Atlas 6.1 Installation Guide

global software

atlas
A Global Software, Inc. Platform

Microsoft Dynamics

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SOFTWARE RELEASE

This documentation accompanies Atlas version 6.1 or higher and which is suitable for Microsoft Dynamics AX 4, AX 2009, AX 2012 or higher and Microsoft Office 2007 or higher, Microsoft Dynamics CRM 2011, 2013 and 2015.

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READER COMMENTS

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1 Introduction

1.1 Outline

Atlas is a global reporting and uploading solution for Microsoft Dynamics™ 365, Dynamics AX, Dynamics CRM and a reporting solution for cubes, data warehouses, and other database sources.

The Atlas 6 version introduces new type of licensing model and Data services. The installation process changed slightly for the new version.

Before you can use Atlas with your enterprise software system, you must successfully complete the installation procedure. This involves the installation of both a server component and a client installation (to be performed for all people that intend to use Atlas). Normally, the server and client installations will be performed separately, but where the Atlas Server and Atlas Client software is located on the same, standalone computer, then the two steps will be done at the same time. This is known as a Demonstration installation.

The purpose of this document is to guide our Atlas partners and customers, along with new users, on how to install Atlas 6.1.

When the installation process has been completed successfully, appropriate services will be started, and you will be ready to login and use Atlas.

2 Software Prerequisites for Atlas 6.1

Here follows a brief description of the commercial pre-requisites. For full details please visit the Software section of our website: http://www.globalsoftwareinc.com. You should be aware of all the pre-requisites and other requirements before undertaking this installation.

Global Software, Inc. provides the Atlas software only. Any other software that is a third party component, listed within this chapter, will need to be purchased or obtained separately from Atlas.

All prerequisites software need to be installed before Atlas will install correctly.

Upon installation, you will be able to select 1 of the 3 Setup type: Client, Server and Demonstration. The Demonstration setup installs both Client and Server. Below outlines the prerequisites for the Setup.

You can view a list or prerequisites downloads on our website http://www.globalsoftwareinc.com.

2.1 Atlas Client

2.1.1 Microsoft Windows Operating System

Atlas is available with the Microsoft Windows Operating system. Compatible versions: Windows 7, Windows 8, Windows 8.1 and Windows 10.

2.1.2 Microsoft Office

Atlas is available for Microsoft Excel, Word, PowerPoint and Outlook. A license to use these Microsoft products is not included with an Atlas license and must be purchased separately.

Compatible version: Microsoft Office 2007, Office 2010, Office 2013, Office 365 ProPlus Desktop and Office 2016.

2.1.3 .NET 4.6.1

Developers produce software by combining their own source code with the .NET framework and other libraries. .NET can be obtained on the Microsoft website https://www.microsoft.com.

2.1.4 Visual Studio Tools for Office (VSTO)

Is also known as Microsoft Visual Studio Tool.

VSTO can be obtained on the Microsoft website. Make sure you are on the latest version https://www.microsoft.com.

2.2 Atlas Server

2.2.1 Microsoft Windows Operating System

Atlas is available with the Microsoft Windows Operating system. Compatible versions: Windows Server 2008 R2 (only), Windows Server 2012 / 2012 R2. Windows Server 2016

2.2.2 .NET 4.6.1

Developers produce software by combining their own source code with the .NET framework and other libraries. .NET can be obtained on the Microsoft website.

2.3 For Microsoft Dynamics AX

2.3.1 Microsoft Dynamics AX

You will need access to Microsoft Dynamics AX. The Microsoft Dynamics AX .NET business connector needs to be installed on the computer that will host the Atlas server service.

Atlas 6.0 supports AX2009, and AX 2012 R1-R3.

Atlas 6.1 supports AX 4, AX2009, and AX 2012 R1-R3, AX 7 along with Dynamics 365.

2.3.2 Business Connector

For AX 4, AX 2009 and AX 2012 R1-3, the business connector must be installed.

For AX 7 and Dynamics 365, there is no business connector.

2.4 For Microsoft Dynamics CRM

2.4.1 Microsoft Dynamics CRM

You will need access to Microsoft Dynamics CRM.

Atlas 6.1 supports support Microsoft Dynamics CRM 2011, 2013, Office 2015 and 2016.

2.5 For SQL Server Database

2.5.1 LLBL Gen

LLBL Gen uses a data dictionary for the SQL Database. It is a third party product and is not included in your Atlas pricing. You will need to procure this separately as it is a pre-requisite for using Atlas over SQL databases.

Visit the link below for free-ProLite version (limits to the data dictionary to 8 tables which is more than enough for proof of concept). http://llblgen.com/pages/trial.aspx

Atlas 6.1 supports version LLBL Gen 4.1, 4.2 and 5.

2.5.2 .NET 4.6.1

For Windows 8.0 SDK, the .NET Framework 4.6.1 Software Development Kit must be installed. 64bit system is required for the .NET 6.1 Framework.

2.6 For Microsoft SQL Server Analysis Services (OLAP cubes)

2.6.1 Microsoft SQL Server Analysis Services

The SSAS needs to be installed on the machine where the Atlas OLAP Service is installed.

3 Hardware and Network Requirements

3.1 Hardware Requirements

These are minimum hardware requirements for the Atlas server and client.

Please note it is best to install Atlas on its own server.

Element	Requirement
Processor	2x Processor Cores, however we recommend 4x Processor Cores.
RAM	8GB RAM or above.
Monitor	1080p, 1920x1080 is the best resolution

3.2 Network Requirements

The following table lists the minimum network requirements for the connection between the server and the Microsoft Dynamics AX Application Object Server (AOS) if not on the same computer.

Element	Requirement
Bandwidth	100 Mbps
Latency	Less the 5 milliseconds

3.3 Citrix and Terminal Server Installation

Element	Requirement
Processor	8x Processor Cores
RAM	16GB RAM or above
Restriction	It is recommended that no more than 20x users are using Atlas and Excel on each Citrix/Terminal Server concurrent.

4 Installation (Atlas Server)

There are 3 Setup types available: Client, Server and Demonstration.

Chapter 4-9 will cover the Server setup.

Atlas Server setup is for the IT department to install and manage Atlas. This setup will install the Atlas Management studio (AMS) key and able to allocate and activate Atlas for the normal users.

Atlas Client setup is for normal users to install and log into Atlas. Chapter 8 and 9 outlines the steps to install the Atlas Client.

Atlas Demonstration setup installs both Client and Server. This is for consultants who are assigned with their own AMS to use, and so they will need the Server setup to install the AMS, then the Client setup to log into Atlas.

4.1 Obtaining the Atlas 6.1 build

Before you can start the Atlas 6.1 installation, you will need to download the program and load it into your computer. http://bit.ly/atlas61

If the link does not work, please visit www.globalsoftwareinc.com.

4.2 Opening the installation program

Navigate to the folder location of the downloaded build and unpack its content.

1. Click to select the installation executable from the **Windows Explorer** window. E.g. GlobeSoftware.Atlas6.1.****.exe
2. Right-click and choose **Run as Administrator**
3. Click **Yes** to accept any User Access Controls you might have set on your computer.

   After a few moments the following will appear, followed by the installation wizard:

4.3 Welcome

1. Click **Next**> to continue

4.4 License agreement

This page details the terms and conditions associated with the installation and use of Atlas. Review the software license agreement. Only click Next> if you agree with the agreement.

1. Tick "**I accept the license agreement**"
2. Click **Next**> to continue

4.5 Release Notes

This page provides release specific notes. Take time to review these to assess applicability.

1. Click **Next>** to continue.

4.6 Installation type

1. Select the type of installation being performed. In this case select **SERVER**
2. Click **Next>** to continue (Do you plan on upgrading some Atlas 5.1 reports into Atlas 6.1? If so, tick the **Atlas 6, Atlas 5 Update Tool** before you click Next)

4.7 Destination folders

Nominate the folder into which the Atlas server component will be installed. You can nominate another location. The default location is C:\Atlas6

1. Navigate and select to the **folder location** into which you wish to install the Atlas components
2. Click **Next>** to continue

4.8 Ready to install

This step allows you to pause before starting the installation. To review the settings you have entered, use the **<Back** button. If you are satisfied with the settings, click the **Next>**

4.9 Installation starts

Here is an example of what you will see when the installation starts:

4.10 Finish!

After a few moments the installation will be complete. A completion step is shown:

1. Tick the "**Open Atlas Management Studio**"
2. Click **Finish>**

5 Activation

Once installation is completed, you will need to activate and connect the Atlas Management Server. The AMS manages data services, licenses, users and user groups from its console.

5.1 Open the AMS

The AMS window should automatically be opened if you tick the “Open Atlas Management Studio” option during the last page of the installation.

Once the AMS is open, it will ask you to activate the management service license:

1. Click **Ok**

5.2 Configure Atlas Management Studio – Connections Details

The Configure Atlas Management Studio will open. We will need to identify the machine and the port number where the service is running.

1. Enter your **Server Name**
2. Enter port number: **9605** for where Atlas will run
3. Click **Next>**

5.3 Configure Atlas Management Studio – License Activation Details

Here you enter your license information.

1. Enter your **First Name, Last Name, Email address** and your **AMS key** (characters with numbers and letters. 5 sections, first section with 8 characters, second-third-fourth section with 4 characters each, final section with 12 characters)

2. Click the **Activate** button on top right corner. You should receive the following message.

3. Click **Ok**. The Activate tick box should now be enabled automatically

4. Click **Connect** button

5.4 AMS loaded

Once you have successfully activated the AMS key, you should be able to view your license information:

6 Set up, Install and Activate Services

6.1 Set up a Service.

1. Go to **Atlas Services tab** on the left column
2. Click on **Install new service** located on right hand corner

You now need to install a Service.

There are more than 1 type of Services. Here, you can add the one of the following Services:

- Microsoft Dynamics AX
- Microsoft Dynamics CRM
- OLAP Cube
- SQL Database
- HubSpot

We will outline how to install a Service for each of the above components (except SQL Database. To install SQL Database Service, please visit our wiki page:

Quick guide for setting up an Atlas 6 Database Service

There are 3 sections to the installation.

- Step 1 - Data Platform
- Step 2 - Service Detail
- Step 3 - Client Connection Detail

6.1.1 Installing Microsoft Dynamics AX Services: AX 7.

Data Platform:

1. Select the **AX Service Platform version**. For this guide, we selected AX 7. AX 7 is online based and so installing the service differ from other AX versions.

2. Click **Next>**

Service Detail:

3. Enter the **URL** (same URL as the one entered into web browser)
4. Enter the **Client Id**. This can be obtained by:
   a. Log into **Azure** (log in using your Microsoft account or create a new account) https://azure.microsoft.com/en-us/free/
   b. On left column tab, click on **Active directory** (the Active Directory should appear on the right column. If you are new to this, you will need to create an Active Directory and make sure it is activated)
   c. Click on **Applications** at the top
   d. Click on **Add** button at the bottom
   e. A popup window will appear **"Add an application my organization is developing"** or **"Add an application from the gallery"**. Select the first option
   f. **Name** your application and then click on the → button
   g. Add **URL** and then click on the ✓ button
   h. A page will load with the Active Directory application properties. Your **Client ID** is also there. Copy it and paste into the AMS Service Detail

   Visit

How do I create a Client ID for an D365fO Service in Atlas 6.1

   for screenshots

5. Enter the **Authority** (can be obtained from your Azure Domain https://login.windows.net/ Your Azure Domain)
6. Enter the **Resource** (Same as URL but without the /Data component)

7. Click **Next>**

Client Connection Detail:

8. Enter friendly name in the **Service Name field** (e.g. Prod, Test, UAT, Dev)

9. Click **Finish** and continue in Chapter 6.1.6: The Service is now created.

6.1.2 Installing Microsoft Dynamics AX Services: AX 2012 R1-3, AX 2009 or AX 4)

Data Platform:

1. Select the **AX Service Platform version**. For this guide, it can be applicable to AX 2012 R1-3, AX 2009 or AX 4. For AX 7, follow steps in Chapter 6.1.1.

2. Click **Next>**

Service Detail:

3. Enter the **AX Server Name**
4. Enter the **AX Server Port**

5. Click **Next>**

Client Connection Detail:

6. Enter friendly name in the **Service Name field** (e.g. Prod, Test, UAT, Dev).

7. Click **Finish** and continue in Chapter 6.1.6: The Service is now created.

6.1.3 Installing Microsoft Dynamics CRM Service.

Data Platform:

1. Select the **CRM Service Platform version**

2. Click **Next>**

Service Detail:

3. Enter the **Organisation URL** (Logged into your CRM account. Go to Settings -> Customizations -> Developer Resources -> The URL will be under Service EndPoints (there are 3 links, choose the Organization Service link)
4. Enter the **Discovery URL** (obtain same way as Organisation URL)

5. Click **Next>**

Client Connection Detail:

6. Enter friendly name in the **Service Name field** (e.g. Prod, Test, UAT, Dev)

7. Click **Finish** and continue in Chapter 6.1.6: The Service is now created.

6.1.4 Installing OLAP Cube Service

Data Platform:

1. Select the **SQL Server OLAP Platform version**

2. Click **Next>**

Service Detail:

3. Enter the **OLAP Server Name, Database Name** and **Cube Name**

4. Click **Next>**

Client Connection Detail:

5. In the **Service Name field**, give it a friendly name (recommended to use the name provided in the **Data Platform for Cubes** table)

6. Click **Finish** and continue in Chapter 6.1.6: The Service is now created.

Data Platform for Cubes *Note that Cubes are Environmental. You must standardize the Cube Names. Below table outlines the Names that we have built into our templates.*		
Server Name	Default Contoso Database Name	Description
Your AMS Server Name	Dynamics AX initial AXAP	Cubes Accounts payable cube
	AXAR	Accounts receivable cube
	AXBUDCONT	Budget control cube
	AXBUDPLAN	Budget Plan Cube
	AXCICEnviron AXTaEExpman	Environmental sustainability cube Expense management cube
	AXGLCUBE	General ledger cube
	AXINV	Inventory value cube
	AXPROD	Production cube
	AXPROFTAX AXPROJCUBE	Profit tax totals cube Project accounting cube
	AXPURCH	Purchase cube
	AXRETAIL	Retail cube
	AXSALESMARK	Sales and marketing cube
	AXSALESCUBE AXWORKFLOW	Sales cube Workflow cube

6.1.5 Installing HubSpot Service

Data Platform:

1. Select the **HubSpot service**

2. Click **Next>**

Service Detail:

3. Add your own API/Portal key or use the preloaded demo environment.
4. Enter Refresh times if you like.
5. Click **Next>**

Client Connection Detail:

6. Enter friendly name in the **Service Name field**, accept the **Port Number**.
7. Click **Finish>**

8. Click **Finish** and continue in Chapter 6.1.6: The Service is now created.

6.1.6 Service is now created

6.2 Activate Service

You will now need to activate the Service.

1. Go to the **Server Licenses tab** on the left hand column
2. Click **Retrieve Online** button located on top right hand corner
3. A popup window will appear with "This will cause all licenses to be refreshed, including on other pages" – Click **Ok**.
4. Your keys should appear in the **Available Licenses section**

5. Click on the **Auto Assign** or **Assign** button under **Server License Allocations**
6. Click **Activate** Button

   There should now be a tick under the Activated column, indicating that the Services have been activated successful.

6.3 Disable Upload

By default, the Upload feature is enabled for the Services. This chapter is optional, in case you wish to disable the Upload feature.

1. Select the **Service** you wish to disable Upload for
2. Click on **Settings** button located on top right corner

3. **Deselect** the Upload box

4. Click **Save & Close**

7 User group (Keys Activation)

7.1 Create an User group

First you will need to create a User group.

1. Go to the **User Group tab** on the left column
2. Click **Add New** located on top right corner
3. The **Add New User Group** window will pop up

4. Give the group a name and select the appropriate permissions

5. Click **Save & Close**

7.2 Allocate License keys to the User/s

1. Go to the **Named License tab** located on left column
2. If you do not see any keys there, click on **Retrieve Online**
3. Click **Allocate** or **Mass Allocate button** on top right corner (either for Standard Licenses or Designer Licenses)

4. Select the user/s from the list

5. Click **Save & Close**

   The keys were allocated to A6TestUser and Administrator.

7.3 Activate keys

The User group has been created and you have assigned the License key to the user/s. Now you will need to activate the keys for the user/s.

1. Click the **Activate** button that is enabled (blue) to activate per specific key, or click on **Mass Activate button** to activate all assigned but not activated keys

2. License Activation requires the user to have a valid email address. If none was found in the **ActiveDirectory** for the users, then the **Provide User Email Address** window will appear. Simply enter the user's **email address** and Click **Ok**

A tick will appear under the Activated column for the activated license key

7.4 Allocate to User Group

Now you will need to allocate the user/s to the group.

1. Go to the **User Group Tab** (under User Group) locate on left column. (remember in point 7.1.4 the User Group named was "All" yours may differ)
2. Under **Group Members**, click **Add/Remove button**

3. Select the user/s

4. Click **Save & Close**

The user/s you have just added will appear in the **Groups Member section**

7.5 Adding User Groups to a Server

1. Go to the **User Group Tab** located on left column (under **Atlas Services**)

2. Click **Add/Remove** button
3. The **Select User Groups** window will appear
4. Select the **User Groups** you wish to add to the service (remember in point 7.1.4 the User Group named was "All" yours may differ)
5. Click **Save & Close**

7.6 What it looks like when an user logs in

Check the **Activated Licenses tab**. This tab provides a history of who have logged into Atlas and the expiry date of the key. If your maintenance date has been updated, the date will be updated the next time the user logs in.

For example, the license key assigned to Administrator was covered by maintenance to 30 June 2016 (under the Expiry date column). When we update the maintenance date to 31 Dec 2016 within our system, the expiry date in your AMS will continue to be 30 June 2015 and will only be updated to 31 Dec 2016 the next time the user logs into Atlas again.

8 Installation (Atlas Client)

There are 3 Setup types available: Client, Server and Demonstration.

Chapter 4-9 will cover the Server setup.

Atlas Server setup is for the IT department to install and manage Atlas. This setup will install the Atlas Management studio (AMS) key and able to allocate and activate Atlas for the normal users.

Atlas Client setup is for normal users to install and log into Atlas. Chapter 8 and 9 outlines the steps to install the Atlas Client.

Atlas Demonstration setup installs both Client and Server. This is for consultants who are assigned with their own AMS to use, and so they will need the Server setup to install the AMS, then the Client setup to log into Atlas.

8.1 Obtaining the Atlas 6.1 build

Before you can start the Atlas 6.1 installation, you will need to download the program and load it into your computer. http://bit.ly/atlas61

If the link does not work, please visit www.globalsoftwareinc.com.

8.2 Opening the installation program

Navigate to the folder location of the downloaded build and unpack its content.

4. Click to select the installation executable from the **Windows Explorer** window. E.g. GlobeSoftware.Atlas6.1.****.exe
5. Right-click and choose **Run as Administrator**
6. Click **Yes** to accept any User Access Controls you might have set on your computer.

   After a few moments the following will appear, followed by the installation wizard:

8.3 Welcome

2. Click **Next>** to continue

8.4 License agreement

This page details the terms and conditions associated with the installation and use of Atlas. Review the software license agreement. Only click Next> if you agree with the agreement.

3. Tick "**I accept the license agreement**"
4. Click **Next>** to continue

8.5 Release Notes

This page provides release specific notes. Take time to review these to assess applicability.

2. Click **Next>** to continue.

8.6 Installation type

3. Select the type of installation being performed. In this case select **CLIENT**
4. Click **Next>** to continue (Do you plan on upgrading some Atlas 5.1 reports into Atlas 6.1? If so, tick the **Atlas 6, Atlas 5 Update Tool** before you click Next)

8.7 Management Service Details

The information you enter on this page will allows you to connect to the Atlas Management Studio Server details so that you can log into Atlas.

1. In the **Server Name** field, enter your **AMS Server Name** (if you do not know this, then check with your IT department)
2. Your **port number** should be prepopulated. Do not change it unless your IT department instructed otherwise

3. Click **Next>**

8.8 Destination folders

Nominate the folder into which the Atlas server component will be installed. You can nominate another location. The default location is C:\Atlas6

1. Navigate to the **folder location** into which you wish to install the Atlas components

2. To create a **new folder, use (Alt+F)** to select the folder location entry box and type in the path. In the following example the location **C:\Atlas6** has been chosen.
3. Click **Next>** to continue

8.9 Ready to install

This step allows you to pause before starting the installation script. To review the settings you have entered, use the **<Back** button. If you are satisfied with the settings, click the **Next>**

8.10 Installation starts

Here is an example of what you will see when the installation starts:

8.11 Finish!

After a few moments the installation will be complete. A completion step is shown:

3. Untick the "**Open Atlas Management Studio**"
4. Click **Finish**

9 Activation (Atlas Client)

You have installed the Atlas 6.1 Client successfully and can now log into Atlas.

1. Open the **Atlas 6.1 Client**

   For Windows 8: Go to Start Menu -> Search “Atlas 6” -> Locate and Click on the Atlas 6 Logon button.

   We recommend pinning Atlas to taskbar: Locate the Atlas 6 Logon button -> Right-click button -> at button left corner should have option to pin.

2. In the **Atlas Client**, enter you **Domain Account & Password**

Note: Microsoft Dynamics CRM requires a separate login:

3. Go to the **Settings** Tab

4. In the **Host Name** field, enter your **AMS Server Name**
5. In the **User Experience** field, move the green mark to the level you want to save

   Level 1 – Manual Start up
   Level 2 – Remember Me
   Level 3 – Remember me and password
   Level 4 – Remember me and password. Show Atlas Client at Start up
   Level 5 - Remember me and password. Automatic login with Windows
6. Click on the **Login** button
7. You should be logged in now

   **Note: if you cannot log in then check with your IT department to ensure you are allocated a License key within the Atlas Management Studio

10 Updating Atlas 6.1 builds

When updating your Atlas 6.1 builds, the best practice is as follows:

10.1 Upgrading Server Install

Before you start the Atlas 6.1 build installation, do the following:

1. Check all other users have logged off the Server
2. Check all users have logged out of Atlas (AMS > License management > Online users)
3. Stop Windows services (the AMS service and the Atlas AX, Cube, Database services)
4. Install Atlas update build
5. Check the Services are running
6. Check AMS – check if the Services are Connected

10.2 Updating Client Install

Before you start the Atlas 6.1 build installation, do the following:

1. Log off all Atlas Clients
2. Exit all Atlas Clients
3. Close all Office apps
4. Install Atlas update build
5. Log into Atlas Client
6. Open Office > check for Atlas menu and Click New

For more Atlas resources, visit:

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