



XRL

Installation Guide

Pegasus XRL (1.77 +)
Powered by Infor Query & Analysis (10.1.10)
Installation Guide



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XRL Installation Guide

Software Requirements

Welcome to the Pegasus XRL Installation Guide. XRL is powered by Infor Query & Analysis. The guide provides detailed instructions for installing XRL for use with Opera 3, Opera II, Operations II and Pegasus CIS.

XRL must be installed on each computer where it is used unless it is used in a Citrix or Windows Terminal Services environment. In these environments, XRL can be installed on a file server and run from client PCs.

Microsoft Mainstream and Extended Support

XRL is tested using and supported for Windows products (mentioned in this guide) that are under Microsoft Mainstream Support. We also offer support when Microsoft products are under Microsoft Extended Support, but we don't test using those environments. Support from Pegasus Software will end when Microsoft extended support ends.

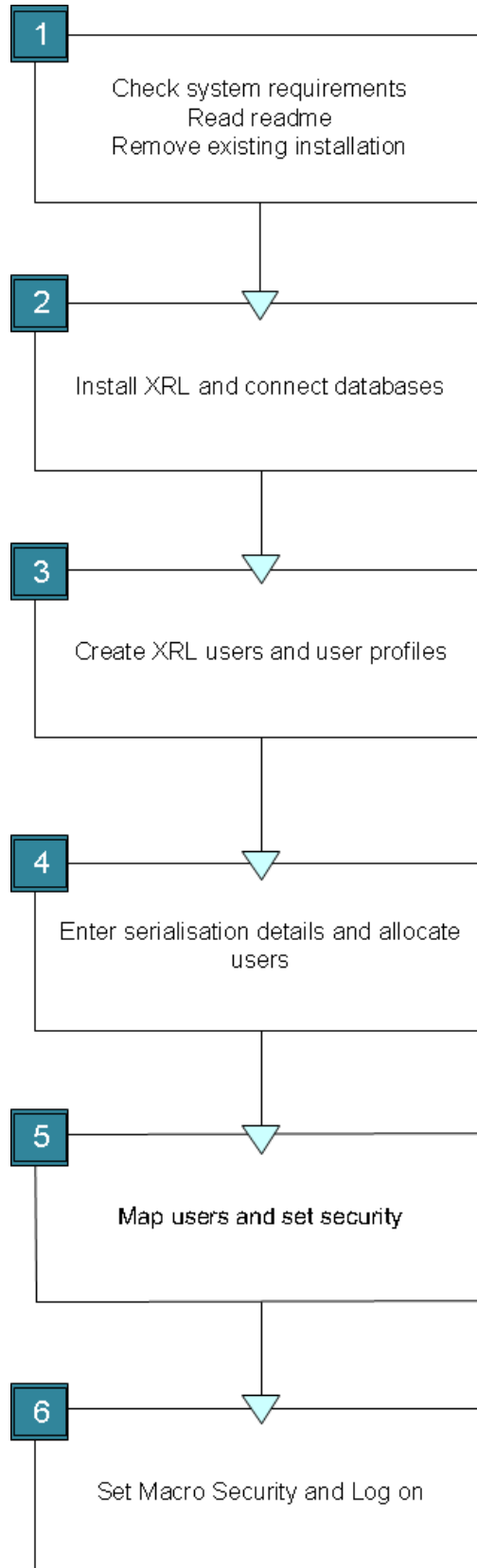
Requirements for XRL and supported platforms ('Infor Q & A' in Microsoft Excel):					✓																				
<ul style="list-style-type: none"> Pegasus Opera 3, Opera II, Operations II or CIS. 																									
<ul style="list-style-type: none"> 1 GB RAM in addition to memory needed for Microsoft Windows and Office. 																									
<ul style="list-style-type: none"> At least 100 MB free disk space. 																									
<ul style="list-style-type: none"> Windows 11 (version 21H2+22H2+23H2) Windows 10 (version 21H2+22H2) 																									
<ul style="list-style-type: none"> Windows Server 2022 Windows Server 2019 Windows Server 2016 (Now in extended support) 																									
<ul style="list-style-type: none"> Microsoft Office 2021 Microsoft Office 2019 Microsoft Office 2016 <i>(32 bit only) Serialised/activated before installing XRL</i> 																									
<ul style="list-style-type: none"> Microsoft Edge, Microsoft Internet Explorer 11.x, Google Chrome (latest version). 																									
<ul style="list-style-type: none"> Microsoft .NET Framework <table border="1" data-bbox="344 1543 1286 1727"> <thead> <tr> <th></th> <th>Opera 3</th> <th>Opera II</th> <th>Operations II</th> <th>CIS</th> </tr> </thead> <tbody> <tr> <td>One of .NET 2.0, 3.0 or 3.5</td> <td>Yes</td> <td>Yes</td> <td>Yes</td> <td>Yes</td> </tr> <tr> <td>One of .NET 4.0, 4.5 or 4.5.1</td> <td>No</td> <td>Yes</td> <td>Yes</td> <td>Yes</td> </tr> <tr> <td>.NET 4.7.2</td> <td>Yes</td> <td>No</td> <td>No</td> <td>No</td> </tr> </tbody> </table> 						Opera 3	Opera II	Operations II	CIS	One of .NET 2.0, 3.0 or 3.5	Yes	Yes	Yes	Yes	One of .NET 4.0, 4.5 or 4.5.1	No	Yes	Yes	Yes	.NET 4.7.2	Yes	No	No	No	
	Opera 3	Opera II	Operations II	CIS																					
One of .NET 2.0, 3.0 or 3.5	Yes	Yes	Yes	Yes																					
One of .NET 4.0, 4.5 or 4.5.1	No	Yes	Yes	Yes																					
.NET 4.7.2	Yes	No	No	No																					
<ul style="list-style-type: none"> MDAC 2.8 or later. 																									
<ul style="list-style-type: none"> Visual Studio Tools for Microsoft Office (VSTO) applicable for the version of Office being used is installed from the Office installer or downloaded as a standalone component from the Microsoft Download Centre (http://www.microsoft.com/en-us/download/). Reboot the PC afterwards. Note: This is required as the Microsoft Excel add-in for XRL is a 'COM' rather than a VBA add-in. VSTO is a requirement for COM add-ins. 																									



XRL Installation Guide

Overview of Installation Steps

These steps to install and configure XRL are described in this guide. Each numbered step is described in detail later in the guide.





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STEP 1: Preparing for the Installation

1. Read the XRL Readme.
2. Note the location of your accounting application's system database – used by XRL to locate the data.
3. Open the serialisation email sent by Pegasus. This email includes the information you need to activate XRL.
4. Close all open applications.
5. Remove the existing installation. Previous releases must be uninstalled before installing the latest version.

Removing the Existing XRL Installation (upgrading from version XRL (1.60) or later)

The uninstallation should always be done from the Infor Query & Analysis or XRL program group on the Windows **Start** menu rather than Windows **Control Panel**. You must be an administrator to complete these tasks.

		✓
1.	Click Uninstall in the 'Infor Query & Analysis' or 'XRL' program group on the Windows Start menu. Select the 'Run As Administrator' right-click option to run the Uninstall shortcut.	
2.	Click the Next button to proceed.	
3.	Select the Remove button and select Finish to close the wizard.	

Removing the Existing XRL Installation (upgrading from versions before XRL (1.60))

The uninstallation should always be done from the Infor Query & Analysis or XRL program group on the Windows **Start** menu rather than Windows **Control Panel**. You must be an administrator to complete these tasks.

		✓
1.	Click Uninstall in the 'Infor Query & Analysis' or 'XRL' program group on the Windows Start menu. Select the 'Run As Administrator' right-click option to run the Uninstall shortcut.	
2.	Click the Next button to proceed.	
3.	Select the 'Completely uninstall DataLinks and application settings' option to remove all XRL settings from the installation.	
4.	Select the Remove button and select Finish to close the wizard.	
5.	Remove the old XRL folders: Depending on the Windows version and the version of XRL previously used the installation folder is one of: <ul style="list-style-type: none"> • C:\Program Files\Infor\Query and Analysis • C:\Program Files(x86)\Infor\Query and Analysis • C:\Program Files\XRL 	

	<ul style="list-style-type: none"> • C:\Program Files(x86)\XRL <p>Depending on the Windows version and the version of XRL previously used the data folders is one of:</p> <ul style="list-style-type: none"> • C:\ProgramData\Infor Query & Analysis • C:\Program Files\Infor PM QA\Settings • C:\ProgramData\Lasata 	✓
6.	Depending on the previous versions of XRL used, delete either the 'XRL' node or 'Infor Query & Analysis' node on the Windows Start menu (these may be removed automatically).	
7.	Open Microsoft Excel and delete the existing Excel add-in or COM add-in from the Add-Ins view on the Excel Options screen (accessed from the File - Options menu). The add-in you need to remove depends on the previous version of XRL installed.	
8.	Check for these Windows registry entries using the 'regedit.exe' utility and delete if they exist: <ul style="list-style-type: none"> • HKEY_LOCAL_MACHINE > SOFTWARE > Wow6432Node > Vision • HKEY_LOCAL_MACHINE > SOFTWARE > Vision 	



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STEP 2: Installing XRL and Connecting Databases

This section includes detailed steps to install XRL. If you are upgrading from an earlier version, you must first remove the existing version after taking a backup of the XRL database file.

Installing XRL

		✓
1.	Run the XRL Installation welcome screen.	
2.	On the XRL Installation screen, click Readme to open the readme file. Then select Install XRL to start the wizard.	
3.	On the Welcome to the InstallShield Wizard screen, select Next .	
4.	On the Destination Folder screen, choose an installation folder or accept the default folder ('C:\Program Files\Infor\Query and Analysis') (32-bit Windows) or 'C:\Program Files(x86)\Infor\Query and Analysis' (64-bit Windows). Select Next .	
5.	On the Q&A Services screen, leave the box empty and select Next .	
6.	On the Setup Type screen, leave the setup type as 'Complete'. Select Next .	
7.	On the Ready to Install the Program screen, select Install .	

Setting up the Databases

Follow these steps to set up XRL and the DataLink for each product using the **Connection Wizard**. The DataLink is a collection of files forming the business logic layer, allowing XRL to present a product database in layout or format that can be easily recognised.

Connecting XRL to its own Database

The XRL database contains user information, serialisation details, and dictionary settings.

		✓
1.	Select 'Query & Analysis' from the Product list and click Next .	
2.	In the Database field, select 'Microsoft Access', and click Next .	
3.	In the File Name field, select the 'LsDatabase.mdb' file from either of: <ul style="list-style-type: none">• 'C:\ProgramData\Infor Query & Analysis\Settings'• 'C:\Program Files (x86)\Infor\Query and Analysis\Settings'	
4.	Click Next twice (ignore the System Database, Time Out, User ID and Password boxes).	
5.	Click Test Connection to check access to the database. If the test fails, click Back to where you can select the 'LsDatabase.mdb' database. Make sure that you have chosen the correct location. Then click Next until you can test the connection.	
6.	Click Finish . The next step is to connect to each Product DataLink.	

Note: The 'LsDatabase.mdb' Microsoft Access database is installed locally in the <INSTALL-DIR>\Settings folder. If multiple users will be using XRL the file should be moved from the XRL program folder to a shared network drive. All XRL clients should then point to this database in a central location. See the [Additional Client Installations](#) section on page 13 for the steps to follow additional users.

Connecting to the Opera3/II DataLink

		✓
1.	Select 'Opera 3/Opera II' from the product list and click Next . Select the Enable box and leave the Database as 'Microsoft FoxPro'. Click Next (ignore the Alias box).	
2.	<p>When setting up XRL, if the System.dbc path is copied/pasted from File Explorer, double quotes are added to the path and, although the XRL setup will complete, you cannot run any reports. You should navigate to the System.dbc via the ellipsis mark instead.</p> <p>Note: Don't copy and paste the path for System.dbc file. Navigate to the file path and select it.</p> <p>Find the 'System.dbc' database in the Opera 'System' folder:</p> <ul style="list-style-type: none"> • The default Opera 3 location is '\\servername\O3 Server XXX Dynamic\System' (where XXX is either 'VFP' or 'SQL') • The default Opera II location is '\\servername\Server XXX Dynamic\System' <p>Click Next twice (ignore the Time Out, OEM to ANSI, Options and Password boxes).</p>	
3.	Select Test Connection to check whether XRL can access the data source. If the test fails, click Back to where you selected the 'SYSTEM.DBC' database file to make sure that you have chosen the correct location for the database. Then click Next until you can test the connection again.	
4.	Select Finish to set up another Datalink or Exit to open the Client Setup screen. Then select Save to close the Client Setup screen.	

Connecting to the Operations II DataLink

		✓
1.	Select 'Operations II' from the product list and click Next . Select the Enable box and leave the Database as 'Microsoft FoxPro'. Click Next (ignore the Alias box).	
2.	<p>Find the 'SYSTEM.DBC' database in the Operations 'System' folder. The default location is '\\servername\Operations II\System'.</p> <p>Click Next twice (ignore the Time Out, OEM to ANSI, Options and Password boxes).</p>	
3.	Select Test Connection to check whether XRL can access the data source. If the test fails, click Back to where you selected the 'SYSTEM.DBC' database file to make sure that you have chosen the correct location for the database. Then click Next until you can test the connection again.	
4.	Select Finish to set up another Datalink or Exit to open the Client Setup screen. Then select Save to close the Client Setup screen.	

Connecting to the Pegasus CIS DataLink (Prior to CISv5.00)

		✓
1.	Select 'CIS' from the product list and click Next . Select the Enable box and leave the Database as 'Microsoft Access'. Click Next (ignore the Alias box).	
2.	In the File Name box, select the 'Companies.mdb' CIS datalink file. The default location of the file is: <ul style="list-style-type: none"> • 'C:\ProgramData\Infor Query & Analysis\Settings\LsAlchemy\CIS' • 'C:\Program Files (x86)\Infor\Query and Analysis\Settings\ LsAlchemy\CIS' Click Next twice (ignore the Time Out , OEM to ANSI , User ID and Password boxes).	
3.	Click Install and select the location of the CIS Server. The folder is normally located on the file server in the '\\servername\CIS\' folder. Then select Update Settings and Close . Then close the confirmation message.	
4.	Click Next and select Test Connection to check whether XRL can access the data source. If the test fails, re-check points 1 to 3 and test the connection again.	
5.	Select Finish to set up another Datalink or Exit to open the Client Setup screen. Then select Save to close the Client Setup screen.	

Connecting to the Pegasus CIS DataLink (CISv5.00+)

		✓
1	From within the Client Setup form select 'CIS 5' from the product list and select Wizard and ensuring focus is on CIS 5 click on Next . Select the Enable box and set the Database is "Microsoft SQL".	
2	Ensure the Data Source Name field is updated with the SQL Server where the CIS databases are stored. Ensure an asterix (*) is entered immediately before the SQL Server name i.e. *SERVERNAME.	
3	The Database name must be "PegasusCIS_Configuration".	
4	Click Next twice (ignoring the Time Out and OEM to ANSI boxes).	
5	Enter the User ID and Password of the account created for <u>user</u> access to the databases when installing CIS 5.	
6	The Authentication button should be set to SQL Server.	
7	Click Next and select Test Connection to check whether XRL can access the data source. If the test fails, re-check the above points and test the connection again.	
8	Select Finish to set up another Datalink or Exit to open the Client Setup screen. Then select Save to Close the Client Setup screen.	

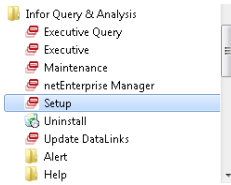
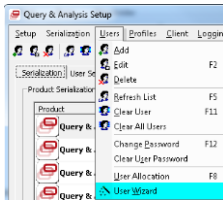
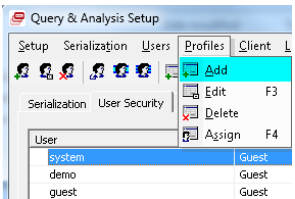
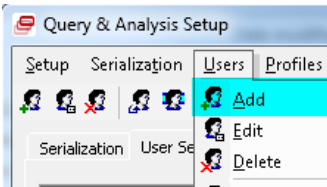


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STEP 3: Creating XRL Users and Profiles

The XRL setup screen is where you create users, user profiles, and remote users. The wizard imports any usernames and user profiles detected in the selected product. A corresponding XRL user and user profile is then created. If no user profiles are found in the data source, the default user profile is used.

Creating XRL Users and Profiles

Steps to create users and user profiles for Opera 3, Opera II and Operations II.		✓
1.	Select Setup from the 'Infor Query & Analysis' program group on the Windows Start menu or the Apps list (type 'vsetup' from the Apps list to open the setup screen).	
2.	Leave the User ID as 'system' and password field blank. Click OK . If required, you can add a password now.	
Complete steps 3 to 5 for Opera 3/Opera II and Operations II		
3.	From the Users menu select User Wizard . Then select either 'Opera 3/Opera II' or 'Operations II' on the Products screen. Ignore the options under Create .	
4.	Select Next and tick the User Security box. Then select Next to the end of the wizard (ignore the boxes on the next screens). All users in Opera 3/Opera II will become XRL users.	
5.	Click Finish to return to the XRL Setup screen. <hr/> XRL users and profiles for Opera 3, Opera II or Operations II are now created in the XRL settings database. To refine user settings (like password requirements), use the Users - Edit menu item.	
Complete steps 6 to 7 for Pegasus CIS		
6.	From the Profiles menu select Add . Enter a code and description under Profile . Then select Save .	
7.	From the Users menu select Add . Enter the username and a password if required. Select the profile created in point 6. Then select Save . <hr/> XRL users and profiles for Pegasus CIS are now created in the XRL settings database. Leave the Query & Analysis Setup screen open.	



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STEP 4: Serialising and Allocating Users to use XRL

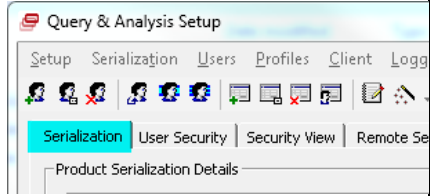
The XRL setup screen is also where serialisation details for all products are entered to activate the product. Enter the details exactly as they appear on your XRL serialisation supplied for the version of XRL.

You can either load the serialization details from the licence file that was sent to you, or you can enter the details yourself.

Loading Serialisation Details from a licence file

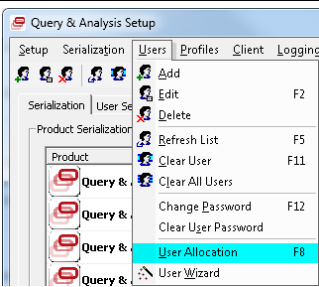
		✓
1.	From the Serialization menu, select Load from file . Locate the file saved on the computer and open it.	
2.	On the Serialization screen, select the Execute button.	
3.	If you are serialising Opera 3/Opera II or Operations II (not necessary for CIS), in the Browse for Folder screen locate the folder indicated on the screen. Then select OK .	

Entering Serialization Details

		✓
1.	Open the Serialization tab on the XRL setup screen.	
2.	Select 'Opera 3/Opera II', 'Operations II' or 'CIS' as appropriate and then select the Serialization button.	
3.	Update the End-User, Licence No., Software Supplier, Expiry Date and Author Product Licence Key boxes.	
4.	<ul style="list-style-type: none"> i. Select 'Concurrent Connections' in the Type box. ii. Enter the number of XRL users in the Number of Users box. iii. If the licence is for a Pegasus partner, tick the Expiry Date checkbox and enter the same expiry date as in step 3. iv. If the licence is for a Pegasus customer, leave the Expiry Date checkbox un-ticked. 	
5.	Enter the Serialisation Code and select Save Changes . If you are serialising Opera 3/Opera II or 'Operations II', in the Browse for Folder screen locate the folder indicated on the screen. Then select OK .	

Allocating Users

Now that the XRL users and profiles have been created, they must be allocated to the products they will use. The number of allowed allocated users depends on the serialisation details. You only need to allocate users to the product that you want to link to XRL.

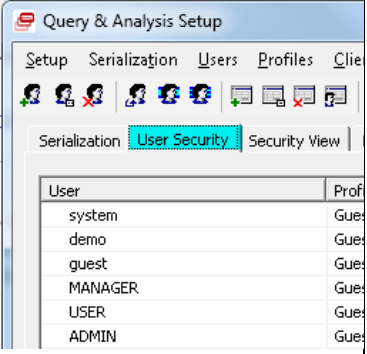
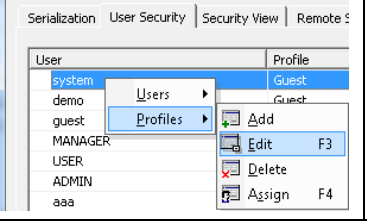
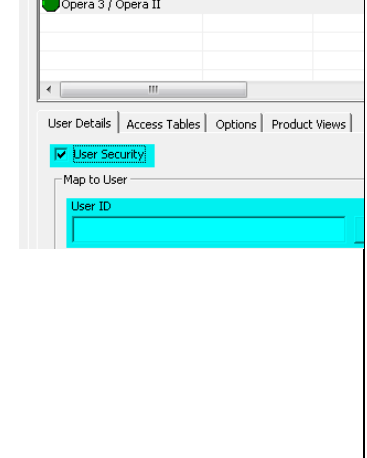
1.	The User Allocation screen is displayed after you close the serialization screen. Select 'Q&A XL' under Products .	 <p>The screenshot shows the 'Query & Analysis Setup' window with the 'Users' tab selected. The 'Product' list on the left includes 'Query & Analysis XL'. The right-hand menu is open, and 'User Allocation' is highlighted in blue. Other options include 'Refresh List', 'Clear User', 'Clear All Users', 'Change Password', and 'Clear User Password'.</p>	✓
2.	Select an unallocated user.		
3.	Select the right arrow button to move the user to the Allocated Users box for all licenced users.		
4.	Select OK . Leave the Query & Analysis Setup screen open.		



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STEP 5: Mapping Users and Setting Security

Once users have been allocated to use the relevant DataLink, it is necessary to map an existing user to an XRL User Profile. This ensures correct access is granted to the relevant tables. Repeat these steps for each relevant user.

1.	<p>On the XRL setup screen, select the Serialisation tab and highlight 'Opera 3/Opera II'. Then select the User Security tab.</p>		✓
2.	<p>Highlight the relevant user, right click and select Edit from the Profiles menu.</p>		
3.	<p>Select the relevant profile and then OK. In the User Profile screen, select 'Opera 3/Opera II', 'Operations II' or 'Pegasus CIS' as necessary. Under User Details:</p> <ol style="list-style-type: none"> 1. Tick the User Security box. 2. In the User ID box select the user to map to XRL and select OK. 3. Click Save to save the profile. <p>When the user is used to log into XRL the correct security settings will be used. Repeat for each user before closing the screen.</p>		

Note: Please refer to the online help for information on configuring XRL users, profiles, and assigning passwords.



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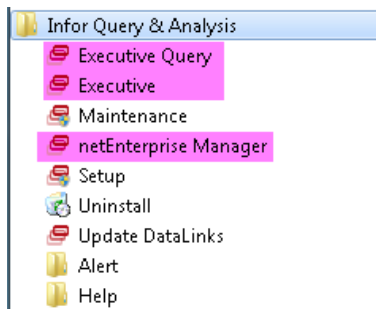
STEP 6: Setting Macro Security and Logging On

The final step is to test that you can log on and check whether XRL can extract data from the product data source.

		✓
1.	Start Microsoft Excel.	
2.	<p>For XRL to operate functions such as Macro Builder and Data Selector, it is necessary to modify Microsoft Excel's security level and settings.</p> <hr/> <p>Note: Modifying security settings will reduce the level of virus protection.</p> <hr/> <ol style="list-style-type: none"> 1. Open the Excel Options screen from the File - Options menu. 2. Select Trust Center from the left pane and then select the Trust Center Settings button to open the Trust Center screen. 3. Select Macro Settings from the left pane and select the Trust access to the VBA project object model box. 4. Click OK twice. 	
3.	<p>Select Infor Q&A on the menu or ribbon bar and then select Logon.</p> <p>If the menu or ribbon bar is not displayed, close Excel and uninstall XRL. Then reinstall Visual Studio Tools for Microsoft Office (VSTO) from http://www.microsoft.com/en-us/download/. Afterwards reinstall XRL and reboot the PC.</p>	
4.	Enter the allocated user and password if one has been set up for the user. Select OK .	
5.	Run a query or report wizard.	

Note - Removing Menu Items for Unused Components:

'Executive Query', 'Executive' and 'netEnterprise Manager' are not used with XRL. It is advisable to remove these items from the Windows **Start** menu or the **Apps** list.





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XRL Additional Client Installations

XRL only requires one XRL database. Once it has been created, when further client installations are to be performed, some installation steps do not need to be repeated.

For additional client installations only perform the following steps:

- [Step 1](#): Check Software Requirements and Remove Existing Installation
- [Step 2](#): Installing XRL and Connecting databases
- [Step 6](#): Setting Macro Security and Logging On.



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Installing XRL on a Terminal Server or Citrix Server

XRL is supported on Windows Terminal Services and Citrix Metaframe. Windows User Account Control (UAC) should be disabled on a Citrix server to access the Setup application.

XRL cannot be installed over a network from a mapped drive on a remote connection to a Terminal Services or Citrix server. If you wish to install XRL via a remote connection to a Terminal Services or Citrix server, you can use a Universal Naming Convention (UNC) path (for example: '\\servername\program files(x86)\Infor'), copy the files to the computer's local drive and then run the install program manually.

To Install XRL on Citrix or Windows Terminal Server software

		✓
1.	Log on locally to the server, ensuring the user used has administrator rights.	
2.	Log off any users currently logged on.	
3.	Use Add or Remove Programs utility to install XRL. Alternatively, at a command prompt type <code>C:\change user /install</code> before running <code>welcome.exe</code> . Once XRL has been installed, type <code>C:\change user /execute</code> .	

To Activate Application User Profiles after the Installation

In a Citrix environment, activate User Profiles after the installation is complete. XRL supports Windows User Profiles. Each user has their own settings, including DataLinks and DataLink connection details. These settings are not visible to other users who may log on to the same computer. Users that do not possess a Query & Analysis user profile and attempt to access a Query & Analysis client application will be prompted for their connection and configuration details.

After installing XRL, do the following:

		✓
1.	<p>To open the setup screen, either:</p> <ul style="list-style-type: none"> - From the Windows Start menu, navigate to the Infor Query & Analysis menu item, and select Maintenance. - From the Apps list type 'Lsmaint' and select Maintenance. 	
2.	On the Maintenance screen, select the About tab.	
3.	Select the Application User Profiles box. Then close the screen.	



Windows Caching

Windows Vista and later automatically caches the 'LsAgEg10.mdb' settings file. Any connection changes made in **Client Setup** may not be reflected. To disable caching, change the program compatibility mode to Windows XP for all XRL applications including Maintenance ('LsMaint.exe') and Update DataLinks ('LsUpdate.exe').

Anti-virus Exclusions

Anti-virus software can sometimes cause XRL to fail. To prevent this, you may want to prevent the anti-virus software from checking the XRL folders. The default locations are *C:\ProgramData\Infor Query & Analysis\ (data)* and *C:\Program Files (x86)\Infor\ (programs)*.

Existing XRL Workbooks

When opening an older version XRL workbook, Excel will attempt to locate the XRL add-in in the program folder. By default, this was C:\Program Files\XRL. The XRL add-in resides in the folder C:\Program Files\Infor\ Query & Analysis. It is necessary to update all XRL query definition formulae to link to the new XL add-in location.

To edit links in a workbook:

1. Start Microsoft Excel and open the XRL workbook.
2. Click the **Links** button on the **Data** tab and select the source from the list.
3. Click the **Change Source** button and select the 'LsAgXLB.xla' file in the XRL program folder.
4. Repeat for each XRL formula.

Note: Alternatives to this you could either install XRL to the original XRL folder location (for example 'C:\Program Files\XRL') or re-run the report providing the add-in has been loaded and you have logged in to XRL.

Microsoft Excel and 3rd Party Add-ins

XRL may impact on other third-party add-ins loaded at the same time by Microsoft Excel. Further, with Excel closed, double-clicking an associated Excel workbook file in Explorer starts Excel and XRL, but fails to open the workbook in the application. This is a known limitation with Microsoft Excel when used in conjunction with third party add-ins.

If you experience either of these issues, try using only one third party add-in at a time.

XRL Add-in & Visual Studio Tools for Microsoft Office (VSTO)

XRL is an Excel add-in and is represented as a menu item on the Excel menu or ribbon bar.

VSTO is a requirement because the Microsoft Excel add-in for XRL is now a 'COM' add-in rather than a Visual Basic for Applications (VBA) add-in. VSTO is a requirement for COM add-ins.

Without VSTO the XRL add-in (shown as 'Infor Q & A') will not be displayed.

If the menu or ribbon bar is not displayed, close Excel and uninstall XRL. Then reinstall Visual Studio Tools for Microsoft Office (VSTO) from <http://www.microsoft.com/en-us/download/>. Afterwards reinstall XRL and reboot the PC.

End of Guide