excel 2003 steps

Excel 2010/2013

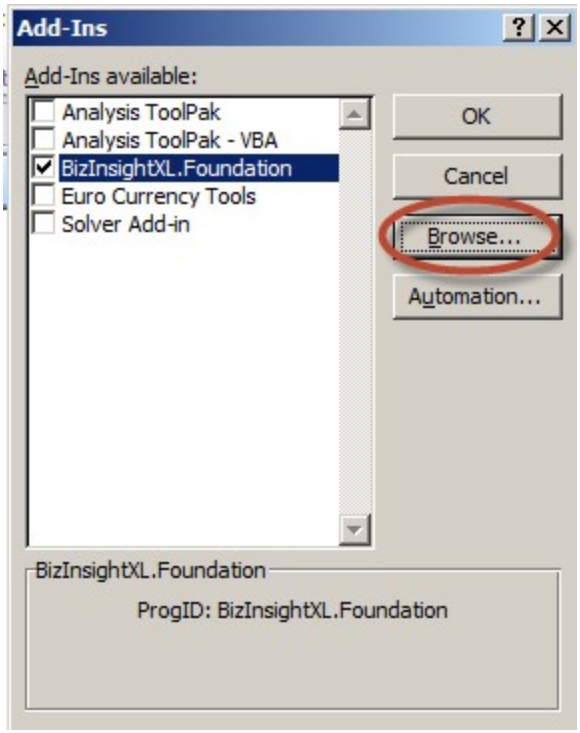
1. Click on **File** > **Options.**


File
Home
Insert
Save
Save As
Open
Close
Info
Recent
New
Print
Save & Send
Help
Options
Exit

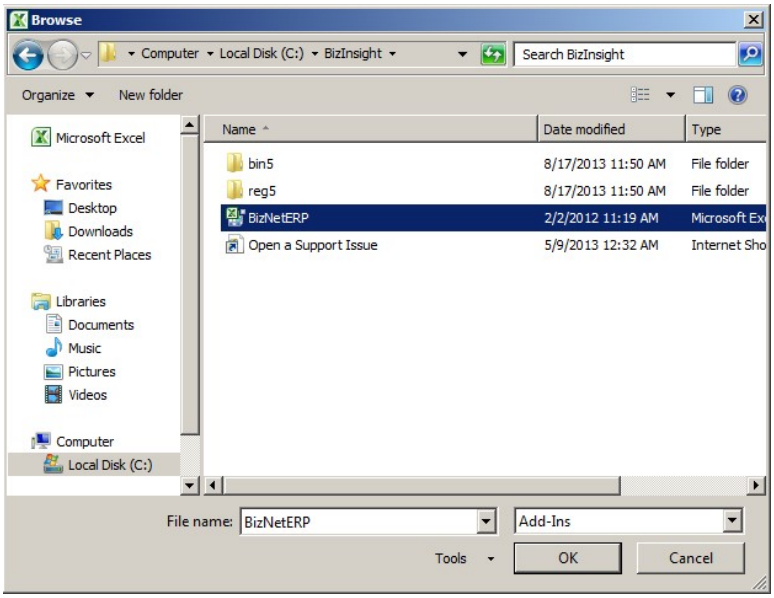
7. Click on **Add-ins** in the left pane and then click on **Go** at the bottom on the right pane.



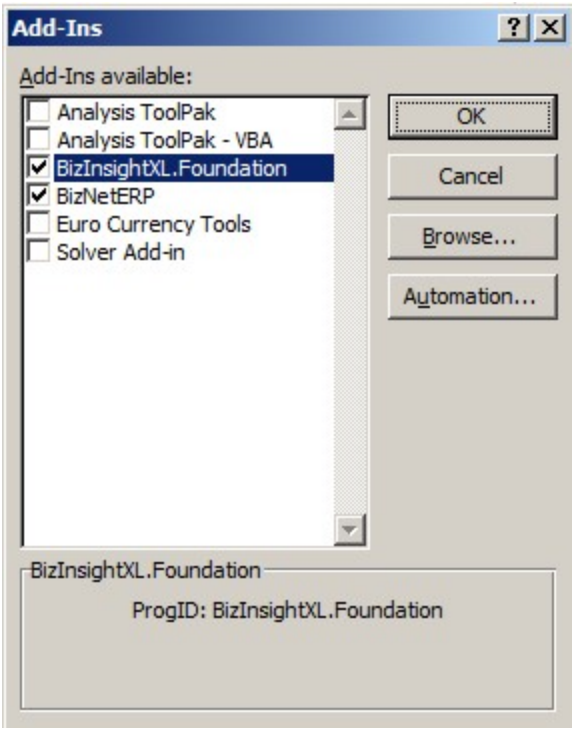
2. In the Add-ins dialog, click on the **Browse** button.



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



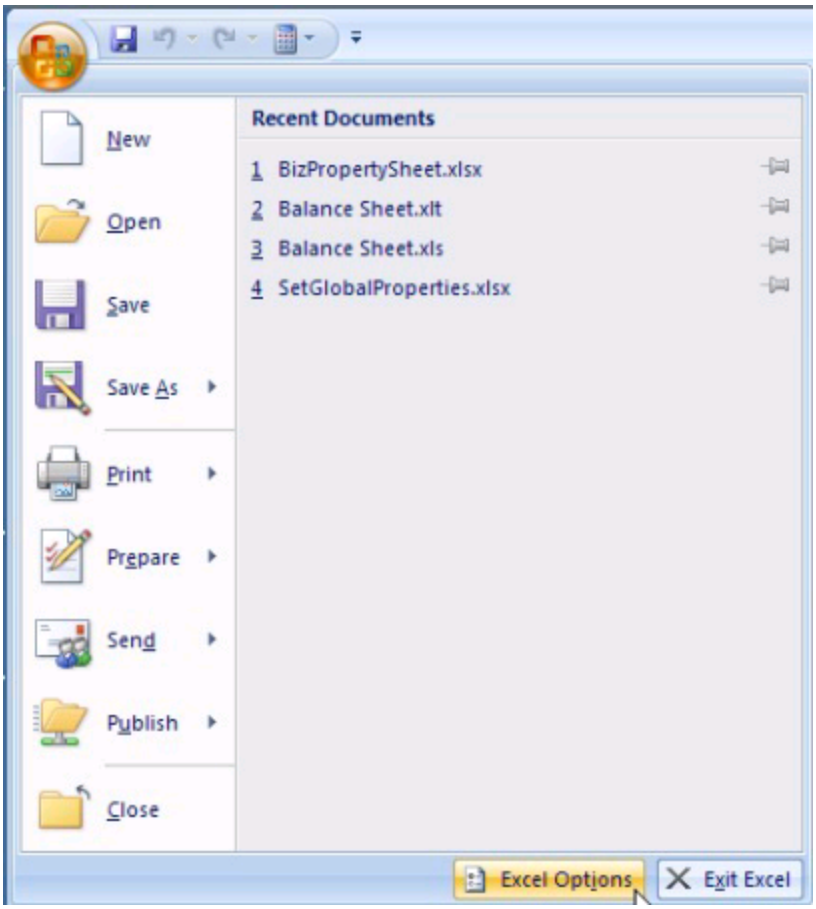
The Add-ins dialog should now look like the following:



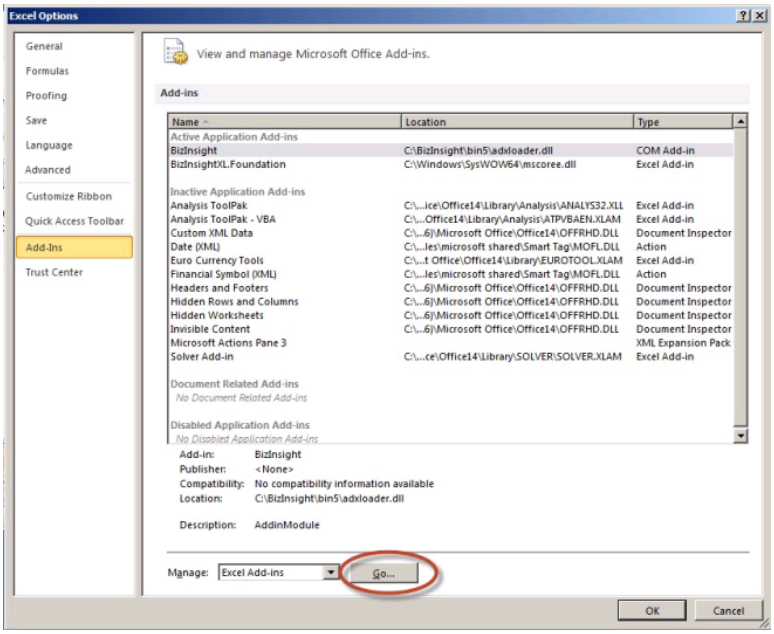
4. Click **OK**.

Excel 2007

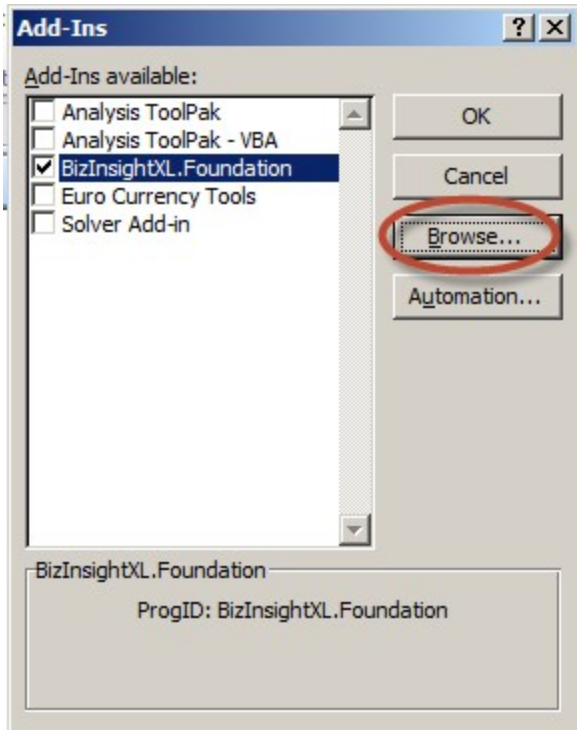
1. Click on the **Office** button and then click on the **Excel Options** button.



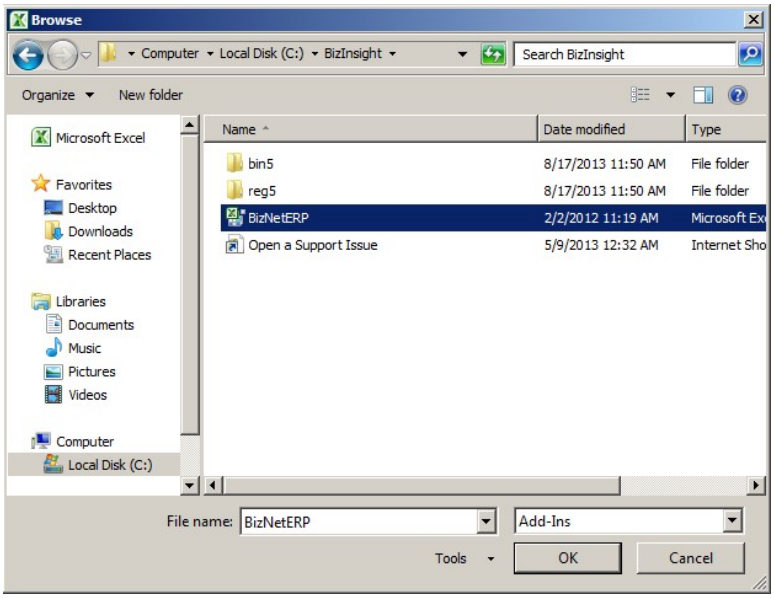
2. Click on **Add-ins** in the left pane and then click on **Go** at the bottom on the right pane.



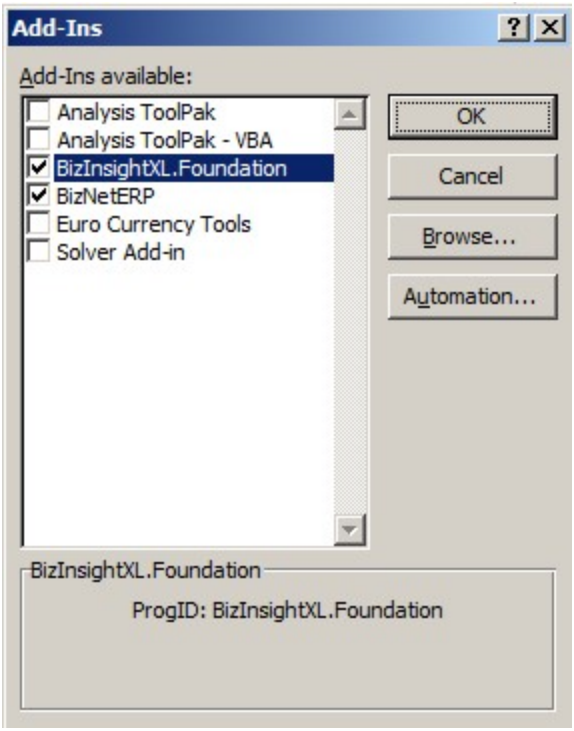
3. In the Add-ins dialog, click on the **Browse** button.



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



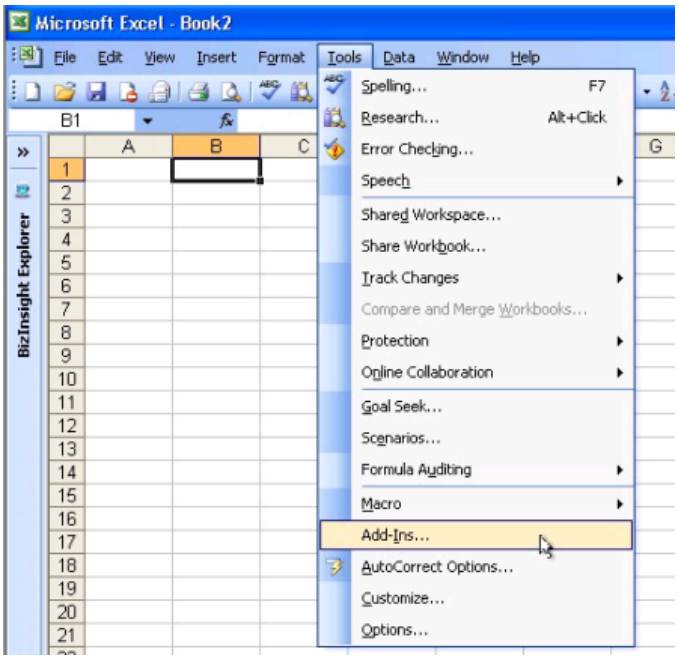
The Add-ins dialog should now look like the following:



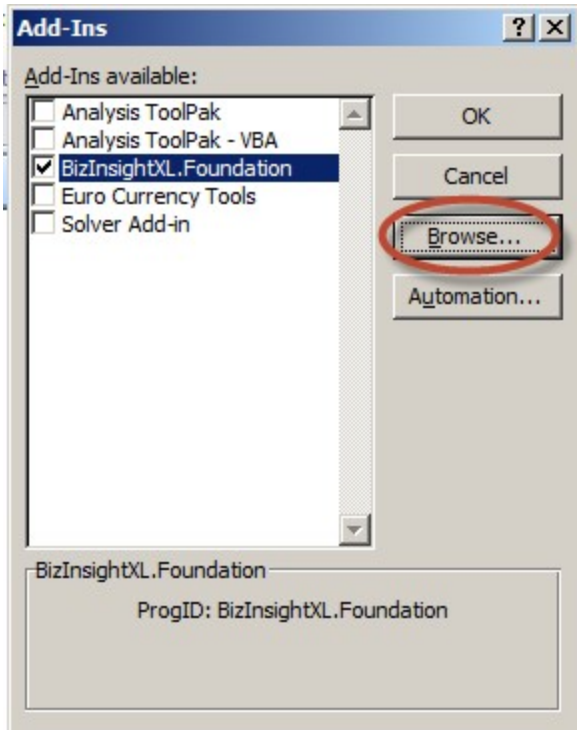
5. Click **OK**.

Excel 2003

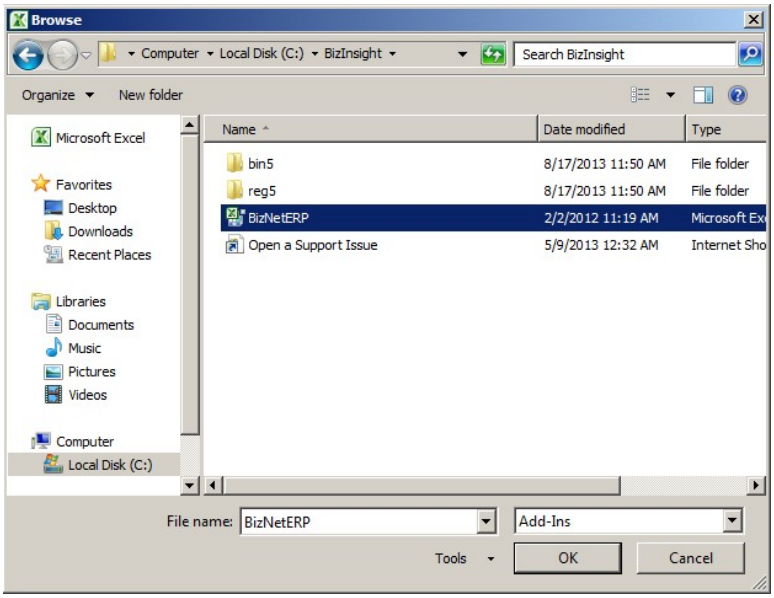
1. Click on **Tools** > **Add-Ins**



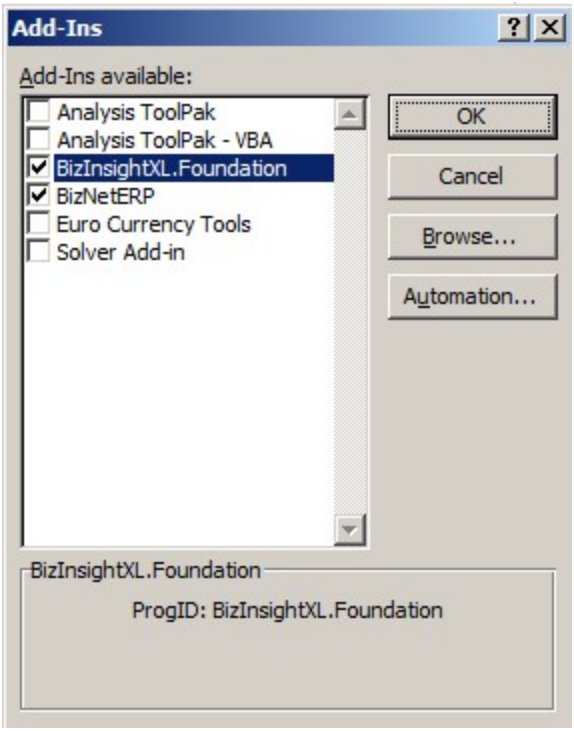
2. In the Add-ins dialog, click on the **Browse** button.



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



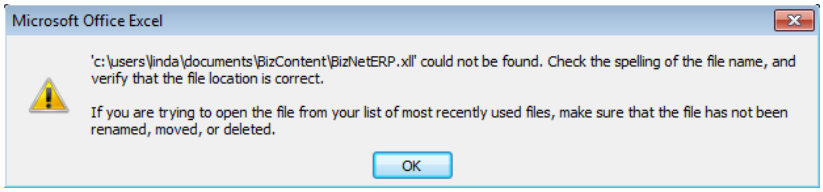
The Add-ins dialog should now look like the following:



4. Click **OK**.

Resolving ".xll could not be found" errors

In some rare instances, the name of the content add-in file provided with an update may change. When an add-in file name is changed, Scan for Content will properly remove that add-in file but will not delete the pointer to it that resides within Excel and the following error will occur:



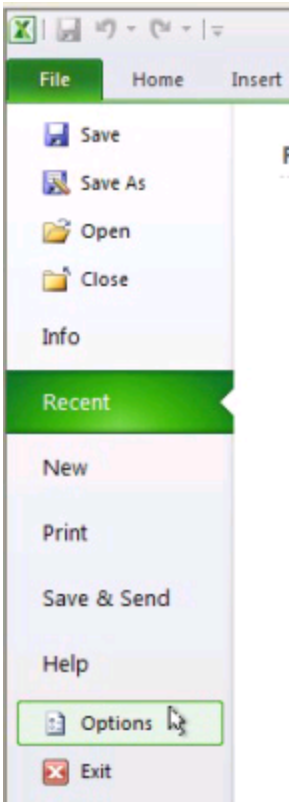
Perform the following steps to resolve the issue:

The remaining steps vary based on the Office version installed:

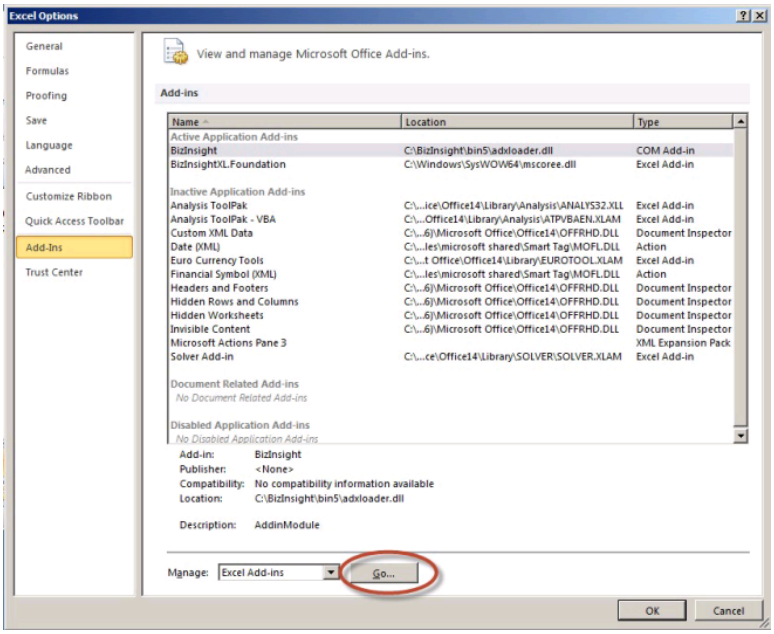
Office 2010/2013 steps
Excel 2007 steps
Excel 2003 steps

Excel 2010/2013

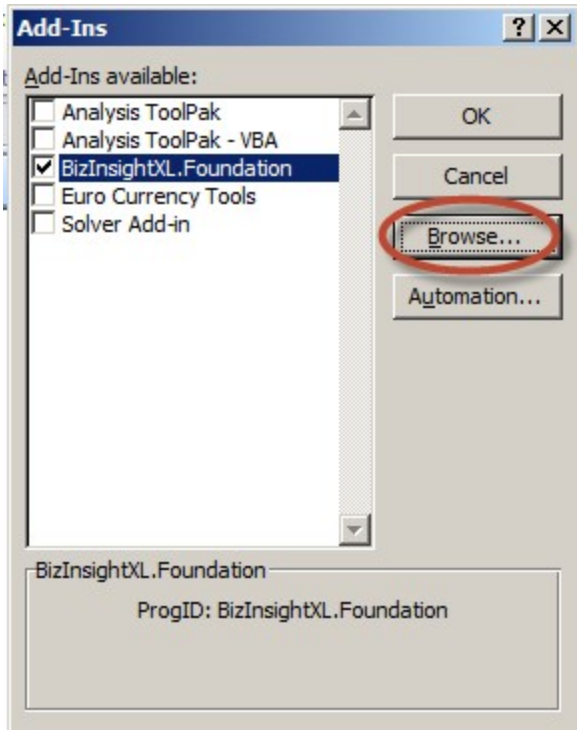
1. Click on **File** > **Options.**


File
Home
Insert
Save
Save As
Open
Close
Info
Recent
New
Print
Save & Send
Help
Options
Exit

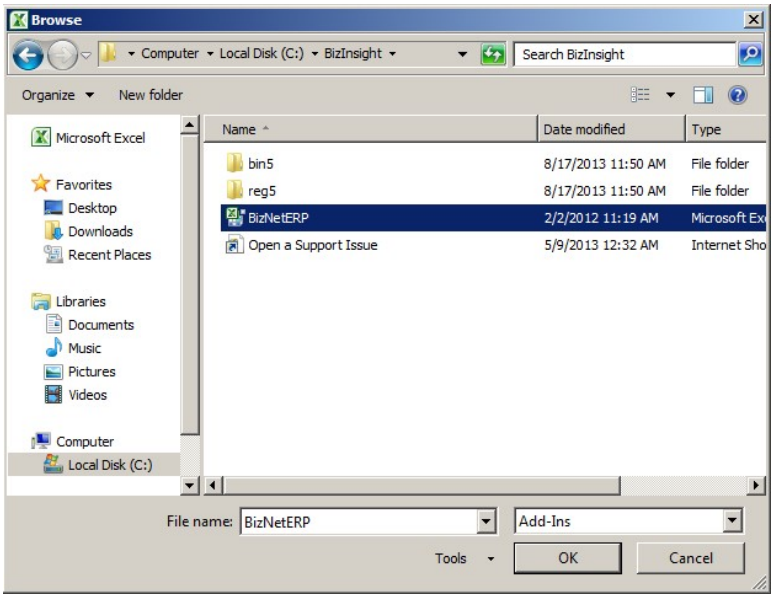
7. Click on **Add-ins** in the left pane and then click on **Go** at the bottom on the right pane.



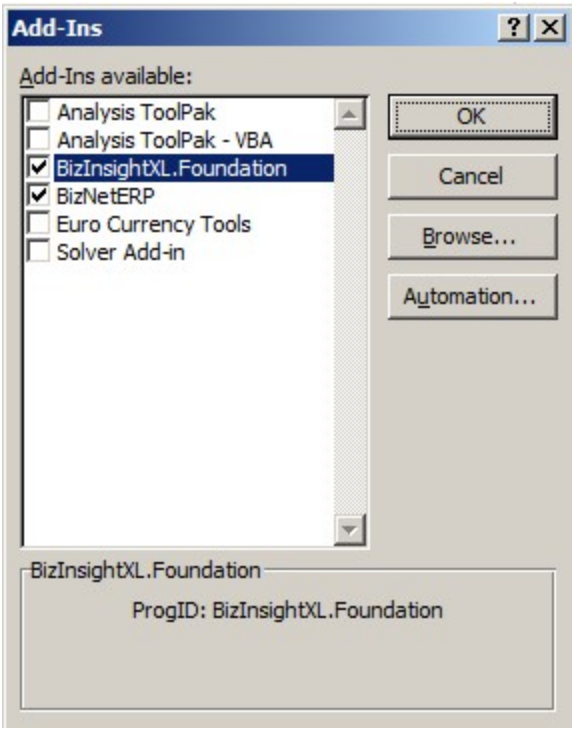
2. In the Add-ins dialog, click on the **Browse** button.



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



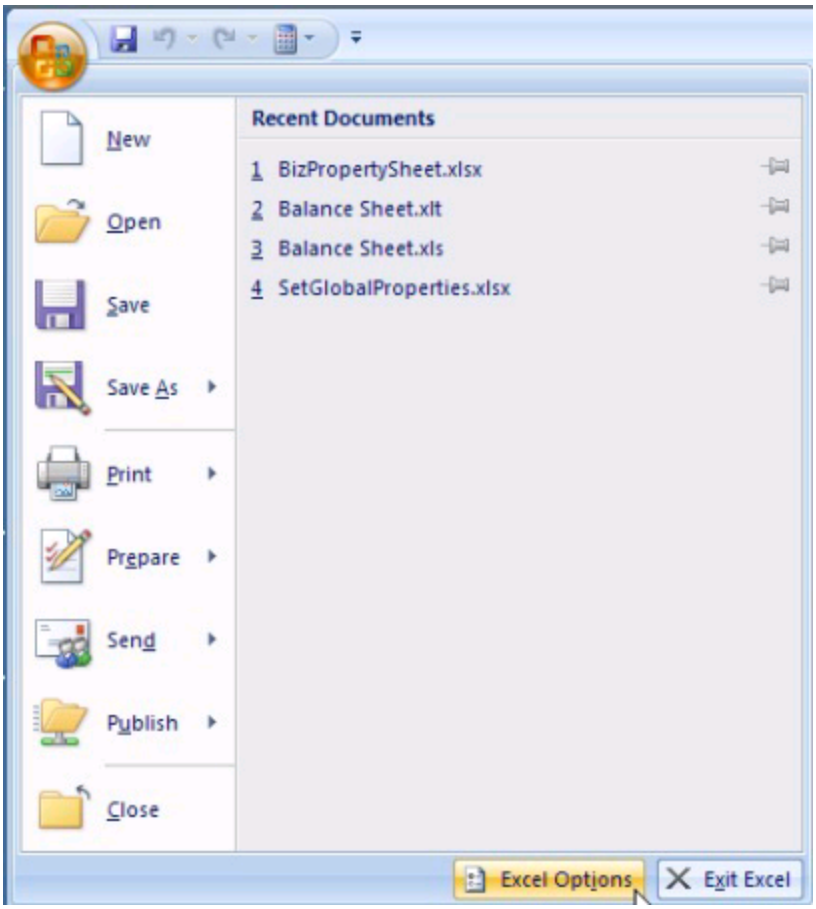
The Add-ins dialog should now look like the following:



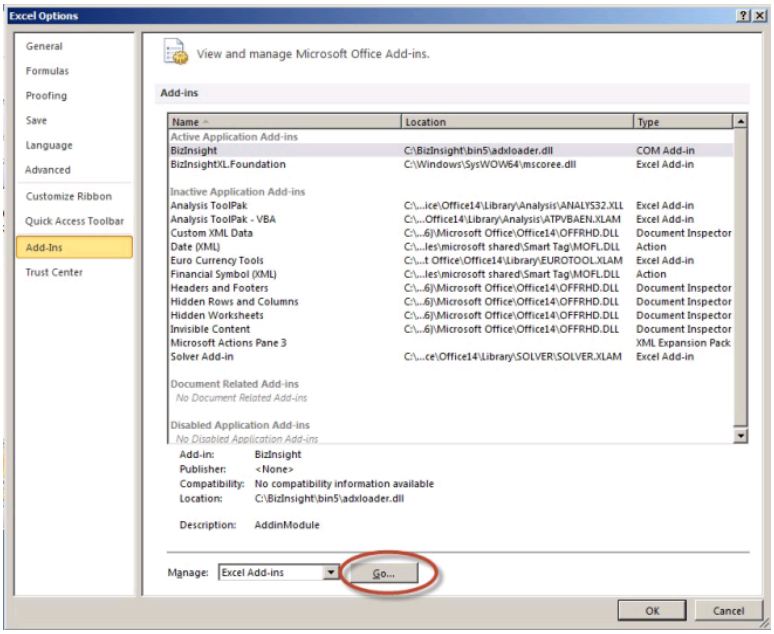
4. Click **OK**.

Excel 2007

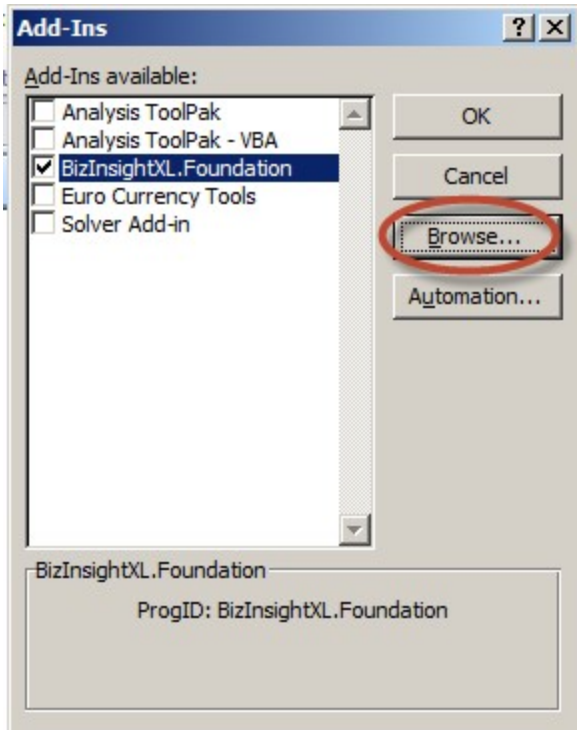
1. Click on the **Office** button and then click on the **Excel Options** button.



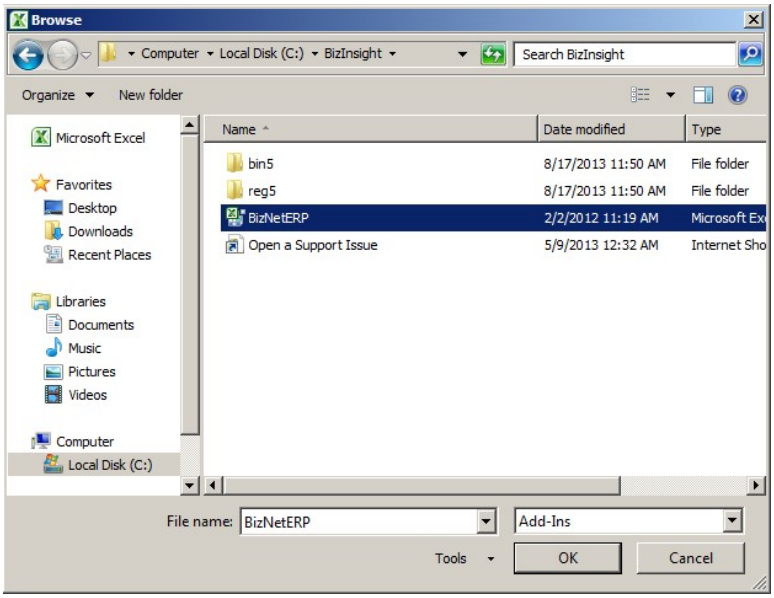
2. Click on **Add-ins** in the left pane and then click on **Go** at the bottom on the right pane.



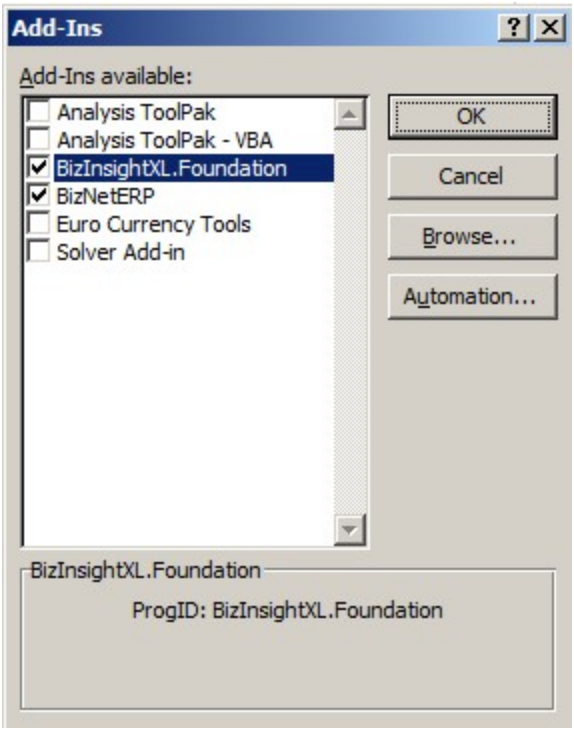
3. In the Add-ins dialog, click on the **Browse** button.



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



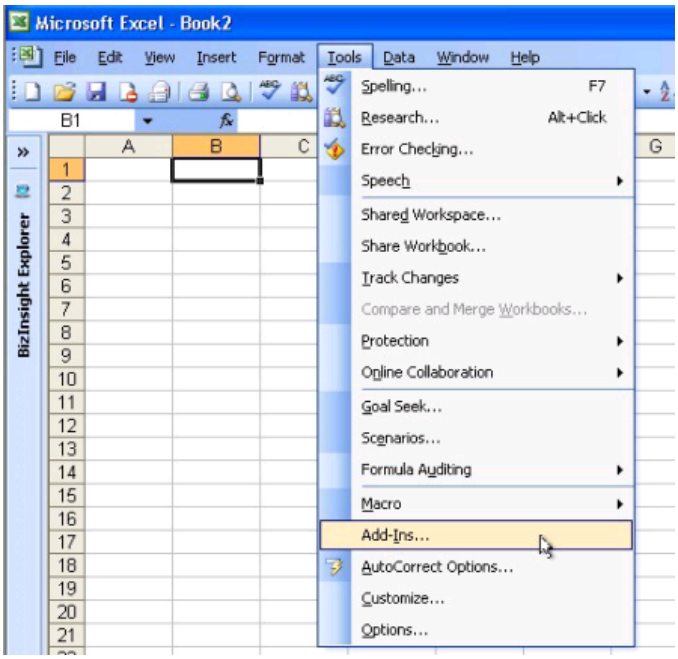
The Add-ins dialog should now look like the following:



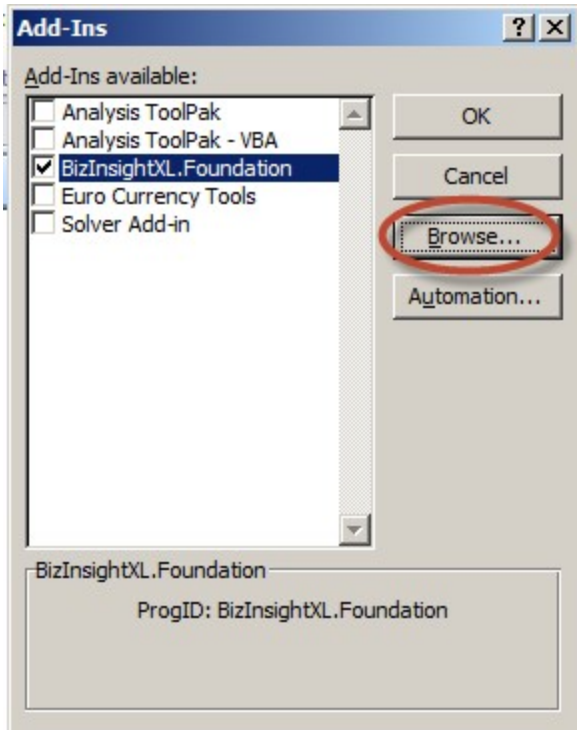
5. Click **OK**.

Excel 2003

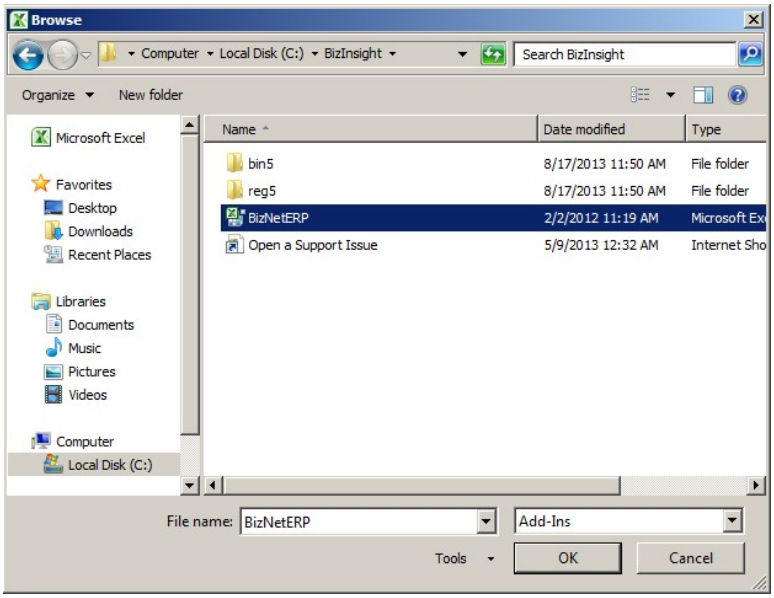
1. Click on **Tools** > **Add-Ins**



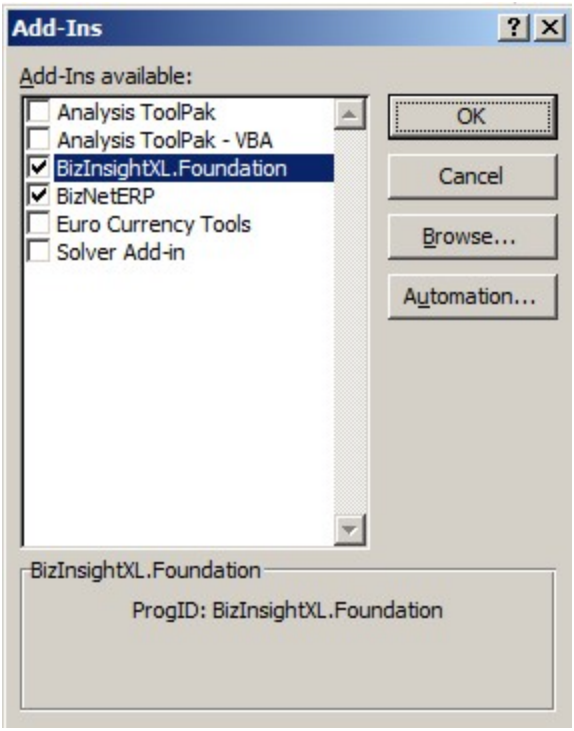
2. In the Add-ins dialog, click on the **Browse** button.



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

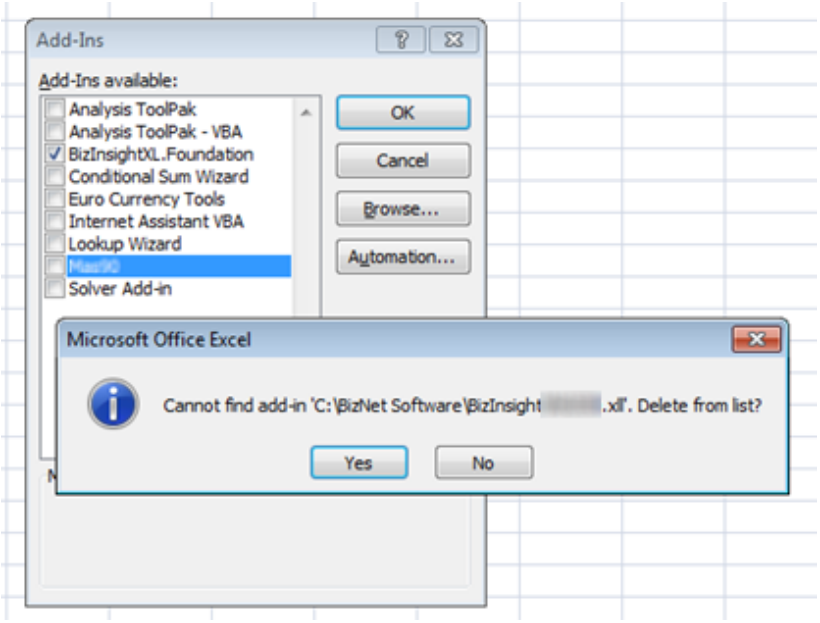


The Add-ins dialog should now look like the following:



4. Click **OK**.

9. Once in the add-ins dialog, uncheck the add-in mentioned in the error message. You should get the following message. Click **Yes**. If you do not get this message, you have unchecked the wrong add-in. Re-check it and uncheck the next one that is shown that has a similar name.



10. Close and reopen Excel to confirm that the error no longer occurs.