

# Installing Intellicus on Windows

Version: 7.3

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## **Acknowledgements**

Intellicus acknowledges using of third-party libraries to extend support to the functionalities that they provide.

For details, visit: <http://www.intellicus.com/acknowledgements.htm>

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# 1 Pre-Installation Instructions

This chapter provides information that you need to know before installing Intellicus. It will help avoid problems during the installation process.

## System Pre-requisites

The following resources are minimally required on a candidate machine to install Intellicus.

- **Operating System:** Windows 2000/2003, XP, Vista
- **Memory:** 512 MB of RAM or more
- **Storage Space:** 2 GB or more

## Application Program Pre-requisites

### Server Machine

The following application programs are required on the machine where Intellicus is installed.

- User may need to have **WinZip** installed on the machine.
- The person working on installation of Intellicus must have administrative privileges on the machine.

### End User Machine

The following application programs are required on the machine where Intellicus is accessed through web.

- Internet Explorer 9.0 or above, or Mozilla Firefox 30.0 or above browser application.
- Plug-ins/applications for opening XLS, XLSX, DOC, DOCX, PPTX and PDF format files.
- JRE/JDK 7 or above

## 2 Installing Intellicus

The Intellicus product CD is setup for automatic run. However, it is also possible to install Intellicus manually.

If you have downloaded Intellicus from the Intellicus website, unzip the downloaded file to get the 'Intellicus<version>\_win<architecture>.exe'.

**Important:** You must have Administrator Privileges on the machine on which Intellicus is being installed.

Double-click the 'Intellicus<version>\_win<architecture>.exe' file. This invokes the installation wizard that guides you through the installation process. Here, installation program starts configuring windows installer. After the configuration is over, the welcome screen of the installation wizard is displayed.

**Note:** In case you have already installed this application on the computer, a message box would prompt to uninstall Intellicus. If not then next step shows up. Tip: To abort the installation process, at any stage of installation, you can click the Cancel button.

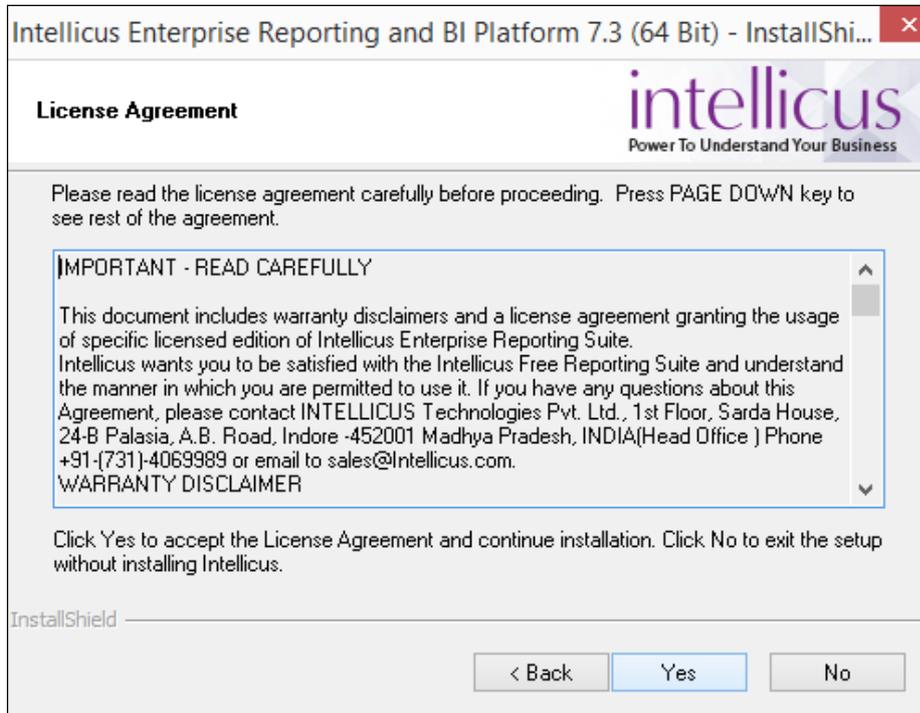
In case you do not have Microsoft Visual C++ on your system, the installer will prompt a message to enable installing this component prior to Intellicus installation.

Figure 1 shows the **Welcome Screen**. Click the **Next** button to proceed. **License Agreement** screen appears.



Figure 1: Welcome Screen

Figure 2 shows the **License Agreement** screen.



*Figure 2: License Agreement Screen*

Read the License Agreement.

If you agree, then click **Yes** button to proceed to the **Customer And Usage Details** screen.

Figure 3 shows the **Customer Information** Screen.

The screenshot shows a window titled "Intellicus Enterprise Reporting and BI Platform 7.3 (64 Bit) - InstallShield". The main heading is "Customer And Usage Details" with the Intellicus logo and tagline "Power To Understand Your Business". The form contains the following elements:

- User Name:** A text box containing "Administrator".
- Company Name:** A text box containing "Intellicus".
- Select who can execute Intellicus components:** Two radio button options:
  - Anyone who uses this computer (all users)
  - Only for me (Administrator)
- Navigation:** Three buttons at the bottom: "< Back", "Next >" (highlighted), and "Cancel".

*Figure 3: Customer Information*

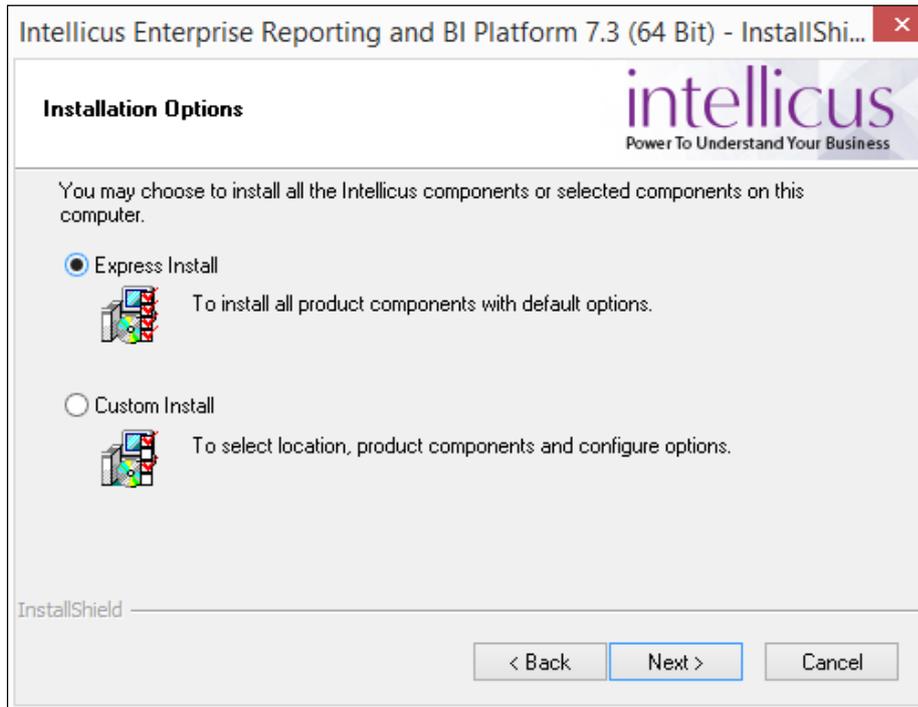
## User Name/ Company Name

Please specify the User Name and the Company Name.

User has an option to install this application for use by either all users (Select Anyone who uses this computer) or only by the administrator (Select only for me).

Click **Next** to move onto the next screen.

Figure 4 shows **Installation Options** screen.



*Figure 4: Installation Options*

## Express Install

Select this option to:

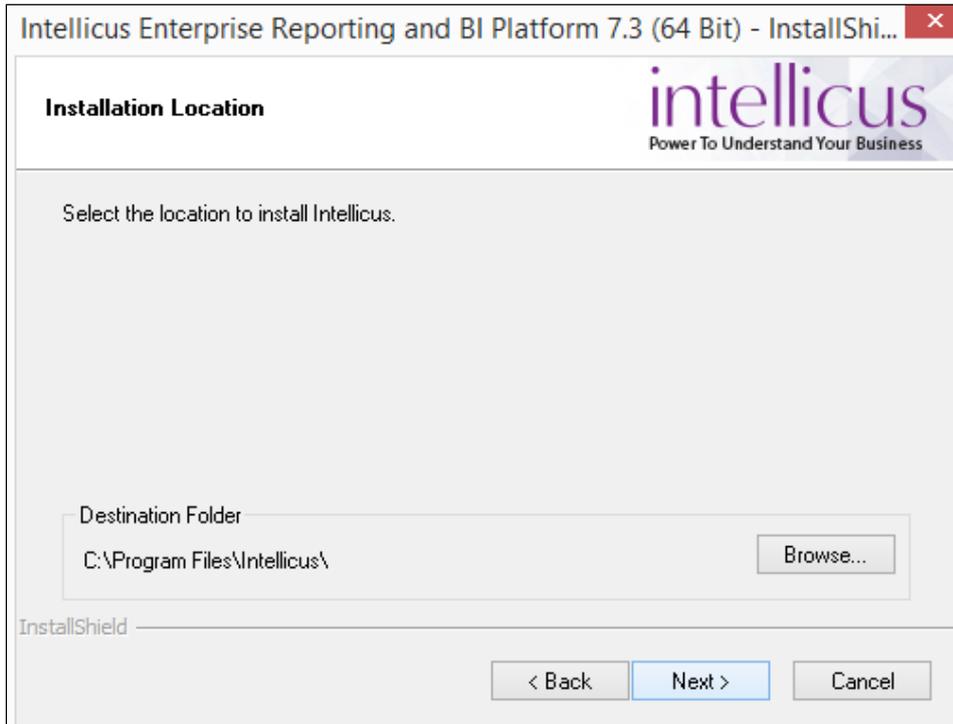
- Install all the components of Intellicus.
- Install Intellicus at the default location set in the installation program.

## Custom Install

Select this option to:

- Select the components to Install.
- Select the location to install Intellicus.

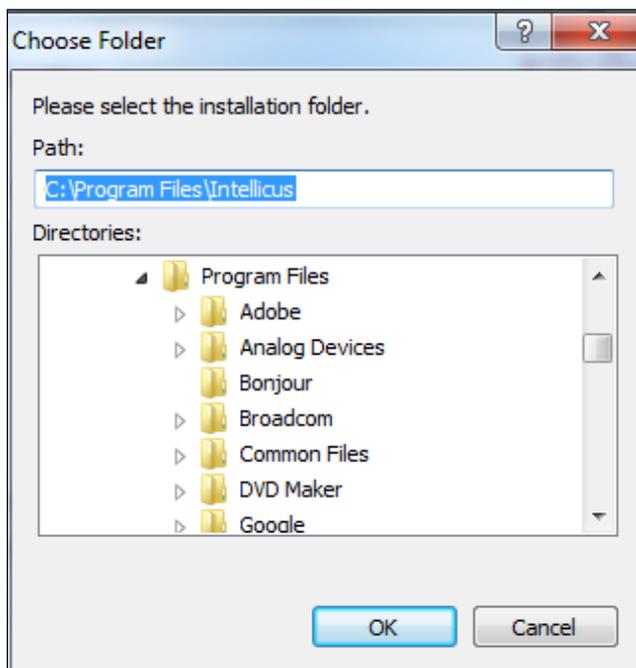
Click **Next** to proceed to **Installation Location** screen.



*Figure 5: Option to change the destination folder*

By default, the application is installed at path: C:\Program Files\Intellicus. User has the option to either go with the default destination location or specify a different destination (installation) location. Click **Browse** and specify the destination location to change it.

When you click **Browse** button, **Choose Folder** screen appears. On this screen, you may specify path in the **Path** area. If you do not remember the path, you can also select it from **Directories** area.



*Figure 6: Specifying Installation folder*

Specify path in **Path** area or select path by double-clicking and opening respective folders within **Directories** area. Selected path will appear in **Path** area.

Click **Ok** to select the path for installation. Click **Next** to go onto the **Select Components to Install** screen.

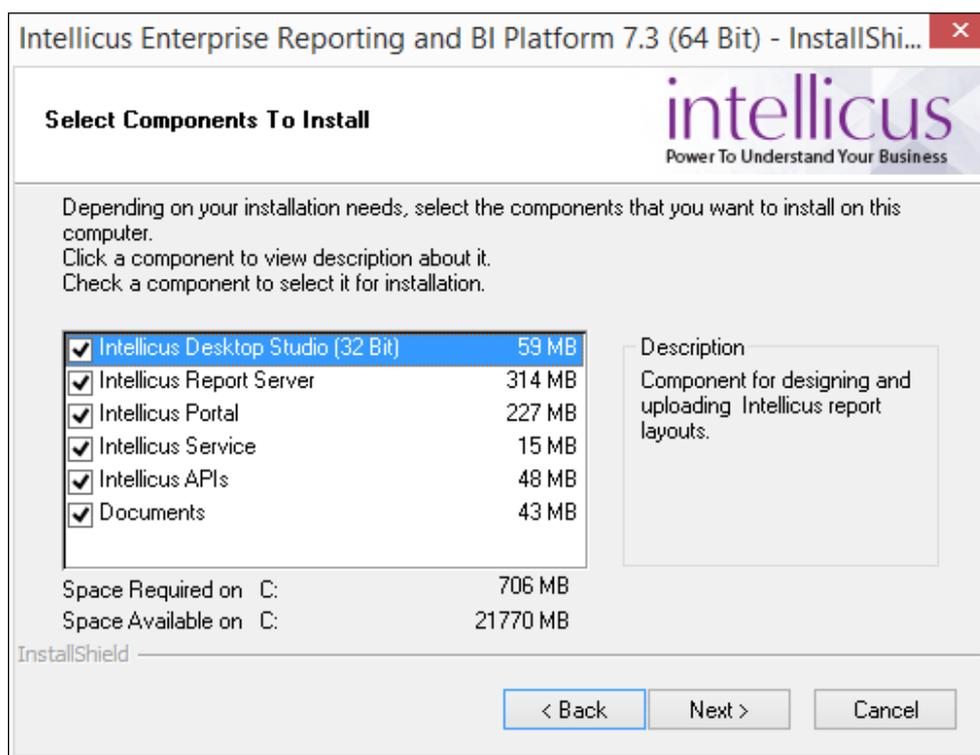


Figure 7: Select one or more components to install

Select one or more components by selecting respective check boxes as shown in Figure 7.

**Tip: Select Components to Install** screen also displays the required and available hard disk space for the selected components. You can utilize this information to judge the system requirements.

Clicking **Next** will open up **Configuring Port Numbers** screen.

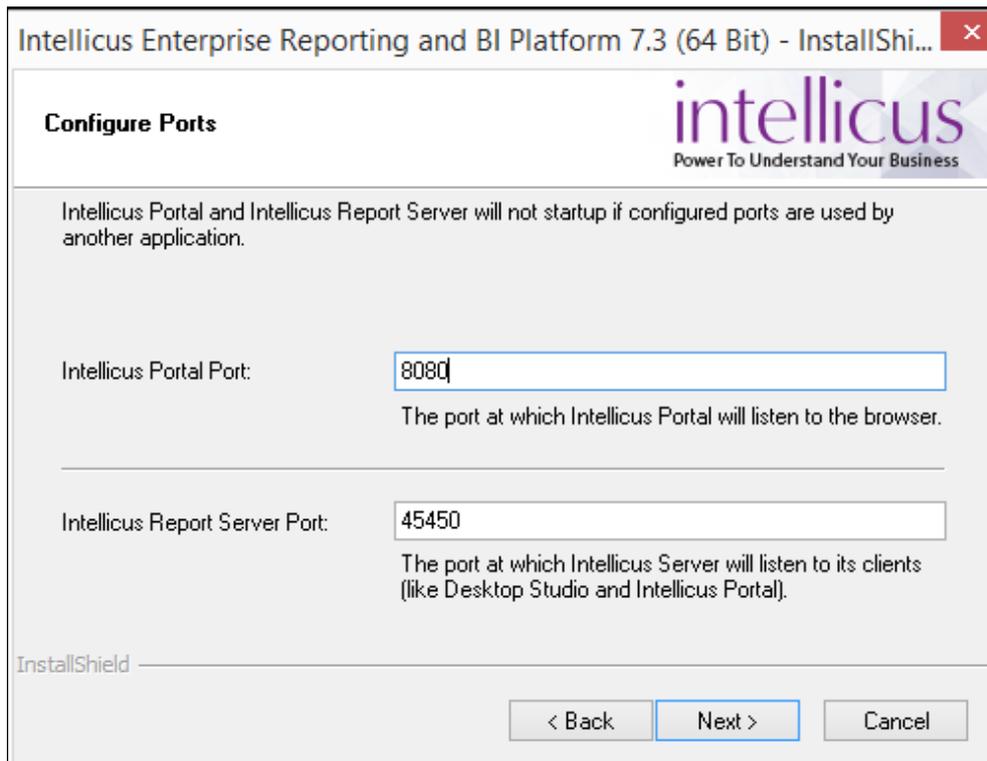


Figure 8: Configuring port numbers

For **Intellicus Portal Port** (default 80) and **Intellicus Report Server Port** (default 45450), specify a port number that is presently unused on this computer.

**Important:** Intellicus will not startup if a port specified here is already in use by other application on this computer. These port numbers can be re-configured at any point of time after Installation is complete.

Click **Next** after specifying port numbers.

Upon clicking **Next** button,

In case of Express setup: **Review The Installation Preferences** screen will open up.

In case of Selective setup: **Configuring Timeout Values** screen will open up.

**Important:** If you had already installed Intellicus at the default path or custom path, setup will open up **Configure Overwrite Options** screen.

Intellicus does not remove some of the folders after un-installation so that you can backup the configuration files. If you have made configuration changes during the previous installation, on **Configuration Overwrite Options** page, you can select the files that SETUP SHOULD REPLACE.

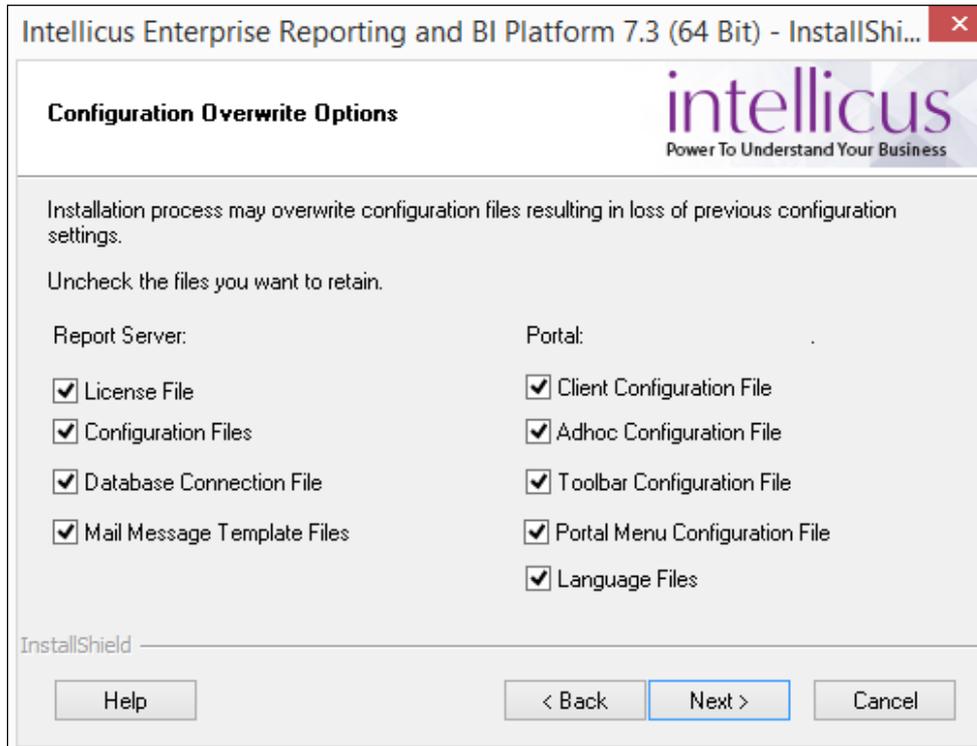


Figure 9: Select the files that setup should replace

Click **Next** to proceed.

Upon clicking **Next** button,

In case of Express setup: **Review The Installation Preferences** screen will open up.

In case of Custom setup: **Configuring Timeout Values** screen will open up.

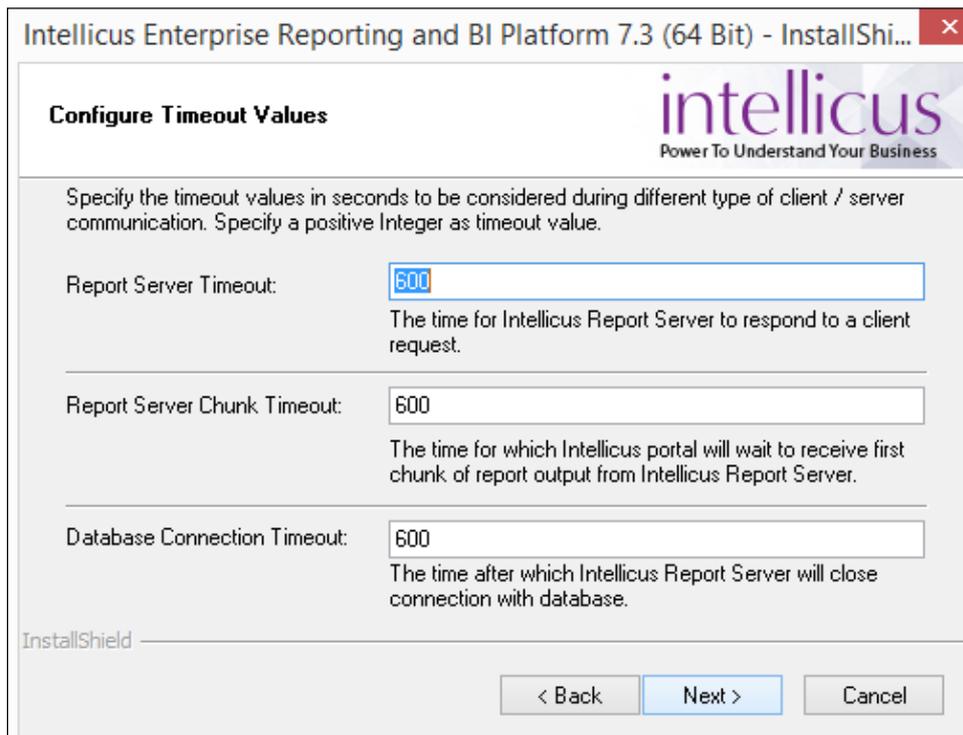


Figure 10: Configuring Timeout Values

Three timeout values are set on this screen. These are specified in seconds:

- **Report Server Timeout:** This is the maximum time within which Intellicus Report Server should respond to a client request. Default: 600.
- **Report Server Chunk Timeout:** This is the maximum time for which Intellicus portal will wait to receive first chunk of report output from Intellicus Report Server. Default: 600.
- **Database Connection Timeout:** This is the time after which the database connection will be closed.

**Important:** These values can be re-configured at any point of time after Installation is complete.

After specifying timeout values, click **Next** button to proceed to **Review the Installation Preferences** screen.

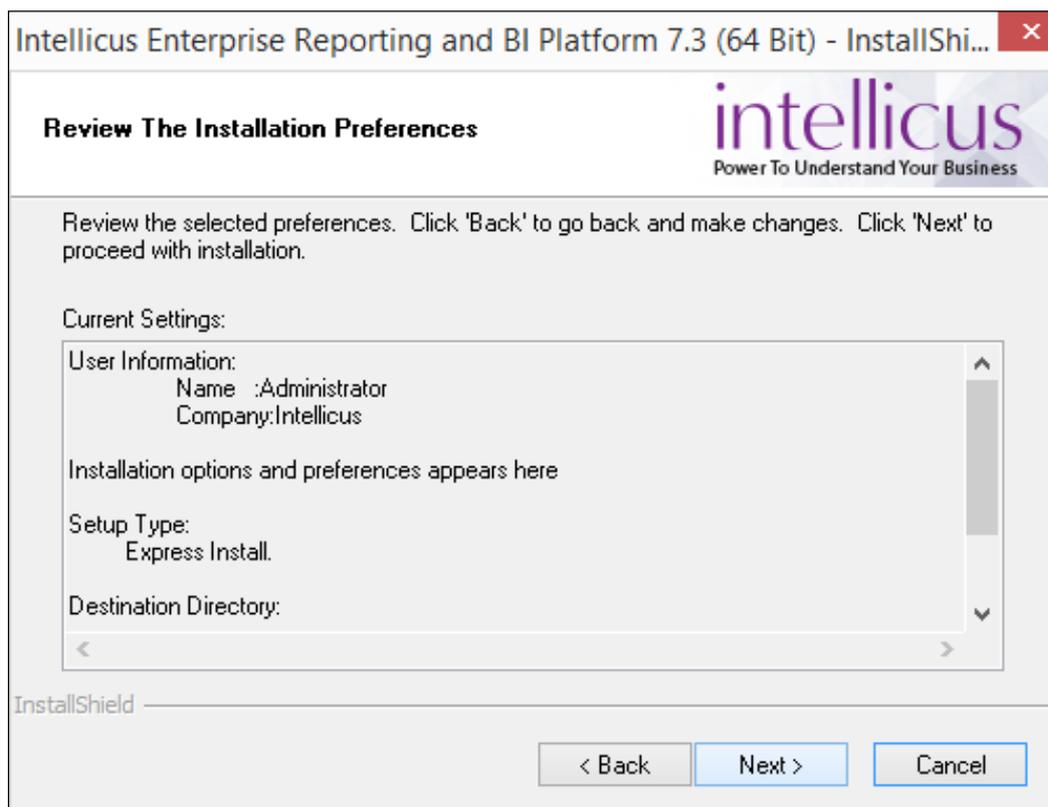


Figure 11: Review the installation preferences screen

Verify the information that is provided. Click **Back** to go back and change any settings if required.

Click **Next** to go onto the **Installation Progress** screen.

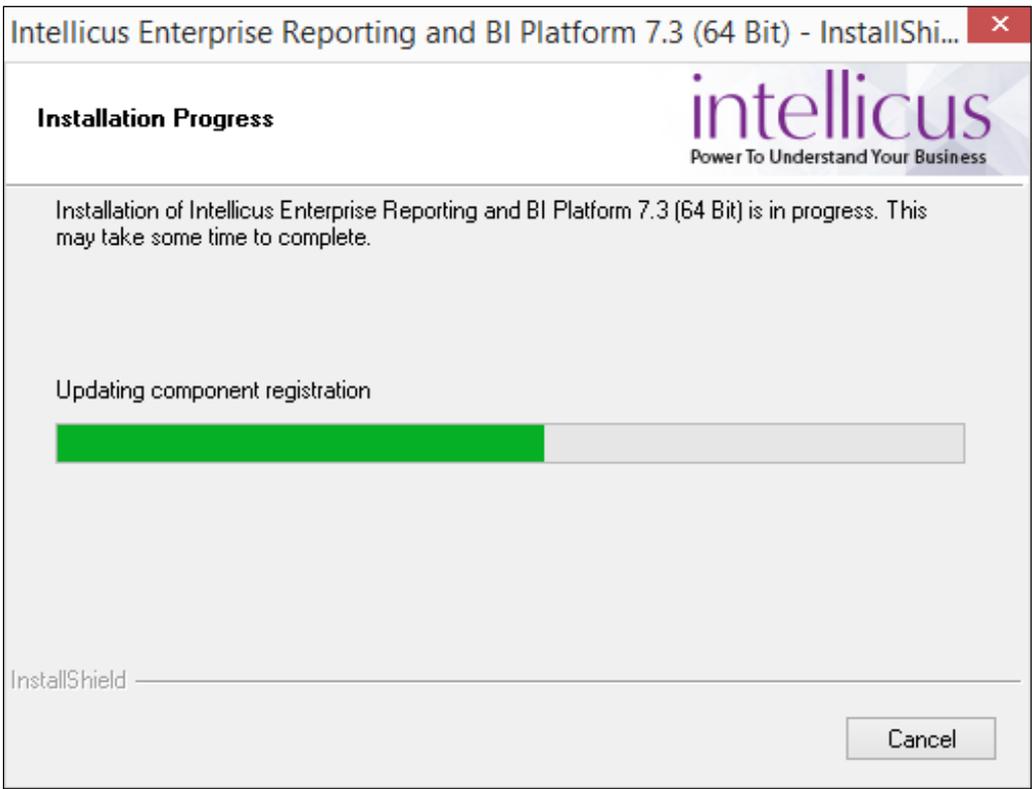


Figure 12: Installation Progress screen

After the installation is complete, **InstallShield Wizard Complete** screen will popup.

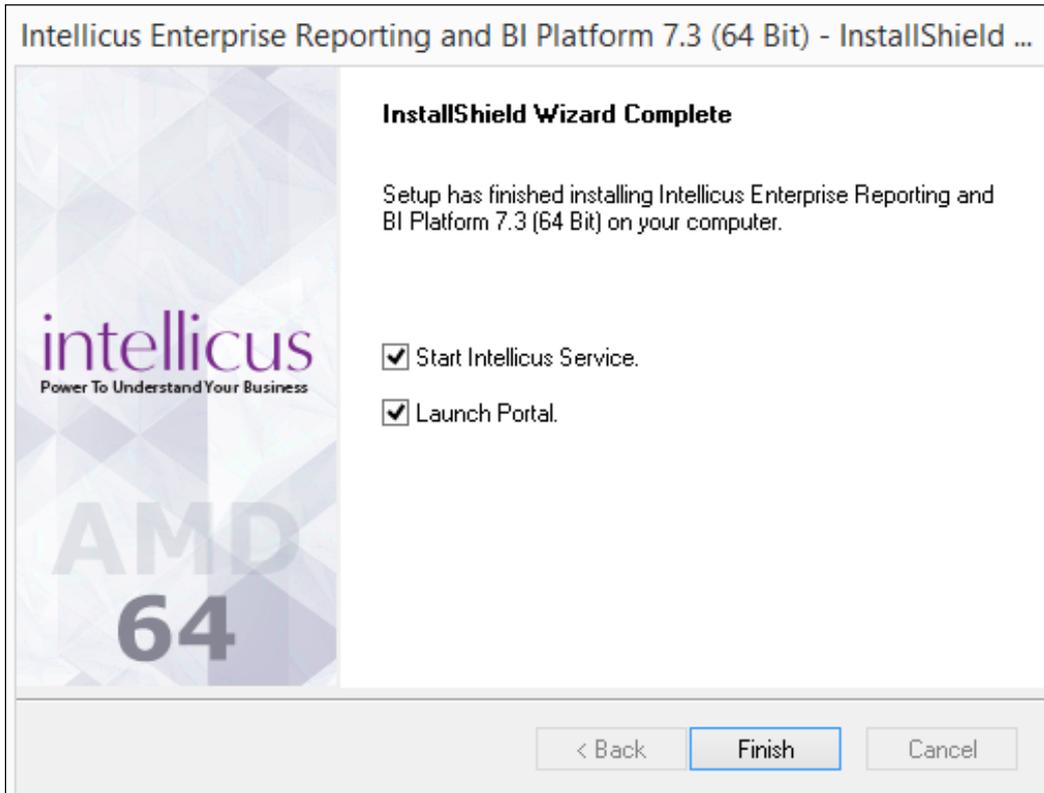


Figure 13: Installation Wizard Complete

Check **Start Intellicus Service** checkbox to startup Intellicus Service. This service will startup Intellicus Server and Intellicus Portal.

Check **Launch Portal** checkbox to auto-open Intellicus portal in default browser (when **Start Intellicus Service** is checked).

### 3 Post-Installation Instructions

The installation process creates the following folders in the installation folder:

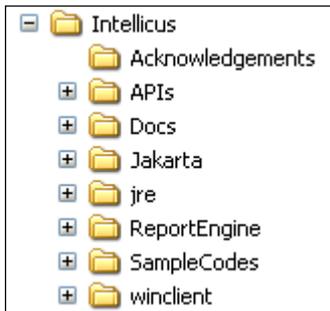


Figure 14: Intellicus Folder Structure

You can start using Intellicus Web-based Reporting Suite immediately after the installation.

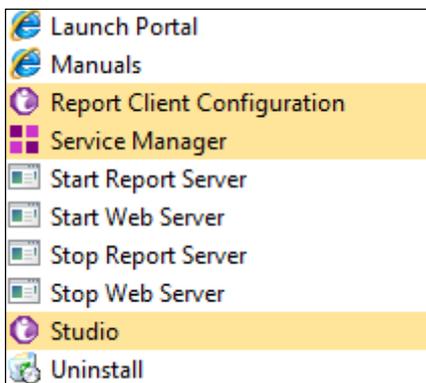


Figure 15: Options in Intellicus menu

You have option to start Report Server and Web Server immediately after installation.

If not started during installation,

To start Report Server, click Start > Programs > Intellicus > Start Report Server.

To start Web Server, click Start > Programs > Intellicus > Start Web Server.

The Web Server and the Report Server will now start automatically when you restart the machine.

User can check the Web Server and the Report Server status by running Service Manager.

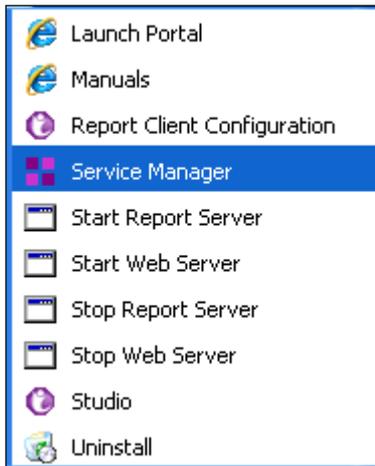


Figure 16: Service Manager

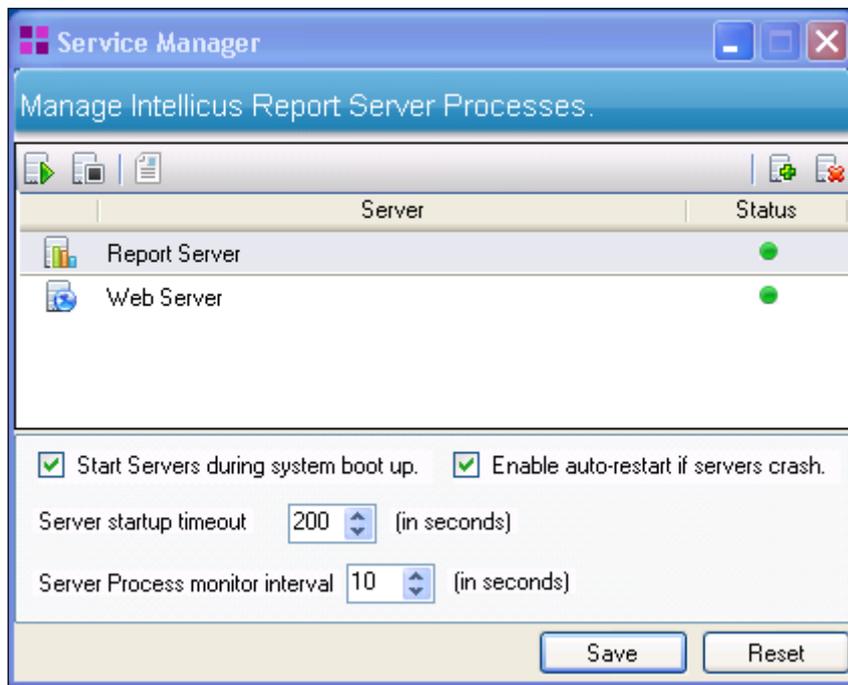


Figure 17: Web Server and Report Server Status

### If the Web Server does not start

Intellicus is set to run on port 80. The Web Server will not start if this port is used by any other application. To start the Web Server change the port from 80 to the one that is free.

## Changing the port number

Here is the information about how to change the port number when Jakarta Web Server is used.

The port number information is stored in server.xml file.

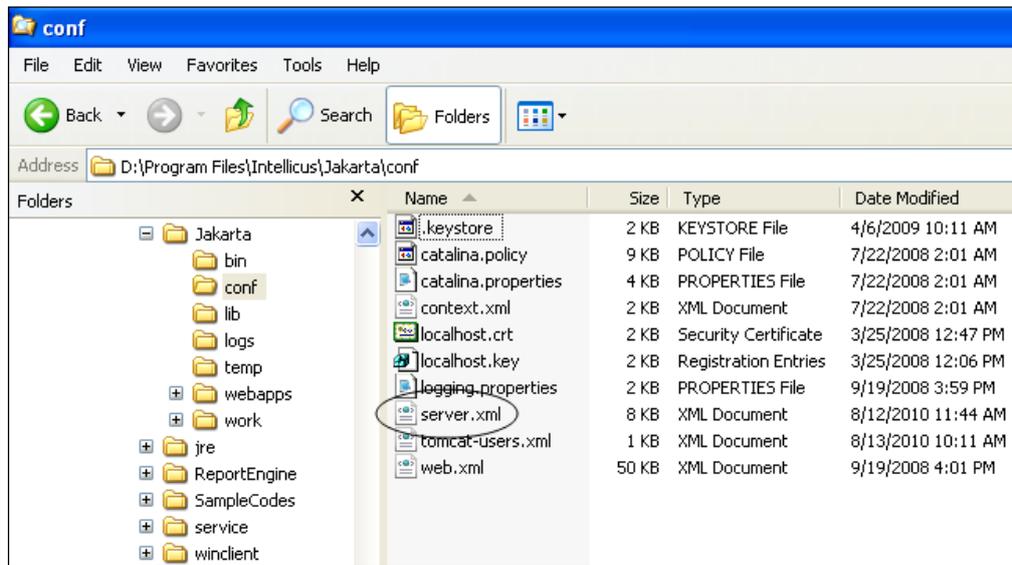


Figure 18: Location of server.xml

To change the port number:

Open server.xml in a text editor.

Change the value of **Connector port** to a number that is free.

Save the changes.

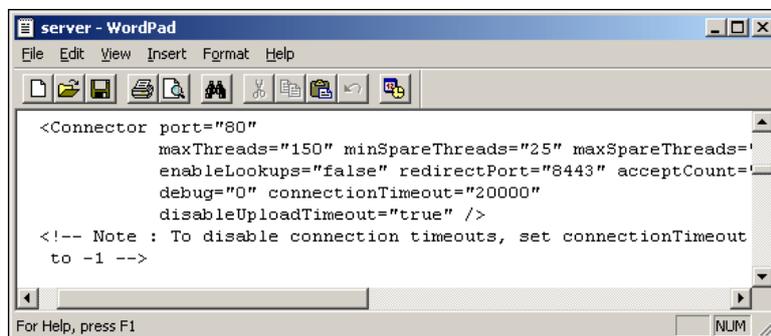


Figure 19: Changing the port number

## Starting the Web Interface

You can use Intellicus Web-based Reporting Suite through its web client (portal). You can access the web client using the following URL:

<http://<IP of the portal>/intellicus>

For example, if the IP of the portal is 120.98.99.256 and port is 7000, then the URL would be:

http://120.98.99.256:7000/intellicus

If the port is 80, then the URL would be:

http://120.98.99.256/intellicus

To access Intellicus from the machine where Web Portal is running, the URL would be:

http://localhost/intellicus

## Security Modes of Intellicus

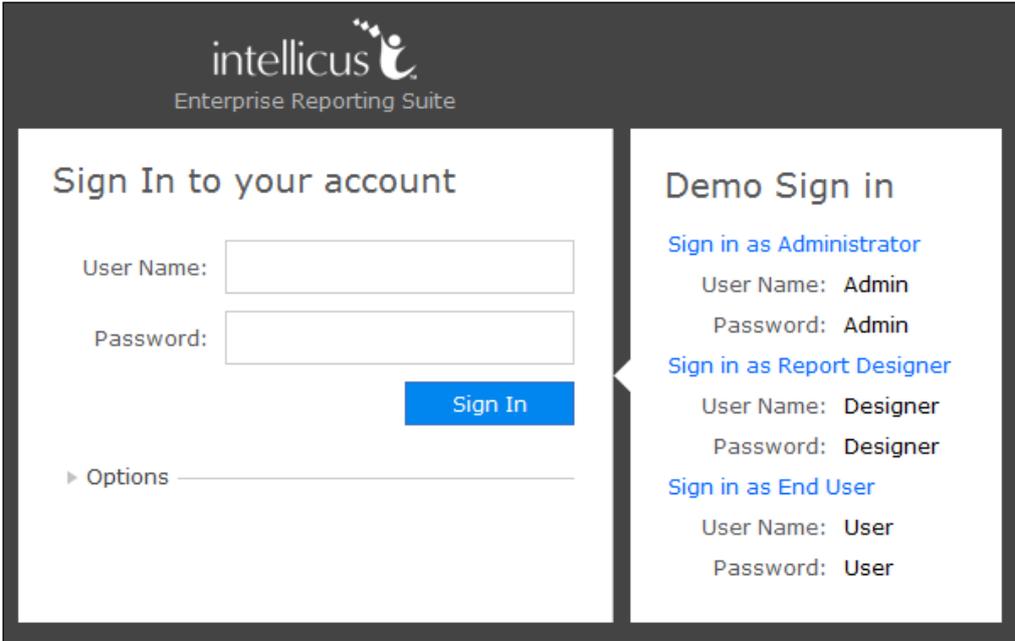
The security mode of Intellicus can be enabled or disabled.

With disabled security mode anyone can use Intellicus.

With the security mode enabled, you need to have necessary access privileges to log into the application. After successful login, you can use Intellicus for the activities that you are authorized to perform.

When security mode is enabled, the first page you receive is authentication page. You need to specify following login details:

- User Name
- Password
- Organization (under Options)



The screenshot displays the Intellicus Enterprise Reporting Suite login interface. It is divided into two main sections: 'Sign In to your account' and 'Demo Sign in'. The 'Sign In to your account' section includes input fields for 'User Name' and 'Password', a blue 'Sign In' button, and an 'Options' dropdown menu. The 'Demo Sign in' section provides three pre-filled login options: 'Sign in as Administrator' (User Name: Admin, Password: Admin), 'Sign in as Report Designer' (User Name: Designer, Password: Designer), and 'Sign in as End User' (User Name: User, Password: User).

Figure 20: Login details

When Intellicus is run with Demo License, users having names: **Admin**, **Designer** and **User** are already created. You have to feed respective User Name and Password to carry out respective tasks.

## 4 Uninstalling Intellicus

Click Control Panel > Programs > Programs and Features to uninstall Intellicus.

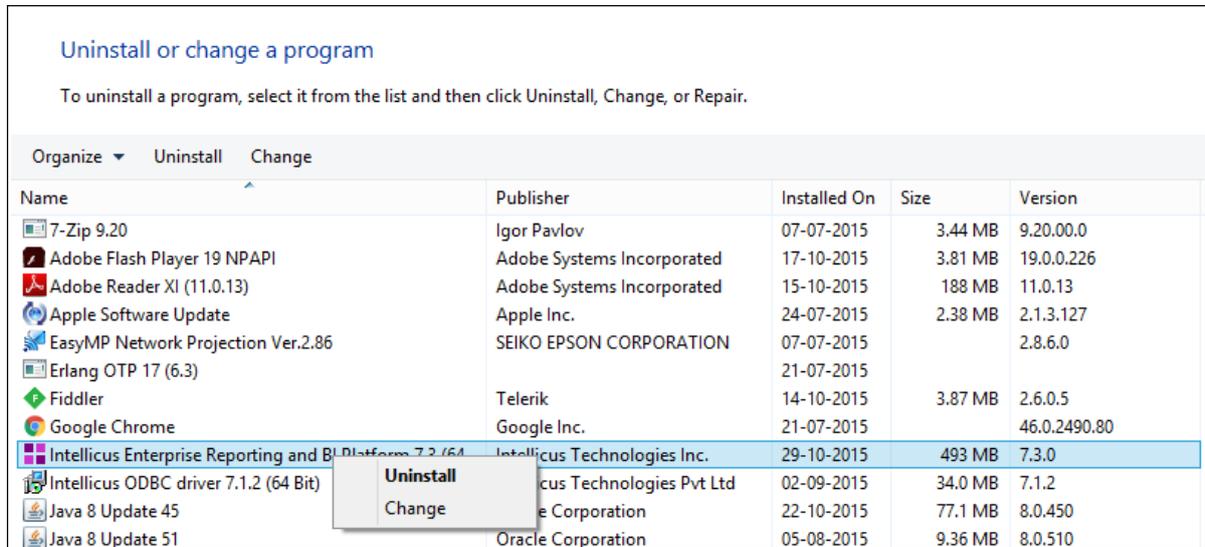


Figure 21: Uninstalling Intellicus Web-based Reporting Suite

Select **Intellicus Enterprise Reporting** and click the 'Change/Remove' button (appears on the right side of the screen). The dialog box **Welcome** appears, as shown in the figure below. Select **Remove** and click **Next**. The **Confirm Uninstall** screen appears. Click **OK** to start uninstall process.

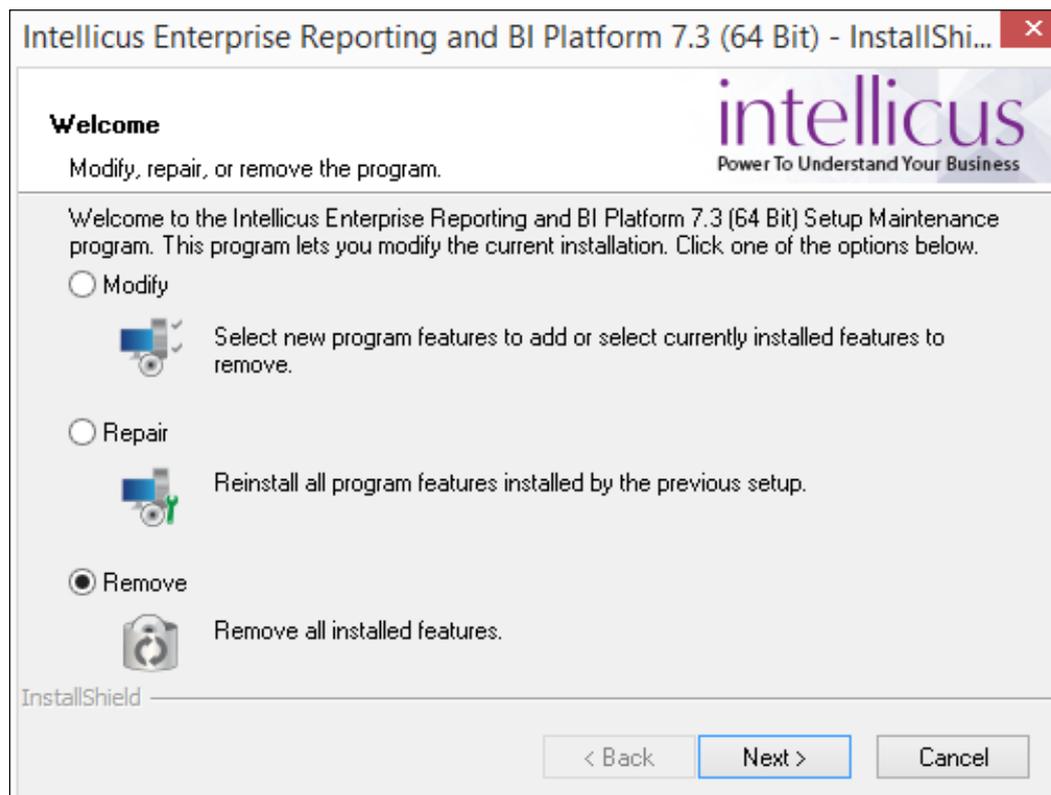
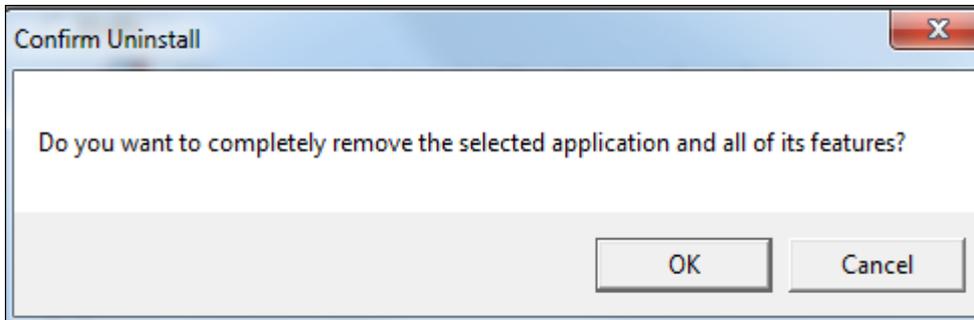


Figure 22: Modify, Repair, or Remove Program

**Tip:** You can also start uninstall process by clicking Start > Programs > Intellicus > Uninstall.

**Note:** You can modify, remove or re-install Intellicus.



*Figure 23: Uninstall Confirmation*