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 10 or above or Windows Server 2012 R2 or above

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
- Microsoft Edge

Cookies

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

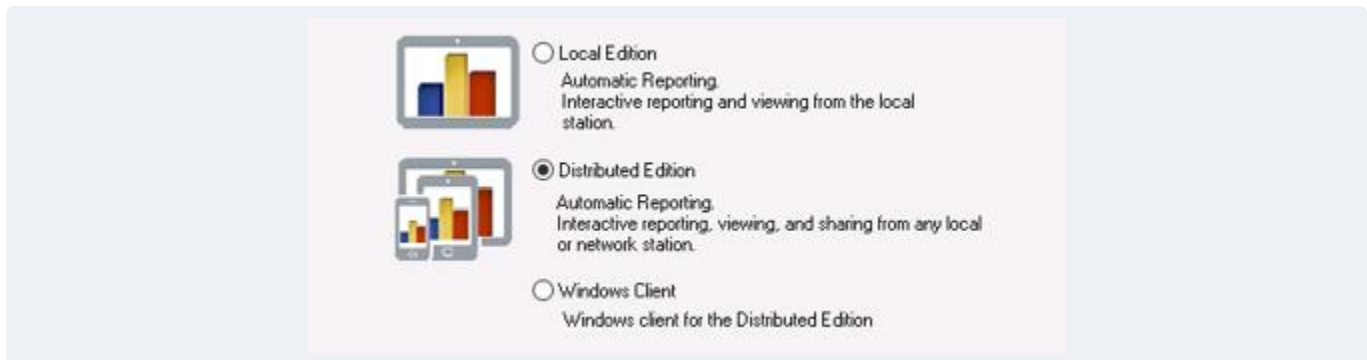**Internet Information Services**

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 <u>does not</u> 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 <u>does</u> 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.
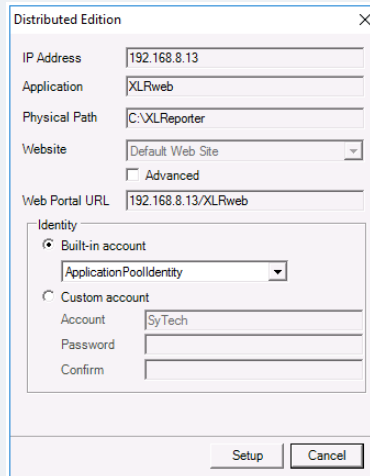
In case of a distributed system, the *xlrWeb* virtual directory is always created.

Windows Client

This is a windows client for the Distributed Edition.

Distributed Edition Setup

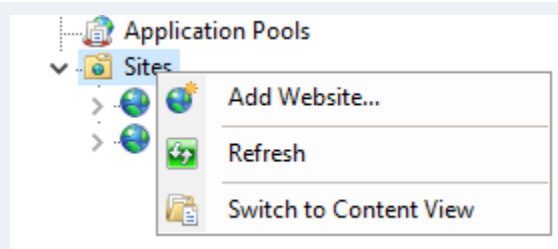When installing the **Distributed** edition you are prompted for some information regarding your system.
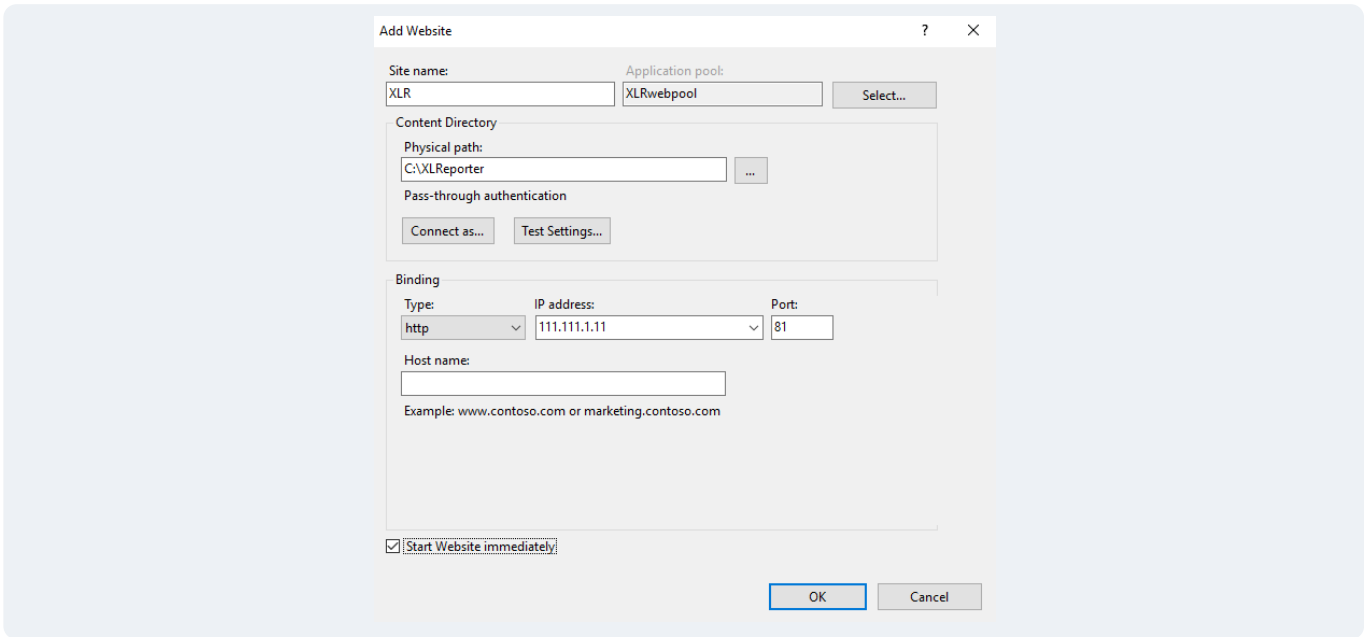

IP Address is the IP address of the local machine that users will enter to access the web portal. This is only configurable if there are multiple IP addresses detected on the system.

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.

If needed, a new website can be created in the **Internet Information Services (IIS) Manager** by right clicking the *Sites* folder and choosing **Add Website…**

Give the new website a name and set the **Application Pool** field to *XLRwebpool*. The **Physical path** field should be set to the XLReporter installation directory. Set the **IP address** field to the IP address of the machine where XLReporter is installed and specify the desired port number. Click **OK** to finish the configuration.

The **Web Portal URL** is the URL any user will use to connect to the web portal based on the settings above. This can be copied to the clipboard to use after installation is complete.

Identity

These settings define the user account under which the web portal runs. By default this is set to **ApplicationPoolIdentity** which is a built-in, very low level user. If **XLReporter** needs to access data or publish reports to other places on the network that require a higher level user, this can be changed to either another **Built-in account** or a **Custom account** which is a configured user on the machine or domain.

If the Identity needs to be changed after installation, it can be done through the **System Check**, accessible from the **XLReporter Project Explorer** under the **Tools** tab.

In **System Check**, select **Tools, Set up Web Portal**. This opens the same Distributed Edition dialog seen during the installation.
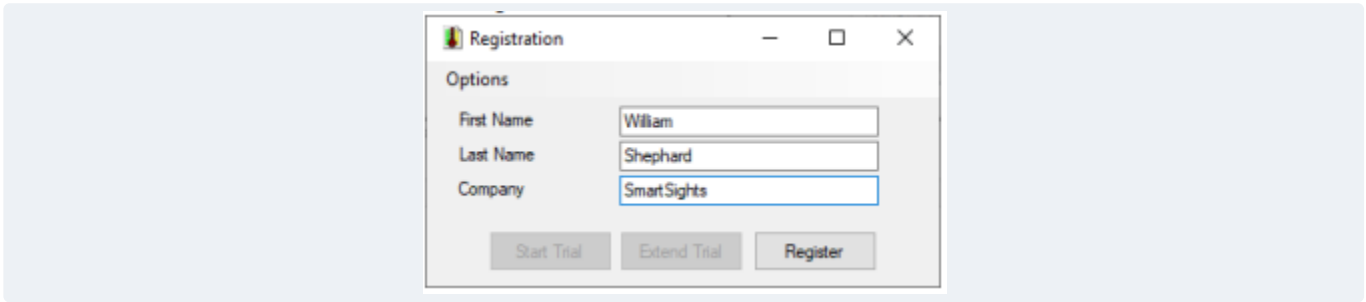
Projects

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**.
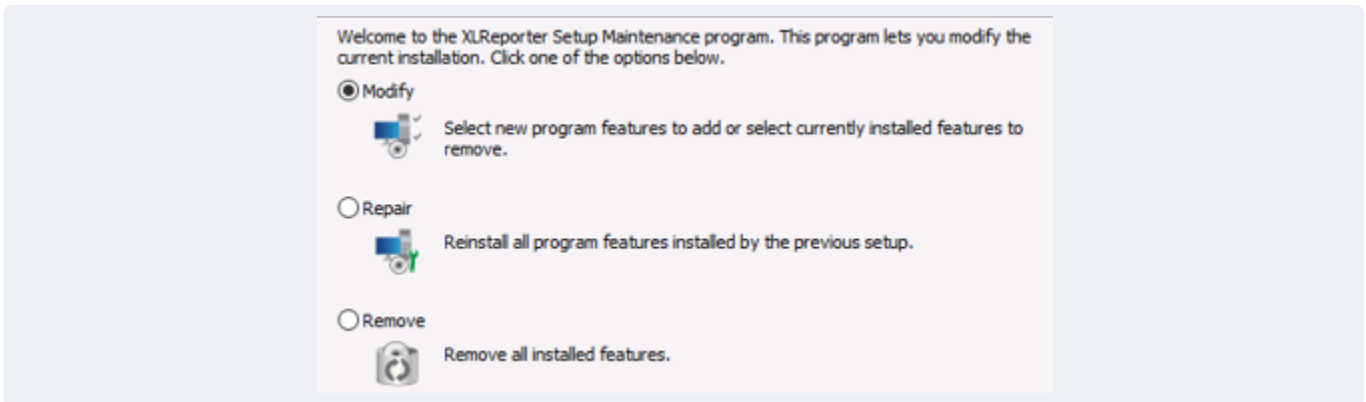

Fill out the form and click **Start Trial**. This enables a two hour evaluation period. Once that time has expired, return to **Registration** and click **Extend Trial** for another evaluation period.
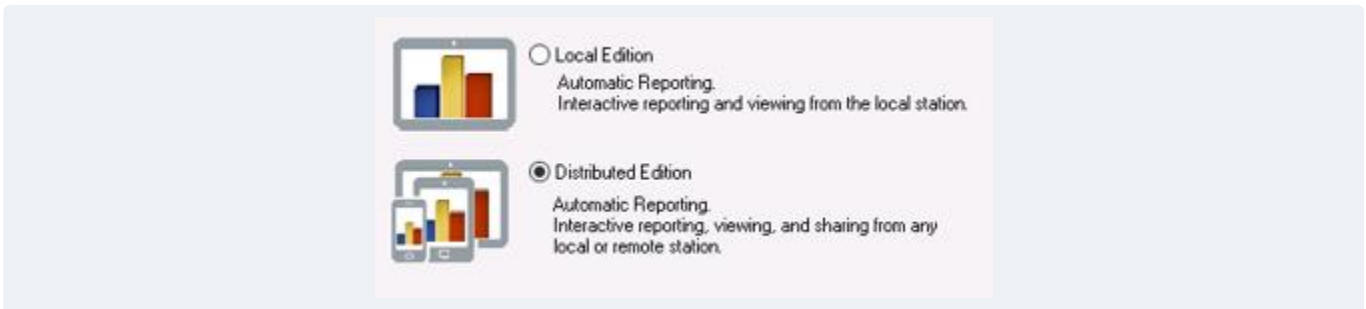
Full License

Select **Register** to open the **XLReporter** online license portal. If the machine is not connected to the internet, clicking **Register** opens the offline registration form to complete. This option is also available by selection **Options, Register (offline)** if internet connectivity is restricted. For more information, see Product Registration in the Document Library.

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. to re-register your system for the proper edition.