

Install XLReporter

Overview

The following describes how all the steps involved in installing **XLReporter** on your system.

Software Requirements

The following software is required for all editions:

- Microsoft Windows 8 or above or Windows Server 2012 R2 or above
- .NET 3.5 framework

While Microsoft Excel is not required, if you would like to use Excel as the template design studio, Excel 2010 or higher is required.

Web Portal

Web Browsers

For the web portal, the following web browsers are supported:

- Google Chrome v74
- Safari (Macintosh only) v12.1.2
- Firefox v68
- Internet Explorer v11

Cookies

Cookies must be enabled (or unblocked) in the web browser in order to access the web portal.

Internet Information Services

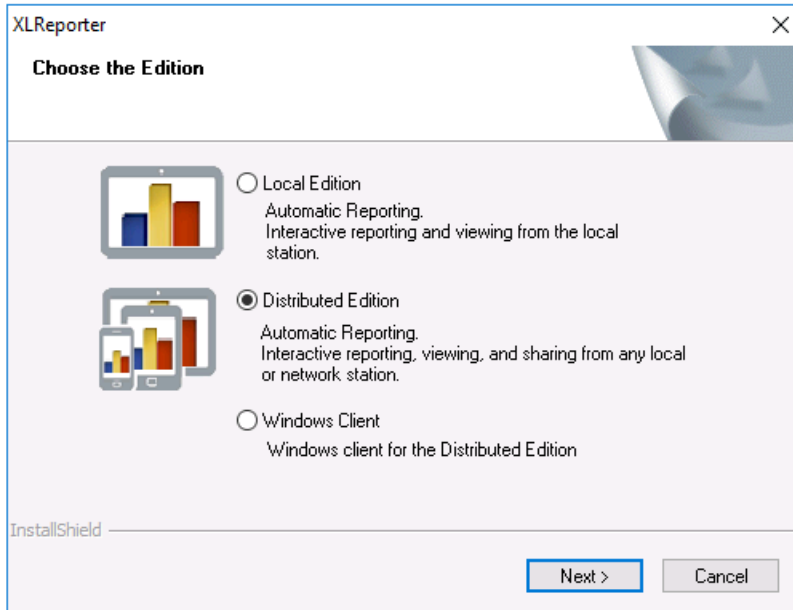
The web portal requires Internet Information Services (IIS) to be enabled in the operating system.

IIS is provided by Microsoft and is delivered as part of the operating system. By default, IIS is not installed and so it must be done manually by an **Administrator** of the system.

For more information on installing IIS, see the How to configure IIS article.

Editions

The installation prompts for the **Edition** to install.



The following are available:

Local Edition

This is a standalone version that does not require IIS. A windows client is provided on the workstation where **XLReporter** is installed for on-demand reporting and viewing.

Distributed Edition

This is a distributed version that does require IIS. A windows client is provided on the workstation where **XLReporter** is installed for on-demand reporting and viewing. Additional roaming clients are provided with features that depend on the product license.

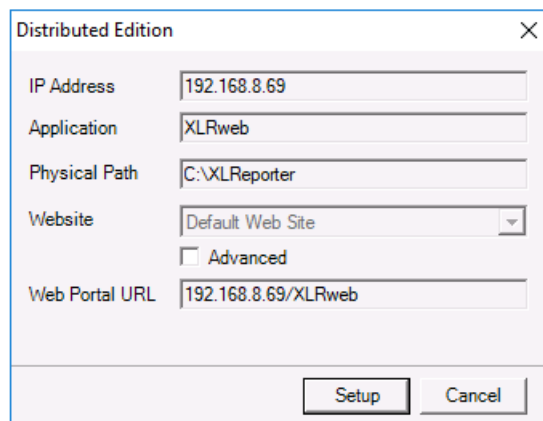
In case of a distributed system, the *xlrWeb* virtual directory is always created.

Windows Client

This is a windows client for the Distributed Edition.

Distributed Edition Setup

When installing the Distributed edition, more information about the system is required.



Website defines the site in IIS where the *XLRweb* application is installed. By default this is *Default Web Site* but if you would like to change this to another site defined in IIS, check **Advanced** and select the **Website** from the list.

The **Web Portal URL** is the URL you will use to connect to the web portal based on the settings above. You can copy this to your clipboard to use after installation is complete.

Note that **IP Address** is only configurable if there are multiple IP addresses detected on the system.

Once all the settings are configured, click **Setup** to proceed. Once setup is complete, click **Continue** to exit and continue the installation.

Projects

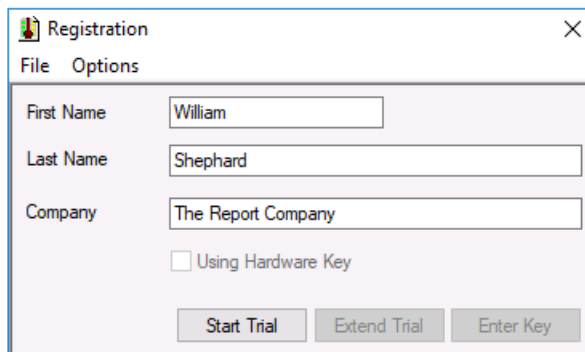
When installation is complete, **XLReporter's Project Explorer** is automatically opened with the Demo project loaded. This project demonstrates some of the high level features of the product.

It is highly recommended to create a new project to develop your project which can be done by selecting **File, New Project** in the **Project Explorer**.

Registration

Evaluation

To perform an evaluation of the product, from the **Project Explorer**, under the **Home** tab click **Register Product**.



The screenshot shows a 'Registration' dialog box with a menu bar containing 'File' and 'Options'. The dialog contains three text input fields: 'First Name' (containing 'William'), 'Last Name' (containing 'Shephard'), and 'Company' (containing 'The Report Company'). Below these fields is a checkbox labeled 'Using Hardware Key' which is currently unchecked. At the bottom of the dialog are three buttons: 'Start Trial', 'Extend Trial', and 'Enter Key'.

Fill out the form and click **Start Trial**. This enables a two hour evaluation period. Once that time has expired, return to **Registration** and click **Extend Trial** for another evaluation period.

Full License

There are two ways to license the product: purchase a hardware key or enter a soft key.

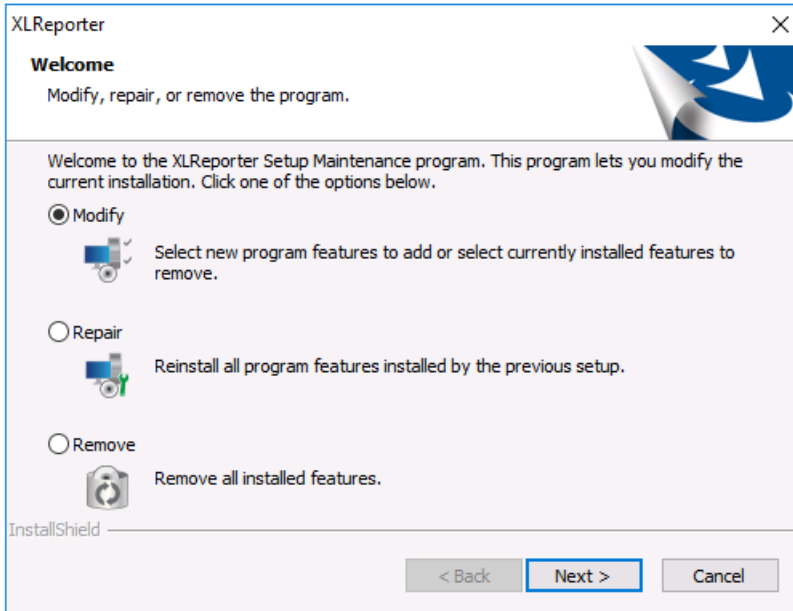
If a hardware key is purchased, simply plug it into the machine and the product is fully licensed.

For a soft key license, open **Registration** and click **Enter Key**.

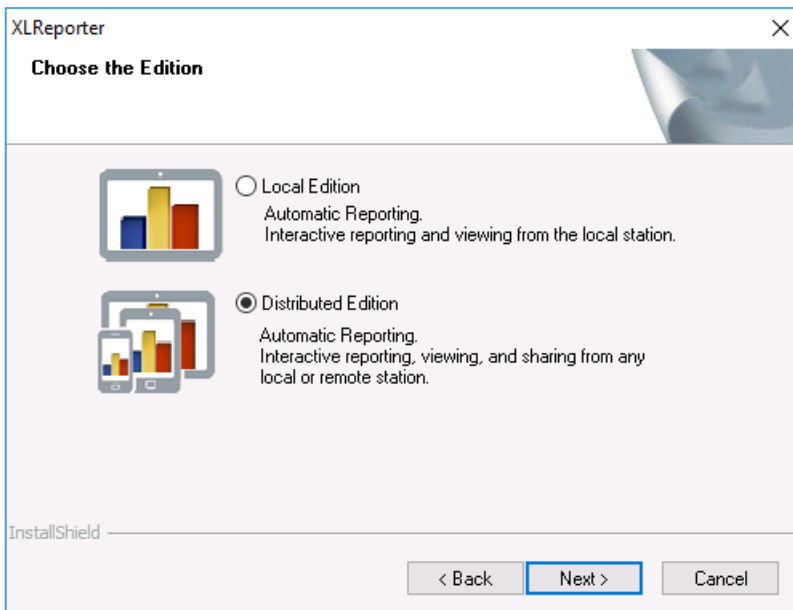
Contact SyTech, Inc. with the **Serial Number** of the package along with the **Lock** displayed in the dialog. You will be provided a **Key**. Enter the **Key** and click **OK** to license the product.

Change Editions

If the incorrect edition was installed initially, it can be changed by running the installation again.



During installation select **Modify**.



Select the proper **Edition** and complete the installation.

If you have already registered the product with a soft key, you must contact SyTech, Inc. to re-register your system for the proper edition.