

Intelicode 15.0.3.5 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 OS 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 OS. 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 OS 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 OS. Intelicode data can be shared with other Intelicode users.

- Create shared SQL Server databases which will be connected to from each instance of Intelicode. (See [SQL Server info](#) section for details).
- Install Intelicode on each user OS (see [Intelicode prerequisite programs](#) and [Standard Intelicode setup](#) sections for details).
 - Note: A "Server" setup can alternately be used on each individual user OS if it is preferable to have Intelicode installed under Program Files or Program Files(x86) on each OS 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 OS 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 OS 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 OS 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://intelicode.fileburst.com/sql_scripts/
 - Office_v61.3.sql (execute on the Office database when created)
 - Provided_v91.sql (execute on the Provided database when created)
 - db_owner permissions to the “Office” database are needed for Intelicode users.
 - db_datareader / db_datawriter are adequate permissions for Intelicode users to the “Provided” database.
 - 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 4.5 or higher (Full version - may be prompted to add to Windows 7 OS if not installed)
- SQL Server Compact 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 for a user login on the OS may be required to install the prerequisite programs. If in an environment with limited permissions when logged into an OS, 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, a .docx viewer is required on the same OS as Intelicode. Microsoft Word 2007 or newer is recommended.
 - Saving reports in a PDF format directly from Intelicode requires MS Word. (Note: Word 2007 requires the MS Office add on for PDF in order to save directly as PDF. Saving as PDF is native in newer versions of MS Word.)
 - A PDF viewer is required to view PDF reports. Adobe Acrobat Reader is recommended.
 - Microsoft Excel 2007 or newer is recommended for opening reports saved as Excel.
 - Microsoft Outlook 2007 or newer is required on the OS 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 file names do not contain the word Server and are 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 OS and data will not be located on a networked SQL Server instance.
- Intelicode to be installed on each user OS and configured to connect to a networked SQL Server instance.
- Note: A “Server” setup can alternately be used on each individual user OS if it is preferable to have Intelicode installed under Program Files or Program Files (x86) on each OS rather than under the Intelicode user profile. 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 OS.

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

- Standard Intelicode 32 bit setup: [Intelicode 15.0.3.5 Setup](#)
- Standard Intelicode 64 bit setup files: [Intelicode 15.0.3.5 x64 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 do include the word Server and can be installed by the end user if they have local administrator permissions or can be installed by local administrators of the OS (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 OS.

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

- Server Intelicode 32 bit setup file: [Intelicode 15.0.3.5 Server Setup](#)
- Server Intelicode 64 bit setup file: [Intelicode 15.0.3.5 x64 Server Setup](#)
- Activation of the “Server” version requires the user to have permissions to write to HKEY_LOCAL_MACHINE.
- “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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