

Intelicode® 15.x.x.x Installation Examples

The following sections provide an overview of three install options and steps when updating or installing Intelicode for the first time. Please contact Intelicode® Support with any questions.

Summary

There are multiple options for installing Intelicode. Here are some considerations:

- Intelicode® can be installed on each user's local PC or can be deployed from an application server (Citrix, RDS, VM, or packaged install). See the [Standard Intelicode® setup](#) and [Server Intelicode® setup](#) sections below for details of which are appropriate in a given environment.
- MS SQL Server is required for data when using Intelicode®. In order for users to share data, a networked SQL Server instance is required. See [SQL Server info](#) section below for details.
 - Each installation of Intelicode® can be configured to use a networked SQL Server for shared data access.

Steps for three common types of installation are summarized in the following pages:

1. [Standalone - see Page 2](#)
2. [Distributed app with shared data for multiple users – see Page 3](#)
3. [Application server with shared data – see Page 4](#)

1. Standalone

Example: Intelicode® is installed on a user PC. Data will not be located on a networked SQL Server database for shared access.

- Install Intelicode® (see [Intelicode® prerequisite programs](#) and [Standard Intelicode® setup](#) sections for details).
- Call for activation of Intelicode®. Activation keys are specific to the PC Intelicode® is installed on.

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2. Distributed app with shared data for multiple users

Example: Intelicode® is installed on each user's PC. Intelicode® data can be shared with other Intelicode® users.

- Create shared SQL Server databases that can be accessed by each instance of Intelicode®. (See [SQL Server info](#) section for details).
- Install Intelicode® on each user PC (see [Intelicode® prerequisite programs](#) and [Standard Intelicode® setup](#) sections for details).
 - Note: A "Server" setup can alternately be used on each individual user PC if it is preferable to have Intelicode® installed under "Program Files" or "Program Files(x86)" on each PC rather than under the user profile. See page 8 for Server setup files.
- Call for activation of each instance of Intelicode®. Activation keys are specific to the PC where Intelicode® is installed.
- Configure each instance of Intelicode® to connect to the shared SQL Server databases.

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3. Application server with shared data

Example: Intelicode® is deployed via an application server (Citrix, RDS, VM, or packaged install). Intelicode® data can be shared with other Intelicode® users.

- Create shared SQL Server databases which will be connected to by all instances of Intelicode®. (See [SQL Server info](#) section for details).
- Install Intelicode on application server (see [Intelicode® prerequisite programs](#) and [Server Intelicode® setup](#) sections for details)
- Call for activation of Intelicode®. Activation keys are specific to the PC Intelicode® is installed on.
 - Note: A multi-machine single activation key is available when a master image is used to create additional instances of Intelicode®. Contact Intelicode® Support for details.
- Connect each instance of Intelicode® to the shared SQL Server databases.

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SQL Server info

SQL Server 2008 or newer is required for hosting Intelicode data. An existing or a new instance can be used either on the same PC as the Intelicode® install or a separate network accessible location.

- 2 databases are needed on the SQL Server instance.
 - “Office” database < 50 MB+ 1 GB per 100,000 visits – no images. (Dynamic. Contains all user created application data.)
 - “Provided” database < 50 MB (Not dynamic. Contains codes and expiration dates used by the application.)
 - Note: Databases can be named more descriptively as needed. Intelicode documentation refers to the two as “Office” and “Provided”.
- Intelicode® scripts for initial table creation in each database can be generated from the Intelicode® application>Administrator Panel>Connection Settings page. Scripts for initial setup of databases can also be downloaded directly from http://download.intelicode.com/sql_scripts/
 - Office_v'xx'.sql (execute on the Office database when created)
 - Provided_v'xx'.sql (execute on the Provided database when created)
 - db_owner permissions to the “Office” database are needed for Intelicode® users.
 - db_owner permissions to the “Provided” database are needed for Intelicode® users to allow updating. This database contains no user data, just codes used by the program.
 - Windows Authentication or SQL Authentication can be used for Intelicode® access to these two databases
- A SQL Server database set up and configuration guide for Intelicode® can be found here : [SQL Server Express 2014 Setup Guide](#)
 - Notes about the installation guide
 - The “Setup Guide’ example uses SQL Express and Windows Authentication for data access. SQL Authentication can also be used for the data connection.
 - Install and configuration of SQL for Intelicode® are both covered.

Once the databases and permissions are correctly set up, each installation of Intelicode® can be configured to connect to the SQL Server database.

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Intelicode® prerequisite programs

Required prerequisite programs on the OS are all prompted for, downloaded and installed during the installation of Intelicode®. The following programs are listed here for reference.

- A Microsoft SQL Server instance with databases set up for Intelicode® is required. See the [SQL Server info](#) section of this document for details.
- .NET Framework 4.6.2 or higher (Full version - may be prompted to add if not currently installed).
- SQL Server Compact Edition 3.5 SP2 (required for activation, not used for audit data).
- Visual C++ 2010 SP1
- SQL Server Service CLR Types
- SQL Server Shared Management Objects

Elevated permissions may be required to install the prerequisite programs. If in an environment with limited permissions when logged into a PC, IT assistance may be needed for installation of the required prerequisite programs.

- Intelicode® creates reports directly in a .docx format when selecting 'Save To Word' from Report Options. Selecting "Save To Excel" creates a report in an Excel format. No additional software is required to create a .docx or .xlsx report.
- Optional software is required on the OS on which Intelicode® is installed in order to print, preview, and email reports directly from Intelicode®:
 - To print or preview a report Microsoft Word 2010 or newer is required.
 - Saving reports in a PDF format directly from Intelicode® requires MS Word 2010 or newer
 - A PDF viewer is required to view PDF reports. Adobe Acrobat Reader is recommended or most modern web browsers contain this functionality.
 - Microsoft Excel 2010 or newer is recommended for opening reports saved as Excel.
 - Microsoft Outlook 2010 or newer is required in order to send reports directly via email from Intelicode®.

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Standard Intelicode® setup

Installs to the currently logged in user profile on the OS (%appdata%\Intelicode).

The Intelicode® “Standard” setup is designed to be run while logged into the OS as the Intelicode end user.

Examples of when to select a ‘Standard’ setup:

- Intelicode® to be installed on each user PC and data will not be located on a networked SQL Server instance.
- Intelicode® to be installed on each user PC and configured to connect to a networked SQL Server instance.
- Note: A “Server” setup can alternately be used on each individual user PC if it is preferable to have Intelicode installed under “Program Files” or “Program Files (x86)” on each PC rather than under the Intelicode user profile. Additional permission configuration may be required. See next page for Server setup files.

A Microsoft SQL Server instance is required with databases set up for Intelicode® data. See the [SQL Server info](#) section of this document for details.

The setup program checks for prerequisite apps and prompts for their download and install if they are not on the PC.

See <http://intelicode.com/update> for the latest version details.

- Standard Intelicode® setup: [Intelicode® 15.x.x.x Setup](#)

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Server Intelicode® setup

Installs to “Program Files” or “Program Files (x86)” depending on version selected and OS.

Intelicode® “Server” setup file names include the word “Server” and can be installed by the end user if they have administrator permissions or can be installed by administrators of the network/domain (IT).

Examples of when to select a “Server” setup:

- Application server deployments (Citrix, RDS, VM, or packaged installs)
- Any OS installation where an end user does not have OS permissions to install applications

A Microsoft SQL Server instance is required with databases set up for Intelicode®. See the [SQL Server info](#) section of this document for details.

The setup program checks for prerequisite apps and prompts for their download and install if they are not on the PC.

See <http://intelicode.com/update> for the latest version details.

- Intelicode® Server setup file: [Intelicode® 15.x.x.x Server Setup](#)
- Activation of the “Server” version requires the user to have permissions to write to HKEY_LOCAL_MACHINE in the registry.
- “Modify” permissions are required for Intelicode users to the Intelicode® application directory and subdirectories on the OS.

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Future updates:

When new Intelicode® updates are released, new version information and update information can be found here <http://intelicode.com/update>

If you'd like clarification on any of this information or help in determining the best installation options for your environment, please let us know. We'll be happy to work with you and/or your IT team to determine next steps for a successful implementation of Intelicode®.

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