



Sage 500 ERP 2016

Sage Intelligence Reporting Upgrade
Guide

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1.0 System Requirements

Supported Operating Systems: Windows 2000, Windows XP, Windows Vista, Windows 7, Windows Server 2003, Windows 2008 Server

1. Microsoft Excel 2007, 2010, 2013
2. Hardware: CPU 1GHz or greater
3. Memory: 512MB RAM
4. Microsoft SQL Server 2005, 2008/R2 and 2012
5. Hard Drive Space: 1Gb or more

2.0 Supported Database Connectivity

Sage 500 ERP Intelligence Reporting uses ODBC and OLEDB technology to gain access to Open Database Systems via the Connector. *Sage 500 ERP Intelligence Reporting* includes direct support for most popular database systems and Connection Types for these are included within the Connector. For systems where a Connection Type does not exist but where the system has an ODBC driver these can be accessed via the **System DSN** connection types within the Connector.

Please note that although the *Sage Intelligence Reporting* Connector module natively works with several database types, it only ships with Reports & Templates for the *Sage Intelligence* databases that run on a SQL Database.

3.0 Upgrade Instructions

This document serves the purpose of guiding a user on upgrading their Sage 500 ERP Intelligence from one version to another. The uninstallation of software and databases is not required when upgrading Sage 500 ERP Intelligence Reporting.

Please ensure the following Sage 500 ERP software is installed before the Sage 500 ERP Intelligence Reporting software can be upgraded.

- Sage 500 ERP Client
- Sage 500 ERP DatabaseExpress
- Sage 500 ERP Client Installation (E.g. 7.4)
- Sage 500 ERP Intelligence Server

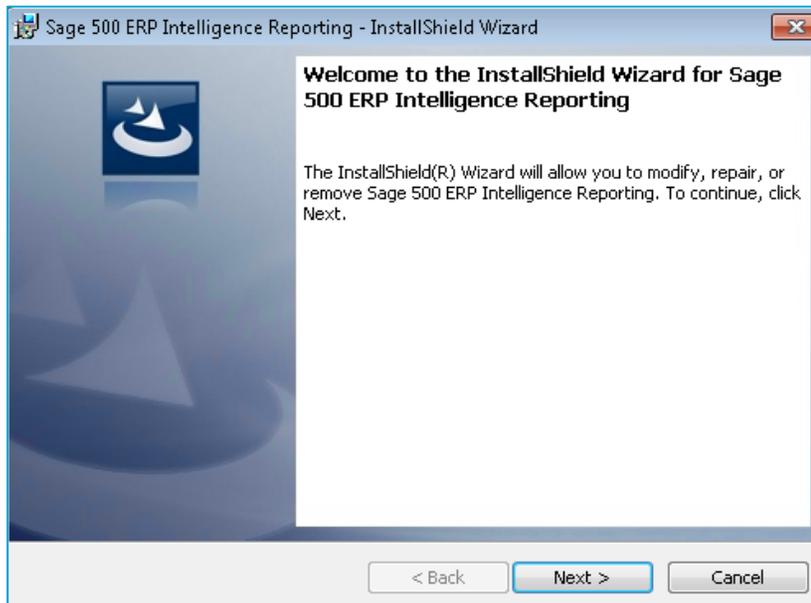
Please ensure that your system meets the minimum system requirements and that the User Account Control (UAC) is disabled under the User Accounts in the Control Panel in Windows, otherwise problems will be encountered when trying to run the Sage 500 ERP Intelligence software.

4.0 Installing Sage Intelligence Reporting

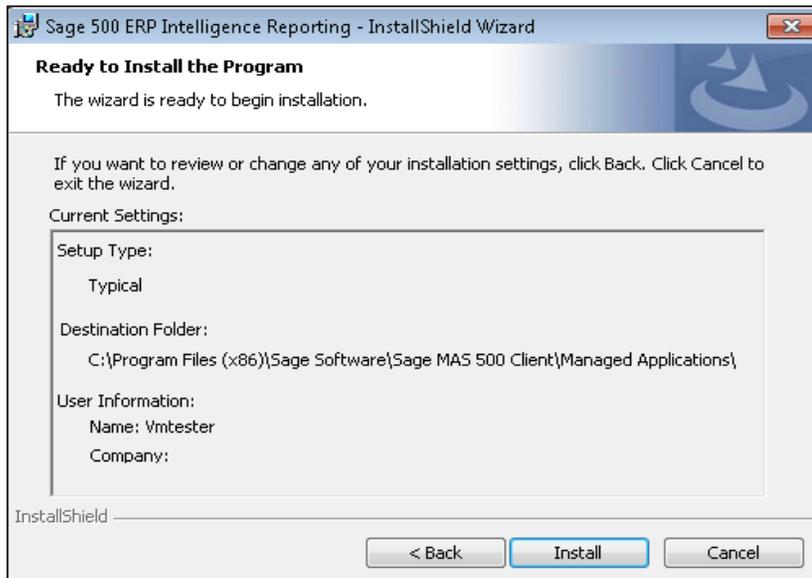
1. Locate the folder where the Intelligence Reporting software is stored and double click on the Setup file and the Preparing to Install screen will appear.



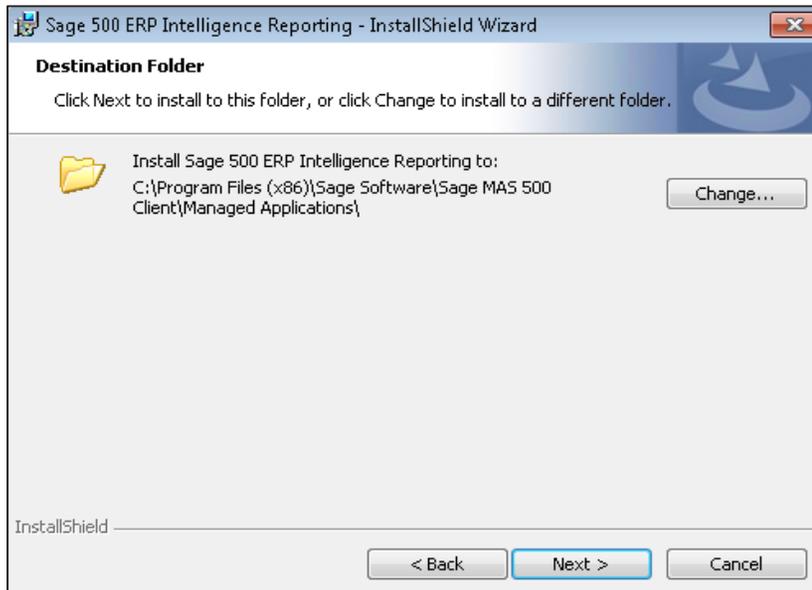
2. The Welcome screen will open. Click the Next > button.



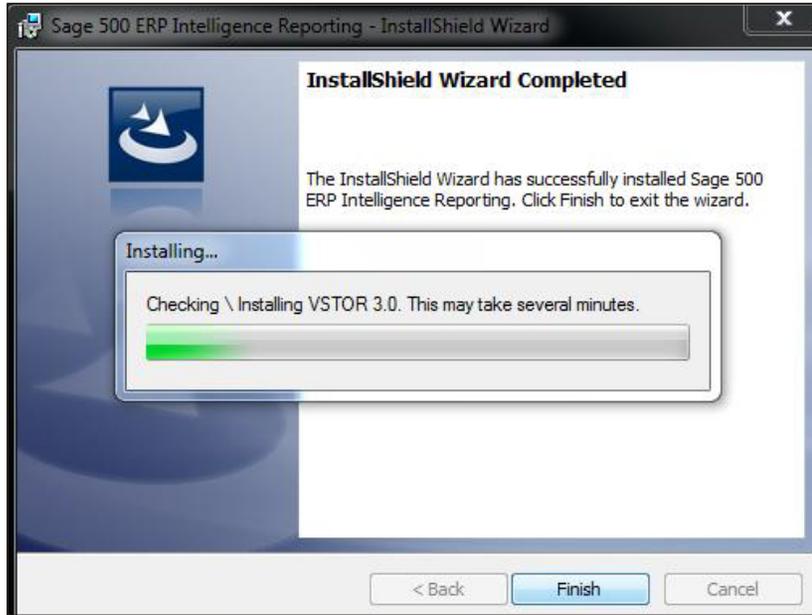
3. The Read to Install the Program screen will appear. Click the Install button.



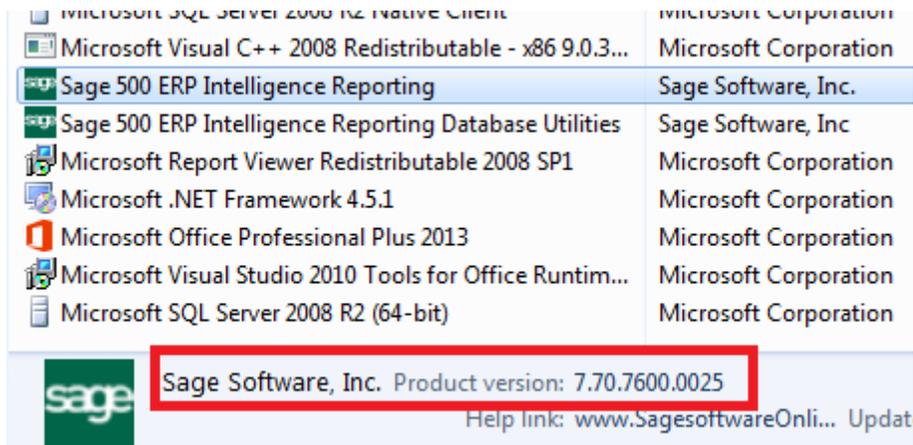
4. The Destination Folder screen will appear. Either click the “Change...” button to change the folder or click the Next > button to use the default folder.



- When Intelligence Reporting has finished installing, click the Finish button. The Install VSTOR 3.0 progress bar will appear and will close itself once VSTOR has been installed.



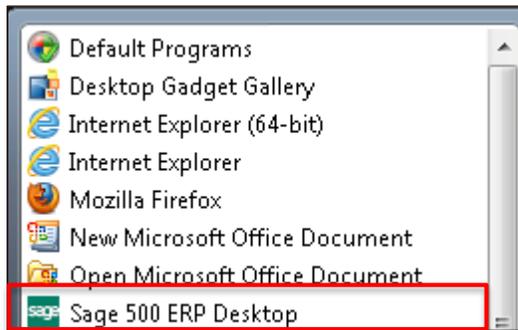
- Verify the version number after installation of Sage 500 ERP Intelligence 2016 by browsing to your **Control Panel > Programs > Programs & Features**. Select Sage 500 ERP Intelligence Reporting. Check that you have the latest version.



5.0 Registering the Intelligence Reporting Upgrade

You will need to register (Not license) Intelligence Reporting online when you have finished upgrading.

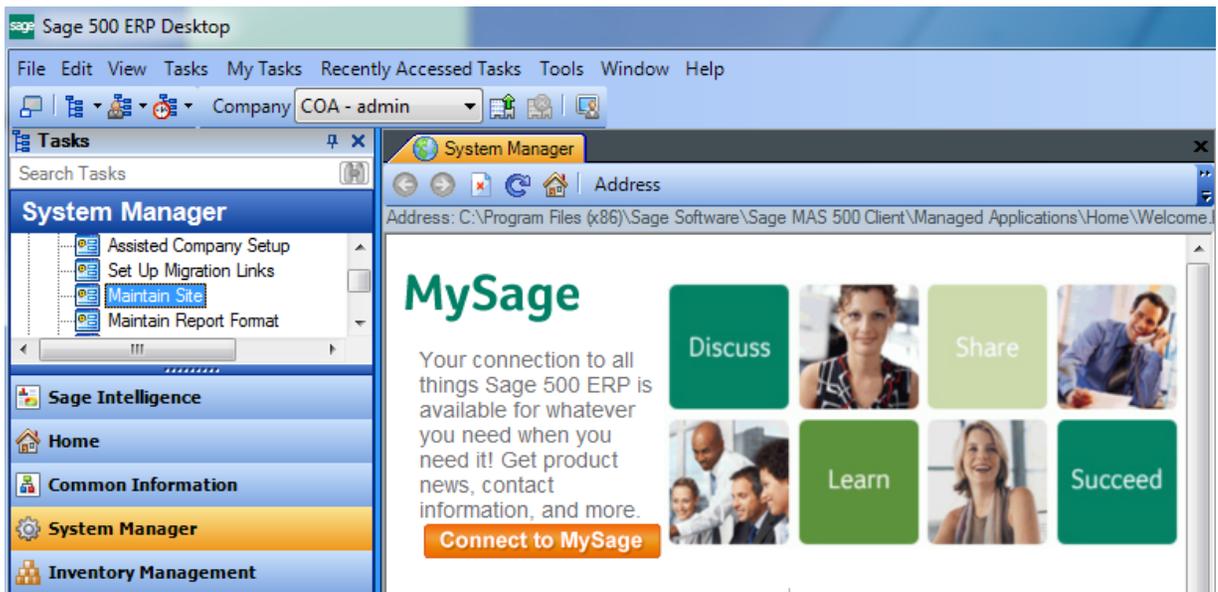
1. Click on either the Start menu or desktop short cut and select Sage 500 ERP Desktop to launch Sage 500 ERP.



2. The Sage 500 ERP Login box will appear. Enter the following details
 - User Name: enter your user name
 - Password: enter your password
 - Company: select a company



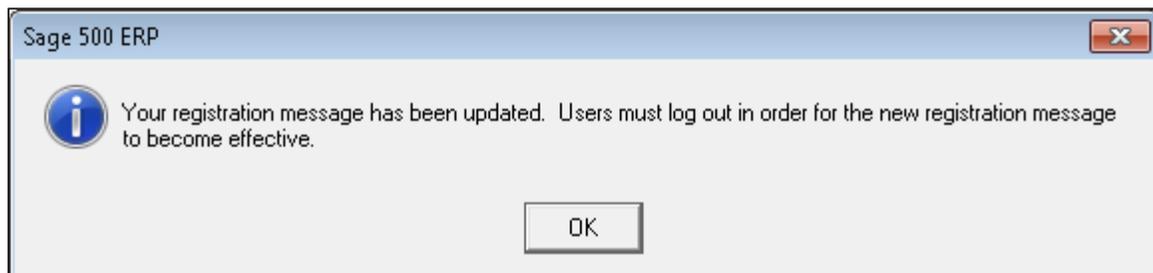
3. Select System Manager and then click on Maintain Site in the system tree.



4. Select the Registration tab and click the **Automatic Internet Registration** button.



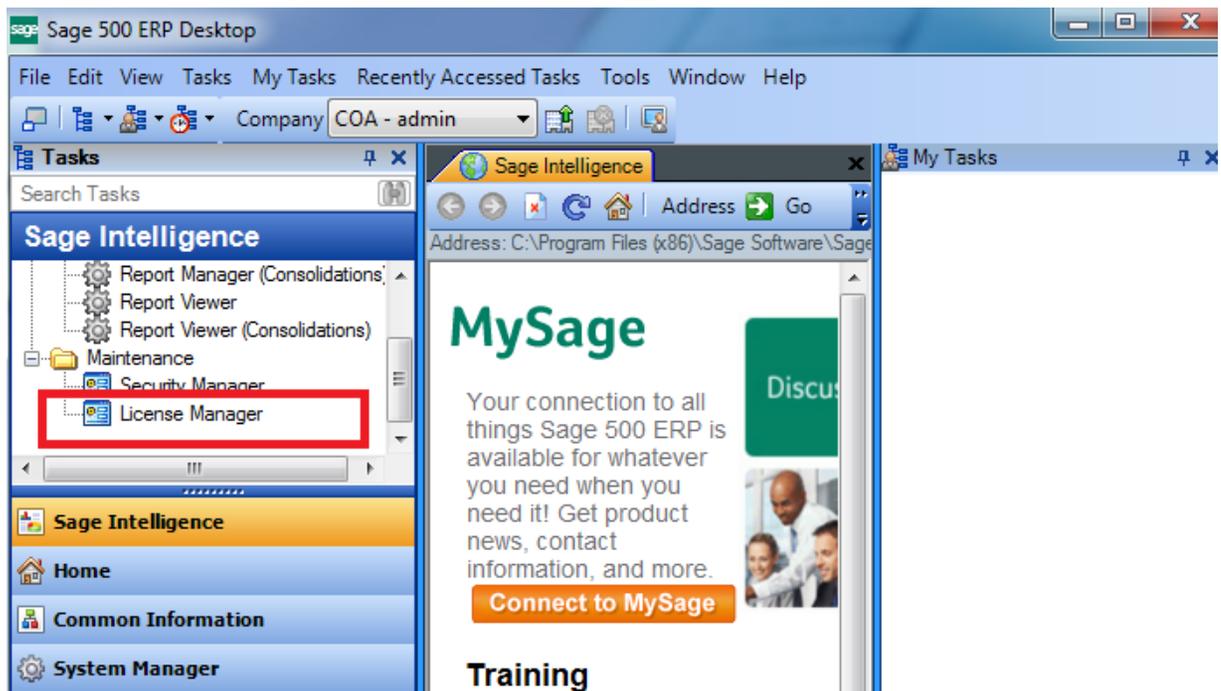
5. The Sage 500 ERP registration message box will appear. Click the OK button.



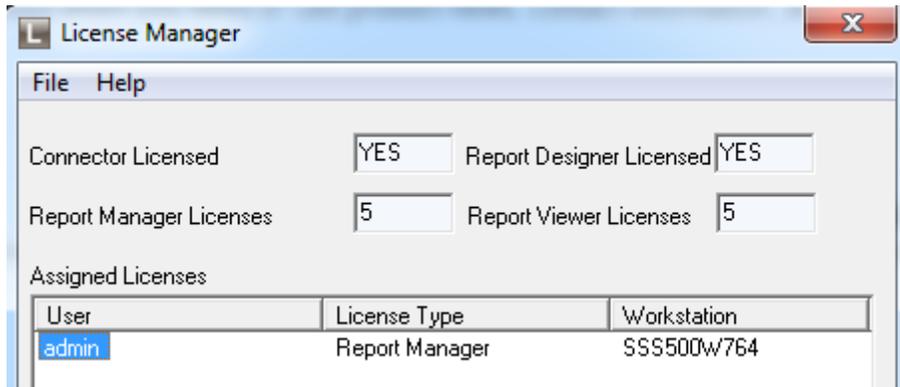
- The Registration Message box will now be populated. Log out and log back into Sage 500 ERP for the registration to take effect.



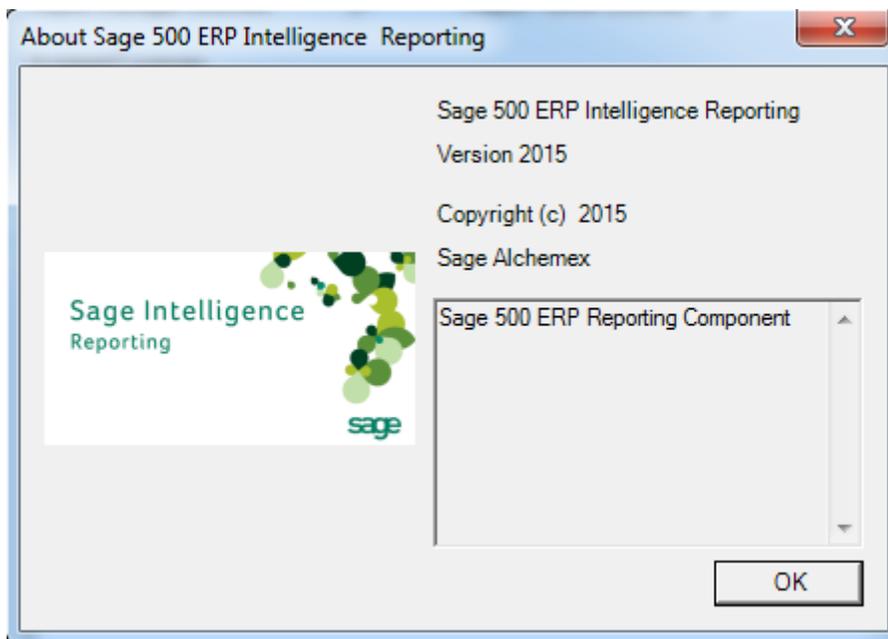
- Log back into Sage 500 ERP and select the Sage Intelligence>Maintenance>License Manager.



- The License Manager screen will open. Click Help and select the About option.



9. The About screen will open. Check that the new version of Intelligence Reporting has been installed correctly. Click the OK button.

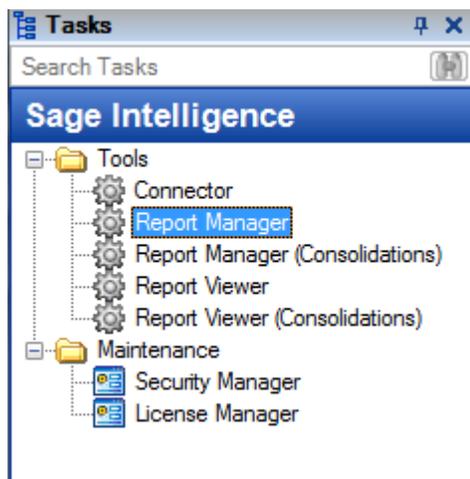


6.0 Bulk Importing Reports

When upgrading to a new version of Intelligence Reporting any new reports included in the new version will need to be imported using the Bulk Import/ update feature in Sage 500 ERP Intelligence.

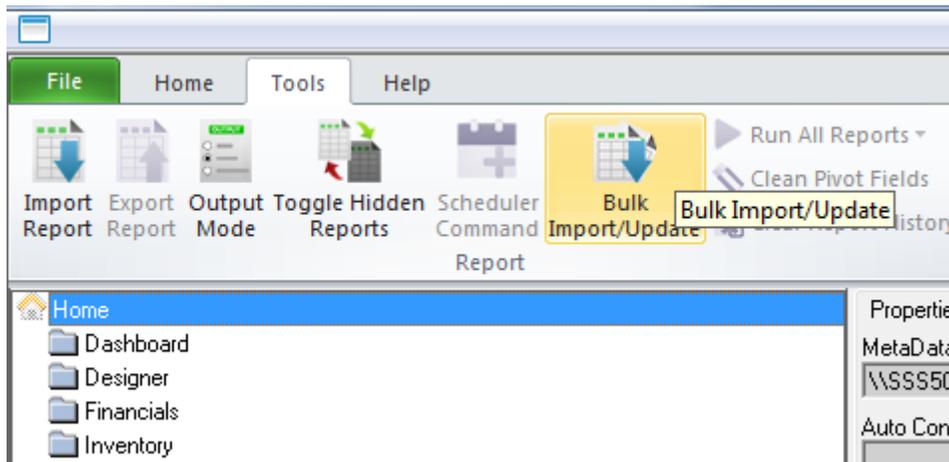
Please note that the Bulk Import feature will not overwrite any old reports.

1. Launch Sage 500 ERP and select the MAS Intelligence folder. Double click on Report Manager in the Tools folder.

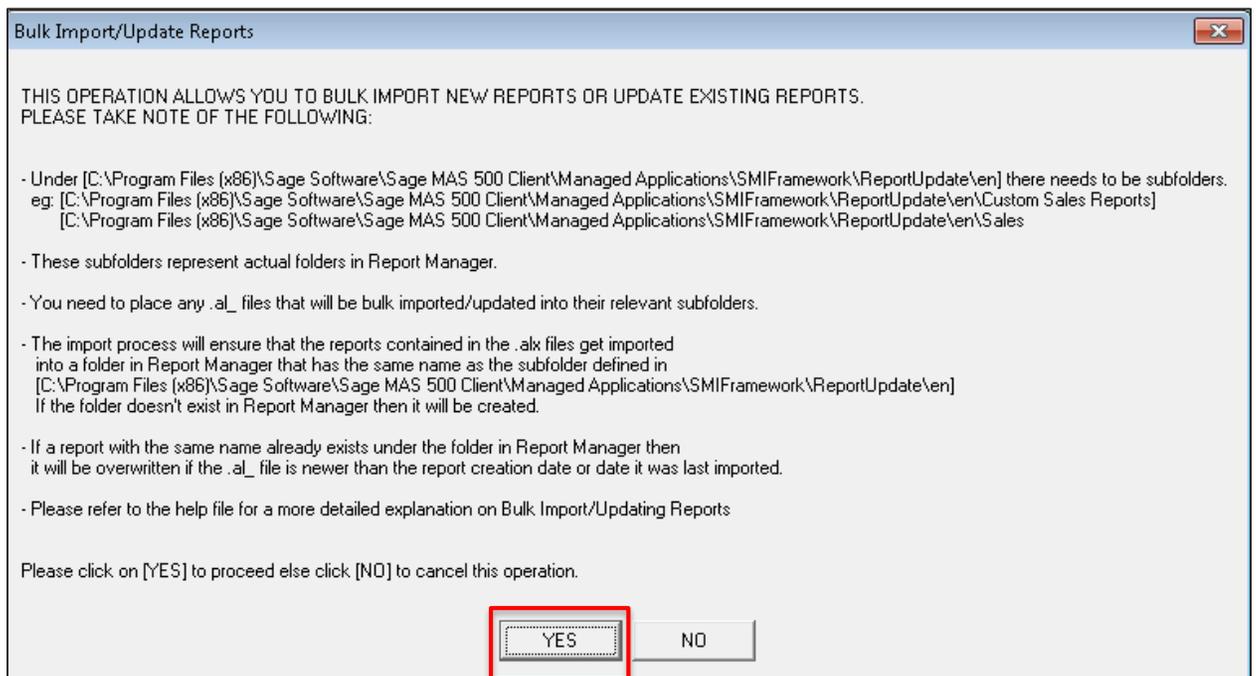


Please note that a Report Manager license is required to run and access reports in the Report Manager.

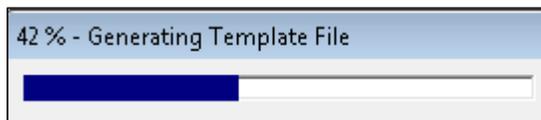
2. The Report Manager screen will open. Highlight the Home icon in the Object window, click on the Tools menu and select Bulk Import/Update Reports.



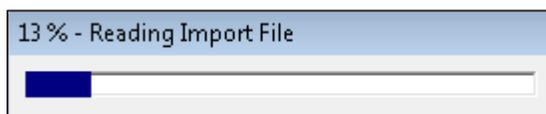
3. The Bulk Import/Update Reports popup screen will appear. Click 'Yes' to proceed with Bulk Import.



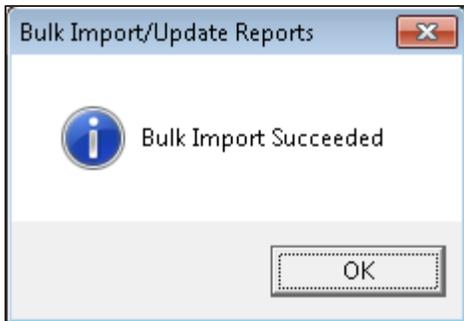
4. The Generating Template File progress bar will appear and close automatically.



5. The Reading Import File progress bar will appear and will close automatically.



6. Message will be displayed showing successful update of Reports.



7. Double click on "Home" icon in the object window to refresh the folders in the Report Manager. New reports will be appear in the Folders.

