

Intelicode 14.0.2.1 Server version / Initial Installation

Two installation options are available for the Intelicode 14 application. The primary difference is where the application files are installed.

- 'Server' installation
 - 32 bit version –
 - installs to Program Files on 32 bit OS and Program Files(x86) on a 64 bit OS
 - 64 bit version –
 - Installs to Program Files
 - Typically for use on an application server (Citrix/Terminal Server)
 - See "Files to download:" section below for Server installers
 - SQL Server used for hosting data (**SQL Server 2008 or newer is required**)
 - The default SQL Server Compact Edition (CE) local database created during install is required for application activation and can be used to host data if the 'Server' version is installed for single user access.
 - Example of CE database: C:\Program Files(x86)\Intelicode\Office.tsidb
- 'Standard' client installation – installs to currently logged in user profile
 - Example: C:\Users\(\UserName)\Appdata\Roaming\Intelicode
 - For standalone use on a PC or with connection to a SQL Server
 - Intelicode_14.x.x.x_Setup.exe is used for first time and update installs. It will check for Prerequisites and prompt for them to be downloaded and installed if they don't exist.
 - 32 bit versions: [Standard Intelicode 14 Setup \(32 bit\)](#)
 - 64 bit versions: [Standard Intelicode 14 Setup \(64 bit\)](#)
 - MS SQL Server Compact Edition local database is default (named Office.tsidb). Optional connection can be made to a shared network SQL Server database.

The following information is specific to the "Server" version of Intelicode which can be installed on local PCs or on an application server. The 'SQL Server' info is intended for the first time installation of the Intelicode databases.

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Files to download for Server version/Initial Installation:

- **Prerequisites:**
 - Microsoft .NET Framework 4 (Full version) and Microsoft SQL Server Compact Edition x86 and x64 are required on the OS. If they are not present on the OS, you will be prompted to have them downloaded and installed during the initial Intelicode Setup.
 - No additional software is needed to create a .docx report. Intelicode creates reports in a .docx format when selecting 'Save to Word' from Report Options.
 - Optional software required for printing, previewing, saving and directly emailing reports:
 - To print or preview a report, a .docx viewer is required. Microsoft Word 2007 or newer is recommended.
 - Microsoft Word 2007 or newer is required for saving reports as PDF documents. (Note: MS Word 2007 also requires MS Office add on for PDF in order to save as PDF, or this functionality is included in the latest service pack for Office 2007 or newer versions of MS Word.)
 - Microsoft Outlook 2007 or newer is required to send reports directly to email.
 - Microsoft Excel 2007 or newer is required for saving as an Excel spreadsheet.

- **Intelicode Server version 14.0.2.1 (released 3-23-2015)**
 - 32 bit Server installers are available here: [Intelicode Server Version \(32 bit\)](#)
 - 64 bit Server installers are available here: [Intelicode Server Version \(64 bit\)](#)

- **SQL Scripts for Office and Provided databases / Intelicode 14.0.2.1**
 - **Provided_v60.3** script and **Office_v23** script are needed for the initial (first time) setup of the two SQL Server databases. **SQL Server 2008 or newer is required.** (SQL Server 2005 is not supported) Note: the 'Office' script is to be run one time only. Future updates for the app may require a new "Provided" script to be run. The "Office" database is not updated with a script but rather during the first connection of the updated app.
 - "Provided" and "Office" scripts are available here: [Intelicode SQL scripts](#)
 - A SQL Server installation guide is available here for an example of setting up the Intelicode databases: [SQL Server Installation Guide with Express Example PDF](#)

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Installation Steps:

- Install the latest Intelicode 14.x.x.x Server Setup.exe
 - When prompted during installation for folder, leave at default setting.
 - Click the “Everyone” radio button instead of the “Just me” radio button to provide access for all users.
- Set permission for all Intelicode users to have Modify permissions to the Intelicode directory and subfolders on the application server(s).
- Create SQL Server databases
 - **SQL Server 2008 or newer is required.** (SQL Server 2005 is not supported)
 - Execute ‘Office’ and ‘Provided’ scripts (see SQL Server Installation guide to generate scripts or download scripts directly as specified on page 2 of this document).
 - Note: Office.sql is to be run only one time to create initial tables. Do not run the Office.sql script again on a previously set up Office database.
 - The ‘Office’ database requires db_owner permissions for the user making the first connection after the database is created or when update versions of Intelicode are installed in order to allow table changes. Permissions may be set as db_datareader & db_datawriter for Intelicode users after the initial connection from the Intelicode app or an updated version of the app.
 - ‘Provided’ database requires only db_datareader & db_datawriter for Intelicode users.
- 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. Once activated for one user, additional users should be able to launch Intelicode without being prompted for an additional activation code.
 - Create Administrator Panel password for Local database (from Options on Login screen)
 - Setup SQL Connection from within Administrator Panel (see [SQL Server Installation Guide with Express Example PDF](#) 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 version using a SQL Server database to the latest version are available from this page: <http://intelicode.com/update> in the section titled "For Application Server Network Installations (Citrix, Terminal Server)"

- Server version .exe installers and "Provided" database scripts needed for updates are available from the "Intelicode Server version with SQL Server 14.x.x.x Update Installation Instructions" link.
- "Provided" databases will typically need to be updated on the SQL Server in conjunction with new versions 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 versions 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 versions is available on the 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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