



Pegasus XRL
for Opera 3 SQL Server Edition
Installation & Implementation guide

Pegasus XRL for Server Edition (1.77.00+)
Powered by Infor Query & Analysis (10.1.10)
Installation & Implementation guide
Version 1.0
Mar 2024

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Manual published by:

Pegasus Software
Orion House
Orion Way
Kettering
Northamptonshire
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www.pegasus.co.uk



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Introduction

Welcome to the Pegasus XRL Installation Guide for Opera 3 SQL SE. Pegasus XRL is powered by Infor Query & Analysis.

The guide provides detailed instructions for installing Pegasus XRL.

About Pegasus XRL for Opera 3 SQL SE

Pegasus XRL links financial information in Opera 3 SQL SE with Microsoft Excel, allowing Opera 3 SQL SE data to be viewed and manipulated within Microsoft Excel using features installed with Pegasus XRL.

Summary and detailed reports can be designed and styled to exact requirements using the Report Designer. Summary or detailed reports are created using the XRL Report Wizard.

Pegasus XRL also provides the ability to drilldown to the underlying transactions and link cells dynamically to Opera 3, ensuring the latest information is displayed.

Cube Analysis enables you to analyse data by viewing it from various perspectives using row (x-axis), column (y-axis), and slicer (z-axis).

Excel workbooks can be automated using macros created using the Pegasus XRL Macro Builder, charted and distributed as PDF documents.

Access to data in Microsoft Excel is managed by the Server Administration & Monitoring utility working together with the Opera 3 SE service. Connections from Pegasus XRL to Microsoft SQL Server use Windows Authentication so a Windows user name needs to be recorded for each Pegasus XRL user.

Pegasus XRL is displayed as 'Infor Q & A' in Microsoft Excel.

Audience

To install Pegasus XRL you need to be trained and accredited for Opera 3 SQL SE and Pegasus XRL, and also have a working knowledge of Microsoft Excel.

Installation and implementation stages

Links to download the latest version of Pegasus XRL are included in the release communications to Pegasus partners.

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Stage 1: Checking the hardware and software prerequisites

In this stage, check the necessary prerequisites.

Hardware and software requirements

#	Requirements for Pegasus XRL and supported platforms	✓
1.	Opera 3 SQL SE (2.61.00+)	
2.	1GB RAM in addition to memory needed for Microsoft Windows and Office	
3.	At least 100 MB free disk space	
4.	Microsoft Windows 11 (version 21H2+22H2+23H2) Microsoft Windows 10 (version 21H2+22H2) Microsoft Windows Server 2022, 2019, 2016 (Now in extended support) Microsoft Office 2021, 2019, 2016, (<i>Serialised/activated before installing XRL</i>)	
5.	Microsoft Edge, Internet Explorer, Google Chrome	
6.	One of Microsoft .NET Framework 2.0, 3.0 or 3.5, <u>and</u> 4.7.2	
7.	MDAC 2.8 or later	
8.	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 Center (www.microsoft.com/en-us/download/). Microsoft Excel add-in for XRL is a 'COM' add-in. VSTO is a requirement for COM add-ins. Reboot the PC afterwards.	

Next stage

After completing this stage, follow [stage 2](#) to create a Windows domain group and allocate users and reporting roles.

Stage 2: Creating a Windows domain group and allocating users and reporting roles

Before installing and configuring Pegasus XRL, pre-installation tasks need to be completed in Windows, SQL Server and Opera 3 SQL SE. The actual steps will depend on the Windows operating system and SQL Server edition being used.

If the installation of Pegasus XRL will be used for demonstrations on a single PC, you only need to complete steps D and E before moving onto the next stage.

Step A: Create a Windows domain group and add users to the group

Create a new Windows domain group for Pegasus XRL reporting and add the relevant Windows users to the group.

This is the method by which the permissions to the Opera 3 SQL SE system and company databases in Microsoft SQL Server is controlled. The domain group restricts the list of users to only those who will need to use Pegasus XRL.

#	To create a Windows domain group	✓
1.	Create a new Windows domain group called 'XRLReporting'.	
2.	Add the Windows users for Pegasus XRL to the new group.	

Step B: Add the Windows domain group to SQL Server as a login

Add the Windows domain group as a SQL Server login so that the users in the new domain group can connect to SQL Server from Pegasus XRL.

#	To add the Windows domain group to SQL Server as a login	✓
1.	Using SQL Server Management Studio, add the 'XRLReporting' domain group to SQL Server under Security - Logins .	
2.	Leave the server role as 'public' for this group. Do not assign other server roles.	

After adding the new Windows domain group to SQL Server as a login the users in the new group will be able to connect to SQL Server but at this point they will not have access to any Opera 3 SQL SE databases or tables.

Step C: Record the Windows domain and group in the Server Administration & Monitoring application

In the Server Administration & Monitoring application, record the Windows domain name and domain group name.

#	To record the domain group	✓
1.	Log in to the Opera 3 SQL SE Server Administration & Monitoring application as 'admin'. You need to set up your password when you log in for the first time.	
2.	On the Email settings view, enter your mail server settings.	
3.	Open the General Settings view and record the Windows domain name and domain group name.	
4.	Stay in the Server Administration & Monitoring application.	

Step D: Allocate reporting roles to Pegasus XRL users in the Server Administration & Monitoring application

In the Server Administration & Monitoring application, allocate reporting roles to the Pegasus XRL users.

This is the method by which access to Opera 3 SQL SE databases and tables in Pegasus XRL is managed for the roles selected. They are based around data processing in the Opera 3 SQL SE applications, for example a 'Cashbook Processor', a 'Purchase Ledger Processor' and so on.

This will add each user to the relevant company and system databases in SQL Server and assign database roles.

#	To allocate reporting roles	✓
1.	<p>Assign reporting roles using either the Roles view or the Users view. Both views create membership of roles.</p> <ul style="list-style-type: none">• Use the Roles view to apply one reporting role to multiple users.• Use the Users view to apply multiple reporting roles to a selected user. <p>The 'System Admin' role has access to all the tables.</p>	
2.	Close the Server Administration & Monitoring application.	

Step E: Record Windows user names in Opera 3 SQL SE

Windows user names must be recorded for each Pegasus XRL user on their **User Profile** record in Opera 3 SQL SE. Only users with their Windows user name recorded will be able to extract data into Pegasus XRL.

#	To record Windows user names	✓
1.	Log in to Opera 3 SQL SE as 'ADMIN'.	
2.	Open the User Profiles form on the System - Maintenance menu.	
3.	For each user who will use Pegasus XRL, record their Windows user name on the General tab.	
4.	Close Opera 3 SQL SE.	

Next stage

After completing this stage, if Pegasus XRL is being installed for the first time follow [stage 4](#) next. For upgrades from earlier versions of Pegasus XRL, follow [stage 3](#) to remove the existing installation before installing the latest version.

Stage 3: Removing the existing Pegasus XRL installation

In this stage, you need to remove any existing installation of Pegasus XRL. Previous releases must be uninstalled before installing the latest version. Ignore this step if Pegasus XRL is being installed for the first time.

Prerequisites

- All actions for [stage 2](#) must be completed.

Removing the installation

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

#	To remove the existing XRL Installation	✓
1.	Close all open applications	
2.	Click Uninstall in the 'Infor Query & Analysis' program group on the Windows Start menu. Select the 'Run As Administrator' right-click option to run the Uninstall shortcut.	
3.	Click the Next button to proceed.	
4.	Select the Remove button and select Finish to close the wizard.	

Next stage

After completing this stage, follow [stage 4](#) to install Pegasus XRL and configure the DataLink.

Stage 4: Installing Pegasus XRL and configuring the DataLink

In this stage, you install Pegasus XRL, connect to the Pegasus XRL database and configure the Opera 3 SQL SE *DataLink*. A 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.

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.

Pegasus XRL must be installed on each computer where it is used.

Prerequisites

All actions up to [stage 3](#) must be completed.

Installing Pegasus XRL

Follow these instructions to install Pegasus XRL.

#	To install Pegasus XRL	✓
1.	Run the Pegasus XRL setup program to open the installation screen.	
2.	On the Pegasus XRL installation screen, open the Readme to see the details of the release. Then select Install XRL to start the wizard.	
3.	On the Welcome 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 .	

Configuring the DataLink

Follow these steps to set up Pegasus XRL and the *DataLink* for Opera 3 SQL SE using the Connection Wizard.

Connecting XRL to its database

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

#	To connect to the Pegasus XRL database	✓
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 the Opera 3 SQL SE DataLink.	

Sharing the 'LsDatabase.mdb' database

The 'LsDatabase.mdb' Microsoft Access database is installed locally in the 'Settings' folder (see step 3 above).

If multiple users will be using Pegasus XRL the 'LsDatabase.mdb' Microsoft Access database file should be moved from the local program data or program files folder to a shared network drive. All Pegasus XRL clients should then point to this database in a central location.

See [Appendix A](#) - Additional client Installations.

Connecting to the Opera 3 SQL SE DataLink

#	To connect to the Opera 3 SQL SE DataLink	✓
1.	Select 'Opera 3 SQL SE' from the product list, and click Next . Leave the Enable box selected and leave the Database as 'Microsoft SQL'. Click Next (ignore the Alias box).	
2.	In the Data Source Name field, enter an asterisk (*) followed by the name of the server. For example, if the name of the server is 'PegasusServer', enter '*PegasusServer'(without the quotes).	
3.	In the Database field, enter 'Opera3SESystem' (without the quotes).	
4.	Click Next (ignore the Time Out and OEM to ANSI boxes).	
5.	Click Next (ignore the User ID and Password boxes). Leave the Authentication as 'Windows'.	
6.	Select Test Connection to check whether Pegasus XRL can access the data source. If the test fails, click Back to where you entered the data source name to make sure that you have entered it correctly. Then click Next until you can test the connection again.	

Next Stage

After completing this stage, follow [stage 5](#) to create Pegasus XRL users and profiles.

Stage 5: Creating users and user profiles

In this stage, you create users and user profiles.

The wizard imports any user names and user profiles detected in the selected product. A corresponding Pegasus XRL user and user profile is then created. If no user profiles are found in the data source, the default user profile is used.

Prerequisites

- All actions up to [stage 4](#) must be completed.

Actions

Creating XRL users and user profiles.

#	To create users and user profiles for Opera 3 SQL SE	✓
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.	
3.	On the Query & Analysis Setup screen, from the Users menu select User Wizard . Then select 'Opera 3 SQL SE' 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 SQL SE will become XRL users.	
5.	Click Finish to return to the Query & Analysis Setup screen. Pegasus XRL users and profiles for Opera 3 SQL SE are now created in the XRL settings database. To refine user settings (like password requirements), use Edit on the Users menu.	

Next Stage

After completing this stage, follow [stage 6](#) to create serialize Pegasus XRL and allocate users.

Stage 6: Serialising Pegasus XRL and allocating users

In this stage, you must serialise Pegasus XRL to activate the product and allocate Opera 3 SQL SE users to use Pegasus XRL.

Check the serialisation email sent by Pegasus. This email includes the information you need to activate Pegasus XRL.

The XRL setup screen is also where serialisation details are entered. 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 manually.

Prerequisites

- All actions up to [stage 5](#) must be completed.

Actions - Serialising Pegasus XRL

Loading serialisation details from a licence file.

#	To load 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.	In the Browse for Folder screen, locate the folder indicated on the screen. Then select OK .	

Or entering serialization details manually.

#	To enter serialization details	✓
1.	Open the Serialization tab on the Query & Analysis Setup screen.	
2.	Select 'Opera 3 SQL SE' from the list and then click the Serialization button.	
3.	Update the End-User , Licence No. , Software Supplier , Expiry Date and Author Product Licence Key boxes.	
4.	i. Select 'Concurrent Connections' in the Type box.	

	<ul style="list-style-type: none"> 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 . In the Browse for Folder screen locate the folder indicated on the screen. Then select OK .	

Actions - 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.

#	To allocate users	✓
1.	The User Allocation screen is displayed after you close the serialization screen. Select 'Q&A XL' under Products .	
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.	

Next Stage

After completing this stage, follow [stage 7](#) to map users and set security.

Stage 7: Mapping users and setting security

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

Prerequisites

- All actions up to [stage 6](#) must be completed.

Actions

#	To map users and set security	✓
1.	On the Query & Analysis Setup screen, select the Serialisation tab and highlight 'Opera 3 SQL SE'. Then select the User Security tab.	
2.	Highlight the relevant user, right click and select Edit from the Profiles menu.	
3.	Select the relevant profile and then OK . In the User Profile screen, select 'Opera 3 SQL SE'. Under User Details : i. Tick the User Security box. ii. In the User ID box select the user to map to XRL and select OK . iii. Click Save to save the profile. When the user is used to log into XRL the correct security settings will be used. Repeat for each user before closing the screen.	

Next Stage

After completing this stage, follow [stage 8](#) to set macro security and log on to Pegasus XRL.

Stage 8: Setting macro security and logging on

The final step is to test that you can log on and check whether Pegasus XRL can extract data from the product data source. For Pegasus XRL to operate functions such as Macro Builder and Data Selector, it is necessary to modify Microsoft Excel's security level and settings. Modifying security settings will reduce the level of virus protection.

Prerequisites

- All actions up to [stage 7](#) must be completed.

Actions

#	To map users and set security	✓
1.	Start Microsoft Excel.	
2.	<ol style="list-style-type: none">Open the Microsoft Excel Options screen from the File - Options menu.Select Trust Center from the left pane and then select the Trust Center Settings button to open the Trust Center screen.Select Macro Settings from the left pane and select the Trust access to the VBA project object model box.Click OK twice.	
3.	Select 'Infor Q&A' on the menu or ribbon bar and then select Logon .	
	<p>If the menu or ribbon bar is not displayed, close Microsoft Excel and uninstall Pegasus XRL. Then reinstall Visual Studio Tools for Microsoft Office (VSTO) from www.microsoft.com/en-us/download/. Afterwards reinstall Pegasus 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.	

Next Stage

You are now ready to use Pegasus XRL.

To install additional client installations, see [Appendix A](#).

For troubleshooting tips, see [Appendix B](#).

Appendix A: 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.

To set up additional client installations ✓

1. [Stage 1](#): Checking hardware and software prerequisites.
2. [Stage 4](#): Installing Pegasus XRL and configuring the DataLink.
3. [Stage 7](#): Setting macro security and logging on.

Appendix B: Troubleshooting

Anti-virus Exclusions

Anti-virus software can sometimes cause Pegasus 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).

Microsoft Excel and 3rd Party Add-ins

Pegasus 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 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.

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

Pegasus 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 a 'COM' add-in. VSTO is a requirement for COM add-ins. Without it the Pegasus 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 www.microsoft.com/en-us/download/. Afterwards reinstall Pegasus XRL and reboot the PC.