# BI360 – Installation Guide

## User Guide v4.7

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# Introduction

The BI360 Suite provides a complete reporting, budgeting and dashboard suite for Microsoft Dynamics AX, GP, NAV, SL, and CRM customers. It can also be used with other ERP systems or stand alone. Because the solution comes with out-of-the-box integration to Dynamics as well as pre-built report templates, it takes only a fraction of the time to implement compared to other BI suites.

The installation of the BI360 Suite is dependent on the application licenses purchased by the organization. The BI360 solution is divided into two separate installation files; one for the BI360 *Reporting* applications (Designer, Player, Composer, Publisher, and Administration Tool) and another for the BI360 *Planning* applications (BI360 Planning and Data Warehouse). This document will provide more insight on how to install the different applications of the BI360 Suite.

Moreover, client software can be installed on workstations and/or Terminal Servers. BI360 suite does not have a server-side application and will not require any installation on a centralized application server. For example, there is no application software that needs to be installed on the organization's ERP system. However, all client software will connect to a centralized SQL server.

## Who should Read this Manual

This manual is designed for the members of the organization's IT department who are responsible for installing and configuring the applications in the BI360 suite.

## What's included in this Manual

This manual is designed to give an in-depth understanding of how to install different applications within the BI360 suite. The manual is divided into the following parts:

- **BI360 Reporting**: overview of the *Reporting* applications and an explanation of the installation process including the client and terminal server installations.
- **BI360 Planning**: overview of the Planning applications and an explanation of the installation process for BI360 Planning and Data Warehouse.
- **iOS App**: overview of the Portal iOS app and an explanation of the installation process.
- **Appendix**: contains miscellaneous information that the reader may reference to.

## Symbols and Conventions

This manual uses the following symbols to make specific types of information stand out.

| Symbol | Description |
|---|---|
| | The sunlight symbol indicates helpful tips, shortcuts, and suggestions. |
| | The warning symbol indicates situations we recommend to be aware of when completing tasks. Typically, this includes cautions about completing steps in their proper order or important reminders about how other information in BI360 may be affected. |

## Post-installation

Although it is not mandatory, it is highly recommended to go through the checklist below to verify that the installation was successful.

- Reporting:
  - ☐ A green checkmark ( ) is displayed in the bottom left hand corner of the *Administration Tool*.
  - ☐ The organization's ERP system is listed under *Installed Packages*.[1]
    - Administration Tool -> Integration Management -> Integration Packages
  - ☐ All connections to databases designated for reporting (ERP and/or Data Warehouse) have been configured.[1]
    - Administration Tool -> System Settings -> Data Connections
  - ☐ All BI360 *Reporting* Licenses have been installed and are not expired.[1]
    - Administration Tool -> License Management
  - ☐ All BI360 *Reporting* users have been assigned to the appropriate *Reporting* module in Application Management.[1]
    - Administration Tool -> Application Management
  - ☐ Users have been given temporary full access through Access Management (Security) [1, 2]
    - Administration Tool -> Security Management -> Access Management
  - ☐ A trial balance report can be run successfully.[3]
    - Pre-built Simple Trial Balance reports are available for download through the Solver Support Portal.
- Planning:
  - ☐ Connections established to Data Warehouse can be seen when accessing the Assignments Panel.[4]
    - Open Excel -> BI360 Planning ribbon -> Assignments
  - ☐ The Admin Panel displays the same connection as the report connection at the bottom of the screen. [4] ○ Warehouse:
  - ☐ The Data Warehouse Manager can be opened and connected to the Warehouse database. [4]
  - ☐ Initial period configurations can be configured through the Warehouse Manager. [4]

Notes:

1. For more detailed instructions, consult the Administration Tool User Guide.
2. Temporary full access may be removed after training to reflect proper access for each user.
3. For more detailed instructions, consult the Training guide for the appropriate module.
4. For Planning and Warehouse validations, consult the User Guide for the appropriate module.

# Client Installation

The following sections will explain how to install the BI360 *Reporting* applications for a client, which can also be defined as a workstation or desktop. The *Client Installation* section is organized as follows:

1. How to install BI360 *Reporting*.
2. Walkthrough of the *repository setup wizard*.
    a. How to create a new repository
    b. How to use an existing repository
3. Walkthrough of the *repository setup wizard* (continued).

If a section of the Installation Guide does not apply to the organizational environment or scenario, the section may be skipped. For instance, if a repository has never been created at the organization, refer to the section *How to create a new repository* and skip the section *How to use an existing repository*.

Upgrading from a previous version

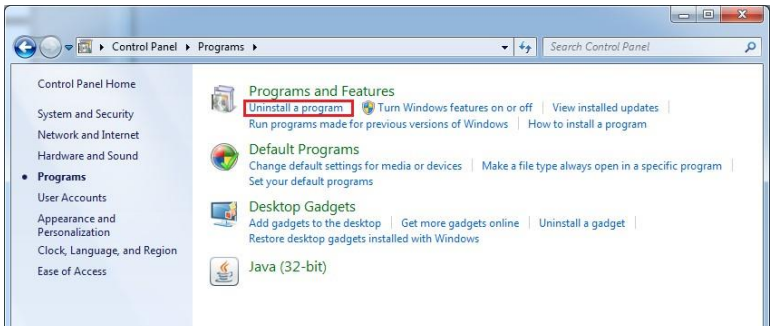
As an existing BI360 Reporting customer (using version 3.8 or older) BI360 Reporting must be uninstalled from all clients using the application before installing Reporting version 4.0 onto the machine.

Uninstalling removes the BI360 Reporting application only. The repository and its data remains intact for continued use. During the installation process the data will connect to the existing repository.

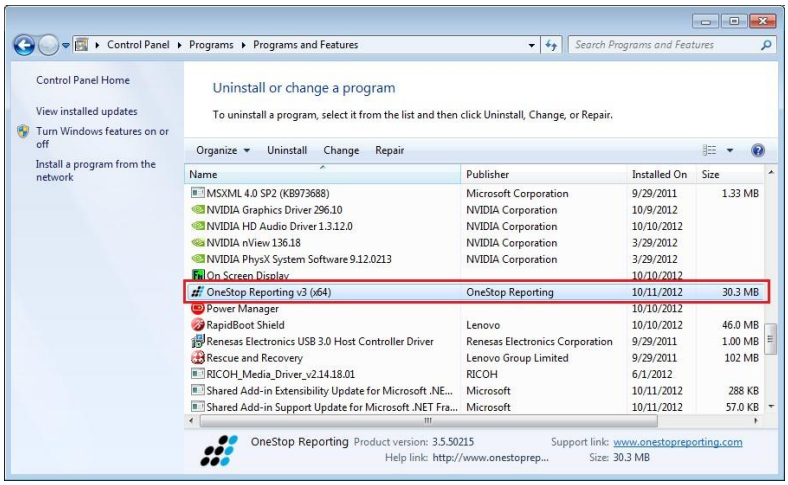
If there is an existing Repository, be sure to back up all databases before upgrading.

The following steps will guide users in the uninstallation of prior BI360 *Reporting* applications.

1. Save and close any open BI360 *Reporting* applications.
2. Access the **Control Panel** from the *Start Menu* and click on *Uninstall a program*.



3. In the generated list, find the older versions of the *Reporting* applications. Select the application and click on **Uninstall**. Repeat for each application if necessary.



As an existing BI360 Reporting customer (using version 3.8 or older) BI360 Reporting must be uninstalled from all clients using the application before installing version 4.0 on these clients.

The installation program will automatically check for, download, and install the prerequisites including .NET Framework 4.5 and Visual Studio Tools for Office (2010).

# Installing BI360 Reporting

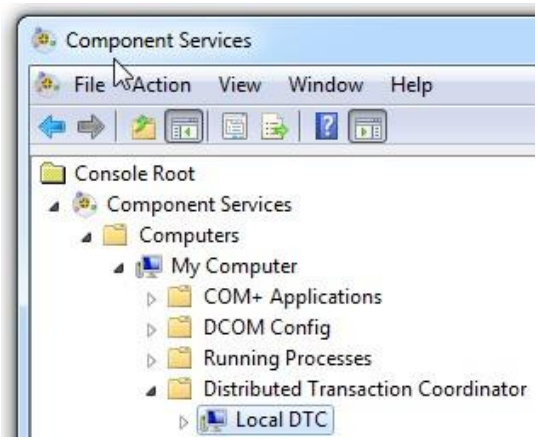
This section will go over installing the software. Below is a high level overview of the steps.

1. Uninstall any previously installed versions of BI360 Reporting on the client.
2. Enable MSDTC on both ends (clients and servers).
3. Configure Firewall to enable DTC communication between client and server.
4. Log onto the machine the software will install on as a Windows user with Administrator rights.
5. Download and run the setup file for BI360 Reporting.
6. The installation program will automatically check to see if the target system has the prerequisites installed, otherwise it will attempt to download and install them. If they are already installed the installer will skip directly to the installation.
7. The Setup Wizard will continue after the check and guide step-by-step on installing the client, creating and/or connecting to a repository.
    a. During the install, an internet connection is needed to download the integration package and to verify the license key. If the machine cannot be connected to the internet please contact Solver support.

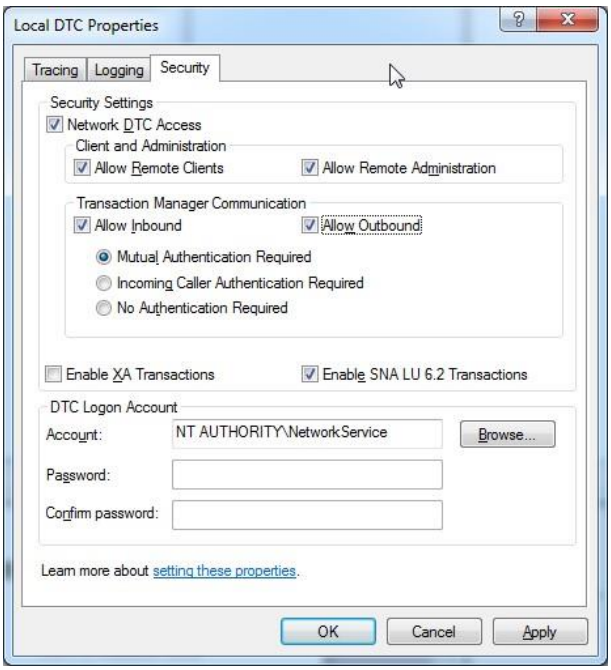
The install of the Reporting application should be performed by a user that is SYSAdmin or has access to a SQL user with SYSAdmin privileges.

## Configure and Enable Microsoft Distributed Transaction Coordinator (MSDTC)

In order for BI360 Reporting to communicate with the database server the MSDTC service must be enabled on both ends (client and server). Any firewalls must also allow DTC communication.



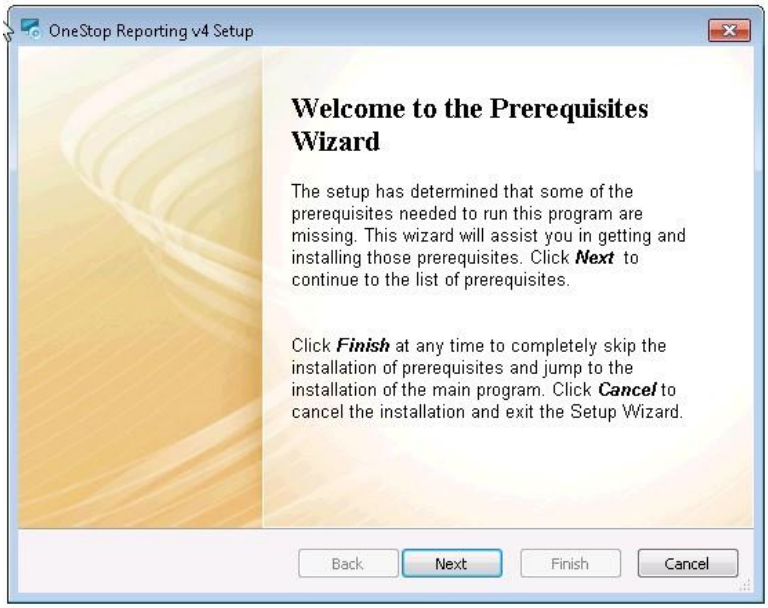

Find and open Component Services on the system (comexp.msc).



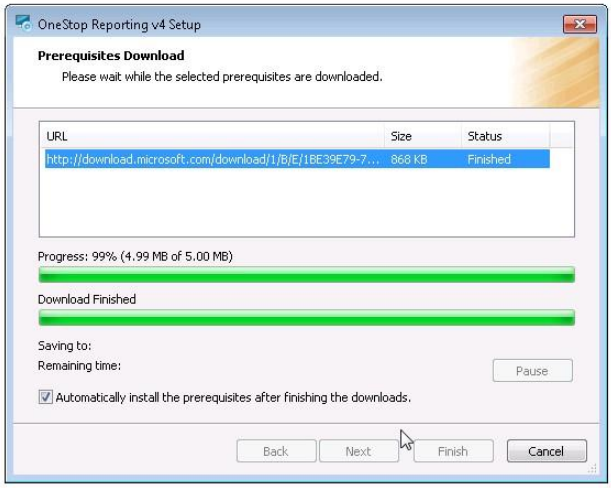

Check the boxes for Network DTC Access, Allow Remote Clients, Allow Remote Administration, Allow Inbound and Allow Outbound.

## Installing the Prerequisites

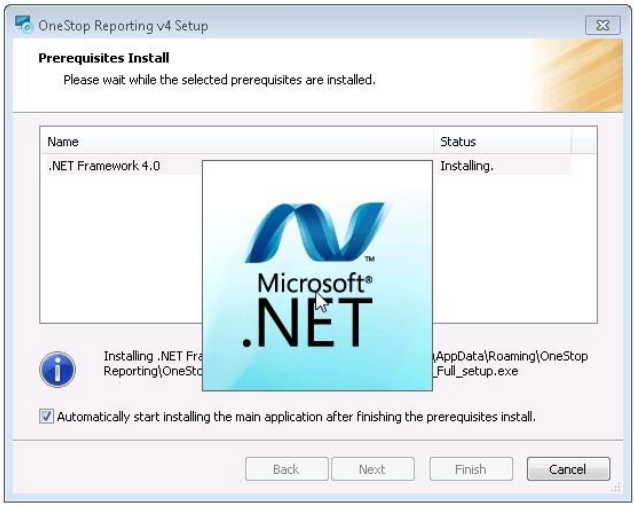
After starting the setup.exe the prerequisites wizard will automatically appear.



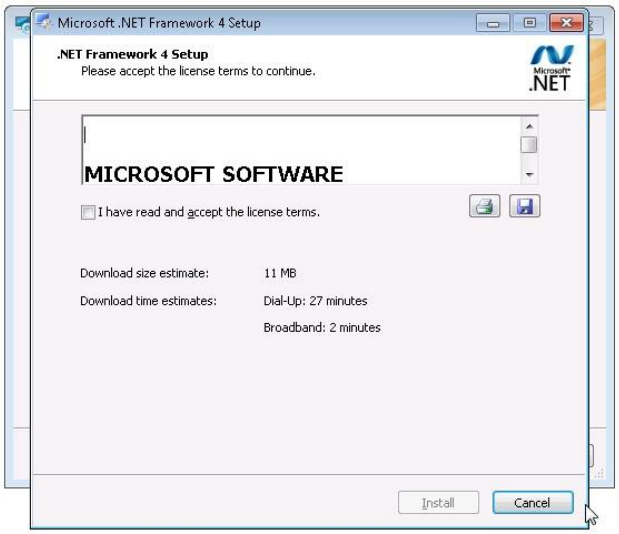

1. Click *Next* to start the prerequisites wizard.



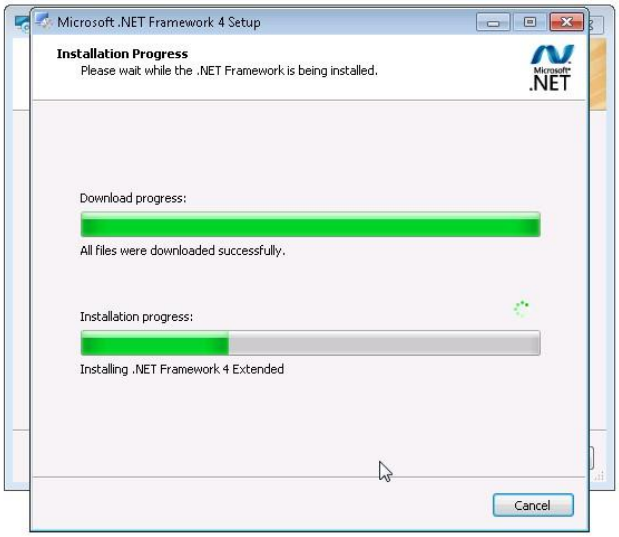

2. Please wait until the download finishes.



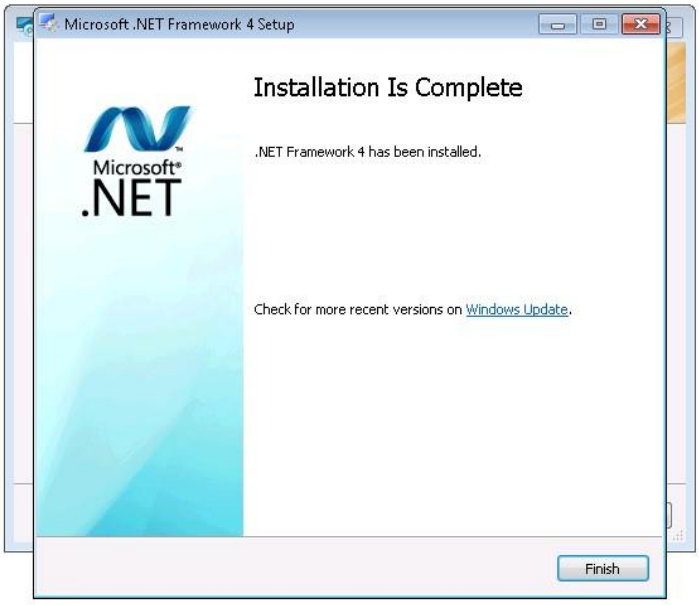

3. When the download is complete the .NET Framework installer will start automatically.




4. Accept the terms and click *Install* to complete the setup of .NET Framework.



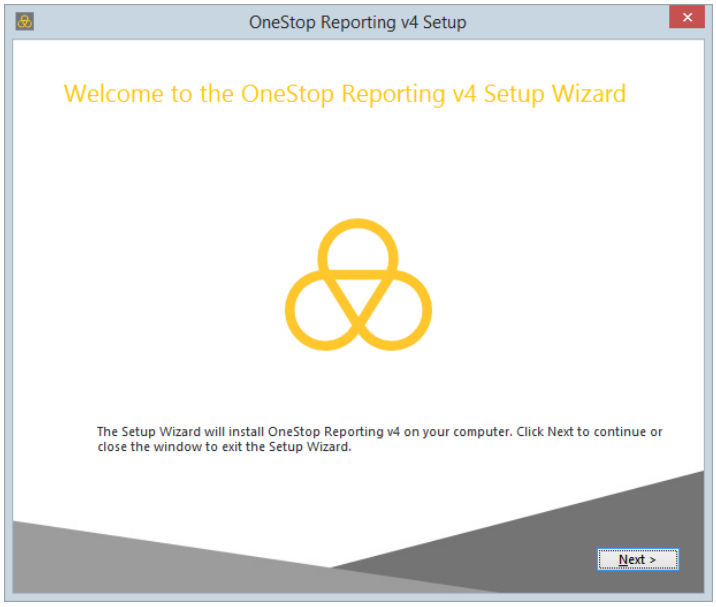

5. The .NET Framework will be downloaded.



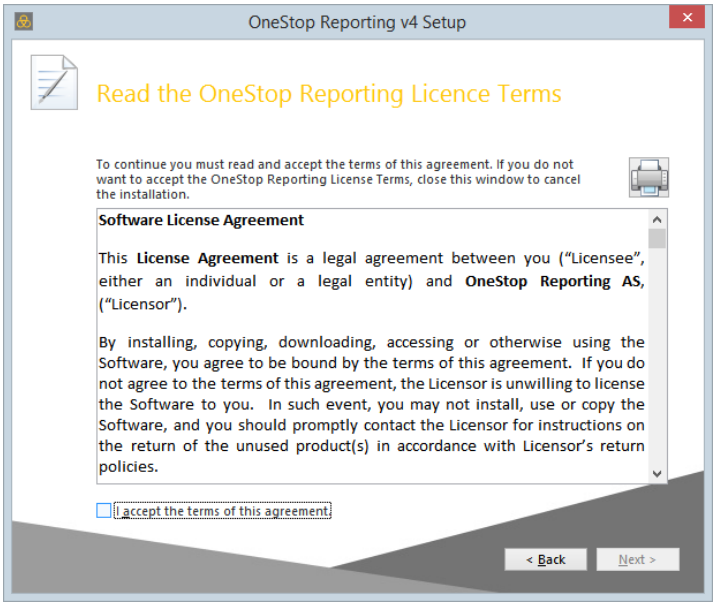

6. Once the download finishes the .NET Framework will be installed automatically.

## Installing on Clients

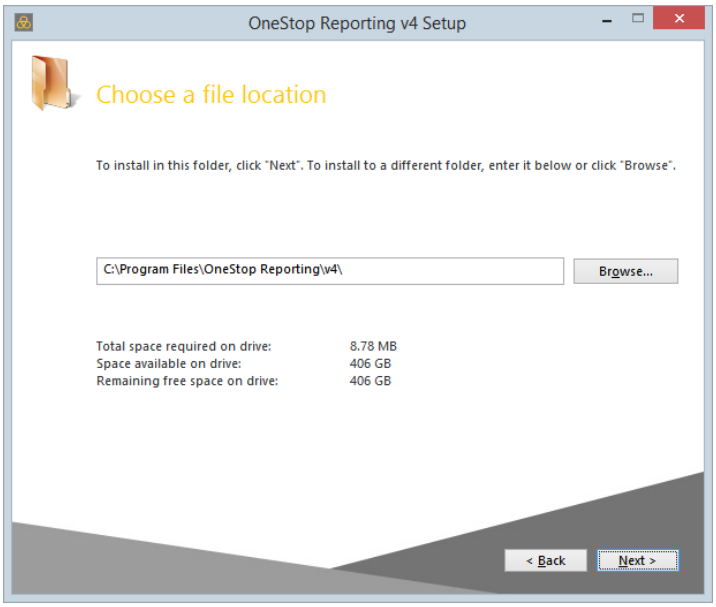
After the prerequisites have been checked and installed the Setup wizard will continue.




1. Once the "Welcome to the BI360 Reporting v4 Setup Wizard" appears, click *Next* to install.




2. Accept the terms and click *Next* to continue.

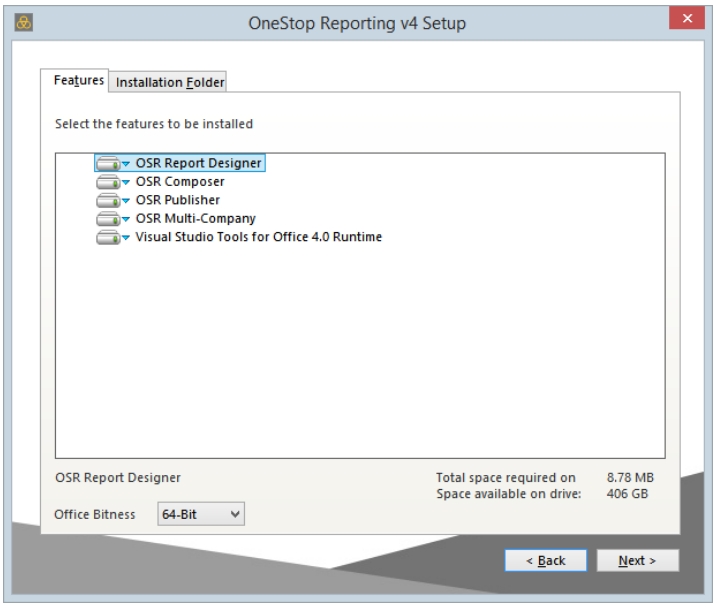



3. In the *Choose a file location* window, the default installation location for BI360 Reporting is automatically displayed. If a user wants the program files to reside in a different location click the *Browse* button to change the location, then click *Next*.

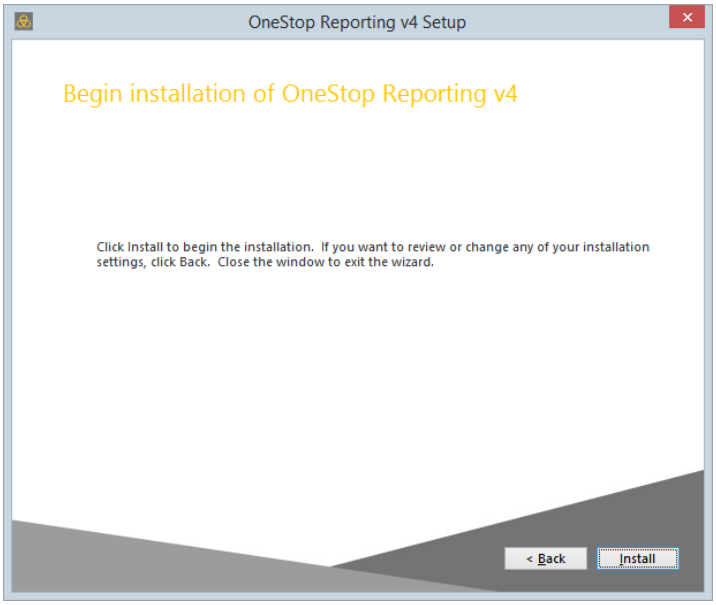
In Windows Vista, 7 and 8 or on Windows Server 2008/2012 it is highly recommended to use the default *Program Files* or *Program Files (x86)* folder as this is a *trusted location*. A *trusted location* has certain security privileges which are required for Microsoft Excel add-ins such as *BI360 Report Designer* and *BI360 Player.*

Installing in a different folder will trigger the *Microsoft Office Customization Installer* dialog the first time Excel is started after BI360 has been installed, asking each user to confirm that the BI360 Reporting add-in should be installed for that user.

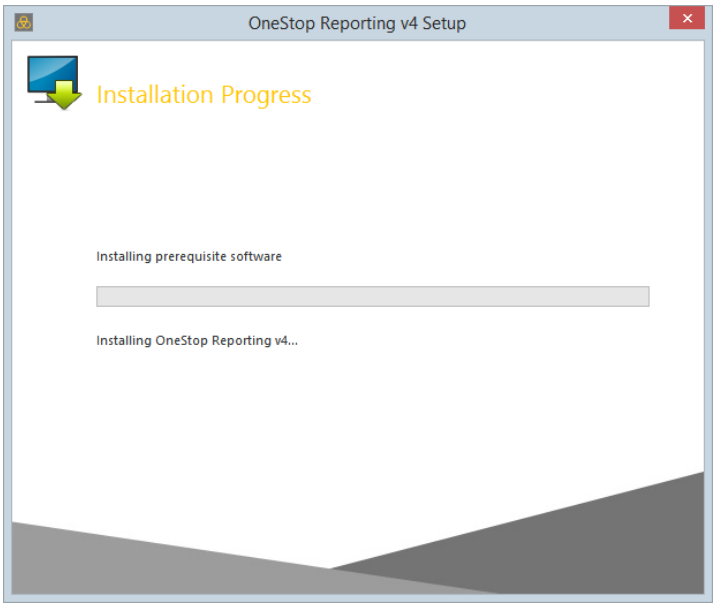
In Windows Vista, 7 and 8, a *User Account Control* window may be displayed, asking if the following program from an unknown publisher is allowed to make changes to this computer. Click *Yes* when prompted.



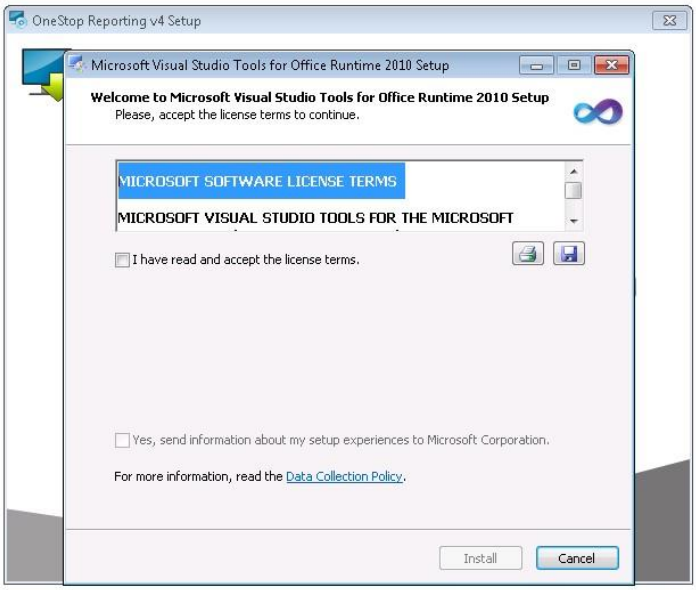

4. Select features to install or leave as is. Click *Next* to continue.



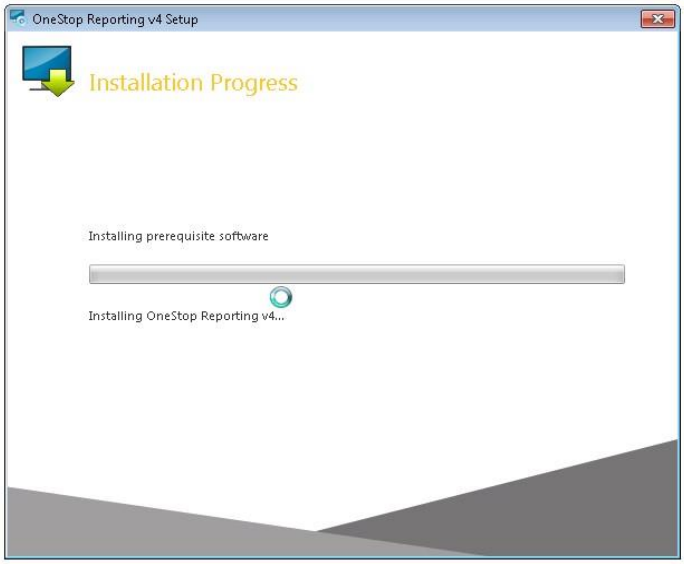

5. Click *Install* to begin the installation



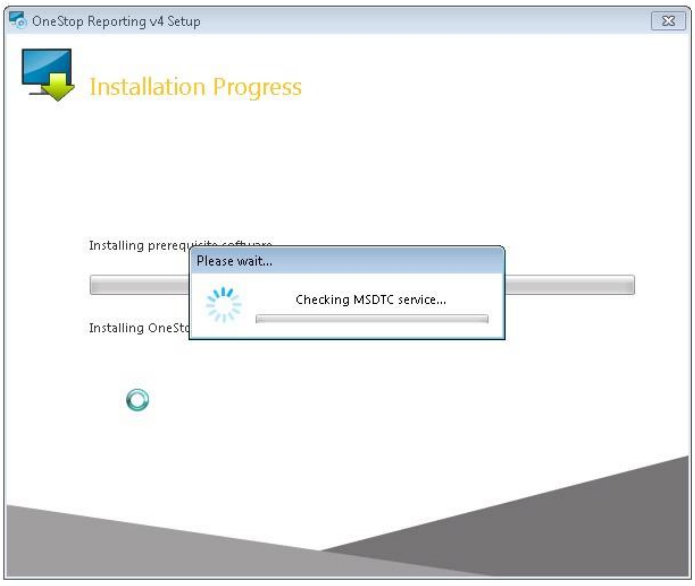

6. If the target system does not have the *Visual Studio Tools for Office Runtime* installed this prerequisite will be downloaded now.



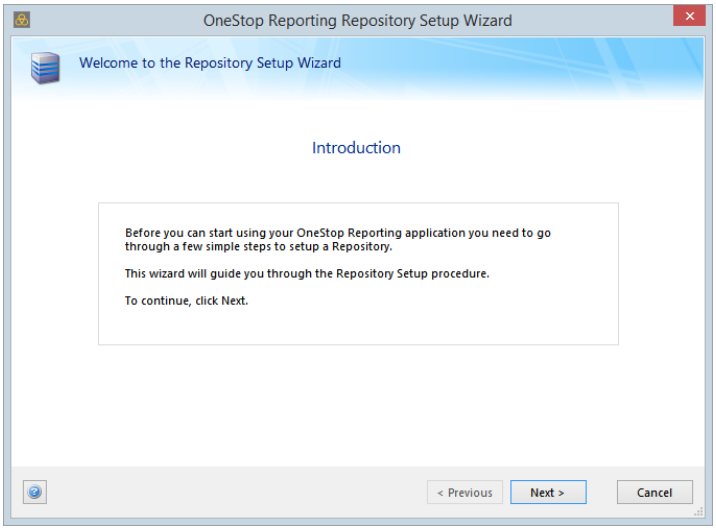

7. Accept the terms and click *Install*.



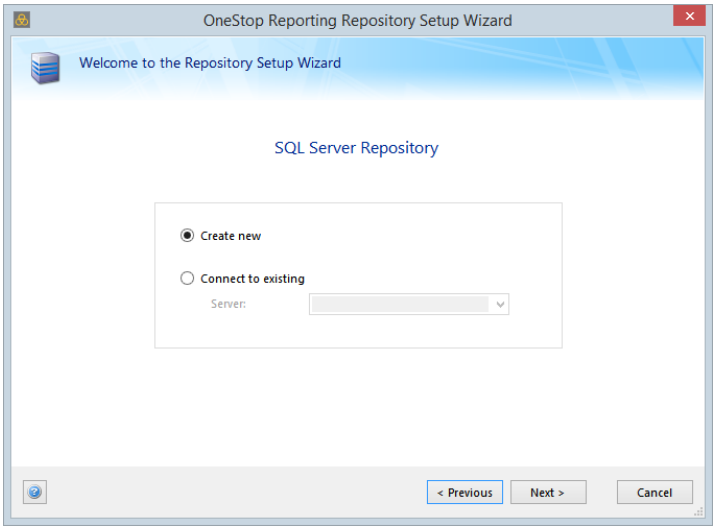

8. The Visual Studio Tools for Office Runtime installation will begin.



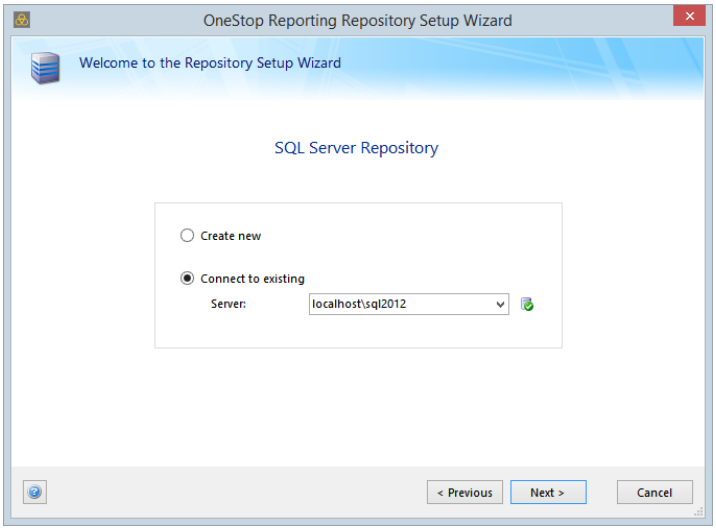

9. Once the Visual Studio tools have been installed the wizard will begin checking for database connectivity using MSDTC. Please note that if DTC is not properly configured on both ends and opened for communication this process will fail. An empty database may be created.




10. Click Next on the Welcome to the Repository Setup Wizard page to continue.

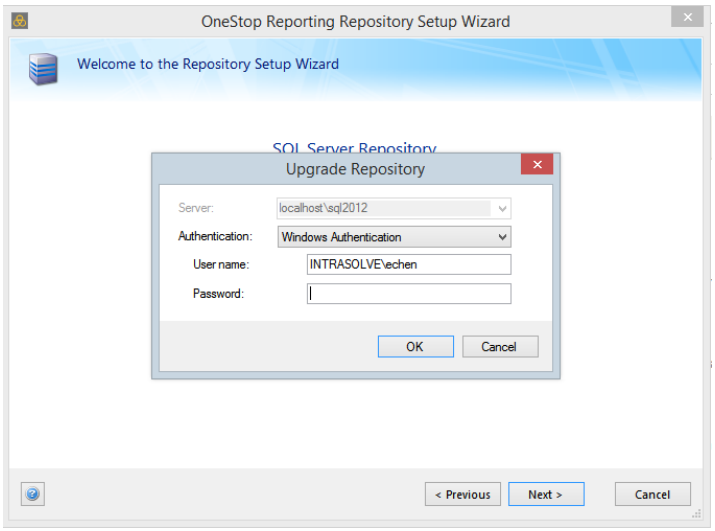



11. If this is the first time BI360 Reporting is installed on this computer, a new Repository must be created. Select database type and click *Next* to continue.

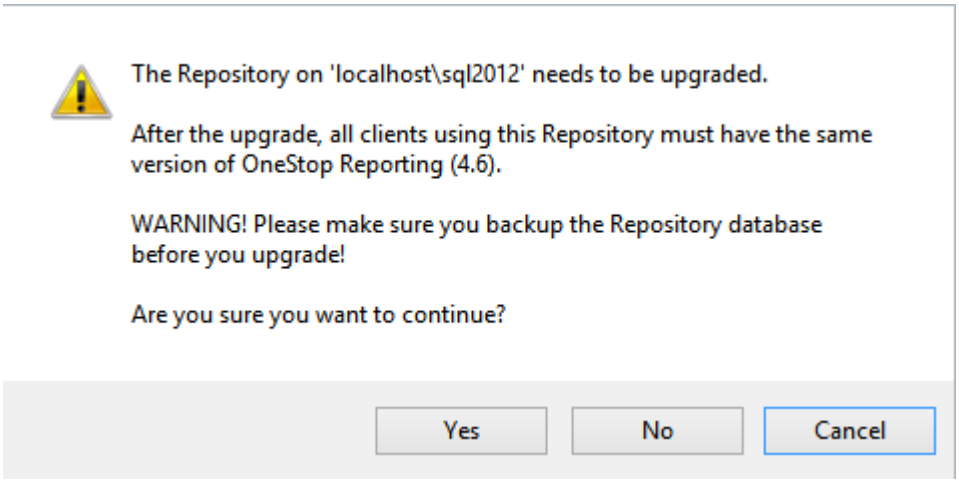



12. If the user is upgrading from a 4.0 database, the user will see the following screens below:

Please note that it is good practice to back up a repository before performing the upgrade. SQL or Windows authentication is required to allow the modification to the repository.

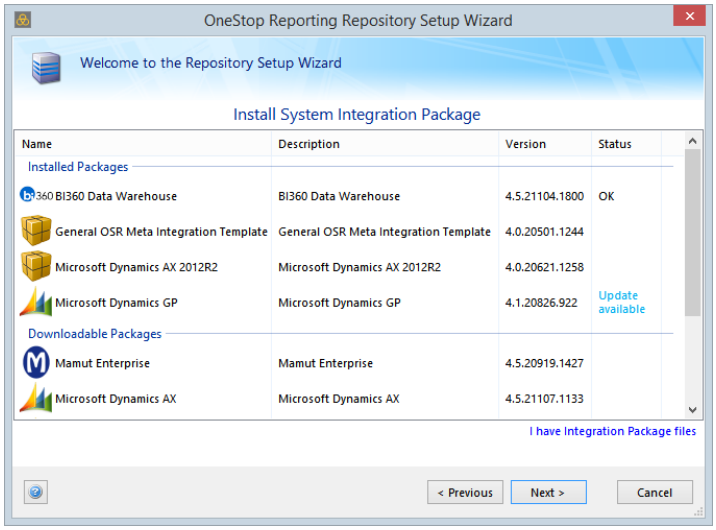



If the user is upgrading from a 4.x to 4.6 Repository, the user will see the following screen:

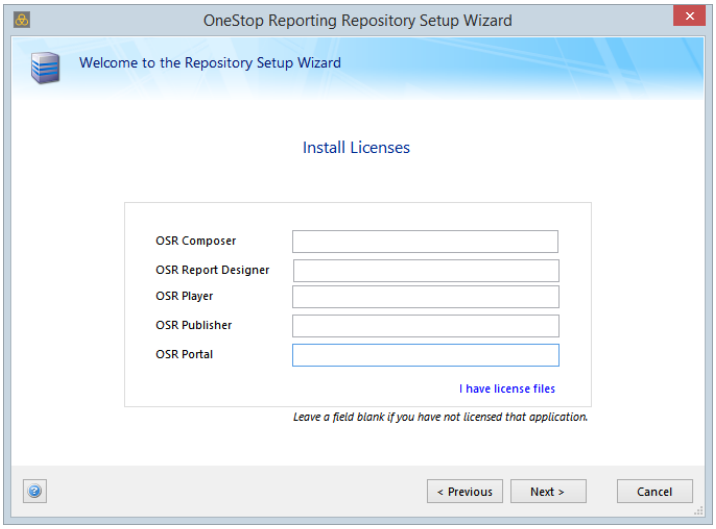



13. If there is an existing Repository, select *Connect to existing* and specify the name of the database server to connect to.

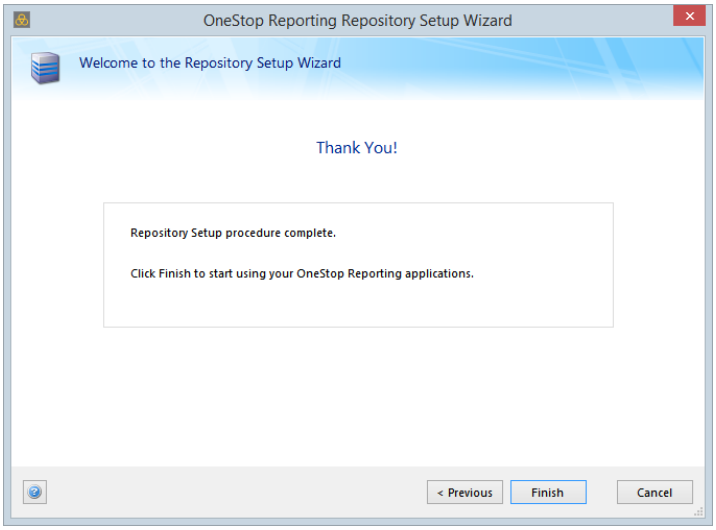
    If the installation is on a new system the wizard will automatically create a new database called "OSR_Repository".




14. Once a Repository is created or connected the option to install integration(s) will appear. Select the integration(s) from the list and click *Next*.




15. Once the integration is installed, license key(s) must be entered in the wizard.




16. Once the licenses have been verified the installation is complete.

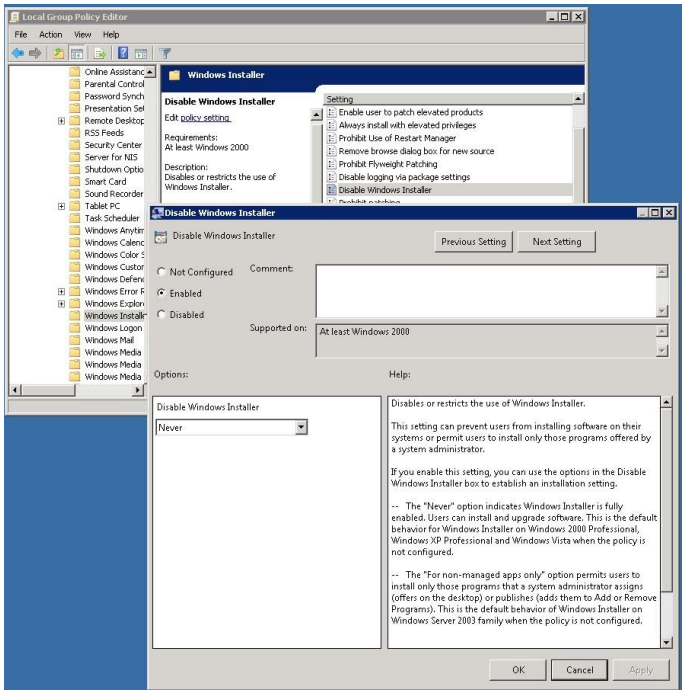
## Installing on Terminal Server

### *Preparation*

1. Log on as a Windows user with administrator rights.
2. The Terminal Server needs to be configured to ensure that Microsoft Installer (MSI) packages are allowed to be installed. This is done by changing a policy in the Windows Group Policy Editor.

### *Changing policy in the Group Policy Editor*

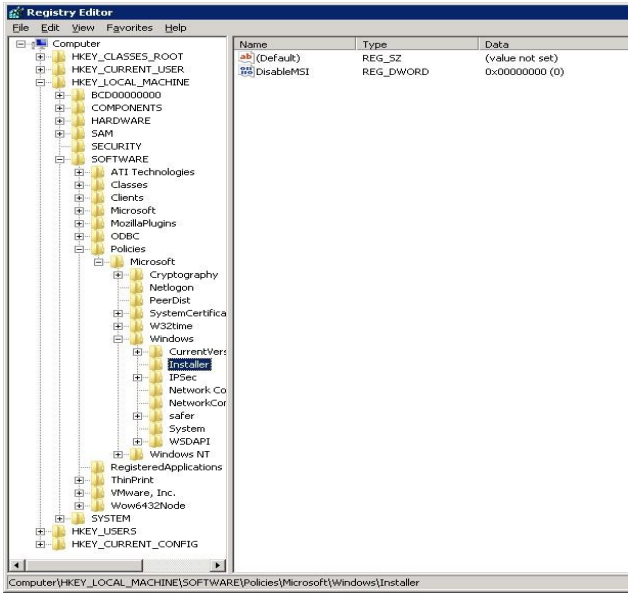
1. Choose *Start* >> *Run*, type *gpedit.msc* and press *Enter*.
2. Navigate to Local Computer Policy >> Configuration >> Administrative Templates >>Windows Components >> Windows Installer.
3. Right-click *Disable Windows Installer* and choose *Properties*. (The user can also double-click *Disable Windows Installer* to open up the properties.)
4. Select Enabled and set the Disable Windows Installer value to Never.
5. Click *OK*.



### *Manually Changing the MSI Settings in the Registry*

If the Group Policy Editor is not available on the server version, the setting can be manualy changed in the Windows Registry:

1. Open the Registry editor and navigate to:
   HKEY_LOCAL_MACHINE\Software\Policies\Microsoft\Windows\Installer
2. Create or modify the REG_DWORD value “DisableMSI” and set it to 0 (zero).




This setting can be reverted back after the installation of BI360 Reporting.

Registry entries for BI360 Report Designer and BI360 Player are installed under HKEY_Local_Machine

Shortcuts for BI360 Reporting components are available from the Start menu are installed in *All Users*

# BI360 Planning & Data Warehouse

## Introduction

This section describes the installation process for the *BI360 Planning* and *Data Warehouse*. The installation package includes the *BI360 Planning* and *Data Warehouse*, which are two different applications. The setup file mentioned in this document can be downloaded by referencing the *Obtaining the Software* section.

If the install will involve upgrading or installing a database, the user performing the install must be a SYSAdmin on the SQL server or have access to a SQL user with SYSAdmin privileges.

## Upgrading from a Previous Version

The BI360 Planning installer automatically uninstalls the previous version of the software. Please make sure that Excel and the Data Warehouse Manager are both closed before running the installation file.

Before upgrading a database, a backup of the BI360 database should be created.

When walking through the Planning installer, if the option to "Upgrade an existing Data Warehouse Database" is select, the following prompt will appear upon clicking **Next**.

## Installation

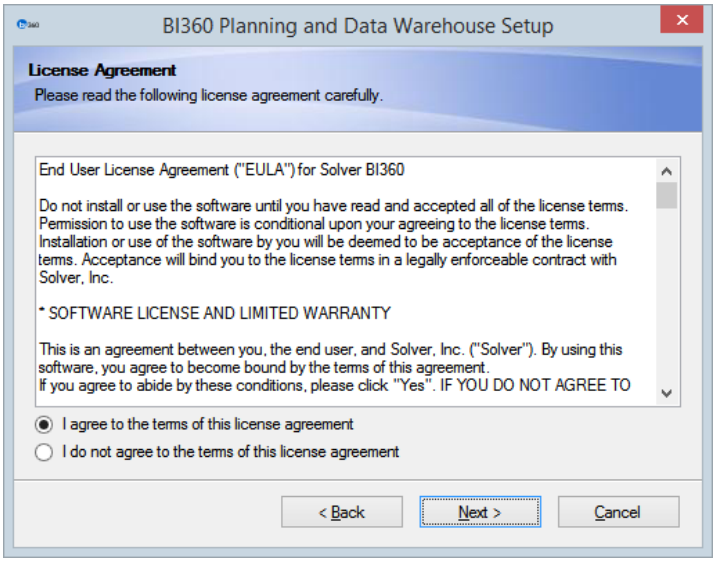
In all instances of installation, the appropriate *BI360 Reporting* components should be installed prior to installing *BI360 Planning* and the *BI360 Data Warehouse*. For miscellaneous upgrade notes, please see the section titled *Miscellaneous Upgrade Notes* after the installation section.

Installation is done at the client computer. This can include either a desktop or a terminal server. It is a requirement to have Microsoft Office Excel 2007 SP2, 2010 or 2013 installed prior to installing *BI360 Planning*.

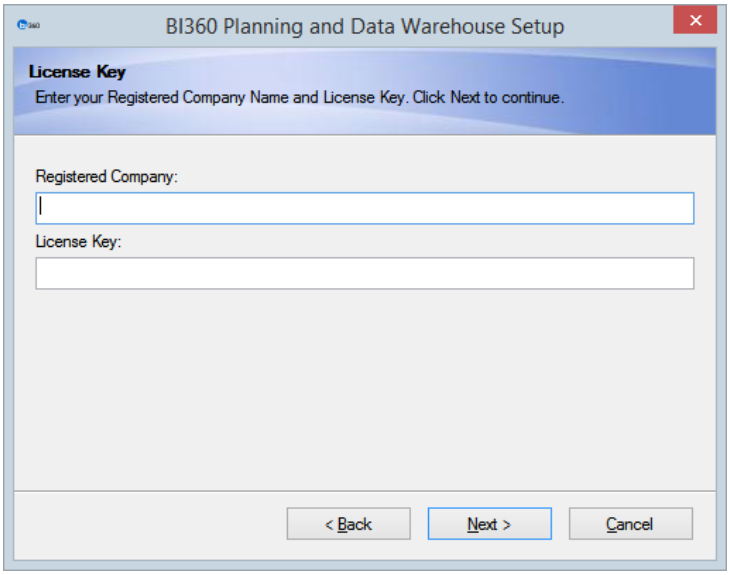
1. Download and double click the setup file for the *BI360 Planning* application.

2. The *BI360 Planning* and *Data Warehouse Setup Wizard* begins on the *Welcome* screen. Click **Next** to continue.

3. The next page will display the license agreement. After reading the license agreement, the user may select **I agree to the terms of this license agreement** and continue the installation process by clicking **Next**. Users are advised to read the terms of the license carefully before proceeding. If the user declines the license terms, they may exit the Setup Wizard by clicking **Cancel**.

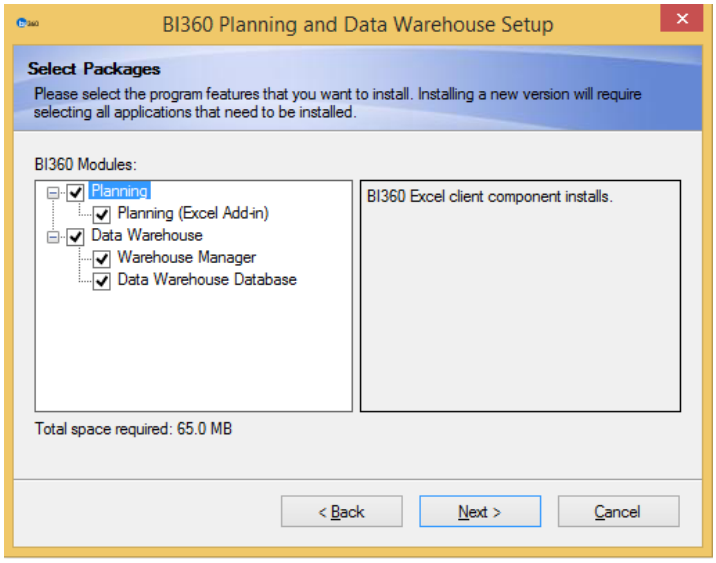



4. At the *License Key* screen, enter the *registered company* name (exactly shown on the purchase order) and license key. Refer to the *Obtaining Licenses* section to get the license keys. Click **Next** to continue with the installation.



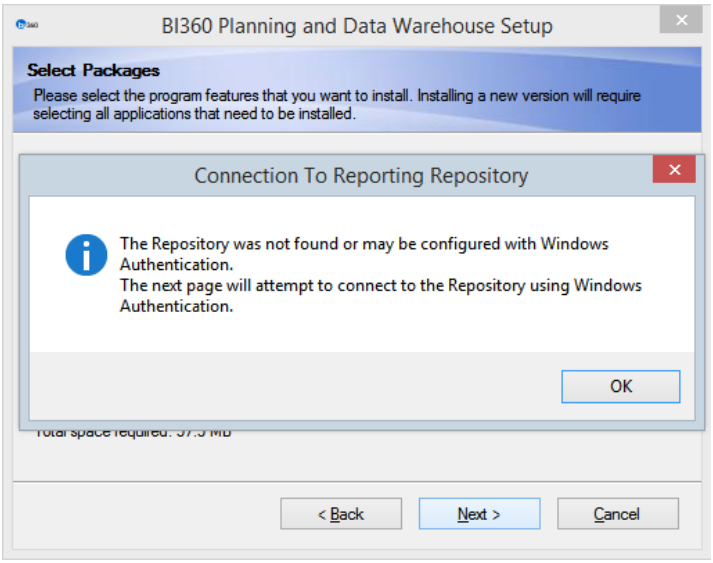

5. At the *Select Packages* screen, select the appropriate modules for installation:
    - If the *BI360 Planning* module was purchased, ensure that there is a checkmark next to it. This will automatically detect the version of Office and install the correct version of *BI360 Planning*.
    - The *Warehouse Manager* is used to administrate the *Warehouse Database* from a workstation using a graphical user interface. Typically, this should be installed only on computers where the user will have direct access to the database. It is not normally needed on users who will only do reporting or planning. If installed, the user must be part of a security group to log into the *Warehouse Manager*.
    - If the *BI360 Data Warehouse* was not created in the organizational environment or the database needs to be upgraded (recommended for each install/software upgrade), check the box next to *Data Warehouse Database*.

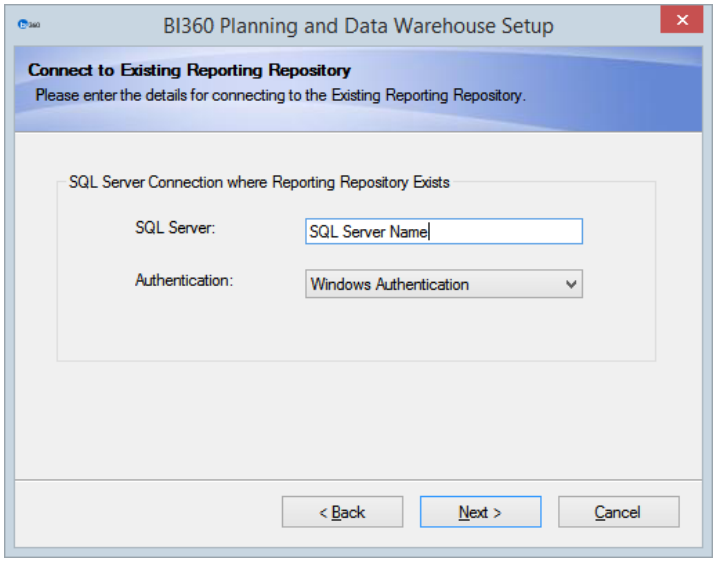
      **Note:** If the *BI360 Planning* application is going to be used, it is required that the *BI360 Data Warehouse* database is installed in the environment. The *BI360 Planning* software will store the data in the *Data Warehouse* when users write back/save data.




6. After clicking next, users will proceed to 1 of the following 3 scenarios. It is possible that after completing one of the scenarios, the users will continue to the next scenario. Alternatively, users may skip scenarios if it is not applicable:
    a. If BI360 *Reporting* has not been installed, but an OSR_Repository database exists in the organizational environment, the user will be prompted for the SQL server information where the repository database exists.

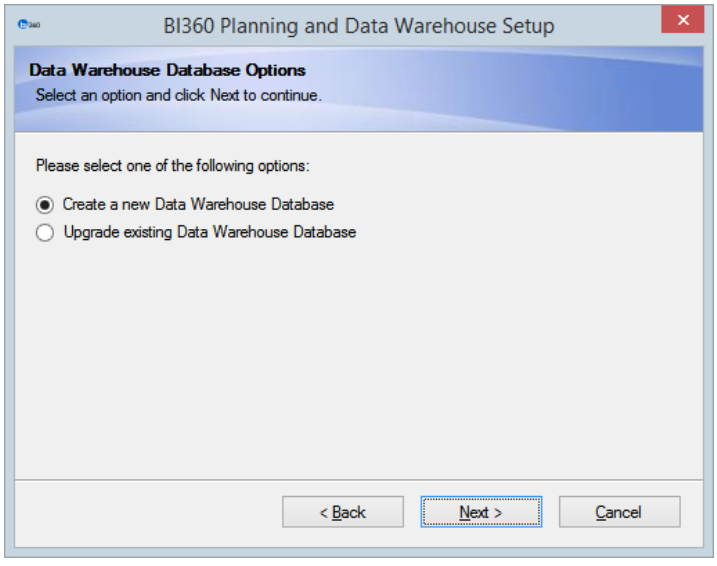
       Initially, the Setup Wizard will attempt to login using SQL Authentication with the user "*osruser*". If the OSR_Repository was not configured using SQL Authentication, the user will be prompted to log in using Windows Authentication. If the current Windows user does not have the appropriate security configuration, then they may exit the installation to reconfigure their environment or continue without connecting to the repository. If a repository connection is not configured, then users will be unable to use *BI360 Planning* or *Data Warehouse Manager*.




If the Reporting Repository is configured with SQL Authentication, then this step will be skipped automatically by the installer.

b. Selecting the *Data Warehouse Database* will take the users to the *Data Warehouse Database Options* page. If the BI360 Data Warehouse was previously installed in the organization's environment, then the user may *Upgrade existing Data Warehouse Database.* If the BI360 Data Warehouse is being installed for the first time, then the user may *Create a new Data Warehouse Database*. Note that users should have DBO or sysadmin rights to create and/or upgrade a database.




i. Both options will ask the user to configure the SQL server connection. Enter the SQL server information at this screen as follows:

ii. **SQL Server**: Enter the SQL Server and instance in the format, *ServerName**Instance*. If the default instance is used, then only the server name is needed.

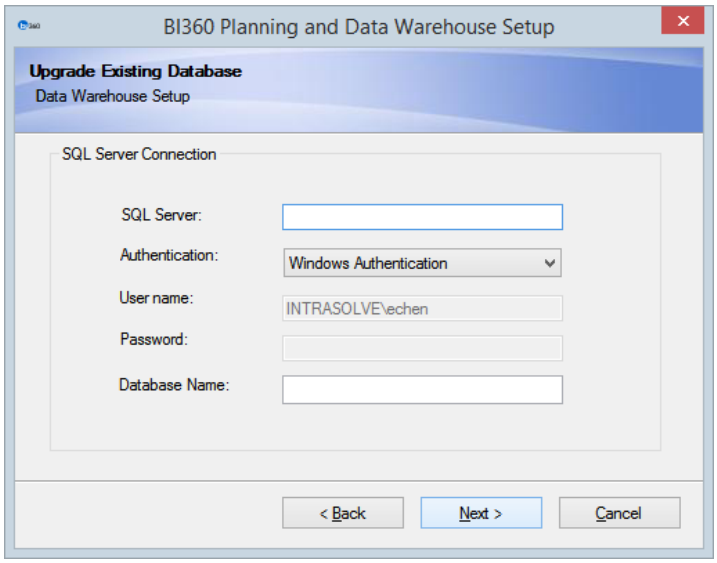
iii. **Authentication**: If SQL Server Authentication is used, then a user name must be defined in the SQL Server. If Windows Authentication is selected, then the user that is currently logged on (in Windows) must have rights to create a database.

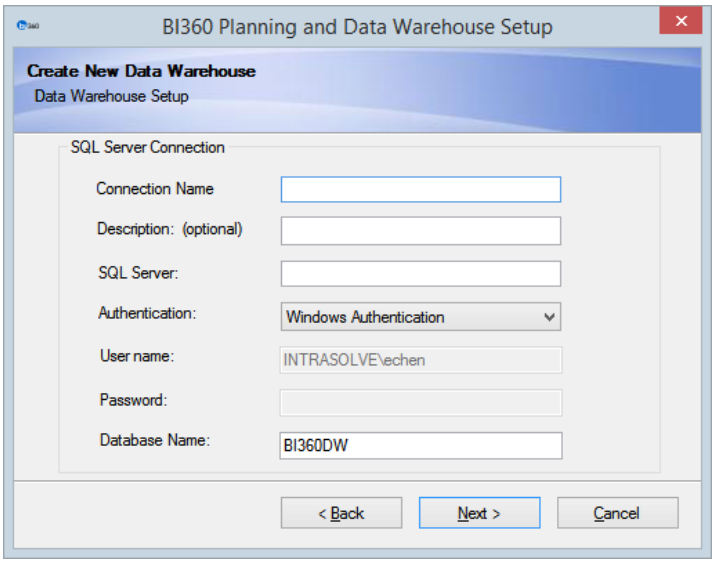
iv. **User name**: This is enabled if the SQL Server Authentication was selected. Typically, the 'sa' user can be used. However, any windows/SQL user with escalated access to the SQL Server instance will work.

v. **Password**: This is enabled if the SQL Server Authentication was selected. This is the password for the SQL Authenticated User entered above.

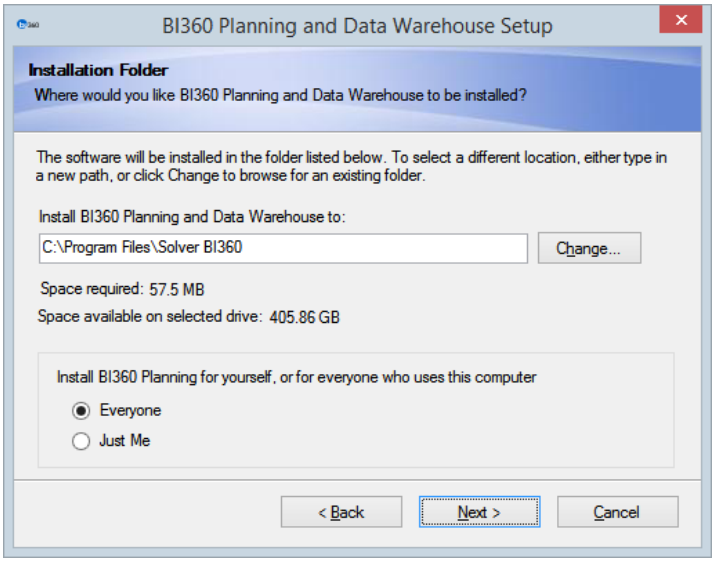
vi. **Database Name**: Enter the name of the existing database or the new database. By default, new databases will be named *BI360DW*.

Click **Next** to continue.

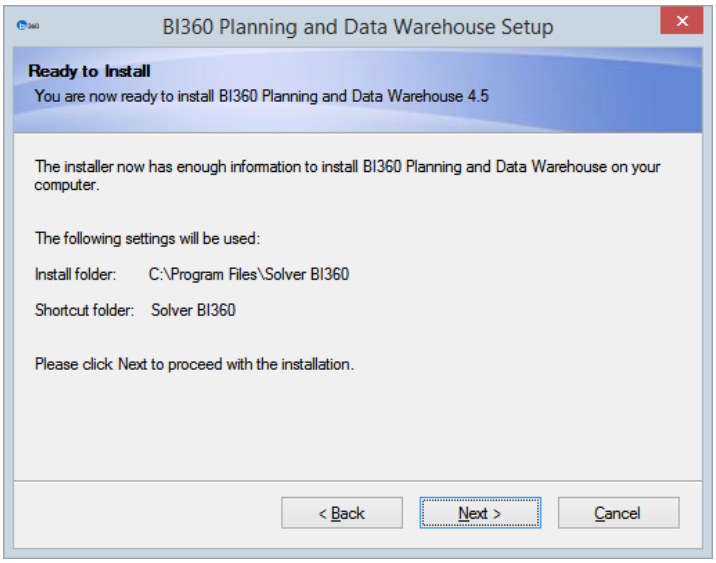


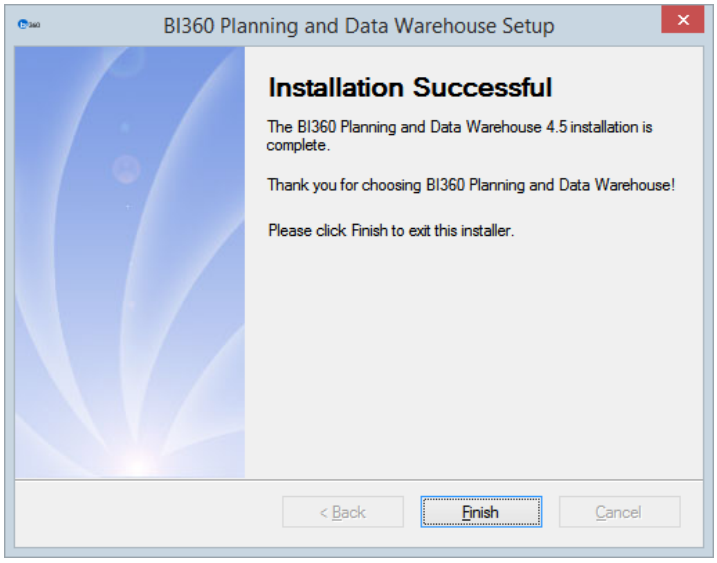

c. At the *Installation Folder* screen, the default installation location where BI360 Planning and/or Data Warehouse Manager will be installed is already selected. However, users may choose a different location by clicking on the **Change…** button and browsing for a directory. Moreover, access for BI360 Planning may be configured on this page. If *Everyone* is selected, any user who logs on to the workstation will be able to access the application. However, if *Just Me* is selected, only the currently logged-in user will be able to access the application. Click **Next** to continue the installation.




8. At the *Ready to Install* screen, the install folder and shortcut folder may be verified. The shortcut folder is the name of the Start menu group. Click **Next** to begin installation.




9. Upon clicking Next, first the installer will uninstall any previous version if it exists. Otherwise, the installer will install the application. Once installation has been completed, click **Finish** to close the installation wizard.




## Silent/Unattended Installation

This applies to Planning, Data Warehouse Manager, and BI360 Publisher.

The installation process can be set to silent and/or unattended mode. The installation can be done through a batch file or scripted using login scripts, though this guide does not provide details on scripting the installation. For more information on silent/unattended installation, there is a knowledgebase article on it that can be accessed here.

As a best practice, it is recommended to create a folder that contains the installation file, the batch file, and the config file. The **Setup.Bat** file is used to start the installation which references a configuration file. Change the setup.bat based on the name and location of the installer and configuration file.

Use the following if the setup file is located on the machine:

```
@echo off
"C:\<subfolder>\BI360ReportingSetup_v4.5.xxxx" /exenoui
```

If the setup file is located on a shared folder, use the following

```
@echo off
"\\<servername>\<subfolder>\BI360ReportingSetup_v4.5.xxxx" /exenoui
```

Note: ".\" references the current folder.

After creating the batch file, simply drag it into the folder where the installer is.

Second, the “Config” folder should be created within this BI360 Setup folder as well. The config.ini file will be placed inside this folder. To create an .ini file, simply open Notepad and copy the following. After the information has been completed, save the file as a “MS ini file”.

**SIM:** True = install/False = do not install the Planning component

**SODS**: True = install/False = do not install the Data Warehouse Manager

**Publisher**: True = install/False = do not install the Planning Office Publisher

**Language**: English (Currently is the only language available)

**SerialNumber**: Enter the BI360 Planning or Data Warehouse License Key

**UserCompany**: Registered Company

**Allusers**: True = install for all users that log in/False = only install for current user installed

**Repository Server**: Reference the SQL Server

**OfficeBitness:** define the Office bit version that Planning will be installed on. 32 or 64.

**Sample file:**

```
[SetupValues]
 %SIM%=true
 %SODS%=false
%Publisher%=false
 %Language%=English
%SerialNumber%=LICENSE KEY
 %UserCompany%= REGISTERED COMPANY
%Allusers%=true
%RepositoryServer%=SQLSERVER\INSTANCE
%OfficeBitness%=
```

## Data Warehouse Database Access Rights

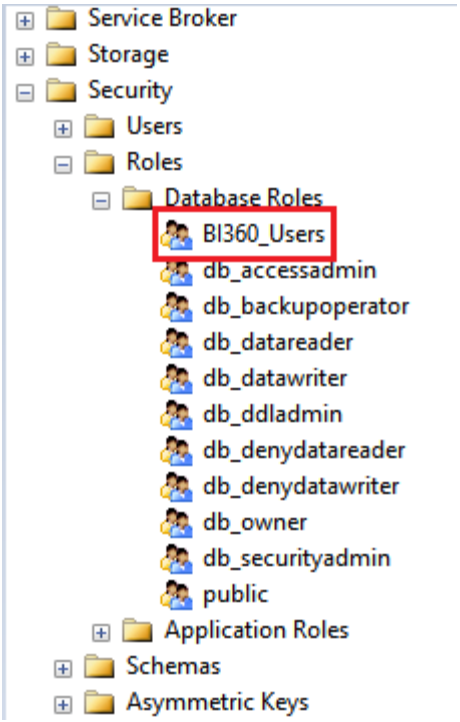
In order for users to access and connect to databases configured to the *Data Warehouse*, the user must be given the proper rights.

### *Windows Authentication*

If end-users will connect to the *Data Warehouse* databases based on their *Windows Authentication*, then those *Active Directory* users or groups must be added to the *BI360_users* role.

### *SQL Authentication*

If end-users will connect to the *Data Warehouse* databases based on *SQL Authentication*, then the users must be added to the *BI360_users* role. To access the *BI360_users* role, access the *Data Warehouse* database -> *Security* -> *Roles* ->*Database Roles*. See image below.

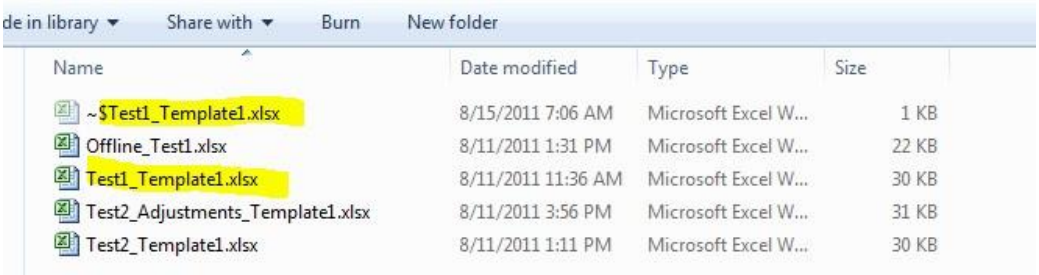



This role has the following access permissions:

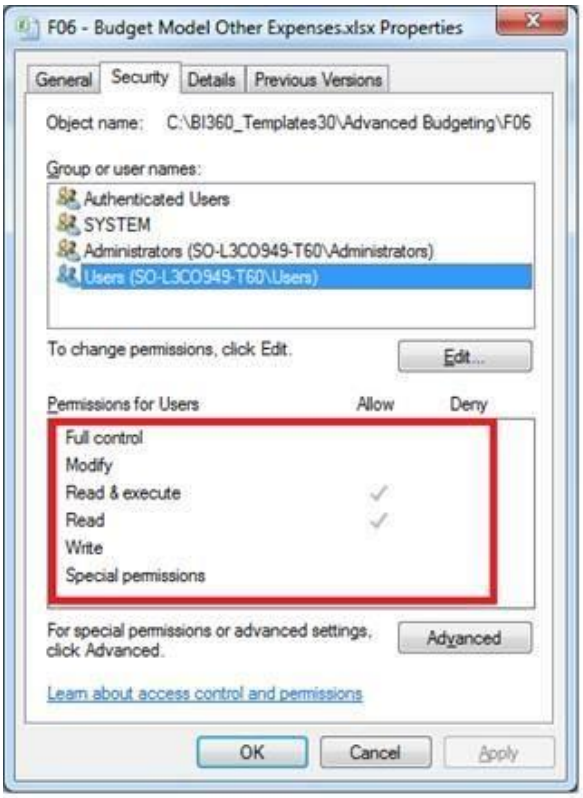
- Create procedure
- Select
- Insert
- Delete
- Update
- Execute

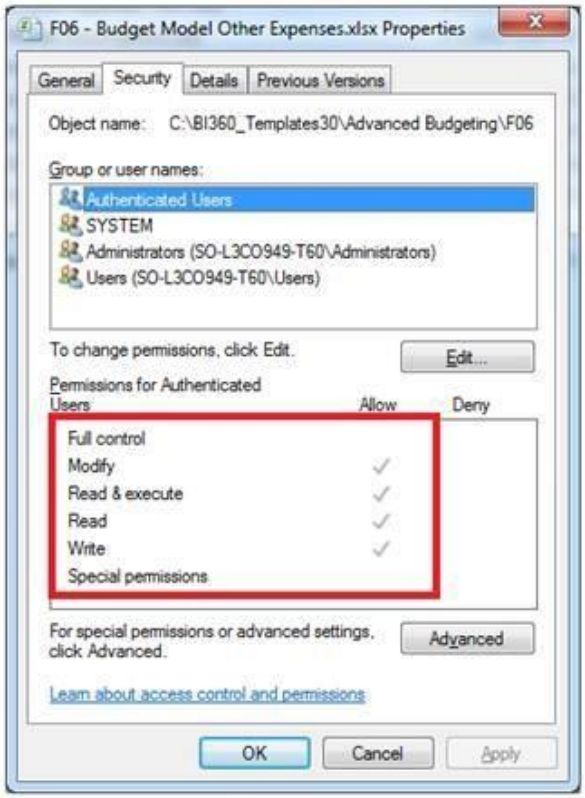
## File and Folder Read/Write Permission

**File and Folder Read/Write Permission**: BI360 Planning utilizes the temporary file created by Excel while a workbook is active to perform its functions. If the Excel file or the folder that contains the Excel file is set to read-only for the user (most common on server environments), then this temporary file will not be created.




Thus, security on files and folder should not be established through the Windows security (*Right-click* on folder/file -> *Properties* -> *Security* tab -> *Edit…*) as shown in the image below.




## Access to Rules and Jobs

A job is a scheduled BI360 Rule (stored procedures). This feature uses SQL Server Agent to run the rule. In order to limit users that could schedule Jobs, there are permissions that must be granted to the various users from SSMS.

If the upgrade was performed by a user with “sysadmin” rights, when upgrading from previous versions, the role “*BI360*_user” was created (for new installs, this role is created). This role had the following permissions granted on the master and msdb database:

1. On the Master database, select “Execute” to the stored procedure xp_sqlagent_enum Jobs
2. On the msdb database, grant “Select” to the following tables
    a. Syscategories
    b. Sysjobhistory
    c. Sysjobs
    d. Sysjobschedules
    e. Sysjobsteps
    f. Sysschedules

Additionally the following rights also need to be granted:

3. Grant “Execute” to the msdb
4. Select “Grant” to “View Server State”
5. Map the user to the master and msdb databases.

Upon adding the user to the “*BI360*_user” role on the two database, the user will now have access to run Rules and Jobs.

In order to grant users access to Rules but not jobs, the user only needs “Select” rights on the syscategories table. This is required in order to pull the history of when the Rule was ran.

For more details, please reference the Data Warehouse Manager User Guide found on the Solver Support site.

# BI360 Portal

## Introduction

This is the installation guide for BI360 Portal.

BI360 Portal 4.0 requires BI360 Reporting 4.0 and may not be used with previous versions of BI360 Reporting.

For a successful installation, three steps must be completed:

1. BI360 Portal must be installed on the IIS Server.
2. BI360 Portal must be configured in the BI360 Administration module.
3. BI360 Reporting 4.6 must be installed on each client that will use any other BI360 Module.

Start with the installation of BI360 Portal on the IIS Server as described in this document. Then configure BI360 Portal (described in the BI360 Administration user guide). Finally, install or upgrade to BI360 Reporting 4.0 on each client that will access any of the other BI360 Modules (described in the BI360 Reporting 4.0 Installation Guide.)

### For Companies already using BI360 Reporting

As an existing BI360 Reporting customer (using BI360 Reporting 3.8 or older) the user must uninstall BI360 Reporting from all clients before installing BI360 Reporting 4.x on these clients.

Uninstalling removes BI360 Reporting applications only. The repository and data remain intact for continued use. During the installation process, a connection to the existing repository will be recreated.

If there is an existing Repository (existing users), take a backup of the Repository before starting the BI360 Portal or Reporting 4.0 installer.

# Technical considerations

## When SQL Server is not in the same domain or VLAN as IIS

If the web server is in a different network or in a DMZ with a firewall between it and SQL Server, the Repository Setup Wizard might fail with an MSDTC error message when creating or upgrading the repository. In this case, follow these steps to set up the repository:

1. Cancel the Repository Setup Wizard. The installation will continue by opening the browser and starting BI360 Portal. Then a message will appear stating that the repository is not set up correctly. Disregard this message and close the web browser.
2. Open Windows Explorer and locate the BI360 Portal installation folder (normally C:\Program Files\BI360 Reporting).
3. In the folder is another folder called Administration. Copy this folder to a network share or removable drive (USB stick) so it can be accessed from the SQL Server machine.
4. On the SQL Server machine, log on as an Administrator and start BI360 Administration by running the AdminTool.exe file located in the Administration folder.
5. When BI360 Administration starts it will display the Repository Setup Wizard automatically and the user can continue with the repository setup.
6. Go back to the web server and start BI360 Administration from the Windows Start menu.
7. If BI360 Administration is able to connect to the repository, the login dialog will appear and the user can continue. Otherwise, the Repository Setup Wizard will start again and the user can select *Connect to existing* and enter the SQL Server name. Then the user can complete the Repository Setup Wizard normally.
8. Start BI360 Portal from the Start Menu or by opening the browser to http://BI360portal.local/.

## When SQL Server and IIS is on the same domain but not on the same physical server

Make sure MSDTC is enabled and appropriately configured on *both* servers.

## SSL (Secure Socket Layer)

In order to activate SSL on BI360 Portal the *Enable SSL for BI360 Portal* option must be checked under *System Settings* in the BI360 Administration module. IIS must then be configured appropriately as described here:

http://www.iis.net/learn/manage/configuring-security/how-to-set-up-ssl-on-iis#IISManager

See the Microsoft Internet Information Services documentation for more information. Solver does not consult on SSL certificates or settings as the desired setup can be different per organization. Please consult the SSL company your are purchasing your certificate for more information.

## Customizing the web address (URL) for BI360 Portal

A custom host name binding (or domain name binding) for accessing BI360 Portal can be created using the IIS Manager under *Bindings*. By setting up BI360 Portal with a default binding where host name is blank, users on the LAN can access BI360 Portal by using its server name, for example: http://my_server/.

See more information about Bindings in the Microsoft IIS documentation:
http://technet.microsoft.com/en-us/library/cc771629.aspx

Make sure Windows Firewall is configured to all WWW services to allow communication through it.

## Silverlight on the server

BI360 Portal does not require Silverlight installed on the server in order to work properly. However, to test the Portal on the server's web browser, for testing purposes, Silverlight must be installed. By default, Internet Explorer will block the Silverlight download, so make sure to add http://*.microsoft.com to the list of *Trusted sites* in *Internet Options*, *Security* before following the onscreen instructions to install Silverlight.

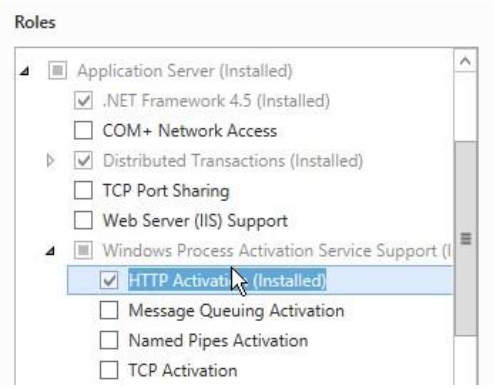
## Before Installing BI360 Portal

1. The Application Server role must be installed and the Windows Process Activation Service Support enabled.
2. The system requirements for BI360 Portal state that Microsoft Distributed Transaction Coordinator (MSDTC) is required.
3. Before stating the installation of BI360 Portal, make sure the MSDTC is set up correctly for use with BI360 Portal.

### Windows Process Activation

In order for Internet Information Services to properly handle communication with the BI360 Portal Silverlight application the "Application Server" role must be installed.

Furthermore, the "Windows Process Activation Service Support" feature and specifically its "HTTP Activation" option must be enabled.



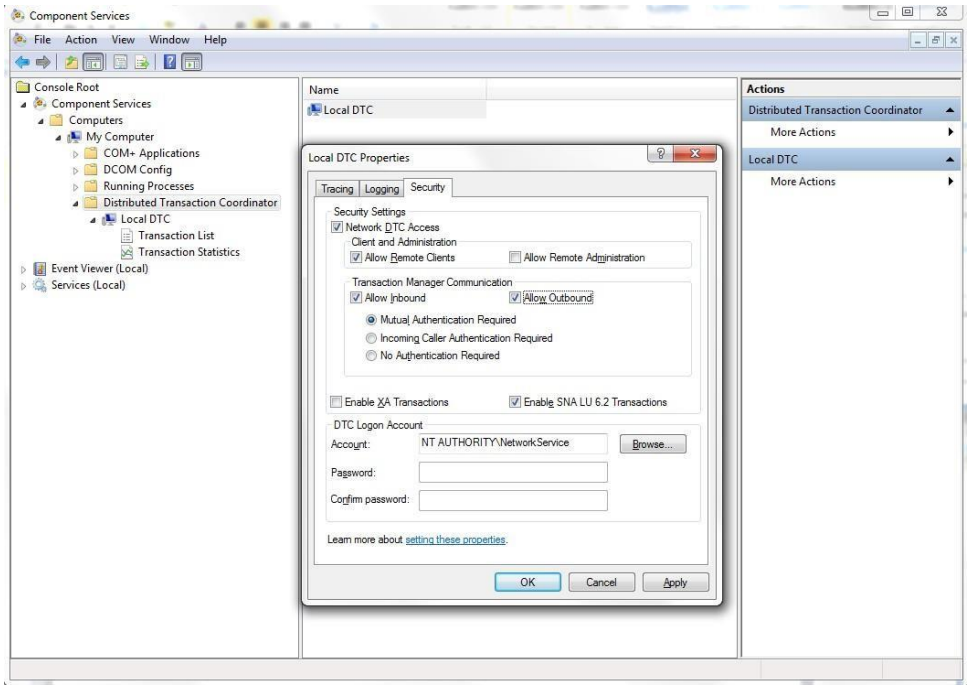

The following features of the Application Server role are required:

1. .NET Framework 4.5.2
2. Distributed Transactions (see next section)
3. Windows Process Activation Service Support
    a. HTTP Activation

### Preparing MSDTC for use with BI360 Portal

If the IIS Server and SQL Server are not located on the same physical computer, the operations described below must be performed on both servers.

1. In the Start menu, locate Administrative Tools >> Component Services.
2. Choose Component Services >> My Computer >> Distributed Transaction Coordinator.




a. In the work area to the right, right click *Local DTC* to open the properties dialog for Local DTC.

b. Choose the *Security* tab.

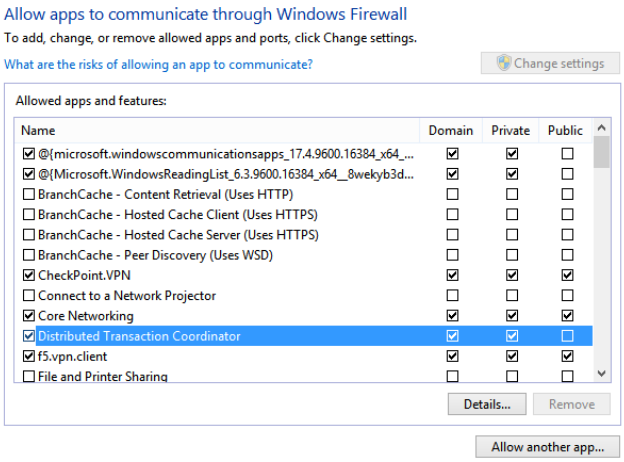
c. Under Security Settings check Network DTC Access and check Allow Remote Clients under Client and Administration. Under Transaction

   Manager Communication check Allow Inbound and Allow Outbound. (Keep Mutual Authentication Required and Enable SNA LU 6.2 Transactions selected (default settings).)

d. Choose OK to save.

## Open Firewall for MSDTC

1. Go to Control Panel >> System Security>> Windows Firewall.
2. In the area to the left, choose **Allow a program or feature through Windows Firewall**.

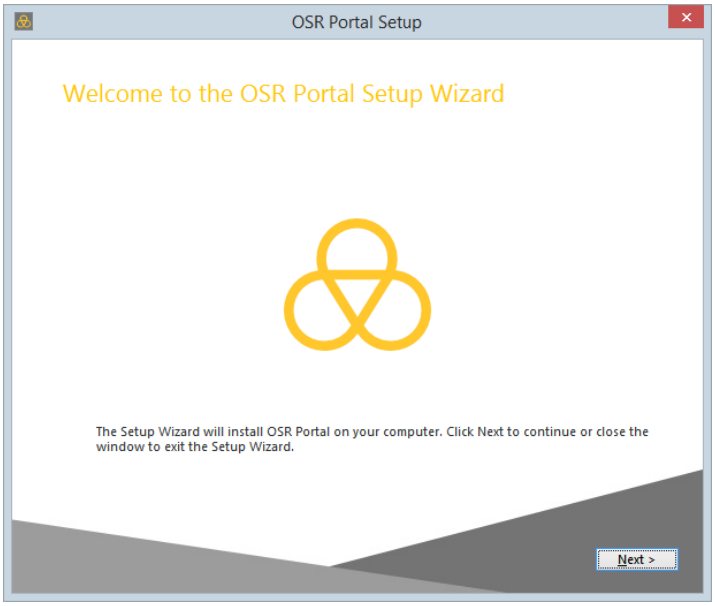



a. In the page that is displayed, find *Distributed Transaction Coordinator* and check the *Domain* and *Home/Work (Private)* boxes.

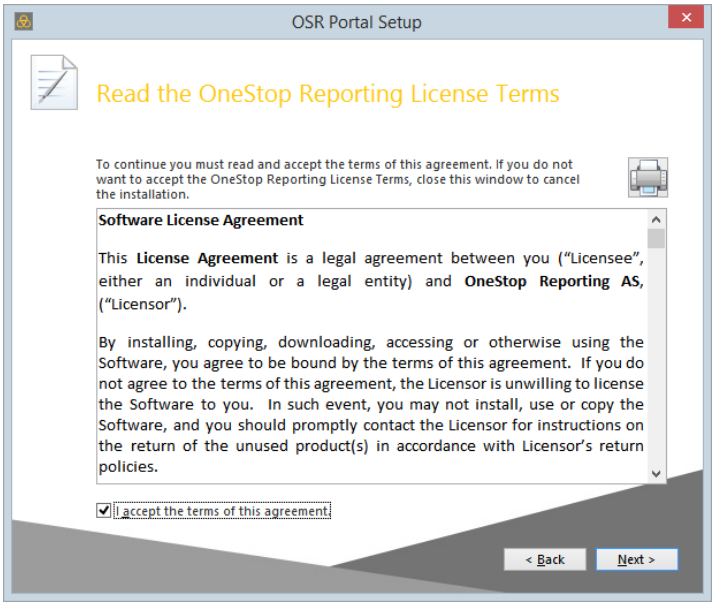
b. Click ***OK*** to save.

## Installing BI360 Portal

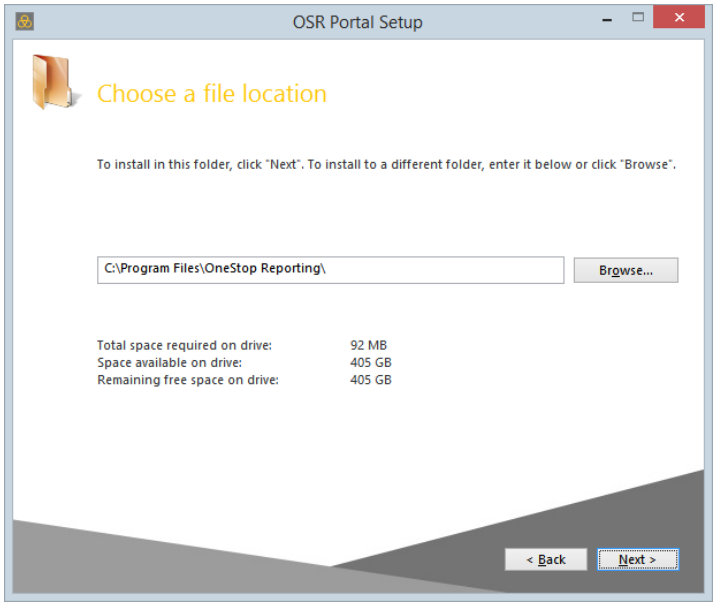
1. Make sure to have administrative access to SQL Server. The user must be member of the SYSADMIN role on SQL Server or have the SQL Server sa login password available during installation. Alternatively the user may use Windows Authentication.
2. Uninstall the v3.8.xxxx or earlier versions of BI360 if installed.
3. Locate and start the file BI360Portal_v4.x.xxxxx.xxxx_Setup.exe. In the Welcome to the BI360 Portal Setup Wizard page, choose **Next**.



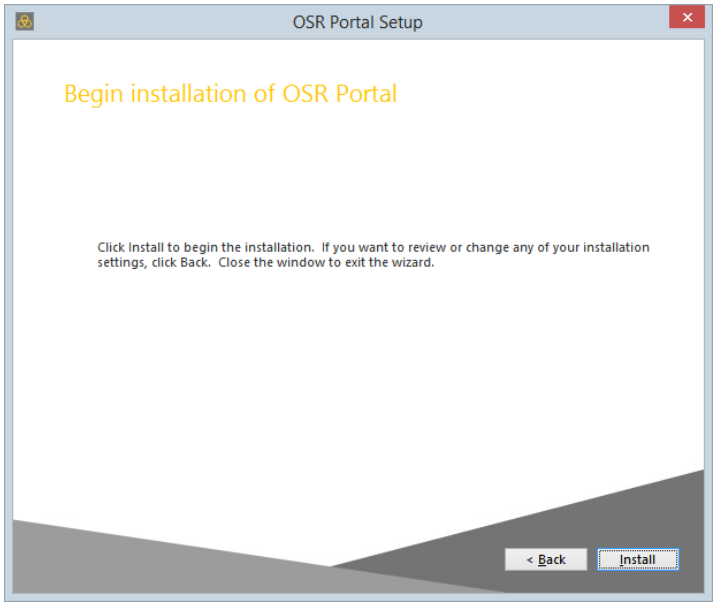

4. In the next dialog, accept the license terms and choose **Next**.



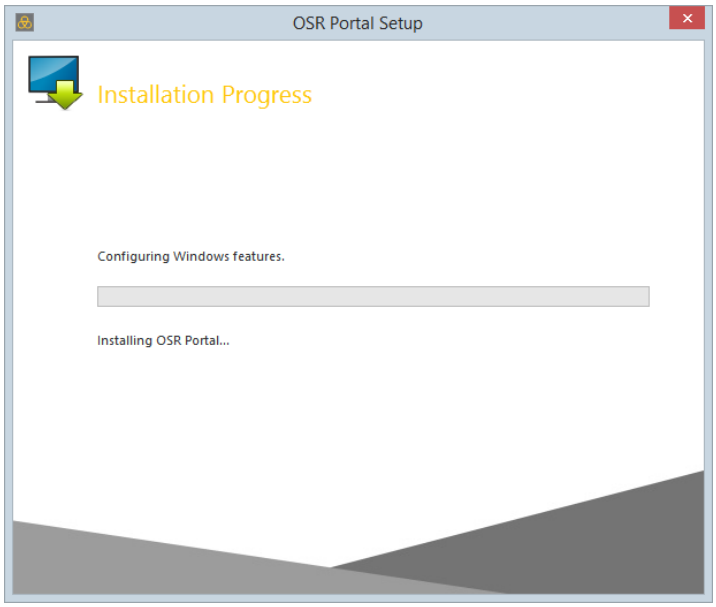
5. Choose a location for the application files or accept the default location and choose **Next**.



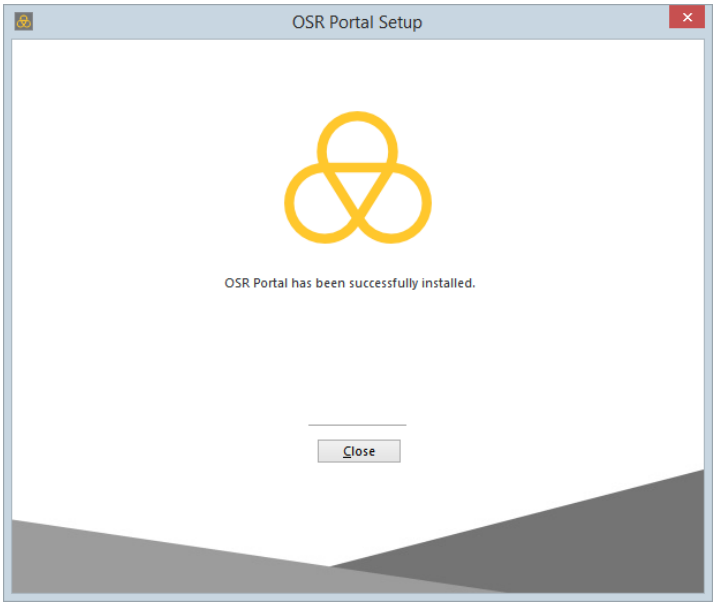

6. Choose **Install** to start the installation.




7. A window indicating the progress of the installation is displayed.




8. When the installation is complete, a success message is displayed and the *BI360 Repository Setup Wizard* will start automatically. Choose **Close** in the message window to close it.




See the next section for instructions on how to set up the repository and perform the other required configuration tasks.

## Configuring BI360 Portal

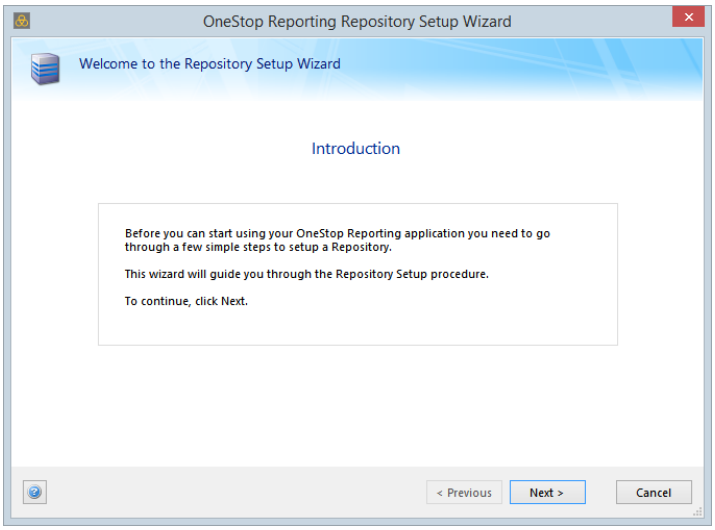
When BI360 Portal has been successfully installed, the repository must be setup and configured for users and roles.

### Setting up the Repository, Installing Integration Package and License Keys

The *Repository Setup Wizard* is used to set up the repository and install the integration package and license keys.

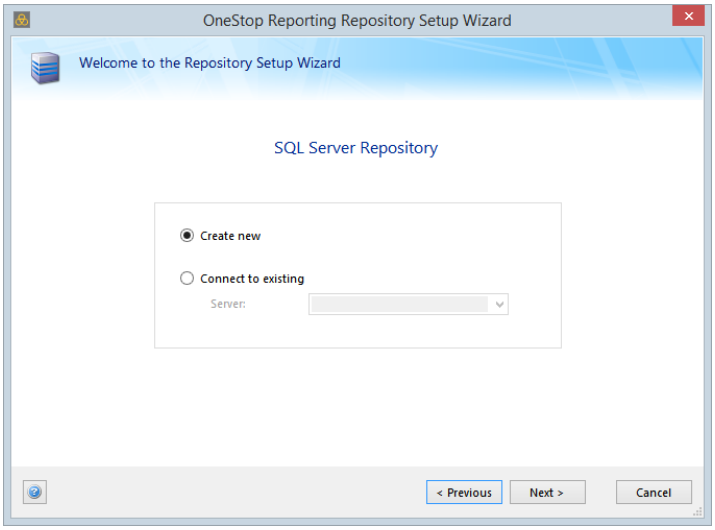
If the organization is already using BI360 Reporting, then there is already an existing Repository that should be backed up before proceeding.

1. In the Repository Setup Wizard window, click **Next**.




2. For SQL Server Repository there are two options: *Create new* or *Connect to an existing*.

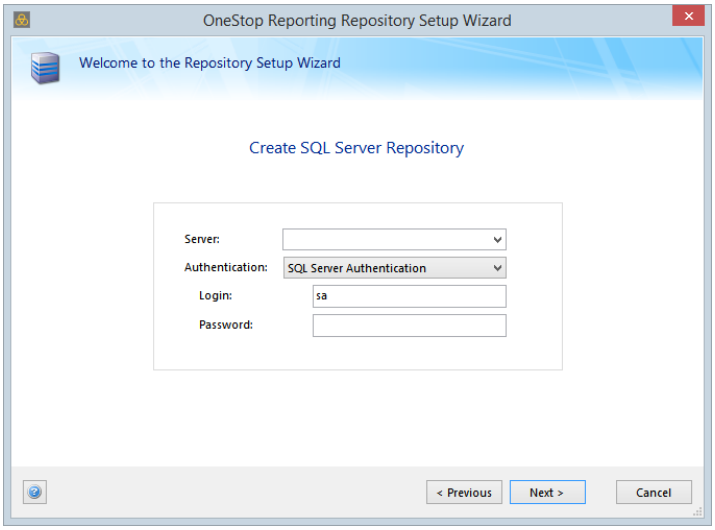
    a. If the user is a *new* BI360 Reporting user and BI360 Reporting has never been installed on any servers/clients in the organization, choose *Create New* and then click *Next.* Then continue with step 4.




b. If the organization is *already using BI360 Reporting*, then there is an existing BI360 Reporting repository, and the user should connect to this repository.

   Choose *Connect to existing* and click *Next.* Then continue with step 4.

3. On the page that is displayed, enter the connection information for the SQL Server in order to create a repository database. (When connecting to an existing repository, the page displayed looks slightly different than the illustration below.)




| Option | Description |
|---|---|
| *Server* | In this field, enter the name of the SQL Server and instance in the format, *ServerName**Instance*. If the default instance is used, only the server name is required. |

| | |
|---|---|
| *Authentication* | If ***SQL Server Authentication*** is used, enter a user login which is defined in the SQL Server and which has permission to create a database and add a new user. Typically the *sa* user is entered.<br><br>• The *SQL Server Authentication* method will create a new login called "*osruser*" on the SQL Server. This user is a system user for BI360 Reporting and will have read and write permissions to the *OSR_Repository* database.<br>• If Windows Authentication is selected, the Windows user entered in the User name field must have the appropriate rights to create a database. By default, this field is automatically filled in with the currently logged on Windows user. If a different user is inputted, then that user's password must be provided. |
| *UserName* | This is the user which will be used for creating the Repository database. If *Windows Authentication* is selected, then a different Windows user may be inputted, but then the corresponding password must be provided as well. |

The OSR_Repository database will be created using this user and the user will be the owner of the Database. A machine account (<domain>\<machine>$) login will also be created and given access to the database. If the SQL Server is on the same server as the Portal, the virtual account for the IIS Application Pool (IIS APPPOOL\OSR Portal) will be created instead of the machine account.

No *osruser* login will be created and the repository database will be accessed through Windows authentication instead. Therefore, all users that will be using any other BI360 Module must manually be given *db_datareader* and *db_datawriter* permissions to the *OSR_Repository* database. See the Microsoft SQL-Server documentation for more information.

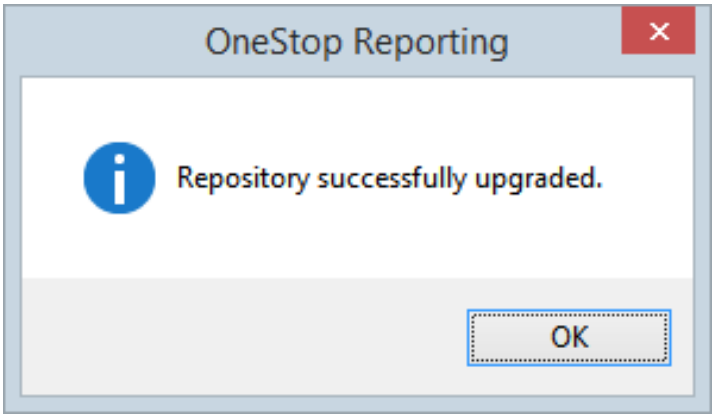
4. After entering all the required information, click *Next*.

   **If *Create new* is selected*:***

   If the information in the previous screen was entered correctly and the user has sufficient rights to create the database, a new repository called *OSR_Repository* will be created in the SQL Server and a dialog notifying that the repository was successfully created will be displayed.

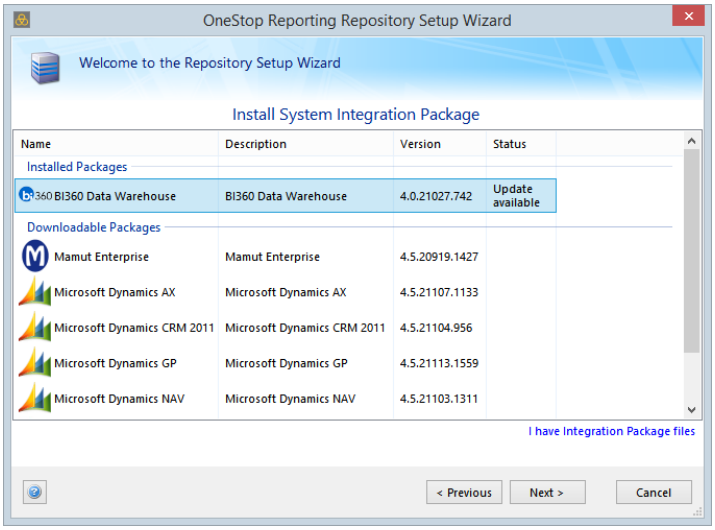
**If *Connect to existing* is selected*:***

Once the upgrade is complete, a dialog notifying that the repository was successfully upgraded will be displayed. This dialog may also show other upgrade notes (*Upgrade completed with messages*). The messages can be purely informational or may require the user to take action.



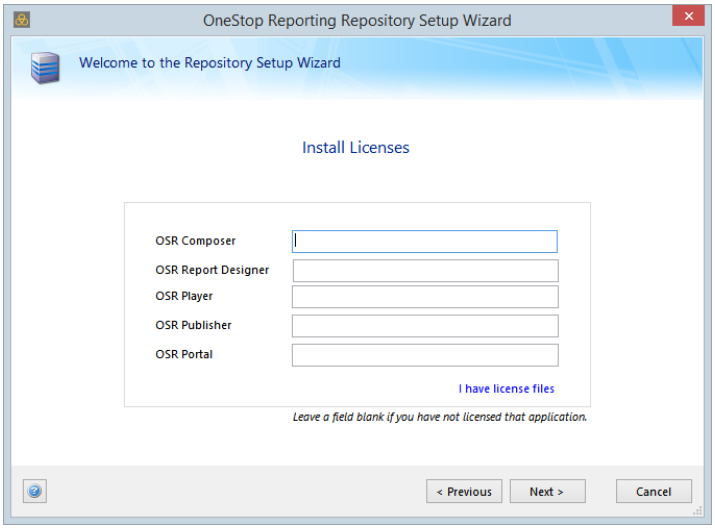

5. In the repository created/upgrade completed page, click *OK* to close the window and continue the setup process. The page for installing the required system integration package opens automatically.
6. Select and highlight the appropriate system integration package for the system and click

   *Next* to start the automatic download and installation of the package.



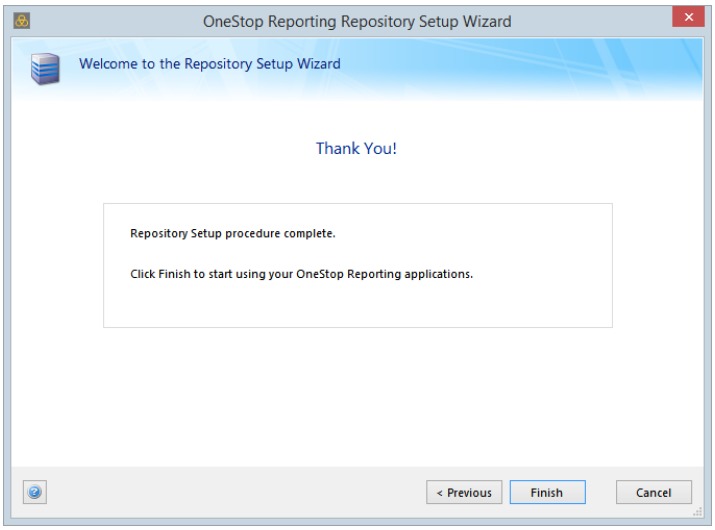
The integration package must be update to version 4.0.xxxx.xxxx

7. In the *Install Licenses* window, enter license numbers for the products purchased and click *Next*. The licenses will be downloaded and installed into the repository.



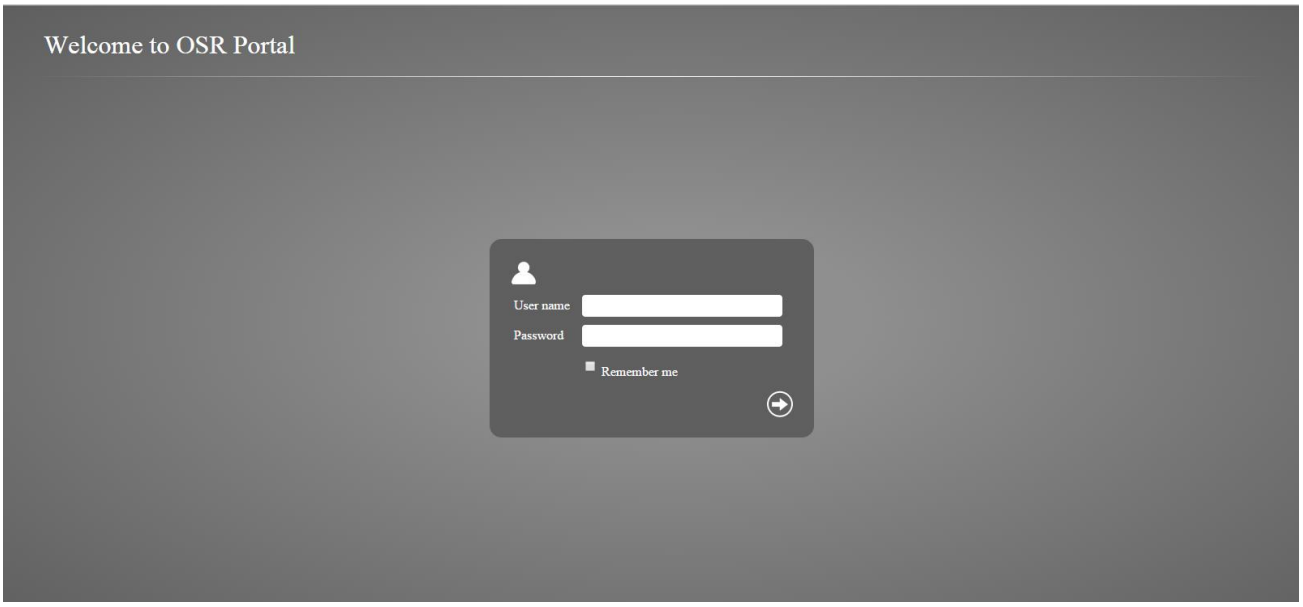
If the user is upgrading from a previous version, the license keys will automatically be displayed.

8. In the *Thank You* window, click *Finish*. This will complete the Repository setup wizard.



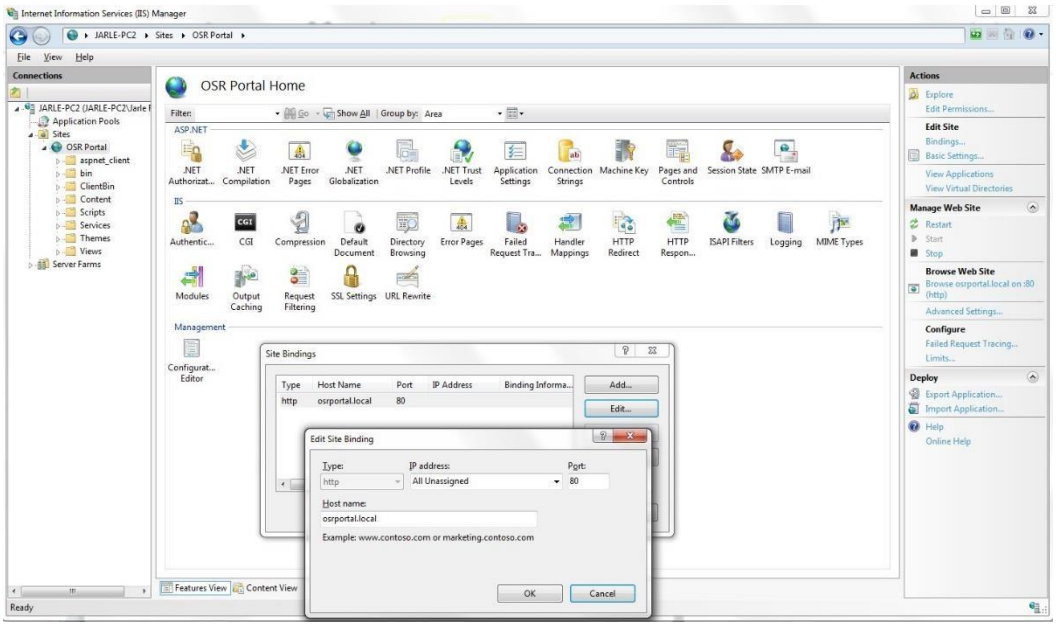

If the configuration was successful your Internet browser will open automatically and connect to the BI360 Portal. A login screen for BI360 Portal will be displayed.

If you want to log in at this point, make sure that Silverlight is installed on this server. (If you attempt to log in and Silverlight is not found on the server, you will get prompted to install Silverlight.)



If the user is upgrading from a previous version, the license keys will automatically be displayed.

Before the BI360 Portal can be accessed from clients, IIS and the web site must be setup correctly. For information about setting up IIS, refer to the IIS documentation.



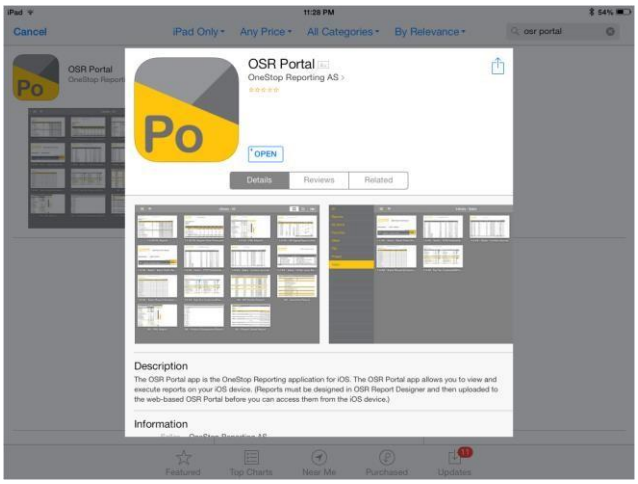

Before you start using the Bi360 Portal in the organization you should continue to setup your data connections and configure users and roles. This is described in the BI360 Administration User Guide in the sections

- Adding Active Directory Users
- Setting Up a New Data Connection
- Managing Roles and Users

# BI360 Portal iOS App

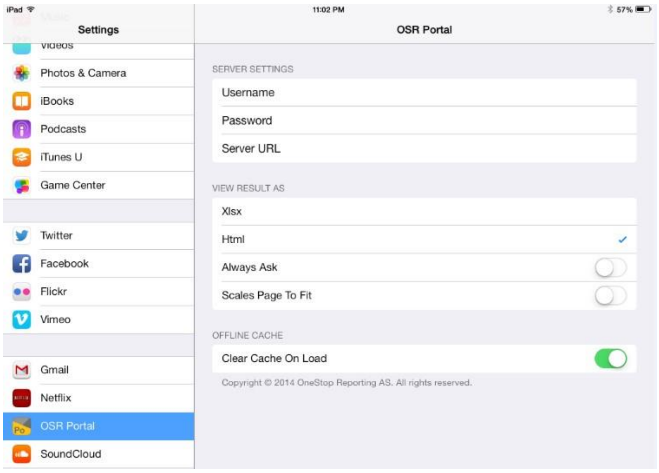
## Installation

To install the app on the iPad, find the Apple App Store, search for *BI360 Portal* to download and install the app.




## Configuring the Settings

Once the app has been downloaded and installed, go to *Settings* and locate the app in the list. Select it to open the settings panel for the application.




### Server Settings

The *BI360 Portal* app comes preconfigured with a user name, password and server URL for a demo site. In order to access the organization's reports, a valid user name and password must be entered and the server URL for the organization's *BI360 Portal* installation.

Enter the user name and password that is used in any other BI360 application (typically the web-based *BI360 Portal*).

The *Server URL* must be the correct URL for the organization's *BI360 Portal* installation.

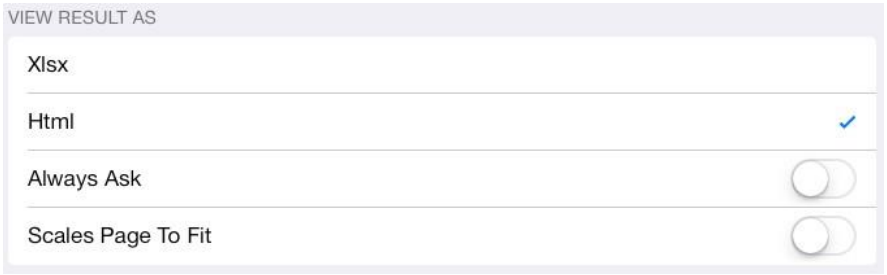
The Server URL must be in http://<host name> format.

## View Result As

In the *View result as* section the user can choose whether to see the reports in .xlsx format or *HTML* format.

Activate the *Always ask* options if the user wants to be prompted to select .xlsx or HTML format each time the application is started.

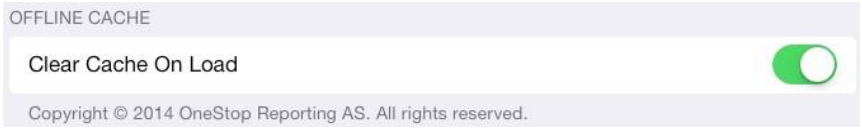
Activate the *Scales Page to fit* option if the user want the application to scale all content to one page. (Not recommended, as visibility will in many instances be very poor with this option enabled.)




## Offline Cache

Every action in the app is stored, so if the user is offline (not connected to a network) all instances of previous reports that were ran and information accessed is available.

If there are large amounts of historic data stored, it may be helpful to empty the offline cache. Activate the *Clear Cache On Load* option to empty the offline cache. When activated, this option removed historic instances of reports from the cache. When activated the *Clear Cache On Load* option removes all historic data, and the user will not be able to see any previously run reports! No data is being deleted from the organization's systems, it is just from the mobile device.



## Network Connection Status Indicator

When connected to a network, a network symbol will be displayed to the right of the list symbol at the top of the screen. The user must be connected to a network to be able to execute reports in real time.

# Appendix – Technical Information

## BI360 Reporting Registry Keys

The following section provides information about the different registry keys for the BI360 Reporting applications.

### Common Settings for All Components

[HKEY_LOCAL_MACHINE\Software\BI360 Reporting\Settings] "RepositoryServer"="<servername>"

[HKEY_LOCAL_MACHINE\Software\Wow6432Node\BI360 Reporting\Settings]

"RepositoryServer"="<servername>"

### BI360 Report Designer/BI360 Player on Windows 32-bit or Windows 64-bit with 64-bit Office

[HKEY_LOCAL_MACHINE\Software\Classes\BI360.ReportPlayer.BI360Functions] All sub keys.

[HKEY_LOCAL_MACHINE\Software\Classes\CLSID\{74B6B2D2-F28A-4F03-BB6A-6B5DA5306460}]

**All sub keys.**

[HKEY_LOCAL_MACHINE\Software\Microsoft\Office\Excel\Addins\BI360.ReportDesigner] All sub keys.

**Office 2007:**

[HKEY_LOCAL_MACHINE\Software\Microsoft\Office\12.0\Common\General]
“EnableLocalMachineVSTO”=”1”

**Office 2010:**

[HKEY_LOCAL_MACHINE\Software\Microsoft\Office\14.0\Common\General]
“EnableLocalMachineVSTO”=”1”

**Office 2013:**

[HKEY_LOCAL_MACHINE\Software\Microsoft\Office\15.0\Common\General]
“EnableLocalMachineVSTO”=”1”

**Will be added when user starts Excel:**

**Office 2007:**

[HKEY_CURRENT_USER\Software\Microsoft\Office\12.0\Excel\Options] "OPEN"="/A
\"BI360.ReportPlayer.BI360Functions\""

**Office 2010:**

[HKEY_CURRENT_USER\Software\Microsoft\Office\14.0\Excel\Options] "OPEN"="/A
\"BI360.ReportPlayer.BI360Functions\""

**Office 2013:**

[HKEY_CURRENT_USER\Software\Microsoft\Office\15.0\Excel\Options] "OPEN"="/A \"BI360.ReportPlayer.BI360Functions\""

Note that the OPEN key may have a different number such as OPEN1 or OPEN35. This is OK.

## Miscellaneous

### BI360 User Authentication

Windows Authentication is not available on the system before Access Management has been setup by the Administrator. Should the user be prompted for a user login at application startup the credentials for the BI360 Administrator (case sensitive) should be used:

- User: Admin
- Password: admin

The password can be changed from within the *BI360 Administration*.

# Additional Information

## Solver Support Center

The Solver Support Center (support.solverusa.com) is the centralized location for users to learn more about the BI360 Suite. From opening and managing your support tickets to reading knowledgebase articles about the product, the Solver Support Center has everything a user will need.

Users may contact Solver Support if they have questions about the BI360 Suite. One of our technical support consultants will gladly assist you.

Users can access the Solver Knowledgebase for more information about the entire BI360 Suite. From user guides, white papers, training manuals and much more, the Solver Support Center has everything a user will need to get started with the application.

## Solver Forum

The Solver Forum (solverusa.com/forum) is a great resource for users to ask questions about the software. Other users or one of the many Solver employees frequently check the boards and can quickly answer your questions.

## Solver Feedback

Solver invites customers to participate in providing feature requests for future versions of BI360 on a site just for user feedback, feedback.solverusa.com. On the Solver Feedback site, users may suggest features for updates and upgrades to BI360 – and/or vote on existing feature submissions from fellow customers to really push for feature(s) that would make BI360 even more powerful, dynamic, and intuitive.

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