

Alchemex 7 Smart Reporting | Installation Guide | November 2010



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Installation Guide

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Alchemex 7 Smart Reporting

Installation Guide



System Requirements

Recommended System Requirements

- Operating System : Windows XP SP3, Windows Vista, Windows 7, Windows Server 2003, Windows Server 2008, Windows Terminal Server
- Microsoft .Net Framework 3.5 SP1
- Microsoft Excel 2003 and higher. Note: to run Report Designer reports, you need to have Excel 2007 or higher.
- Hardware: CPU > 1.3 GHz
- Memory: 1GB RAM
- Hard Drive Space: 350MB

Database Connectivity Supported

Alchemex 7 Smart Reporting uses ODBC and OLEDB technology to gain access to Open Database Systems. *Alchemex 7 Smart Reporting* includes direct support for most popular database systems and Connection Types for these are included within the Administrator. 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 Administrator.

Some of the more common Database types supported are:

- Microsoft SQL Server
- Pervasive
- Oracle
- Sybase
- Microsoft Access
- Microsoft Visual Foxpro
- Dbase
- MySQL
- Sage50
- Paradox

Installation Guide

Pre-Installation Requirements

The following points must be actioned before an installation of your *Alchemex 7 Smart Reporting* Solution can take place.

1. The *Alchemex 7 Smart Reporting* License/s purchased need to be assigned to the relevant users on site i.e. Administrator license, Report Manager License, Report Viewer license.
2. An *Alchemex 7 Smart Reporting* shared folder needs to be created on the file server and full rights (read & write) need to be assigned to this folder. This is for your Report Repository which will store your centralized reports to ensure that all users of *Alchemex 7 Smart Reporting* are looking at the same report repository.
3. The security credentials if applicable i.e. User id and password for the database/s must be made available.
4. A list of the databases/companies that *Alchemex 7 Smart Reporting* must connect to must be made available.
5. Please ensure that Microsoft Excel version 2007 or later is loaded and functioning on all workstations that will be running the *Alchemex 7 Smart Reporting* software
6. Before beginning the *Alchemex 7 Smart Reporting* installation, ensure that all instances of Microsoft Excel are closed.

Alchemex 7 Smart Reporting General Installation Guide

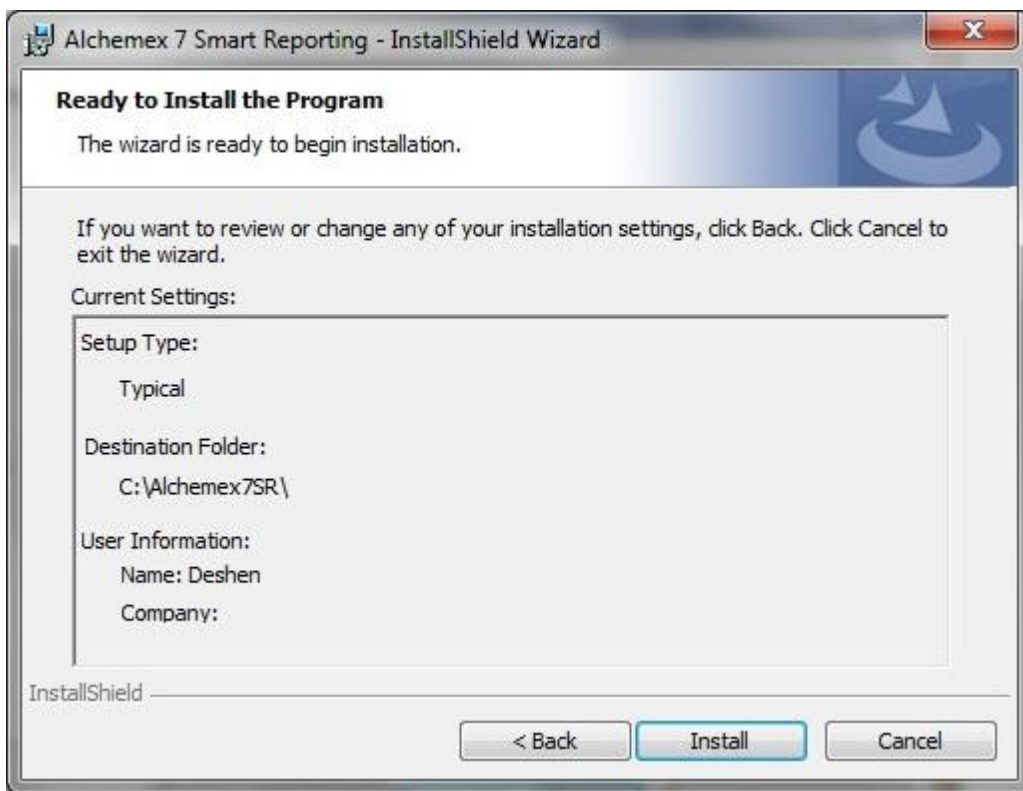
1. To begin installation, insert the *Alchemex 7 Smart Reporting* CD or launch the setup file. The Install Shield Wizard screen will appear.



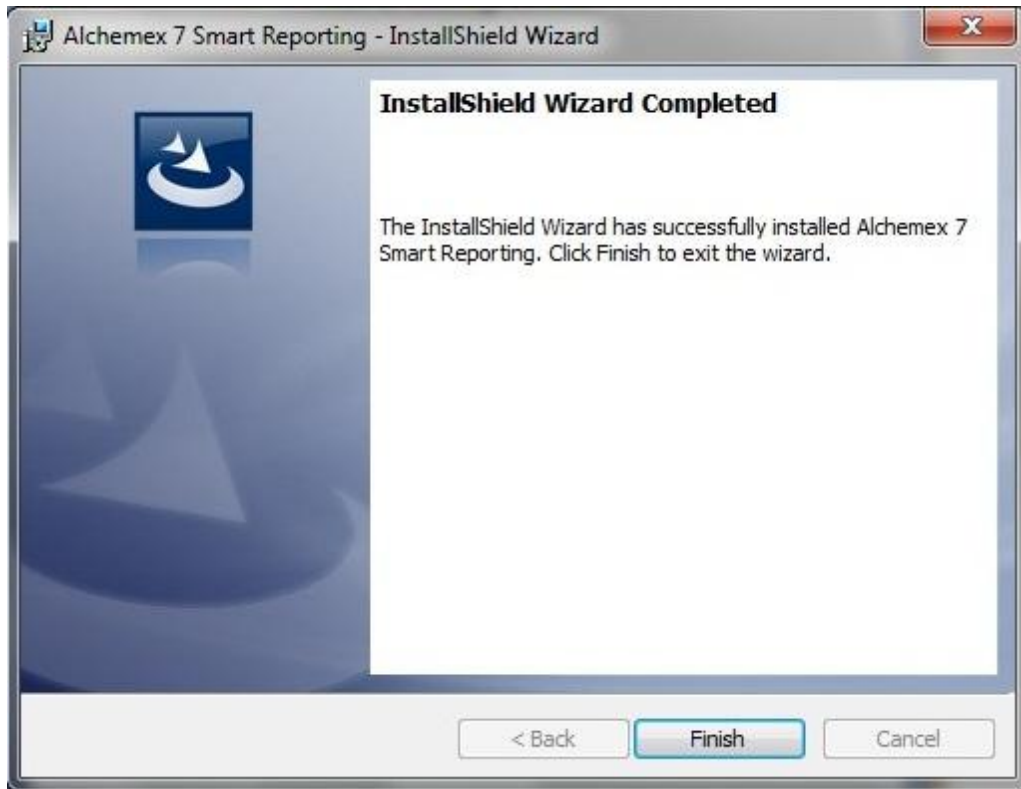
2. Click **Next**.



3. Click **Next** to install to the default folder or **Change** to browse to an alternative folder.



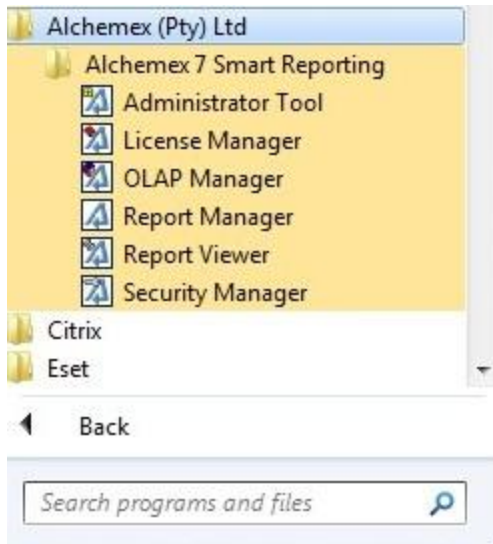
4. Click **Install** to continue.
5. When the installation has completed, a window will appear confirming successful installation.




6. Click **Finish**.
7. **Note:** If .NET Framework 3.5 sp1 or higher is not installed on the system, setup will perform the installation of the .NET Framework 3.5 sp 1 now.



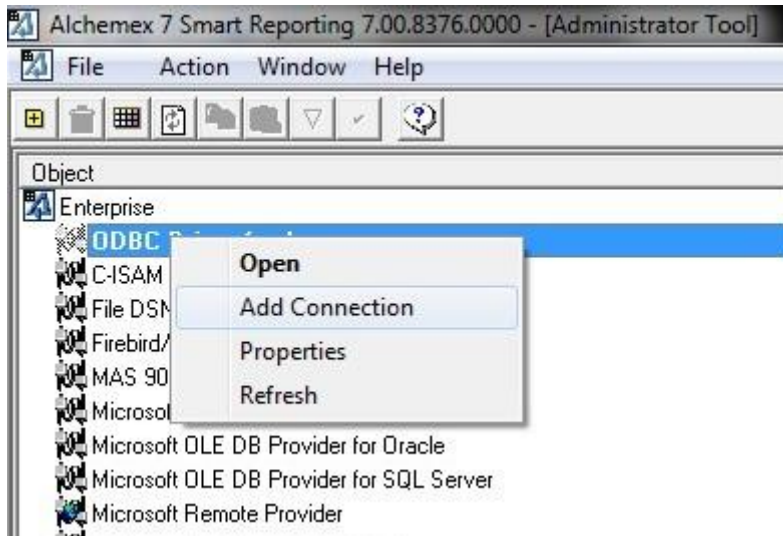
8. Launch the Report Manager. Go to Start All programs, Alchemex 7 Smart Reporting and select Report Manager



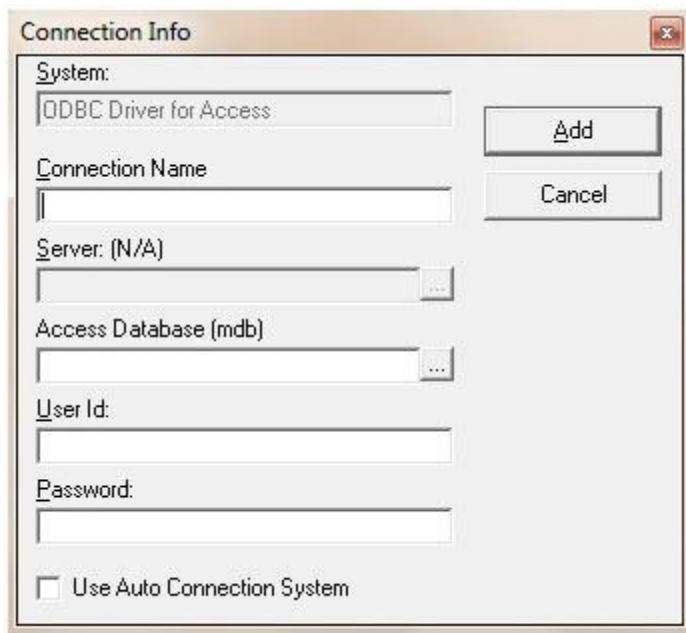
9. Click the browse button  and navigate to the shared network folder where your report repository is located.



10. Click **Ok**.
11. You will now need to make a connection to the database/s you will be reporting from.
12. Open the Administrator Tool. All programs, **Alchemex7 Smart Reporting** and select **Administrato** **r Tool**. Right Click on the Driver Connection type for the database you are trying to connect to and select **Add Connection**.



13. Enter your database connection details and click **OK**.



14. Proceed to serialise your software.

Serialising your Software

Serialising your Alchemex 7 Smart Reporting Installation Online

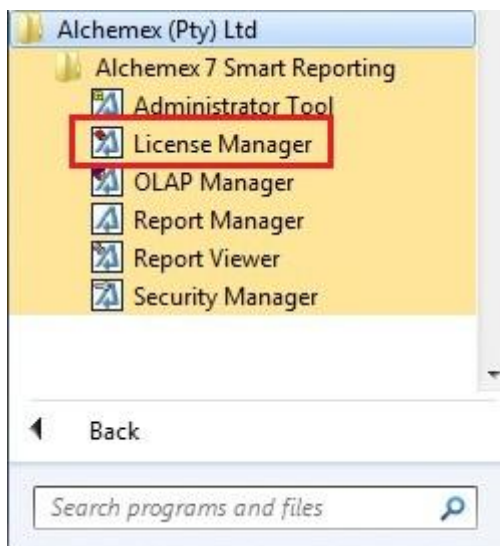
To prevent software piracy and illegal use of *Alchemex 7 Smart Reporting*, the software needs to be serialised once a year. The process involves downloading files and information from the update server that re-enables the software. Once downloaded the Update Module on each client workstation must be run to ensure that it continues to function.

Performing Serialisation

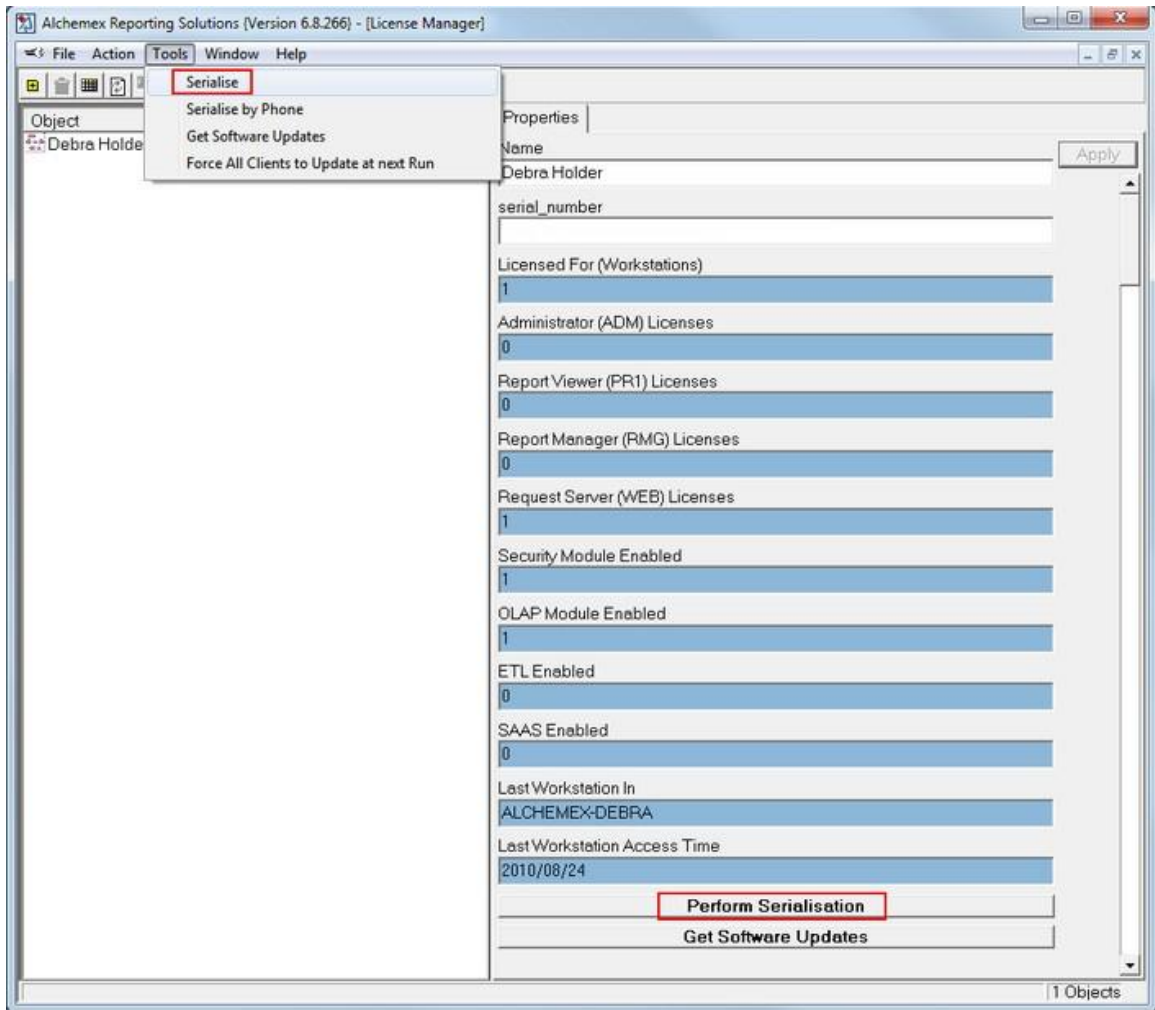
For the first time:

Over the Internet

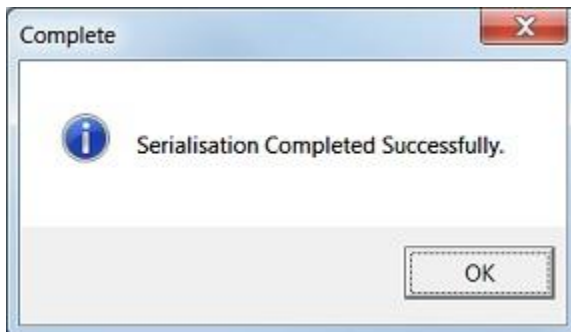
1. Open the License Manager.



2. You will be prompted to enter the name for your company and your *Alchemex 7 Smart Reporting* serial number as supplied to you by your dealer. The company record will be created and the License Manager Module will activate.
3. Ensure that you are connected to the internet and from the **Tools** menu choose **Serialise** or click on **Perform Serialisation** at the bottom of the page.



Alchemex 7 Smart Reporting will contact the Update Server and if authentication with the Update Server is successful (i.e. a valid Company Name and Serial Number) then the necessary files and information to enable *Alchemex 7 Smart Reporting* will be downloaded and you will receive a confirmation.



Serialising your Alchemex 7 Smart Reporting Installation Telephonically

Telephonically

If there is no internet connection available then serialisation can also be performed telephonically.

1. Before you can do this you must obtain a Dongle file (PLDONGLE.DLL) from your *Alchemex* Customer Support consultant
2. Once you have done this, open the License Manager and from the **Tools** menu, choose **Serialise by Phone**
3. Confirm you have placed the dongle file in the relevant folder as per step 1 by clicking **OK**
4. The screen below will be displayed and your Alchemex Customer Support consultant will take you through the rest of the process to serialise your product.
5. You will need to supply your Alchemex Customer Support consultant with the relevant information displayed on your screen. (See example below)

Telephonic Serialisation

Step 1. Obtain the latest version of PLDONGLE.DLL from your Alchemex VAR

Step 2. Call your Alchemex VAR and request Telephonic Serialisation
 Have your serialisation details handy as you will need to supply these

Step 3. When prompted, please supply the following information

Verification Code 653653674429	PLSERIAL.DLL Version 6.8.0.333
Date 15-Sep-2010	PLDONGLE.DLL Version 3.0.0.1033

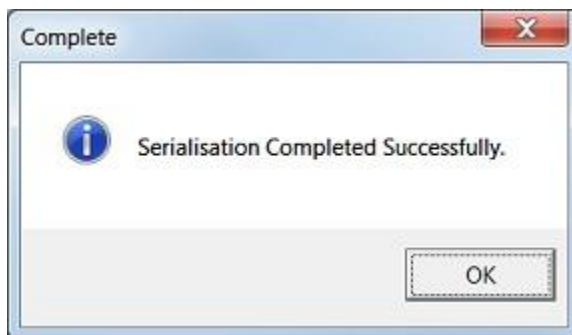
Step 4. Enter in the information supplied to you below

Product Code []	Licenses Total [] Administrator Tool [0] Report Manager [0] Request Server [0] Report Viewer [0]
PIN Code []	
Check Sum 0	
Security Module <input type="checkbox"/> OLAP Manager <input type="checkbox"/>	
ETL Manager <input type="checkbox"/> SAAS <input type="checkbox"/>	
Report Designer <input type="checkbox"/>	

Step 5. Complete the process by pressing OK

OK Cancel

- Enter the information as supplied to you by the support centre. On successful serialisation, you will receive the message below, and you can start using your product.



- Click OK.

Workstation Licenses


Alchemex 7 Smart Reporting uses a workstation Licensing model. After you have serialised your *Alchemex 7 Smart Reporting* installation, you will have (n) Workstation Licenses available (where n is the number of Licenses you have purchased). The first (n) workstations to access *Alchemex 7 Smart Reporting* will be assigned these Licenses. When the (n) licenses have been assigned you will need to purchase more licenses or you will need to Un-Assign some existing Licenses.

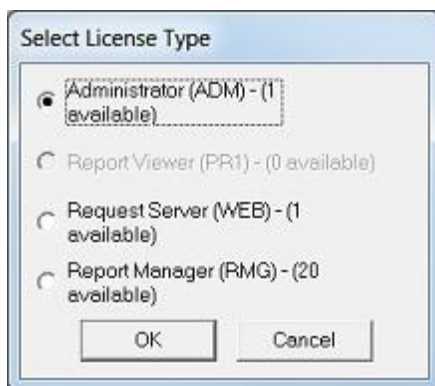
Licenses will be tied to a User Name and Workstation so the licensing is not “concurrent” licensing. The preferred method is to allow workstations to claim licenses at first access; however you may manually add workstation licenses.

The License Manager provides a snapshot of your *Alchemex 7 Smart Reporting* licenses and module configuration.

Allowing Workstations to Claim Licenses at first access

For each workstation, follow steps 1-7 of the [Installation Guide](#)

8. Click the browse button  and navigate to the shared network folder where your Server Report Repository is located.
9. Click **OK**.
10. Enter your connection details and click **OK**.

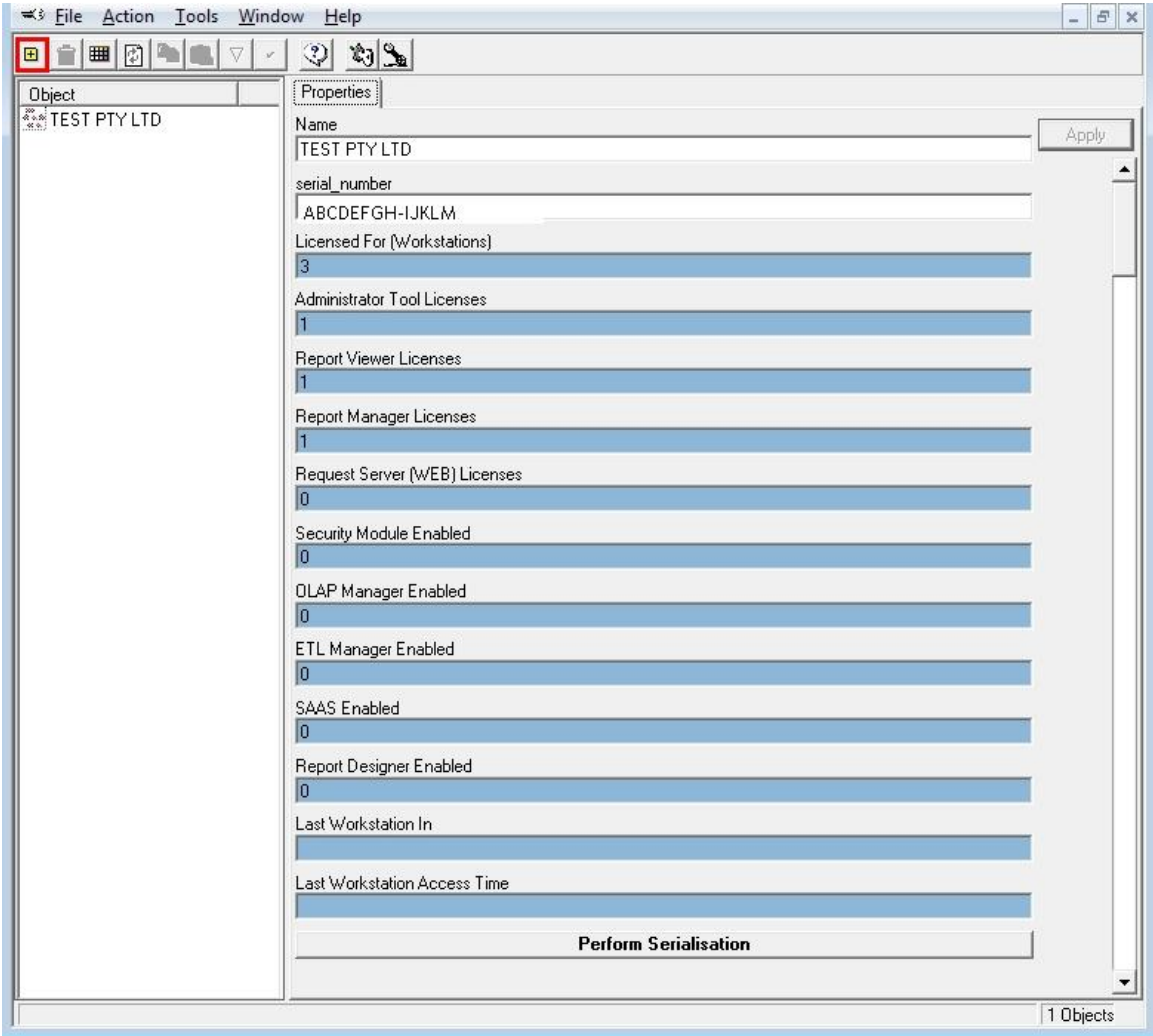


11. Select the Correct License type for the workstation.

12. Click **OK**.

Manually Adding Workstation Licenses

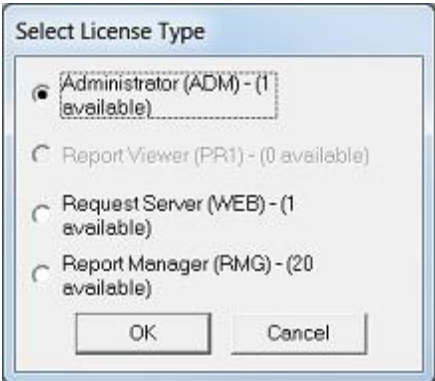
1. When the License Manager is opened, the screen below will open, listing the licenses.



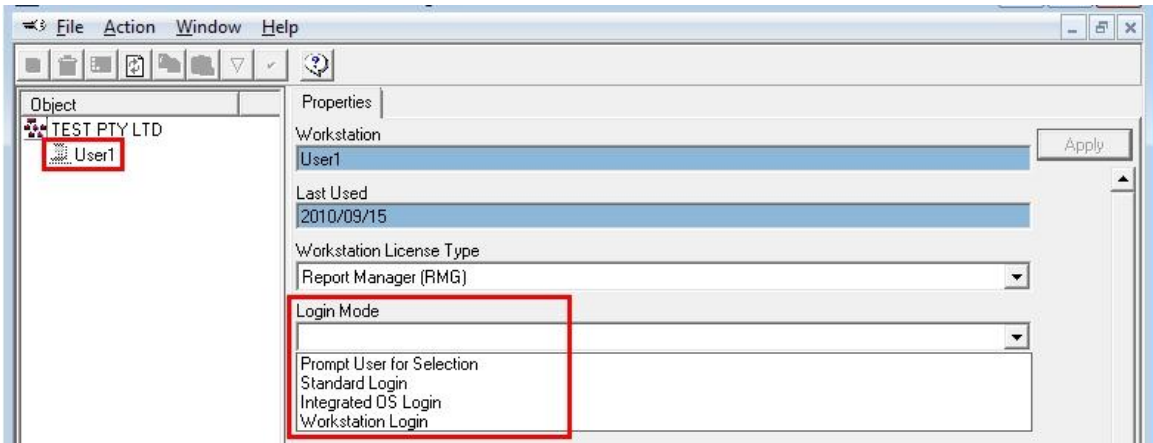
2. Select the **Add** button to add a new license.



- 3. Enter the Workstation name to assign the license to.
- 4. Click **OK**



- 5. Choose the license type you would like to add.
- 6. Click **OK**.
- 7. You will now see the workstation license you added along with the license type. Select the **Login Mode** for the user.



- 8. Click **Apply**.

Getting Support

The *Alchemex 7 Smart Reporting* Help Files have been written to provide maximum information and assistance to all *Alchemex 7 Smart Reporting* users. Every effort has been made to make *Alchemex 7 Smart Reporting* easy to understand and use. The comprehensive help files can be accessed by pressing the F1 button in your *Alchemex 7 Smart Reporting* software. If you still need assistance with your installation, please contact our *Alchemex 7 Smart Reporting* Team on 0861 102 302. For further assistance, please contact:

Sales	sales@alchemex.com
Website	www.alchemex.com
BI Community - Find product videos and a comprehensive knowledgebase and documentation	http://alchemex.ning.com
Knowledgebase - Repository of support articles and help files	www.alchemex.com
Online Academy - Offering you specialised Excel and Alchemex training to enhance your reporting skills	www.alchemexacademy.com
Trial Software - A complete installation of the Alchemex reporting software for you to evaluate over the next 30 days	www.alchemex.com
Support - No luck from self-help websites? Email your questions, comments or problems	support@alchemex.com
Customer References	www.alchemex.com

Other Support

For more information about obtaining support please contact your Certified *Alchemex* Dealer or Call Centre