



Title: Administrator Setup for EasyReporting

Abstract: Installing EasyReporting

Product	EasyReporting Toolset
Suite	Technical
Release	Version 5 +
Document ID	AdministratorsSetupGuide5+.docx
Date Created	24 May 2018
Date Reviewed	26 July 2021
Date Revised	26 July 2021

1. Download the Software

The latest EasyReporting software can be downloaded from the EasyReporting web site at:

<http://download.easyreporting.com>

You will be prompted for a user name and password, these can be obtained by emailing support@easyreporting.com

Run the EasyReporting setup programs

Un-zip the EasyReporting zip and you will find 3 folders as below:

- ConfigurationAssistant
- ▼ EasyReporting
 - Excel32bit
 - Excel64bit
 - Manual

- Select the version of Excel you are running 32 or 64bit
- Run the setup.exe found in the EasyReporting folder as Administrator.
- Run the setup.exe found in the ConfigurationAssistant folder as Administrator.

2. Setup ODBC DSNs

If you are using the 64bit version of Excel you will need to setup 64bit ODBC DSNs or if you are using the 32bit version of Excel 32bit ODBC DSNs need to be created to connect to your JD Edwards database.

3. Uninstall old EasyReporting version 4

If you have the 32bit EasyReporting version4.x installed it should be un-installed.

4. Run the Configuration Assistant Tool

From the configuration Assistant tool administrators can.

- Activate EasyReporting
- Maintain default environment settings.
- Add new environment and configure them.
- Set user preferences.

- Check EasyReporting version details.
- Check the version of the configuration tool which is being used.
- Create a configuration log file for support purposes.
- Export details of the EasyReporting setup.
- View the EasyReporting Install log.

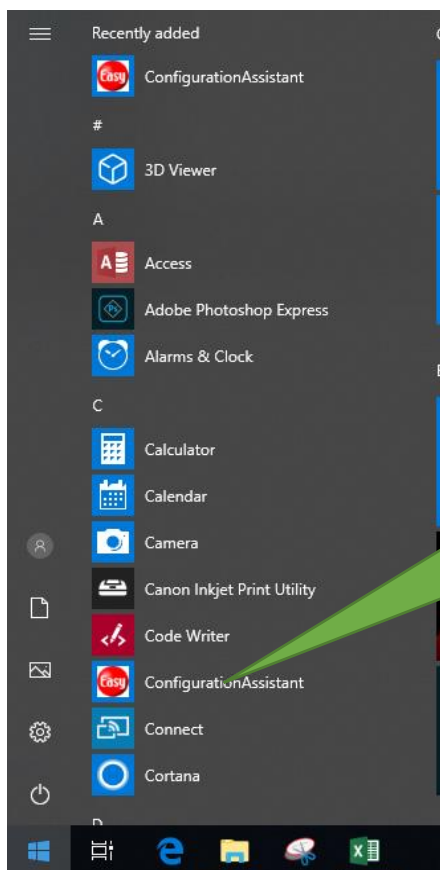
From the configuration Assistant tool users can.

- Register and un-register the EasyReporting Com Add-in and Excel Add-In.
- View the log file which is created when Excel starts.

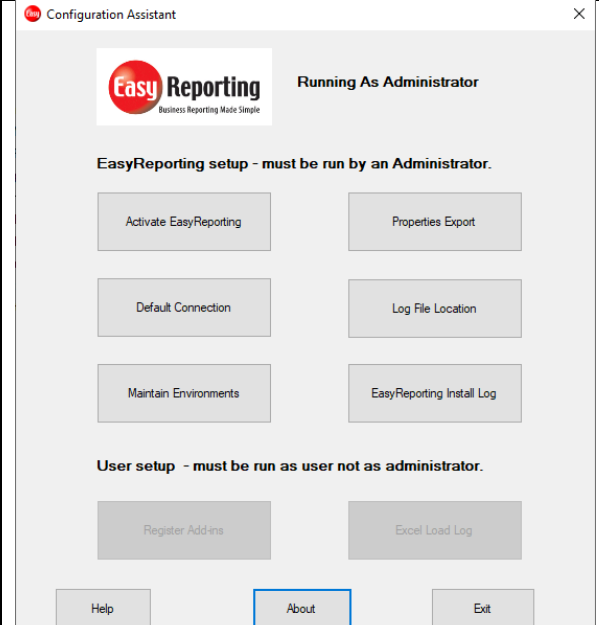
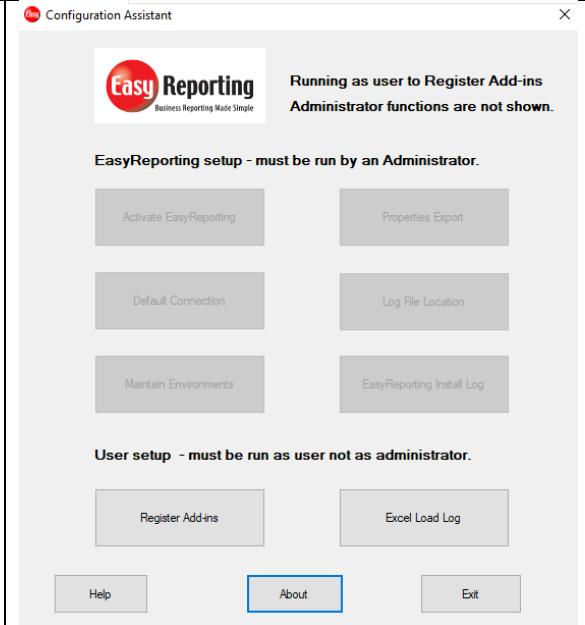
The ConfigurationAssistant must be installed into the C:\Program Files\EasyReporting and is called EasyReportingConfigurationAssistant.exe.

NOTE. There is only a 64 bit version of this program which is used to configure the 32 or 64 bit versions of EasyReporting.

The ConfigurationAssistant can be run as an Administrator or a User from either the install directory or from windows Start Menu as shown below. The options available will vary depending on whether it is run as an administrator or a user.



Please make sure you right click on the task and run as Administrator to perform EasyReporting Configuration.

Running As Administrator	Running as a user
This mode will be used to activate EasyReporting and configure it for use.	This mode will be used to register the EasyReporting Add-ins so a user can use EasyReporting.
	

5. Activate EasyReporting

There are 2 types of activation codes:

- Trial codes which are valid for 30 days.
- Full activation codes. Full activation codes are valid for a calendar year for activating PCs or servers which are running EasyReporting.

Activation codes are issued by EasyReporting. To get an activation code from EasyReporting support e-mail to support@EasyReporting.com and quote:

1. Contact name.
2. Contact Email Address
3. Company name
4. Type of activation code.
5. Day or year the code is required for.

If you enter a 30day activation code you should get the message shown below:

EasyReporting Activation



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A.C.N 096 328 326

Easy Reporting
Business Reporting Made Simple

Contact us at:
www.EasyReporting.com

Warning: This computer program is protected by copyright law and international treaties. Unauthorized reproduction or distribution of this program, or any portion of it, may result in severe penalties, and will be prosecuted to the maximum extent of the law.

Activation Code

30 Day Trial period enabled from today.

If you enter a full activation code you should get the message shown below.

EasyReporting Activation



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Activation Code

EasyReporting Toolset Activated.

6. Add a Default Connection

Please see the EasyReporting manual which will give detailed on setting up connections.

Connection Setup

Environment Name: Production 9.2

Default User: jde

Enterprise Server:

- Standalone
- Oracle
- SQL Server
- IBM DB2
- AS400

Business Data Source: JDE 9.2 Production | ODBC DSN / Datasource Name: ... | Object Owner ID: proddta

Security:


- No Security
- EnterpriseOne Security
- World

Set Calculation to Manual at login.
 Use EnterpriseOne Accounts Receivable
 Use Network authentication
 Over ride default SQL timeout

Decimal places which sales units are stored: 2

Decimal places which GL units are stored: 2

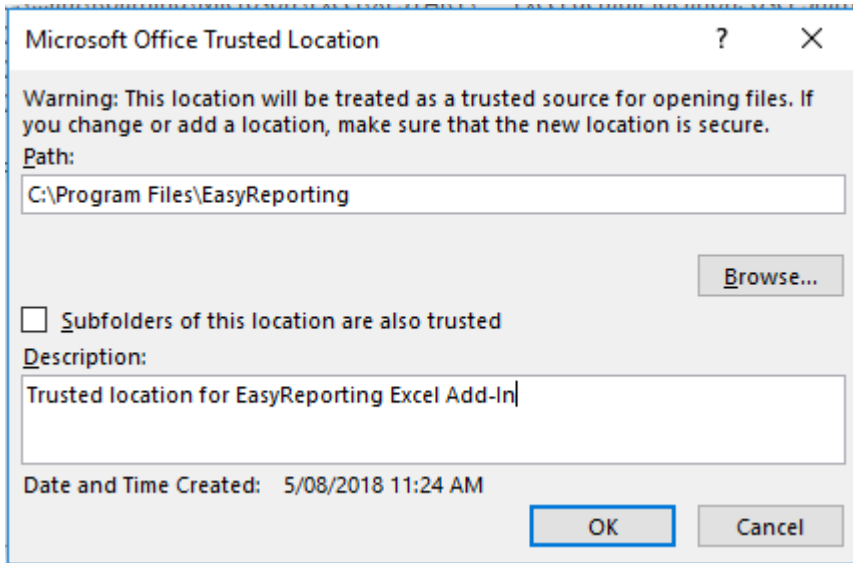
Buttons: About, Help, Advanced Setup, Cancel, OK



7. Set the Folder where EasyReporting is installed as a trusted location

EasyReporting Add-ins will load more reliably if the location where the EasyReporting software is located is a trusted location. The follow the steps below to set a Trusted Location.

- Select File > Options > Trust Center then “Trust Center Settings” button.
- Select Trusted Locations.
- Press the Add new location button.
- Browse to the location where EasyReporting has been installed usually C:\Program Files\EasyReporting.
- Press the OK button to save the location.



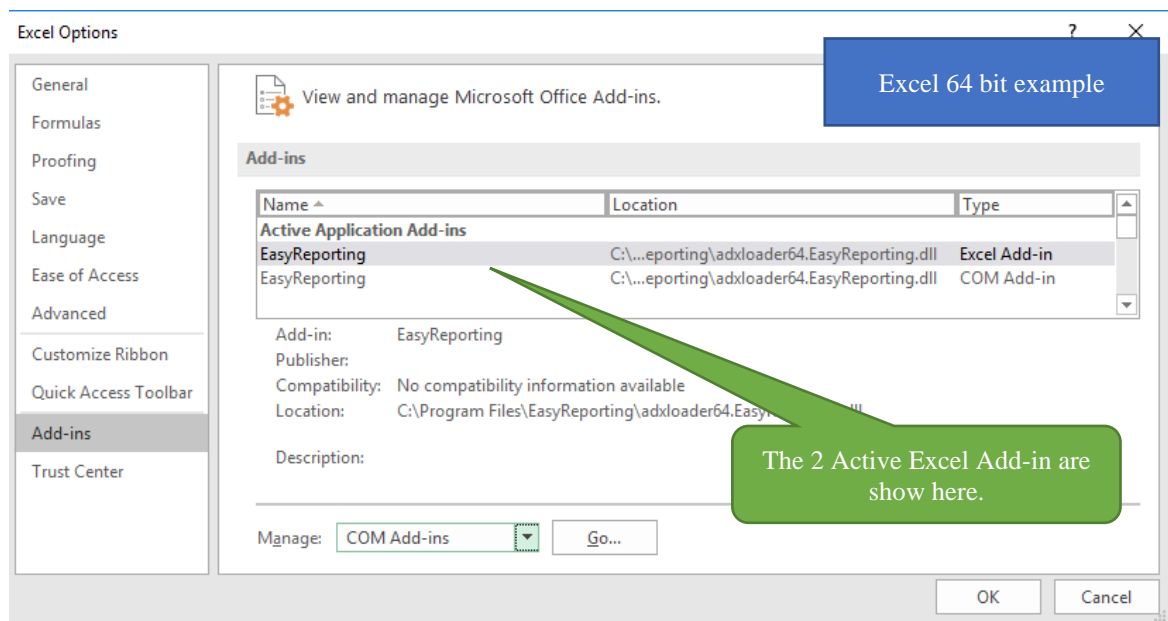
8. Open Excel and check EasyReporting Add-ins are registered

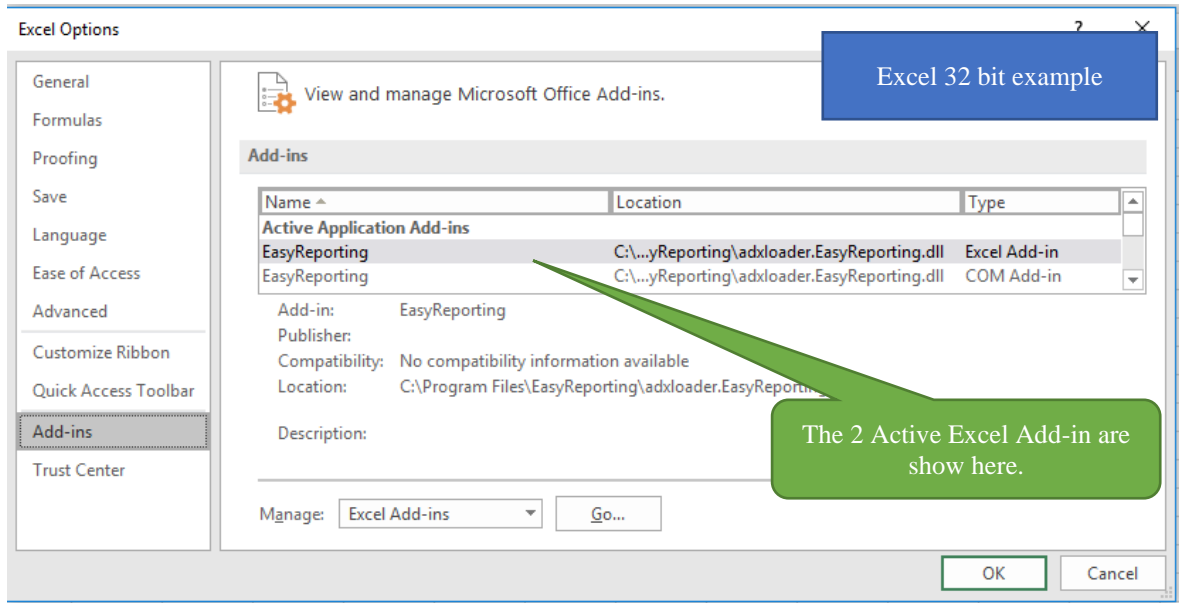
EasyReporting is made up of 2 add-ins which must be loaded when Excel is started. The COM Add-in enables the EasyReporting ribbon and the Excel Add-in makes the various functions available. Both Add-ins need to be loaded for EasyReporting to work correctly.

To check the Add-ins are loaded follow the setups below:

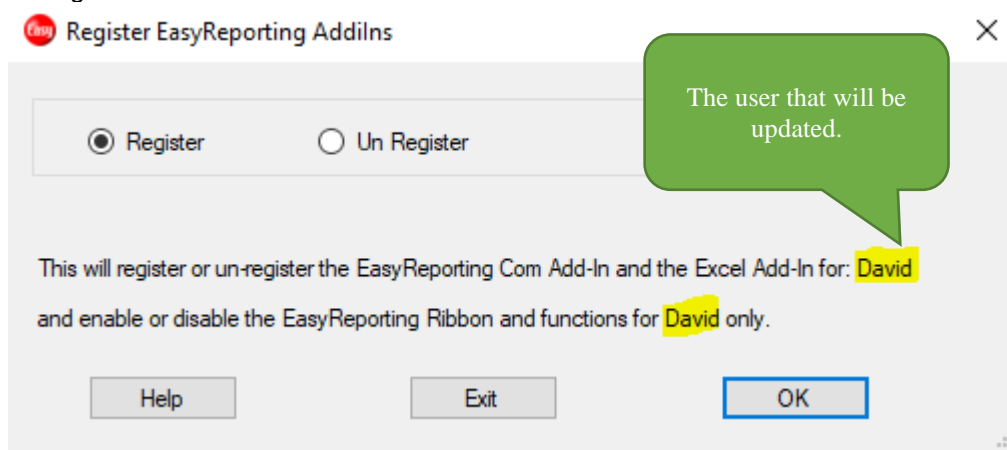
Once EasyReporting is setup Excel Add-Ins it will be automatically available when Excel is started.

Click the **File** tab (in the top left corner of the Excel window) and then click **Options**.

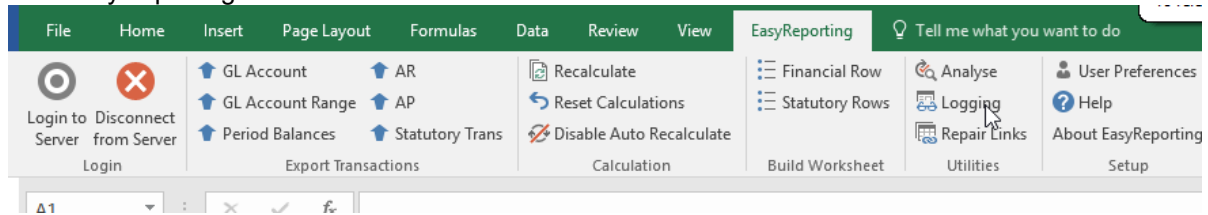




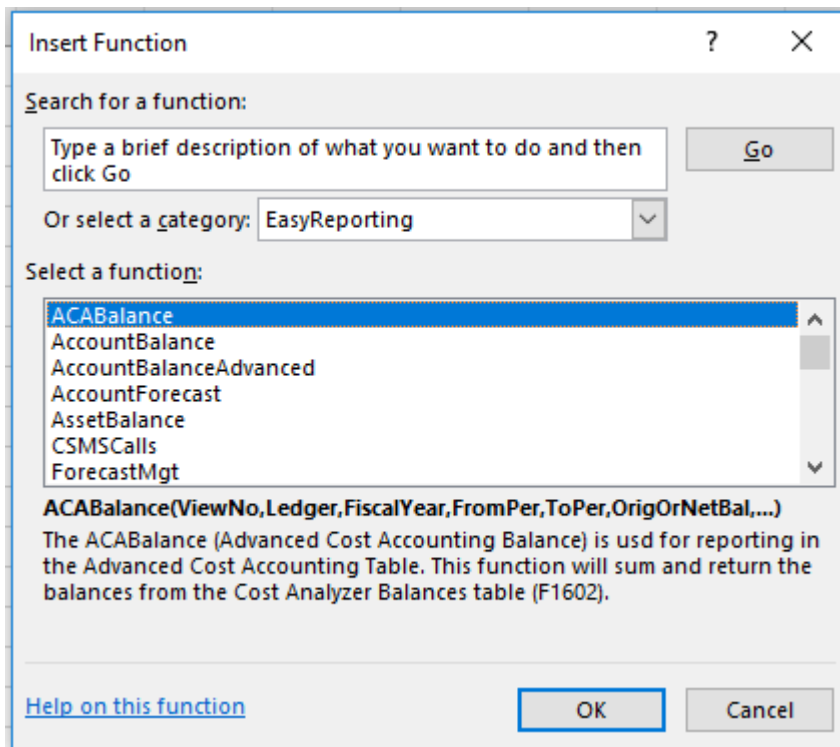
If Add-ins are not visible please refer to “Running as an Excel Add-in” in the detailed manual. If Add-ins are not visible please you can run the Register Add-Ins application which is found in the Configuration Assistant.



The EasyReporting “COM Add-in” will add the ribbon



The Excel Add-in will add the EasyReporting functions.



9. Open the Connection to the Server

On the EasyReporting ribbon select "Connect to Server" and enter your login and password and check the EasyReporting functions and applications are working.

