



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: <ul style="list-style-type: none">• Microsoft Excel 2016• Microsoft Excel 2013• Microsoft Excel 2010 (<i>support ended 2017</i>)
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: <u>Macro Settings</u> "Enable all macros" <u>OR</u> "Disable all macros with notification" <u>External Content</u> "Enable all Data Connections" <u>OR</u> "Prompt user about Data Connections" <u>Trusted Documents / Trusted Locations</u> (<i>recommended</i>) 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 Driver.	informXL Analyzer requires installation of this driver. This driver was created by Microsoft for the purposes of connecting SQL Server with other Microsoft products. informXL supports the following versions: <ul style="list-style-type: none">• SQL Native Client (<i>recommended</i>)• SQL Server Native Client 10.0• SQL Server Native Client 11.0

Microsoft Excel Security Setup (required)

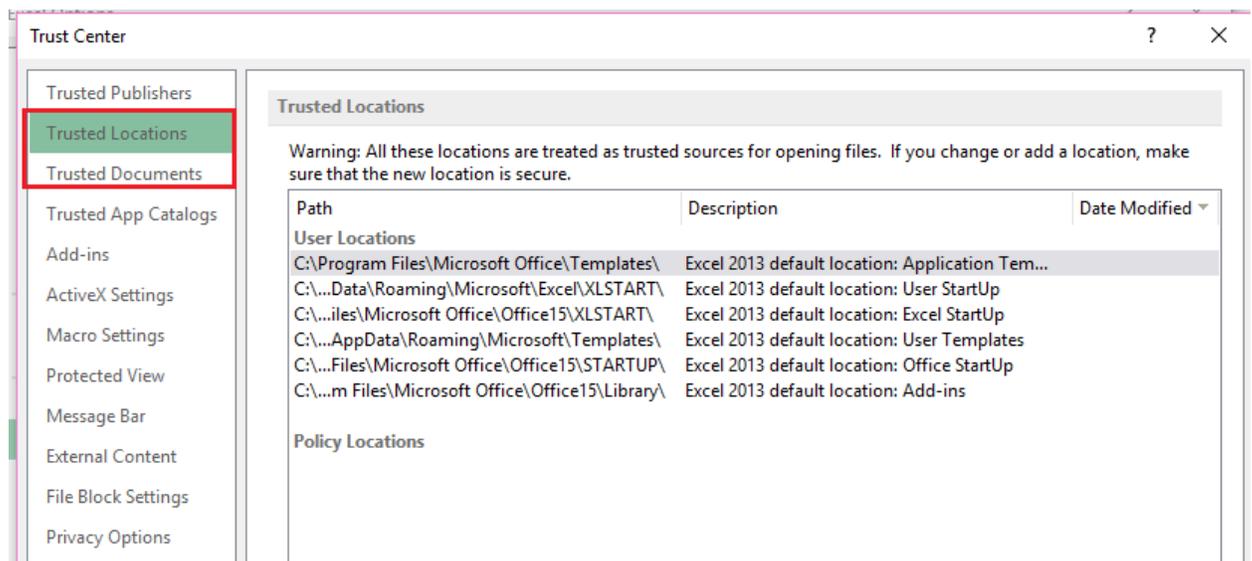
Users running informXML Analyzer will need to configure Microsoft Excel's security settings to allow the execution of macros and external data content. Enabling Excel macros and external data connections can be accomplished through various methods in Office, two methods which are mentioned below. informXML 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 directly 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:

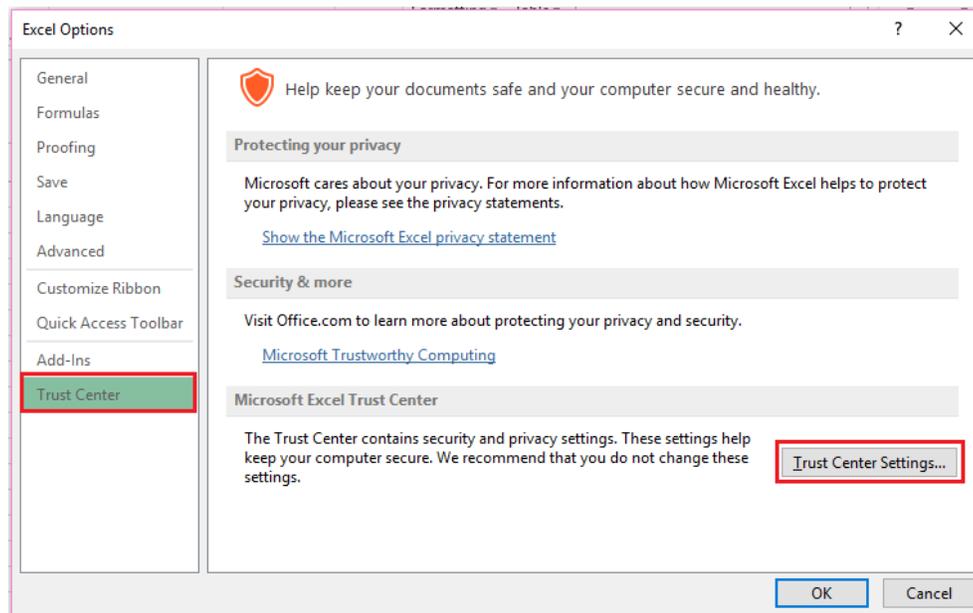
- [Microsoft Support - Trusted Documents](#)
- [Microsoft Support - Trusted Locations](#)



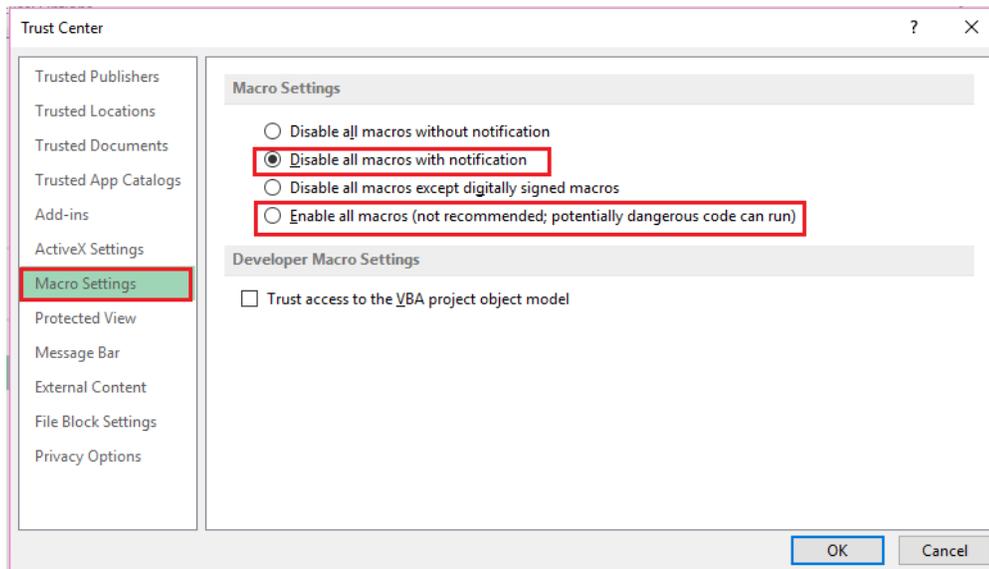
Method B – Enable Macros and External Data settings

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.

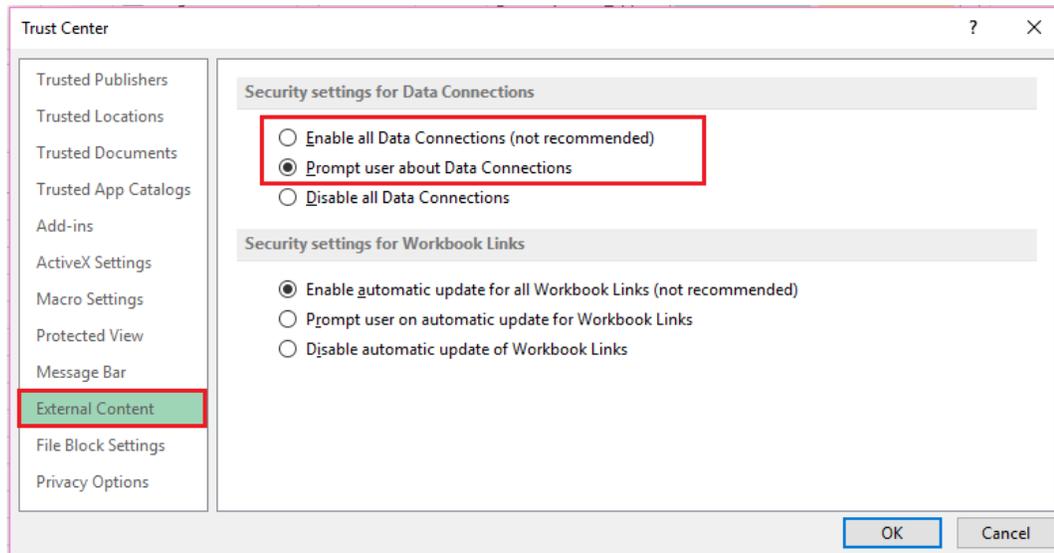
1. In **Microsoft Excel** click the **File** menu in the upper left hand corner, then choose the **Options** menu.
2. In the Excel Options menu screen, click the **Trust Center** menu in the left menu pane, then click the **Trust Center Settings...** button from the browse screen.



- a. From the Trust Center Menu screen select the **Macro Settings** menu option in the left menu pane and choose "**Enable all macros**" OR "**Disable all macros with notification**". The selection of this option should follow your company's IT security policy.



- b. From the Trust Center menu screen select the **External Content** from the left menu, then choose the **“Prompt user about Data Connections”** OR **“Enable all Data Connections”** radio button.



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

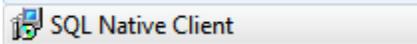
Note: Enabling macros and external data connections could expose Microsoft Excel to potentially harmful or malicious code. When this option is selected users should use caution and only open Excel files from trusted sources.

Installing the Microsoft “SQL Native Client” ODBC driver (required)

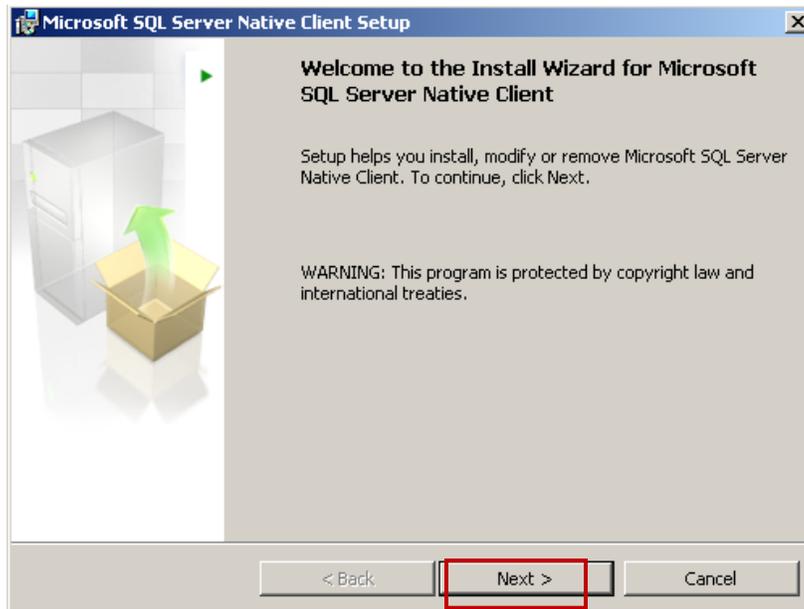
informXL requires the installation of the Microsoft “SQL Native Client” (*recommended*), “SQL Server Native Client 10.0” or “SQL Server Native Client 11.0” ODBC driver. The SQL ODBC driver allow informXL to communicate with your SQL Server.

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

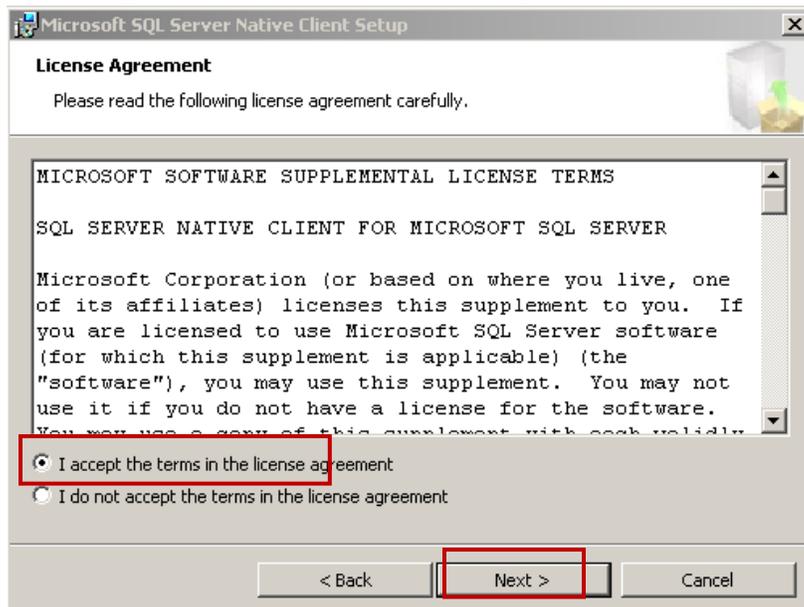
1. Double-click the “SQL Native Client” odbc file provided to you by informXL Inc.



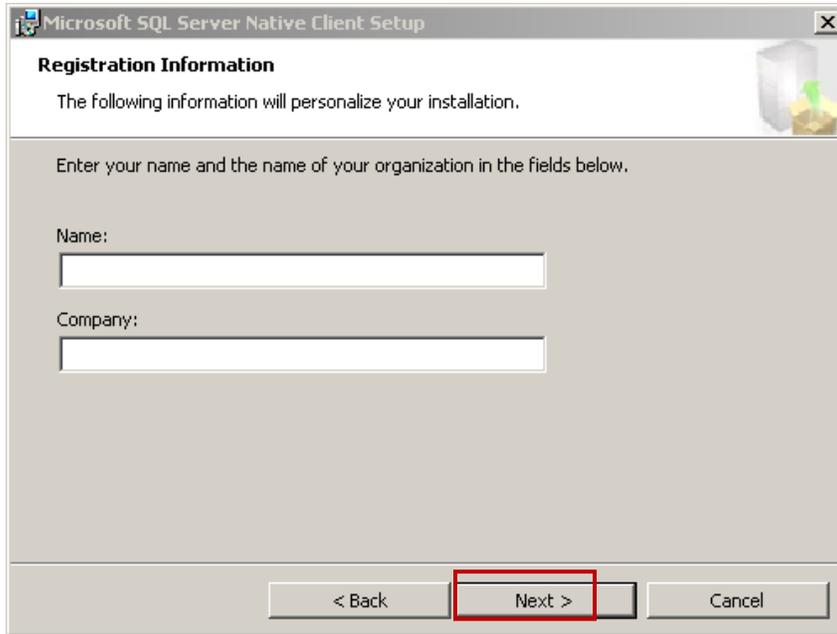
2. Welcome Screen - Click “Next”



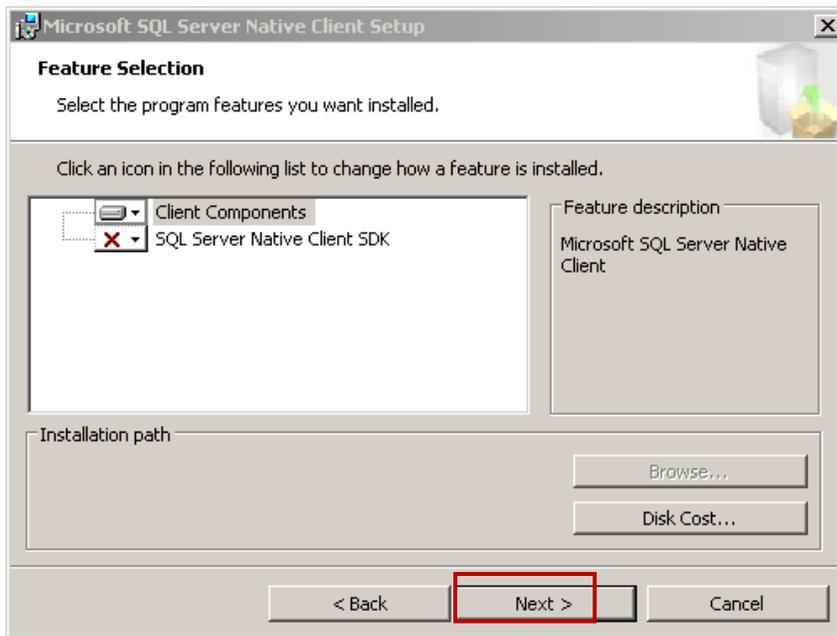
3. Licence Agreement Screen – choose “I accept . . .”, then click “Next”.



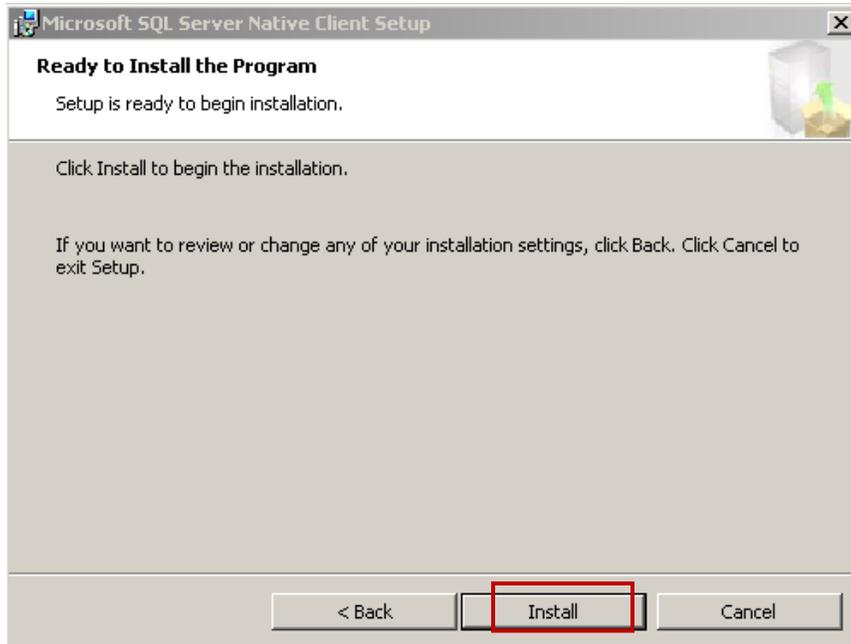
4. Registration Screen (*Optional*)



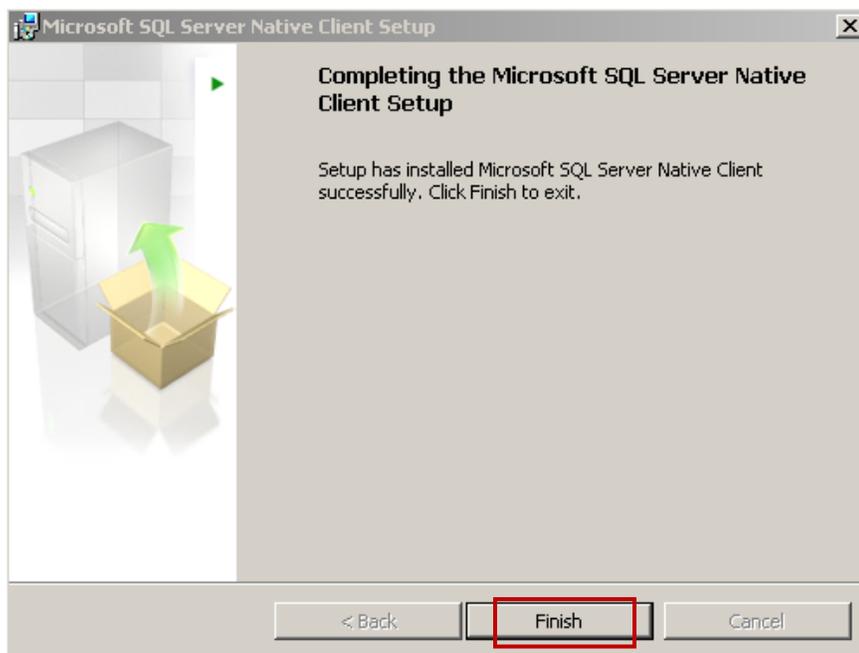
5. Feature Selection Screen – Choose the default as shown below to install “Client Components”. (Installing SDK feature is optional and not necessary). Click “Next”.



6. Final Setup Screen - click "Install".



7. Click "Finish".



Support Information

informXL Support

Mon-Fri, 8:00 am to 5:00 pm Mountain Time

phone: 303-872-7764

web: www.informxl.com/support

email: support@center6.com