

# Intelicode® 15.x.x.x Server setup / Initial Installation

The following information is specific to the “Server” setup of Intelicode which can be installed on local PCs or on an application server. Typical uses for the “Server” setup files are on an application server (Citrix/Terminal Server) or on a user PC where elevated permissions are needed in order to install the application. MS SQL Server is required for hosting the Intelicode databases.

## Files to download for Intelicode® “Server” setup initial Installation:

- **Intelicode® Server setup downloads / select appropriate installer:**
  - **32 bit Intelicode® ‘Server’ setup** / valid for 32 bit or 64 bit OS:
    - “Intelicode®15.x.x.x Server Setup.exe” / download from here:  
[Intelicode Server Setup \(32 bit\)](#)
      - 32 bit OS: installs to C:\Program Files\Intelicode
      - 64 bit OS: installs to C:\Program Files (x86)\Intelicode
  - **64 bit Intelicode® ‘Server’ setup** / valid for 64 bit OS only:
    - “Intelicode®15.x.x.x x64 Server Setup.exe” / download from here:  
[Intelicode Server Setup \(64 bit\)](#)
      - 64 bit OS: installs to C:\Program Files\Intelicode
- **Prerequisite programs:**

Required prerequisite programs on the PC are all prompted for, downloaded and installed during the installation of Intelicode® V15. The following programs are listed here for reference.

- .NET Framework 4.6.2 or higher (Full setup - may be prompted to add to Windows 7 OS if not installed)
  - SQL Server Compact 3.5 SP2 (required for activation, not for data).
  - Visual C++ 2010 SP1
  - SQL Server Service CLR Types
  - SQL Server Shared Management Objects
- **SQL Scripts for Office and Provided databases / Intelicode®15.x.x.x**
    - Scripts to create tables in the initial ‘Office’ and ‘Provided’ databases on the SQL Server can be generated and saved from within Intelicode after installation and initial launch.
    - Or...scripts can be downloaded directly from here:  
[http://download.intelicode.com/sql\\_scripts/](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)

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## **Optional software required for printing, previewing, saving and directly emailing reports:**

Intelicode® creates reports directly in a .docx format when selecting 'Save To Word' from Report Options and in a .xlsx format when selecting "Save To Excel" from Report Options. No additional software is required to create a .docx or .xlsx formatted 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 Microsoft Word 2010 or newer.
- A PDF viewer is required to view PDF reports. Adobe Acrobat Reader is recommended. Most modern web browsers also include this functionality.
- Microsoft Excel 2010 or newer is recommended for opening reports saved as Excel.
- Microsoft Outlook 2010 or newer is required on the PC in order to send reports directly via email from Intelicode®.

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## Installation Steps:

- Install the latest Intelicode® 15.x.x.x Server Setup.exe
  - When prompted during installation for the target install directory, leave at default setting. An alternate drive can be selected such as D: rather than C: if applicable.
    - Confirm the “Everyone” radio button is selected to provide access for all users on the OS.
  - Set permissions for the newly created directory to “Modify” for all Intelicode® users after install. Example: C:\Program Files\ Intelicode
- Create SQL Server databases ‘Office’ and ‘Provided’ on SQL Server instance if not existing.

Note: SQL Server 2008 or newer is required. (see [SQL Server Express 2014 Setup Guide](#) for details). A new or existing instance of SQL Server can be used for the two databases. The names of the two databases can be made more descriptive if desired. (Example: Intelicode\_Office and Intelicode\_Provided).

  - Execute ‘Office’ and ‘Provided’ scripts (see “SQL Server Express 2014 Setup Guide” above for steps to generate scripts ) or download scripts directly as described above in the **SQL Scripts for Office and Provided databases / Intelicode® 15.x.x.x** section on page 1 of this document).
    - Notes: If using the downloaded scripts, the “USE” command in each script may need to be edited if the created database names are different than ‘Office’ and ‘Provided’.
    - The Office.sql script is intended to be run only one time to create initial tables on a new database. Do not run the Office.sql script again on a previously set up Office database if one exists. An existing version 14 Office database can be converted to be version 15 compatible in a separate process.
    - The ‘Office’ database requires db\_owner permissions for Intelicode users.
    - The ‘Provided’ database requires db\_owner permissions for Intelicode users.

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## Installation Steps: (continued)

- Configure Intelicode® to connect to SQL Server:
  - Login to Citrix / Terminal Server. Launch Intelicode®.
  - Select “Continue Evaluation” or else “Activate Intelicode” to see options for activating via phone or email. Elevated permissions are required in order to activate the ‘Server’ setup since the process writes to HKEY\_LOCAL\_MACHINE\Software\Intelicode in the registry.
  - Once activated, additional users should be able to launch Intelicode® without being prompted for an additional activation code.
  - Setup the SQL Server Connection when prompted and set up user login names and offices if connecting to a newly created Office database (see [SQL Server Express 2014 Setup Guide](#) for details).

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## Updates to Intelicode® Server installations:

Step by step instructions and links for updating a current install of Intelicode® Server setup using a SQL Server database to the latest setup are available from this page: <http://intelicode.com/update> in the section titled “For Application Server Network Installations (Citrix, Terminal Server)”

- Server setup .exe installers and “Provided” database scripts needed for updates are available from the “Intelicode® Server setup with SQL Server 15.x.x.x Update Installation Instructions” link.
- “Provided” databases will typically need to be updated on the SQL Server in conjunction with new setups of Intelicode being released. The “Provided” scripts drop current tables and insert new tables.
- All user specific office/visit data is maintained in the “Office” database.

## Automated notification of updates being available

- Updated setups of Intelicode will be posted on <http://intelicode.com/update>
- The Intelicode® app by default will check for new updates when launched as long as web access to codesmarter.com is available. Major updates will be added to the Notification Server on codesmarter.com so users are aware of them when released. Minor updates will be available from the <http://intelicode.com/update> website.
- A change log for released setups is available on the [Intelicode.com/update](http://intelicode.com/update) page.
- Automated notification can be disabled from within Intelicode® by selecting Tools>Preferences and checking the box beside “Do not notify me of future updates”.

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 with your IT team to determine next steps for a successful implementation of Intelicode®.

*Intelicode® Support Team*

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