

BI360 Pre-Installation Checklist

The following is a list of prerequisites that the user should make sure have been met before running the installation files. **Please ensure that the requirements are installed and fully licensed.** This will help speed up the process when Solver, Inc. assists in an install. For additional information, please read the BI360 Installation Guide found on the Solver Support Site (support.solverusa.com).



Please ensure that all the required related installation guides are downloaded from the Solver Support Site (support.solverusa.com).

Please provide the following information *(if applicable)*

Dev SQL Server: _____ Prod SQL Server: _____

Dev Application Server: _____ Prod Application Server: _____

Terminal Server or Client Install: _____

If you answer "Yes" to all of the following questions you have met the prerequisites to install the software.

Pre-Install

Yes

Are you registered on the Solver Support site (support.solverusa.com) to access the software download and your license key? Click [here](#) to register.

Is the user installing the software as a local administrator on the computer?

Can the PC/Server be rebooted if necessary? This includes making sure all users have saved their work, are no longer logged into the machine and Excel is closed at the time of install.

Does the machine the software is being installed on have access to the internet? (Needed to verify license keys and to install integration packages)

Is the user who will be doing the install a SYSADMIN on the SQL Server? This is needed in order to create databases.

Does Microsoft Office have an activated license?

Is the computer up to date (all Windows and Office updates have been performed)?¹

Is Visual Studio 2010 Tools for Office (VSTO) installed?²

Is .Net Framework 4.5.1+ installed and up to date on the machine?²

1. to check for Windows updates, go to **Start -> Control Panel -> System and Security -> Windows Update**
2. to check whether a program has been installed, go to **Start -> Control Panel -> Programs**

Microsoft SQL Version^{1, 2} (is one of the following versions installed that users have access to)

Yes

2008/2008R2

2012/2012SP1

2014

2016

1. SQL Standard Edition or greater
2. Web Budgeting requires SQL Database Compatibility 2008+

Microsoft Operating System (is one of the following versions installed on the machine)

Yes

Windows Vista/Windows 7/Windows 8/Windows 8.1/Windows 10

Windows Server 2008/ Windows Server 2008R2/ Windows Sever 2012/Sever 2012R2

Microsoft Office Version¹ (is one of the following versions installed on the machine)

Yes

2007 SP3+

2010 SP1+

2013

Office 365 (local install only)

2016

1. Microsoft Office will only need to be installed on the client machine. If the client has purchased BI360 Portal, additional information is provided in that section.

Portal (separate from the Reporting Application)

- If the user did not purchase BI360 Portal, this section will not apply.
- Prerequisites as mentioned in the Pre-Install and Additional Software sections apply to this section as well.

If the answer is “Yes” to each of the following questions, then the prerequisites have been met to install the BI360 Portal.

Yes

Is IIS7+ installed on a webserver?

Is Microsoft Distributed Transaction Coordinator (MSDTC) enabled on the web server?

Is .net Framework 4.5.2+ installed and up to date on the machine?

Is ASP .Net 4.5 with .NET Extensibility 4.5 enabled on the IIS machine?

Has a Service account been created to be used as an Application Pool and OSR Portal service user account?

Do you have access to the Domain Controller(s)?

Can the IIS machine be restarted if needed?

Is the SQL port open for access? The default port is 1433.

Are the BI360 mobile applications going to be used? If so, Microsoft Excel will need to be installed on the server.