

### **User Setup Document**

**Date:** March 1, 2018 **Applicable to:** informXL Analyzer v 4.0 and higher

## **User Installation Summary**

informXL is a Microsoft SQL Server and Microsoft Excel based reporting and analytics solution. This document covers the client setup requirements for running the informXL Excel analyzers.

Installation Item	Brief Description
Microsoft Excel (2016, 2013, 2010)	informXL Analyzer supports the following versions of Microsoft
	Excel for Windows:
	Microsoft Excel 2016
	Microsoft Excel 2013
	Microsoft Excel 2010 (support ended 2017)
Microsoft Excel security settings	informXL Analyzer requires enablement of Excel macros and
	external data connections. These can be set and enabled in
	Excel via the following settings:
	Manua Cattin as
	<u>"Enable all macroe"</u> OP "Dicable all macros with
	notification"
	nonjication
	External Content
	"Enable all Data Connections" OR "Prompt user about
	Data Connections"
	Trusted Documents / Trusted Locations (recommended)
	Excel macros and external data connections may be
	enabled through setup of Office "Trusted Documents" and
	or "Trusted Locations". Please refer to your company's IT
	policy and Microsoft's Office documentation for proper
	setup of Trusted Locations and Documents.
Microsoft SQL Native Client ODBC	informYL Analyzer requires installation of this driver. This
Driver	driver was created by Microsoft for the nurnoses of
	connecting SOL Server with other Microsoft products
	informXL supports the following versions:
	SQL Native Client (recommended)
	SQL Server Native Client 10.0
	SQL Server Native Client 11.0

# **Microsoft Excel Security Setup (required)**

Users running informXL Analyzer will need to configure Microsoft Excel's security settings to allow the execution of macros and external data content. Enableing Excel macros and external data connections can be accomplished thorough various methods in Office, two methods which are mentioned below. informXL Inc. suggests you follow your company's IT security policy when configuring these settings.

#### Method A – Configure "Trusted Documents" and / or "Trusted Locations" (recommended)

Trusted Documents and Trusted Locations allow Excel files that have active content (macros, ActiveX controls, data connections, and so on) to open without the Message Bar prompting for approval. After a document or location is trusted it does not open in Protected View. Therefore, you should trust documents only if you trust the source of the file.

Enabling and configuring Trusted Documents and Trusted Locations can be done direcly in Excel through the Excel Trust Center. Details on how to configure these settings can be found on Microsoft's Office support site or through the following links:

- <u>Microsoft Support Trusted Documents</u>
- <u>Microsoft Support Trusted Locations</u>

	Trust Center			?	Ĭ	×
I.	Trusted Publishers	Trusted Locations				
	Trusted Locations Trusted Documents	Warning: All these locations are treated as trusted sure that the new location is secure.	l sources for opening files. If you change or add a	location, m	nake	
ſ	Trusted App Catalogs	Path	Description	Date Mod	ified 🔊	•
L	Add-ins	C:\Program Files\Microsoft Office\Templates\	Excel 2013 default location: Application Tem			
	ActiveX Settings	C:\Data\Roaming\Microsoft\Excel\XLSTART\ C:\iles\Microsoft Office\Office15\XLSTART\	Excel 2013 default location: User StartUp Excel 2013 default location: Excel StartUp			1
L	Macro Settings	C:\AppData\Roaming\Microsoft\Templates\	Excel 2013 default location: User Templates			
	Protected View	C:\Files\Microsoft Office\Office15\STARTUP\ C:\m Files\Microsoft Office\Office15\Library\	Excel 2013 default location: Office StartUp Excel 2013 default location: Add-ins			
l	Message Bar					
	External Content	Policy Locations				
	File Block Settings					
	Privacy Options					

#### Method B – Enable Macros and External Data settings

Excel macros and External Data Connections can be enabled to always allow or allow with prompts by manually setting the Excel Trust Center's "Macro Settings" and "External Content" settings.

- 1. In Microsoft Excel click the File menu in the upper left hand corner, then choose the **Options** menu.
- 2. In the Excel Options menu screen, click the **Trust Center** menu in the left menu pane, then click the **Trust Center Settings...** button from the browse screen.



a. From the Trust Center Menu screen select the Macro Settings menu option in the left menu pane and choose "Enable all macros" <u>OR</u> "Disable all macros with notification". The selection of this option should follow your companys IT security policy.

Trust Center		?	×
Trusted Publishers Trusted Locations Trusted Documents Trusted App Catalogs Add-ins ActiveX Settings Macro Settings Protected View Message Bar External Content File Block Settings Privacy Options	Macro Settings <ul> <li>Disable all macros without notification</li> <li>Disable all macros with notification</li> <li>Disable all macros except digitally signed macros</li> <li>Enable all macros (not recommended; potentially dangerous code can run)</li> </ul> Developer Macro Settings           □ Trust access to the YBA project object model		
	OK	Cano	cel

 b. From the Trust Center menu screen select the External Content from the left menu, then choose the "Promt user about Data Connections" <u>OR</u> "Enable all Data Connections" radio button.

Trust Center			?	×
Trusted Publishers Trusted Locations Trusted Locations Trusted Documents Trusted App Catalogs Add-ins ActiveX Settings Macro Settings Protected View Message Bar	Security settings for Data Connections <ul> <li>Enable all Data Connections (not recommended)</li> <li>Prompt user about Data Connections</li> <li>Disable all Data Connections</li> </ul> Security settings for Workbook Links <ul> <li>Enable gutomatic update for all Workbook Links (not recommended)</li> <li>Prompt user on automatic update for Workbook Links</li> <li>Disable automatic update of Workbook Links</li> </ul>		f	×
External Content File Block Settings Privacy Options		ОК	Car	ncel

- c. Click **OK** to close out.
- d. Exit and restart Excel.

**Note:** Enabling macros and external data connections could expose Microsoft Excel to potentially harmful or malicious code. When this option is selected users should use caution and only open Excel files from trusted sources.

## Installing the Microsoft "SQL Native Client" ODBC driver (required)

informXL requires the installation of the Microsoft "SQL Native Client" (*recommended*), "SQL Server Native Client 10.0" or "SQL Server Native Client 11.0" ODBC driver. The SQL ODBC driver allow informXL to communicate with your SQL Server.

*Note: Installation of this file can only be performed by a local computer administrator.* 

1. Double-click the "SQL Native Client" odbc file provided to you by informXL Inc.



2. Welcome Screen - Click "Next"

🚰 Microsoft SQL Server Native Client Setup				
•	Welcome to the Install Wizard for Microsoft SQL Server Native Client			
	Setup helps you install, modify or remove Microsoft SQL Server Native Client. To continue, click Next.			
	WARNING: This program is protected by copyright law and international treaties.			
	<back next=""> Cancel</back>			

3. Licence Agreement Screen – choose "*I accept . . . "*, then click "Next".

ট Microsoft SQL Server Native Client Setup				
License Agreement				
Please read the following license agreement carefully.				
MICROSOFT SOFTWARE SUPPLEMENTAL LICENSE TERMS				
SQL SERVER NATIVE CLIENT FOR MICROSOFT SQL SERVER				
Microsoft Corporation (or based on where you live, one				
of its affiliates) licenses this supplement to you. If				
you are licensed to use Microsoft SQL Server software				
"software"), you may use this supplement. You may not				
use it if you do not have a license for the software.				
You may use a sony of this supplement with each welidly				
<ul> <li>I accept the terms in the license agreement</li> </ul>				
C I do not accept the terms in the license agreement				
< Back Next > Cancel				

### 4. Registration Screen (Optional)

📴 Microsoft SQL Server Native Client Setup	×
<b>Registration Information</b> The following information will personalize your installation.	
Enter your name and the name of your organization in the fields below	
Lincer your manie and the manie or your organization in the heids below.	
Name:	
Company:	
< Back Next > Can	cel

5. Feature Selection Screen – Choose the default as shown below to install "Client Components". (Installing SDK feature is optional and not necessary). Click "Next".

🚼 Microsoft SQL Server Native Client Setup	×
Feature Selection Select the program features you want installed.	
Click an icon in the following list to change how a feature Client Components SQL Server Native Client SDK	is installed. Feature description Microsoft SQL Server Native Client
Installation path	Browse Disk Cost
< Back	Next > Cancel

6. Final Setup Screen - click "Install".



7. Click "Finish".

🔂 Microsoft SQL Server Native	e Client Setup	×
	Completing the Microsoft SQL Server Native Client Setup	
	Setup has installed Microsoft SQL Server Native Client successfully. Click Finish to exit.	
	< Back Finish Cancel	

## **Support Information**

informXL Support Mon-Fri, 8:00 am to 5:00 pm Mountain Time phone: 303-872-7764 web: <u>www.informxl.com/support</u> email: <u>support@center6.com</u>