Sage 300 Construction and Real Estate

Sage Construction Central Setup Guide (Version 18.2)

Certified course curriculum

Important Notice

09/2018

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Sage Construction Central

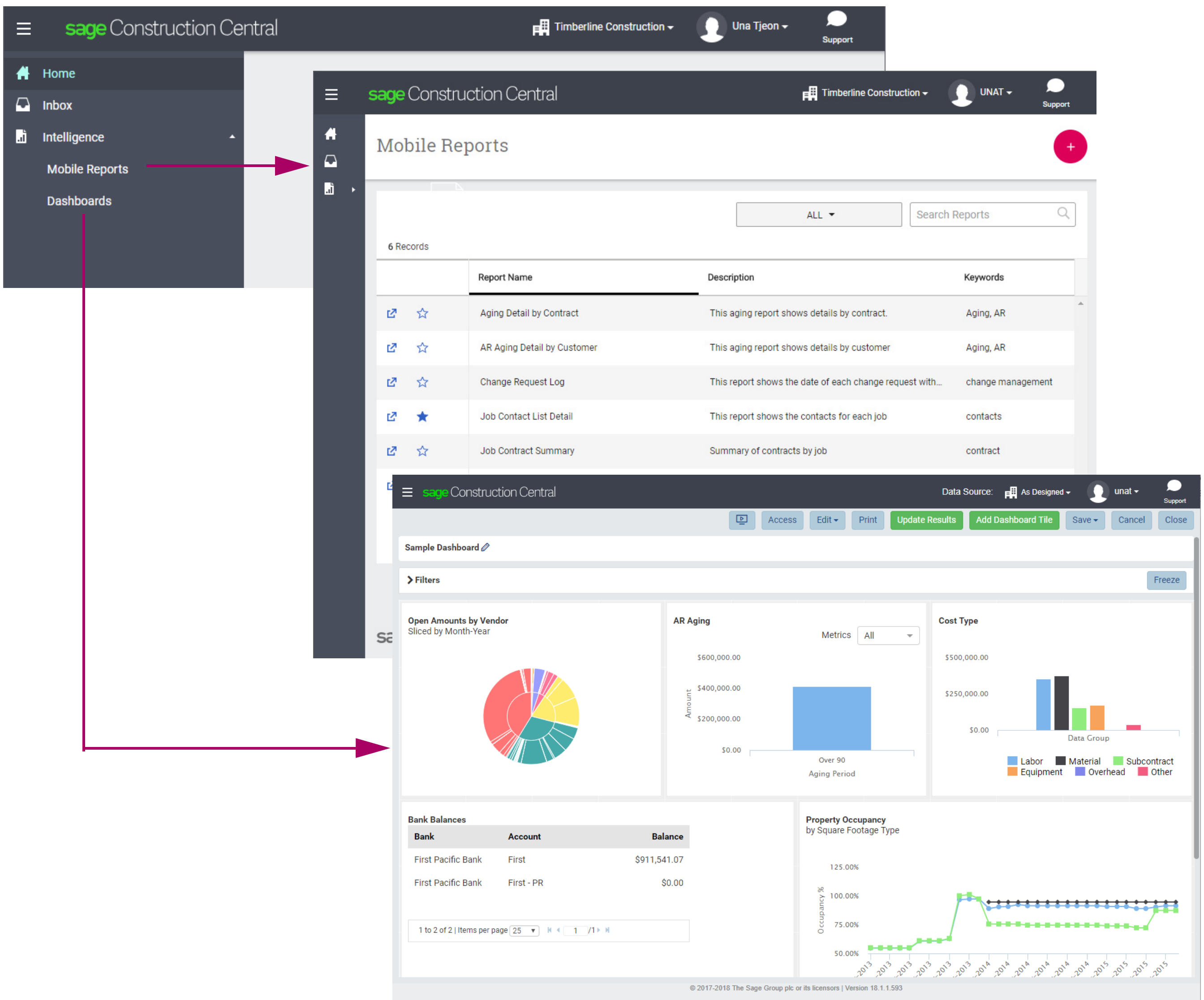
Take your business to the cloud with Sage Construction Central. You can now access your Sage 300 Construction and Real Estate data from anywhere, using any mobile device. Sage Construction Central is the website for your Sage Mobile Intelligence solutions: Mobile Reports and Mobile Dashboards.

Mobile Reports

You don't have to be confined to your desk to access the information you need to run your business. Use Mobile Reports to generate and view reports designed in SAP Crystal Reports.

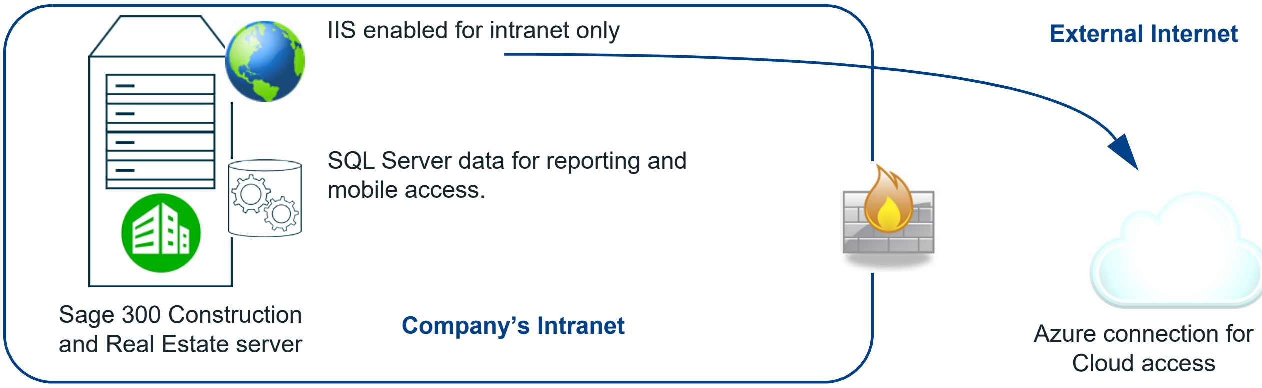
Mobile Dashboards (Viewer or Designer)

Dashboards give you all the information you need at a glance—powerful data visualizations with information from different data sources in one location. You can use the report designer that comes with this mobile application to create reports for your dashboards or use the ones that Sage provides.



Sage SQL Replicator

Sage SQL Replicator lays the foundation for Sage Construction Central. It copies your Sage 300 Construction and Real Estate data from a Pervasive data management system into SQL Server, and configures IIS (Internet Information Services) on your server to host Sage Construction Central.



The replication process works in the background, which means you can work in the Sage on-premises and mobile solutions without interruption. You can choose to use continuous synchronization and always get up-to-the-minute information, or set up the replication to occur based on a schedule.

Requirements

To begin using your Sage Mobile solutions, you must:

- Upgrade to Sage 300 Construction and Real Estate version 18.1 or higher.
- Acquire the appropriate software licenses and allocate them to your users.
- Use Sage SQL Replicator to copy your Sage 300 Construction and Real Estate company data from the Pervasive data management system into a SQL Server database.
- Deploy your company's Sage Construction Central website through Microsoft Azure Cloud Services.

NOTE: To acquire software licenses, contact your Business Parter or Sage Customer account manager at (800) 858-7095 or CRESales@sage.com. Your Sage Mobile Intelligence solution comes with license of Microsoft Azure Active Directory Basic account.

About this guide

This reference guide explains the configuration needed to implement your Sage Construction Central website and Mobile applications. Topics include:

- How to allocate Mobile software licenses to users.
- The required setup in Sage 300 Construction and Real Estate Security Administration.
- How to publish your Sage Construction Central website through Microsoft Azure Cloud Services.
- Getting started in your Mobile applications.

NOTE: This guide does not include instructions for replicating your Pervasive data into SQL Server, a required step for Sage Construction Central. To learn how to set up, configure, and use Sage SQL Replicator, download the Sage SQL Replicator Setup Guide from the Product Documents web page.

Set up Sage Construction Central users

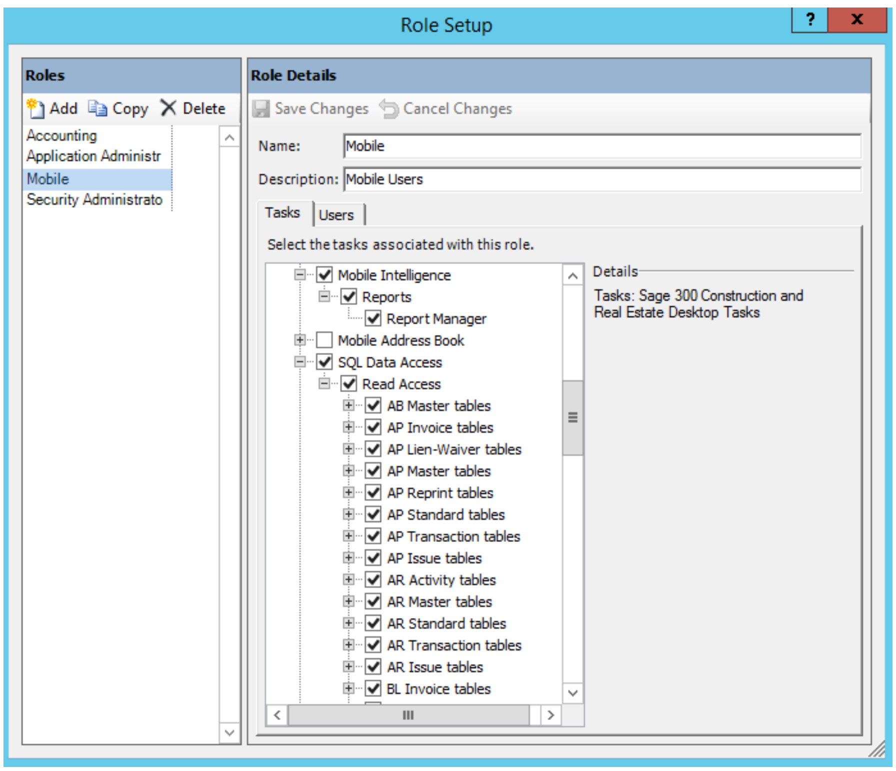
Software licenses for Mobile features are user-specific. You use Sage 300 Construction and Real Estate Security Administration to set up users and grant permissions, and then use License Administration to allocate licenses to your users.

Sage 300 Construction and Real Estate Security Administration

FOR MORE INFORMATION: To learn how to use Security Administration, refer to the User's Guide posted on the Product Documents website.

Roles

On existing roles or new roles, define which Mobile tasks are allowed.

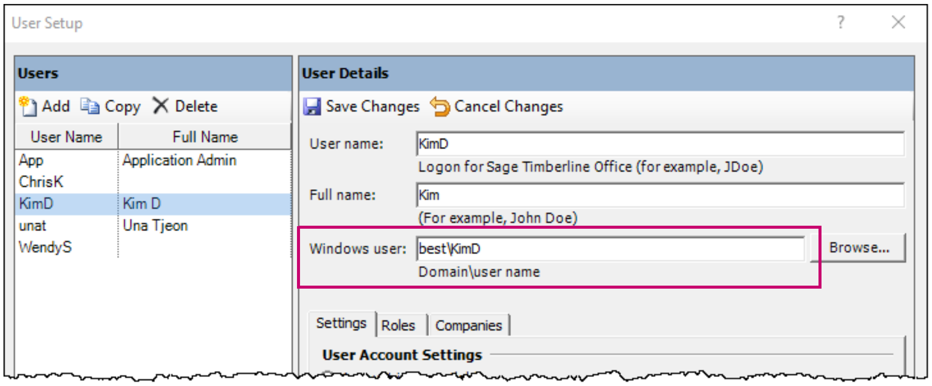


When selecting Mobile task(s), consider the following:

- **SQL Data Access** is required for Mobile Reports and Mobile Dashboards.
- The tasks under **Mobile Intelligence** are associated with Mobile Reports. **Reports** lets you generate and view reports. **Report Manager** lets you add reports and make them available to users.

Users

Set up users and associate them with roles that have permissions to Mobile tasks. You must also enter the Windows name for each user because Sage Construction Central requires you to log on with Windows credentials.



Security by Company and Records

In addition to task security, you can limit the companies, files, and records (specific prefixes, bank accounts, or jobs) that a user can access. This type of security is enforced when accessing the data in Sage Construction Central.

WARNING: During the initial replication, Sage SQL Replicator copies all the security settings from Sage 300 Construction and Real Estate into SQL Server. If you change any security settings after the initial replication is completed, you must synchronize the security between the Pervasive and SQL Server databases—in **System Administrator** > **Replicator Configuration** tab, click **Sync Security**.

License Administration

In order to activate licenses, your server must have access to the Internet. If your organization's policy requires servers to be blocked from the Internet, you can disconnect it immediately after you activate your license.

License Administration connects to the Sage licensing system at least once a year to verify that licenses are still active. If your server is generally not connected to the Internet, your licenses could expire after one year. To re-activate licenses, contact Support through one of the means described in the Knowledgebase article **17540**.

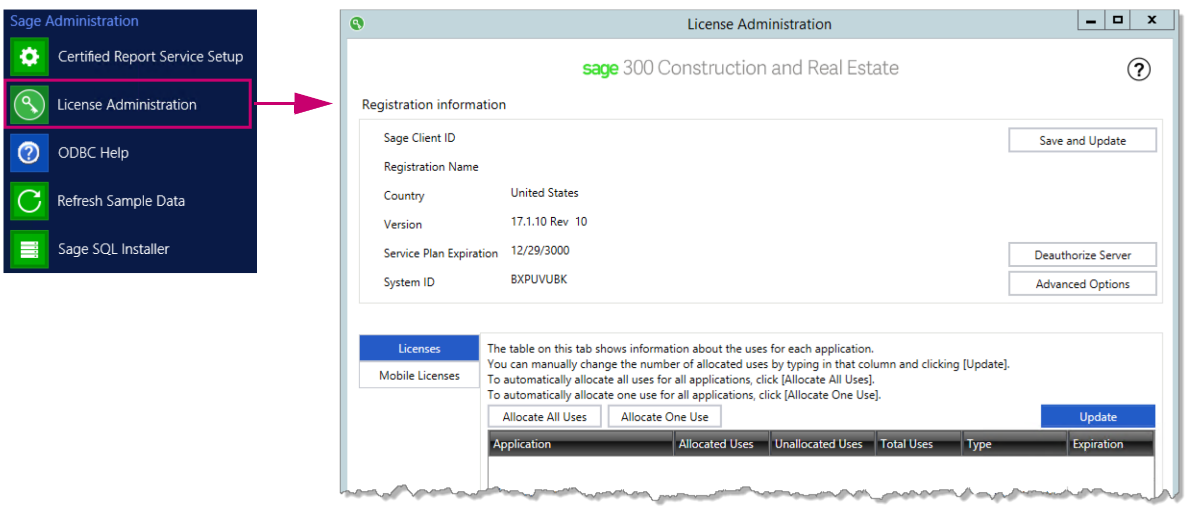
Please be aware that:

- For Mobile Dashboards, your organization needs to have at least one license of Mobile Dashboard Designer.
- Mobile licenses are assigned to specific Sage 300 Construction and Real Estate user IDs, each mapped to a Windows ID.

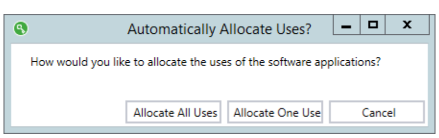
NOTE: To acquire software licenses, contact your Business Parter or Sage Customer account manager at (800) 858-7095 or CRESales@sage.com.

Activate and assign mobile licenses

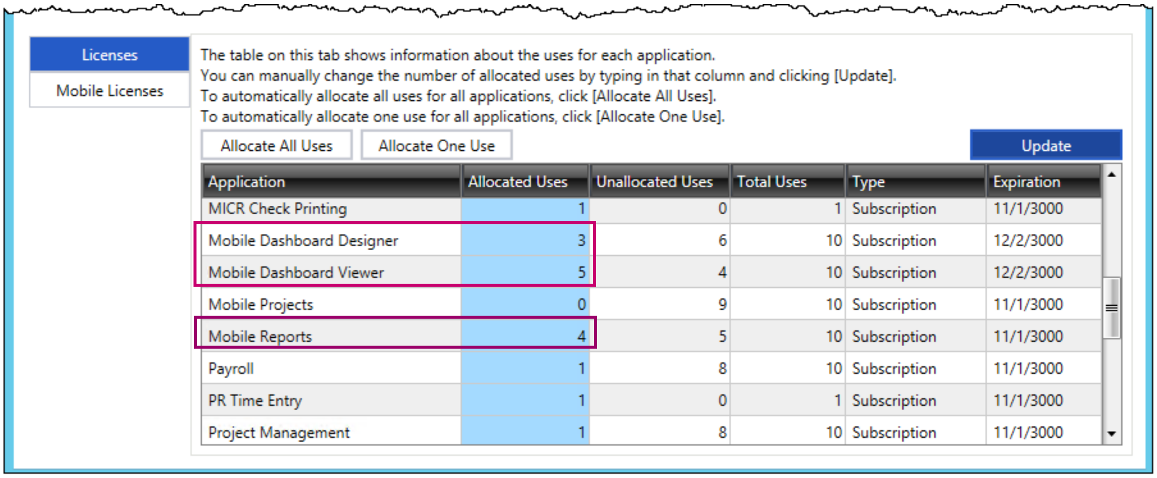
1. Log on to your accounting server as a local administrator.
2. On the Windows Home page, in the **Sage Administration** group, click **License Administration**. In the **Sage 300 Construction and Real Estate - Log On** window, enter the credentials of an Application Administrator.
3. Enter your organization's information in the **Sage Client ID** and **Registration Name** boxes.



4. Click **Save and Update**. Allocate uses based on your organization's needs.

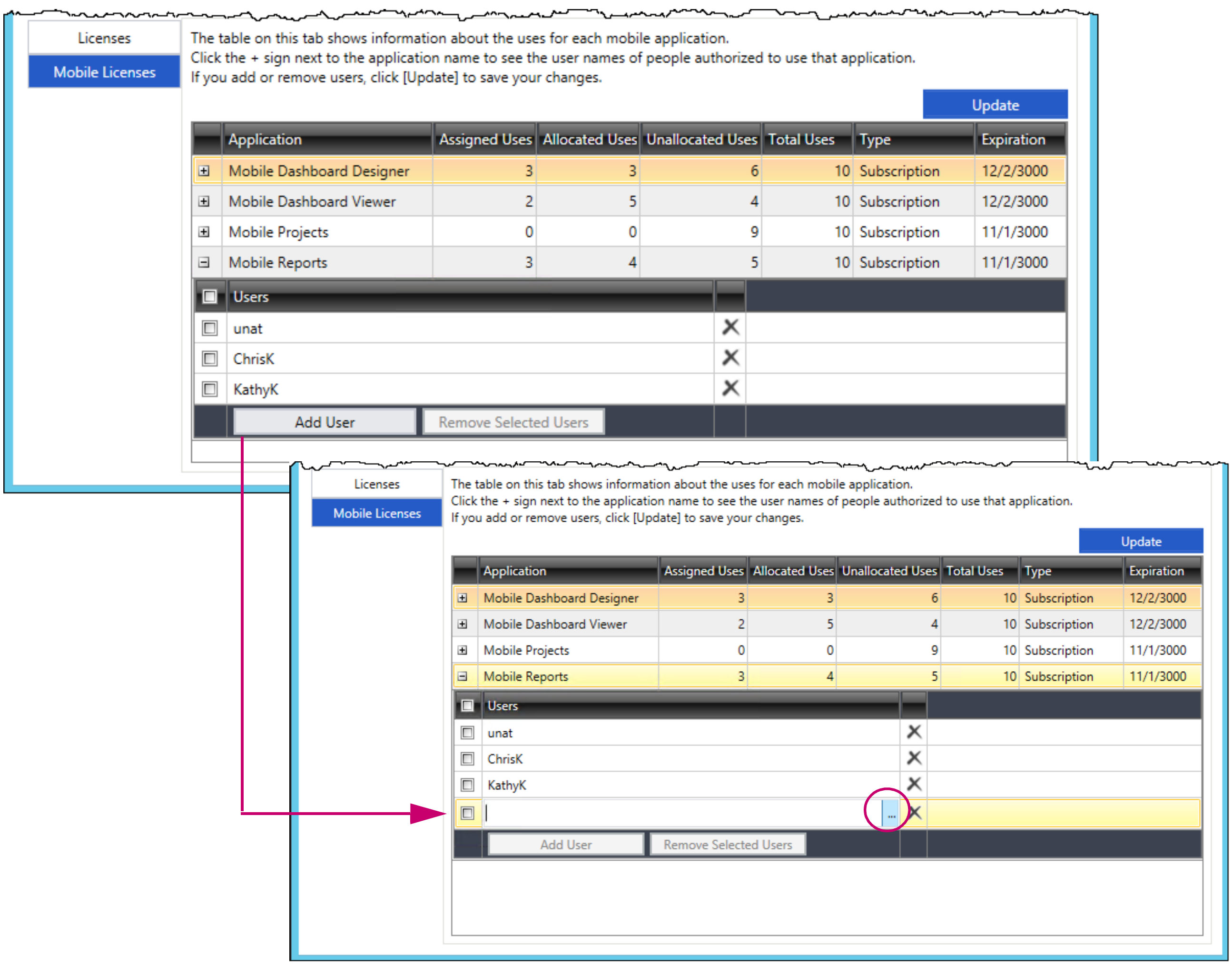


5. On the **Licenses** tab, scroll down the list to locate the Mobile applications. If needed, you can change the use allocation by changing the number in the **Allocated Uses** column.



6. Click **Mobile Licenses** to assign licenses to specific users.

7. Click the plus symbol next to a Mobile application to expand it, and then click **Add User**. Enter the Sage 300 Construction and Real Estate user name or click the ellipsis to select a user from the list.



8. Click **Update** to save your changes.

Deploy your Sage Construction Central website

To access your Sage 300 Construction and Real Estate information from the Cloud, the data must be replicated into SQL Server through Sage SQL Replicator. If you have not already replicated your data, use the instructions from the document called Sage SQL Replicator Setup Guide posted on the Product Documents web page.

Once your data has been replicated, you can follow the instructions in this chapter to test the Sage Construction Central website, and then deploy the website through Microsoft Azure Cloud Serves.

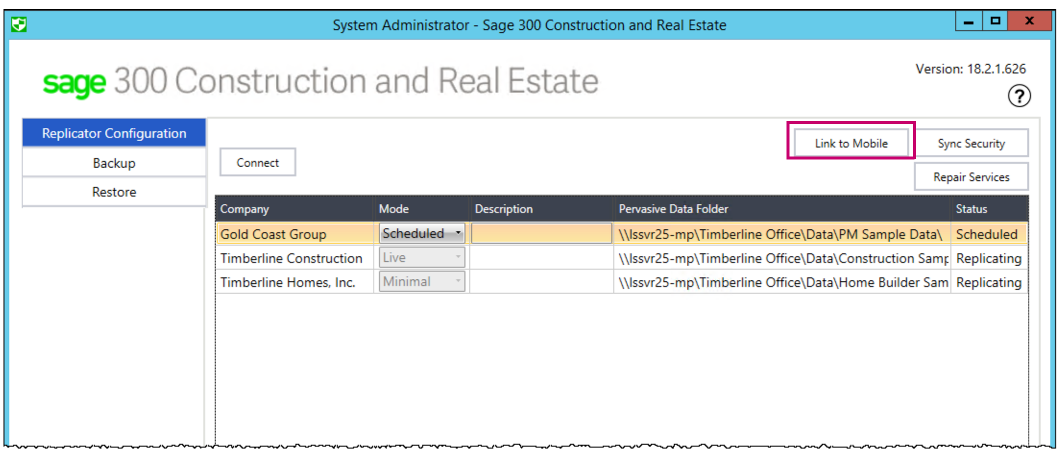
WARNING: To use the Sage Construction Central site securely, you must set up the Azure Active Directory site as explained starting on page 13.

Link to Mobile

1. Follow the instructions in the Sage SQL Replicator Setup Guide to replicate your data.

WARNING: For continuous synchronization between the Pervasive and SQL Server databases, clear the **On-Demand** check box for the company in **System Administrator** > **Replication Configuration** tab. This ensures that information is continuously updated in your on-premises Sage applications and in Sage Construction Central.

2. In System Administrator, click **Link to Mobile** if you have not already done so. This links Sage Construction Central to your SQL Server instance.



NOTE: The Sage Construction Central web site is available as soon as the initial replication is done. An error message appears if you try to access the site before the replication is finished.

Test your Sage Construction Central website

NOTES:

- Before you can log on to Sage Construction Central, your company's data must have finished replicating.
- The Sage Construction Central site uses port number 8080 by default.
- By default, Windows servers have Enhanced Security enabled for Internet Explorer. If you want to use Internet Explorer to verify the Sage Construction Central website from the accounting server, you'll need to disable it. See the following link for more information: **https://prajwaldesai.com/disable-ie-enhanced-security-in-windows-server-2012-r2/**

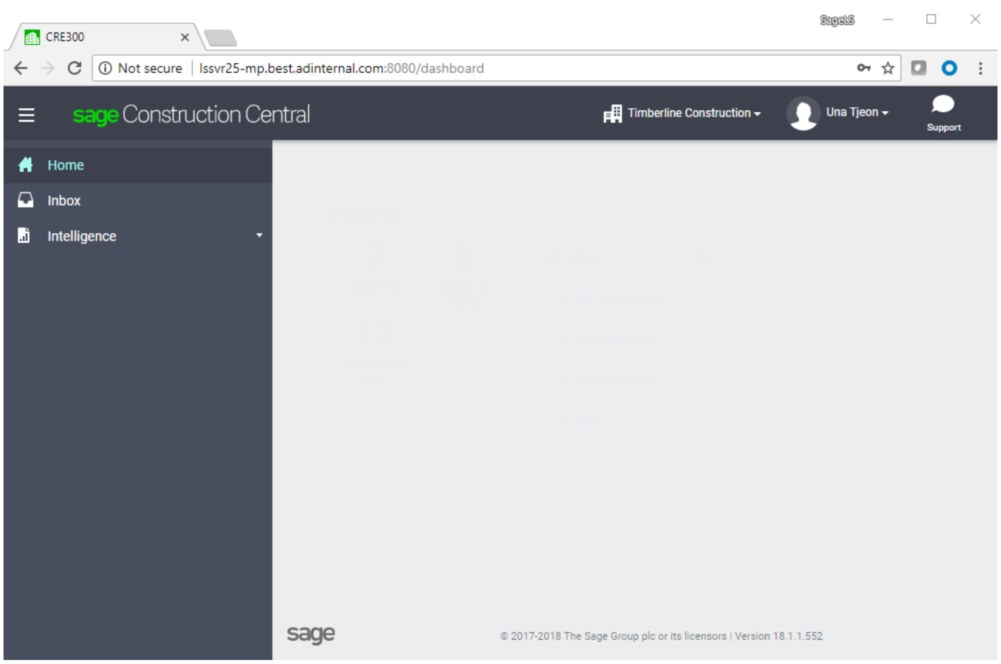
Test the Sage Construction Central website by browsing to it from inside your network to verify your data. The URL for this site requires you to know the fully qualified domain name for your server. The URL follows this pattern:

http://*FullServerName*:8080.

For example, if your server is sageserver.example.com, the URL is http://sageserver.example.com:8080.

Open a browser and go to your Sage Construction Central site. You'll be required to enter the Windows credentials for one of the users you added in Sage 300 Construction and Real Estate Security Administration. See "Users" on page 8.

WARNING: Use this internal URL (http://) for testing only. To use the Sage Construction Central site securely, you must set up the Azure Active Directory site as explained starting on page 13.

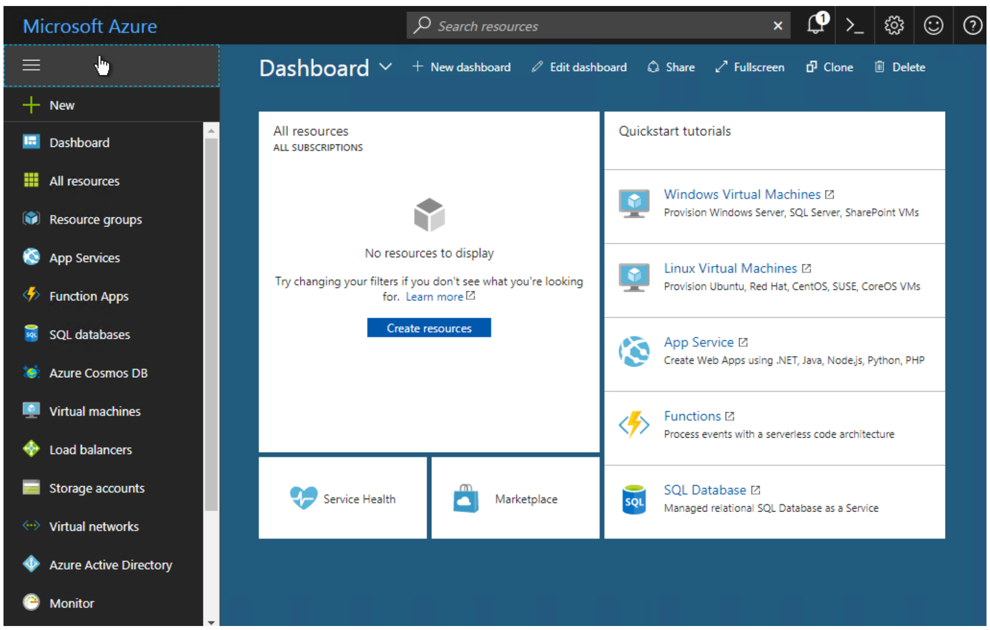


Publish your Mobile website through Microsoft Azure

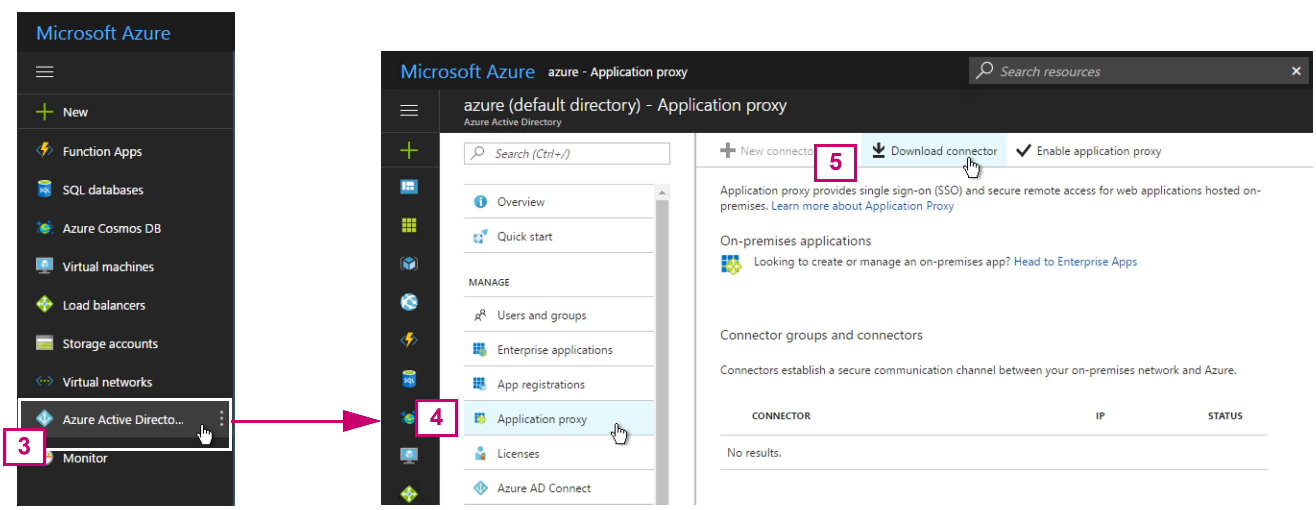
For individuals to access Sage Construction Central through a secure connection, you must configure a Microsoft Azure application to connect to your accounting server. To do this, you need an Azure Active Directory Basic account, which is provisioned for you automatically when you purchase a subscription to any Mobile feature.

NOTE: Azure Active Directory Basic accounts are provisioned based on your country: the United States, Canada, or Australia.

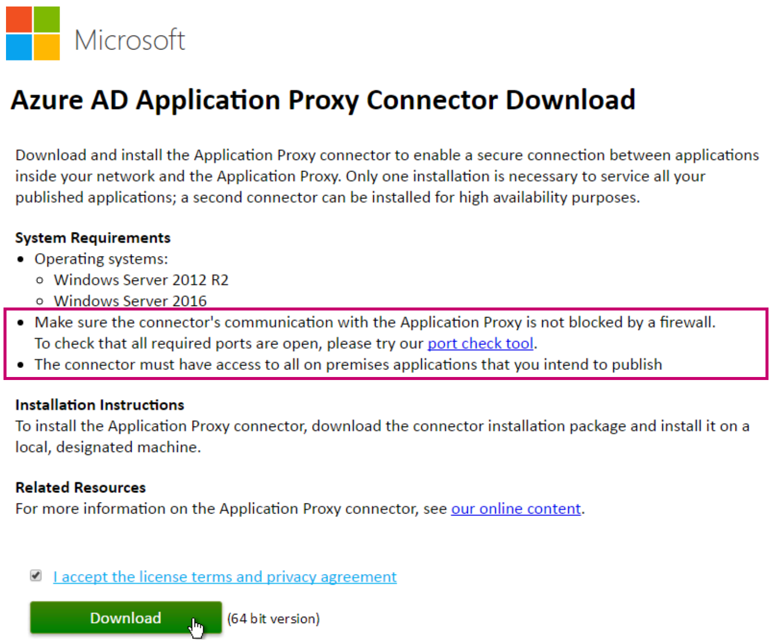
1. From your accounting server, open an Internet browser and go to **https://portal.azure.com**. Sign in if needed.
2. If you are asked to change a temporary password, supply the Microsoft account credentials that you received in your welcome email. Be sure to record this information once you enter the new password.



3. On the left, click **Azure Active Directory**.
4. In the next window, click **Application proxy**.
5. Click **Download connector**.



6. Review the information on the connector download page. Your accounting server should already be on a supported operating system.

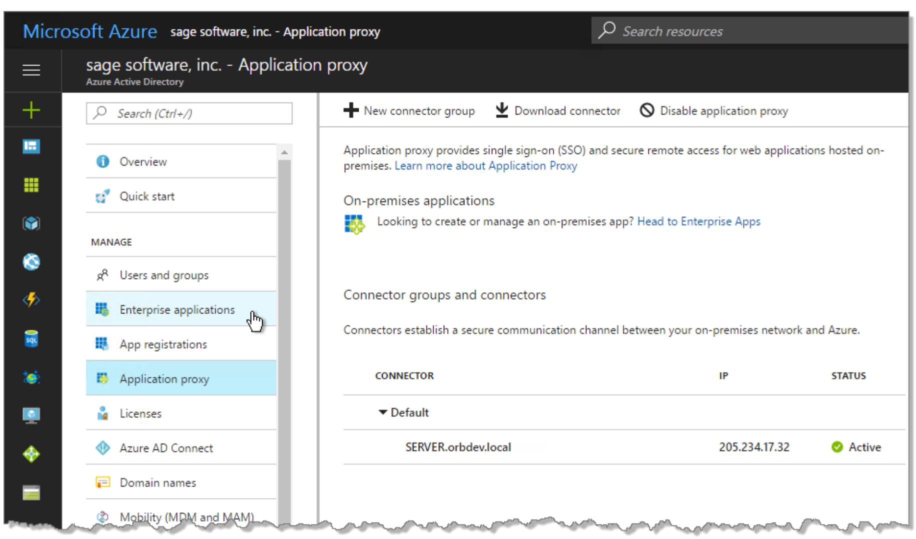


Work with your system administrator to ensure the necessary ports are open to outbound traffic.

FOR MORE INFORMATION: The outbound ports required for the application proxy are described in the Microsoft article **Get started with Application Proxy and install the connector**.

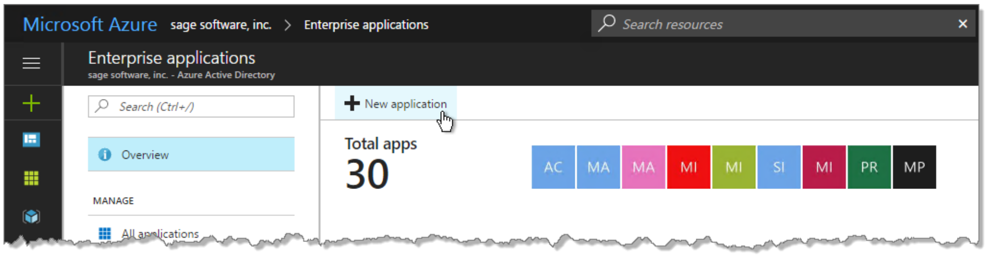
7. Accept the license agreement, click **Download**, and follow the instructions to install the connector.
8. When the installation is finished, return to the Azure portal page (**https://portal.azure.com**) and refresh it. You'll see your connector associated with your accounting server. This means the connection was successful.

   Now you'll publish your Sage Construction Central website to Azure.

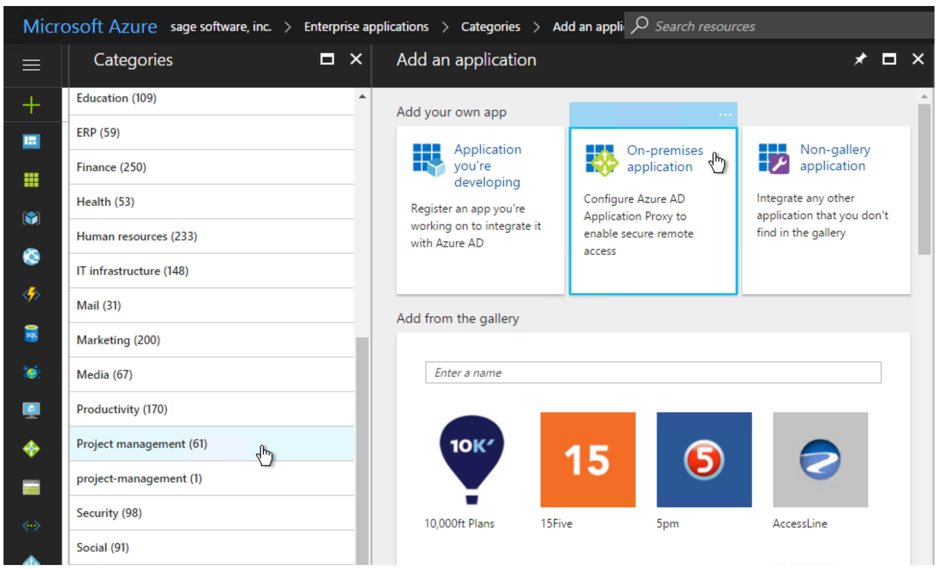


9. On the left, click **Enterprise Applications**.

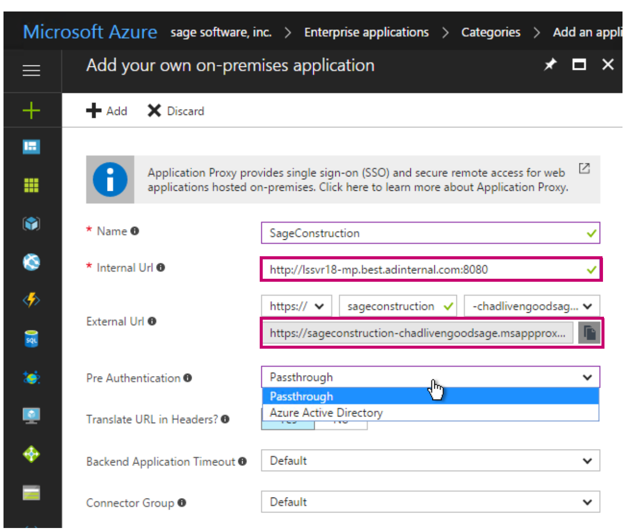
10. Click **New application**.



11. Select a category; you can choose any category you want. In this example, we chose **Project Management**.
12. Click **On-premises application**.



13. Enter a display name for your application. This can be your company name or some other name that makes sense to your employees. This example shows a company called **Sage Construction**:



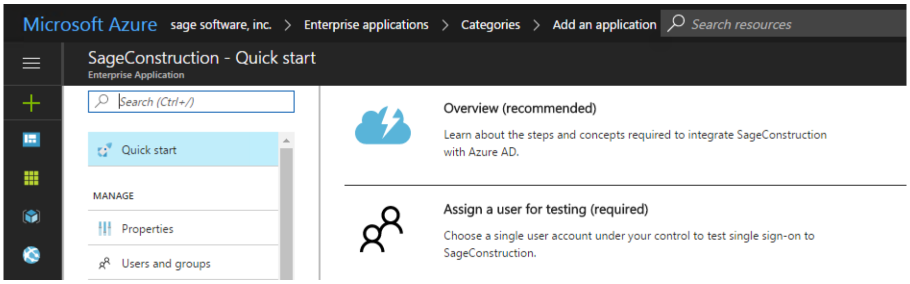
Internal Url is your server's name followed by a colon (**:**) and the port number (usually **8080**).

External Url is the public, Internet address for your Sage Construction Central site.

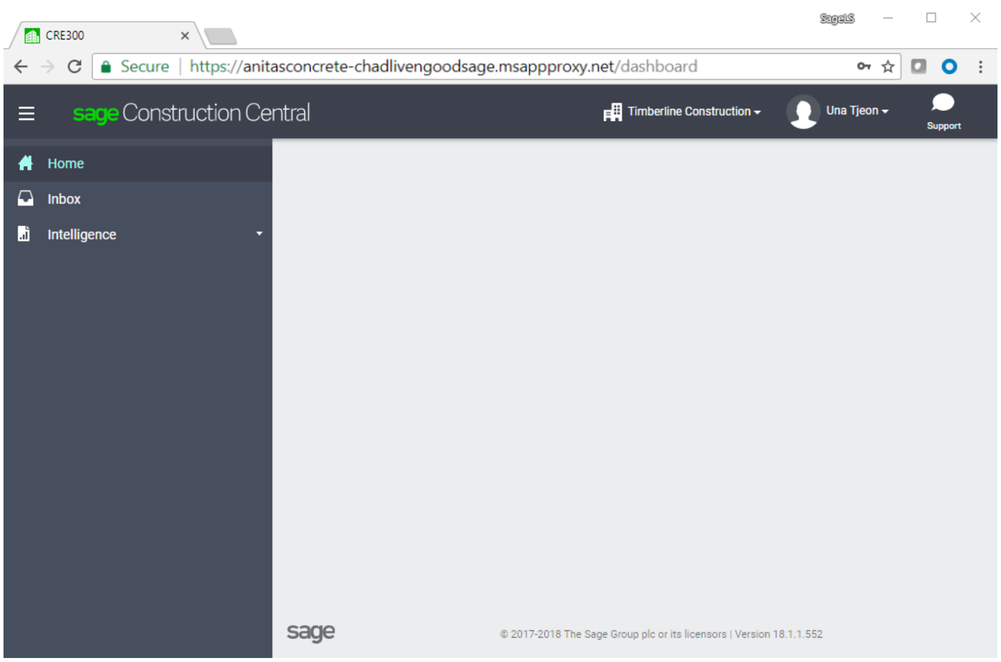
14. For the **Internal Url**, enter the URL you established for your site on page 12. This entry must include the port, **:8080**, as part of the address. For example, if your server is sageserver.example.com, the internal URL is http://sageserver.example.com:8080.

    Notice that the public URL for your site will be a combination of the entries in the window above: https://applicationname-accountname.msappproxy.net

15. For **Pre Authentication**, select **Passthrough**. You can leave the remaining options as they are.
16. Click **Add**. After the application is created, you're taken to the **Enterprise Application** page. You don't need to modify anything else in this window.



17. Open the URL in a browser to make sure it's connected.



Go live with Sage Construction Central

After you successfully publish your Mobile website through Microsoft Azure Cloud Services, you are ready to go live with Sage Construction Central.

Notify Mobile users to let them know:

- The external, secure URL (https://) for accessing Sage Construction Central.
- That they must log on using their Windows credentials (associated with their Sage 300 Construction and Real Estate user setup).

Mobile Reports

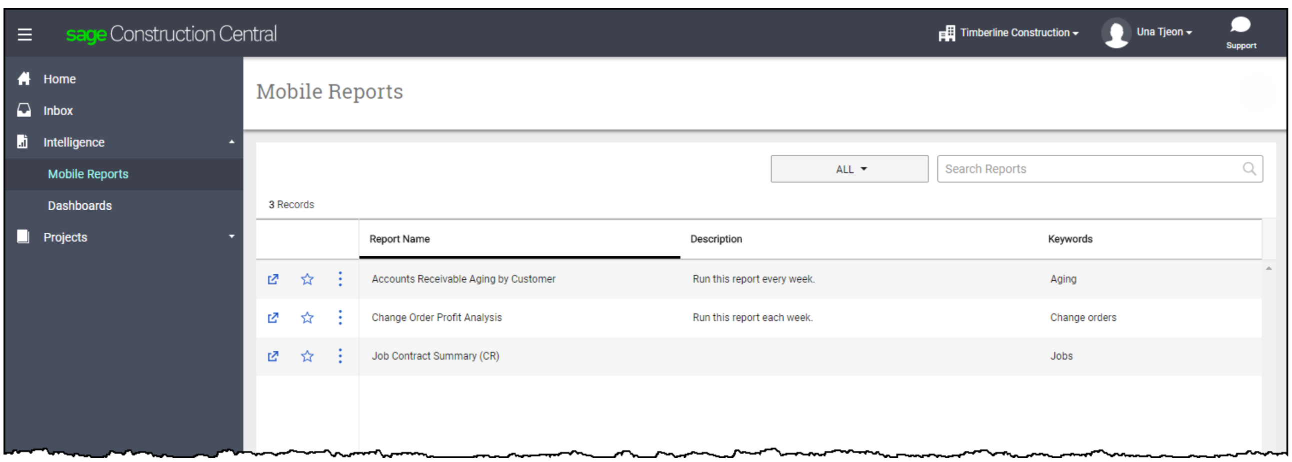
Mobile Reports lets you access the information to run your business without being confined to your office. You can generate reports from anywhere, using any mobile device.

- When you generate reports, you can select a PDF or an Excel spreadsheet format.
- You can view reports on your screen or download them to your device.

TIP: In order to view a report on your screen, you must set your browser to allow pop-ups for your Sage Construction Central web address.

- You can send reports by email.

FOR MORE INFORMATION: See “Learn how to use Mobile Reports” on page 23 to find out about training on Sage University.



Please note the following about the reports you can use in Mobile Reports:

- Only report designs created in SAP Crystal Reports are supported.
- You can use new or existing reports that are based on a Sage 300 Construction and Real Estate Pervasive data source or a SQL Server data source (it must be data replicated by Sage SQL Replicator).
- When you use a report design based on a Pervasive data source, Sage Construction Central automatically switches the data source on the report to use the replicated data stored in SQL Server.

TIP: Before you add the report to the Mobile Reports menu, verify that it generates successfully with the **Use SQL** check box selected in Sage 300 Construction and Real Estate.

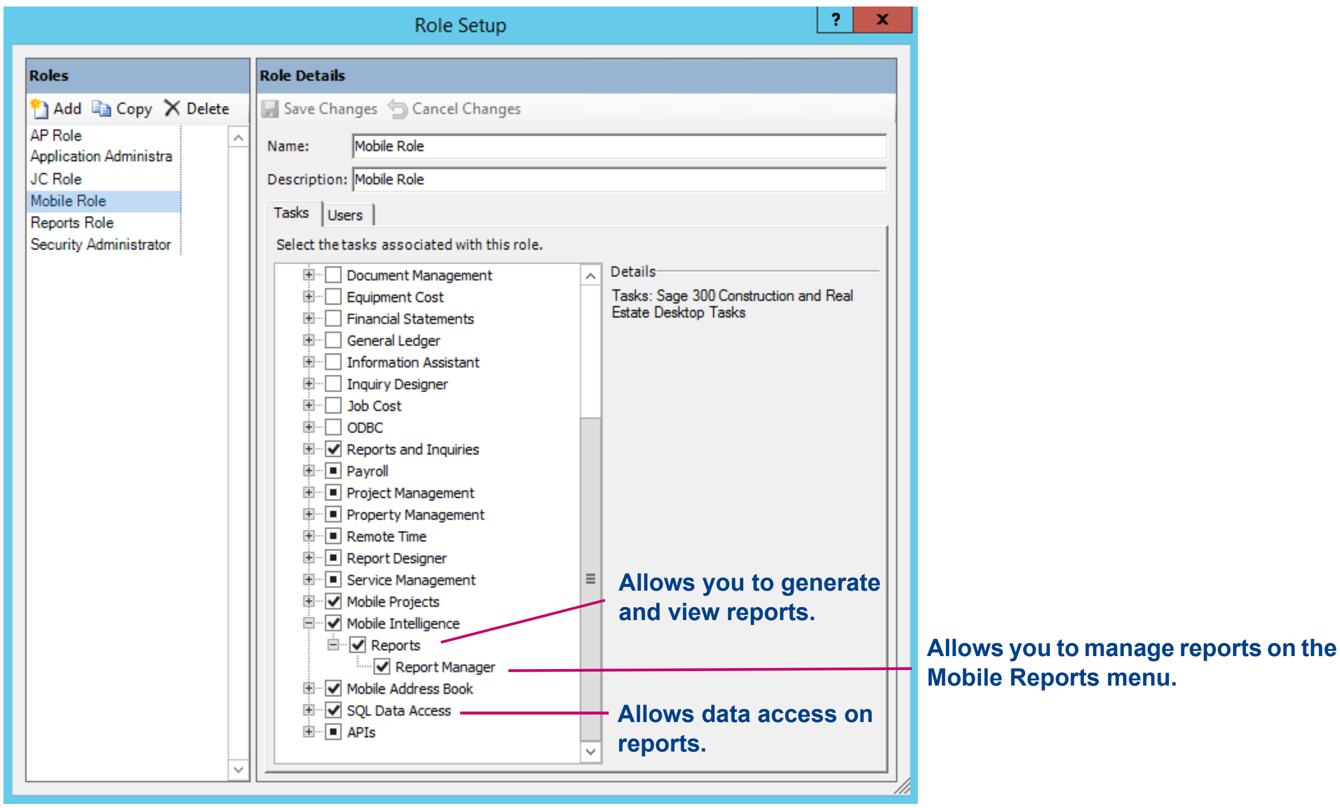
Access to Mobile Reports

To generate and view reports, Mobile Reports users must have permissions to the following tasks in Sage 300 Construction and Real Estate Security Administration:

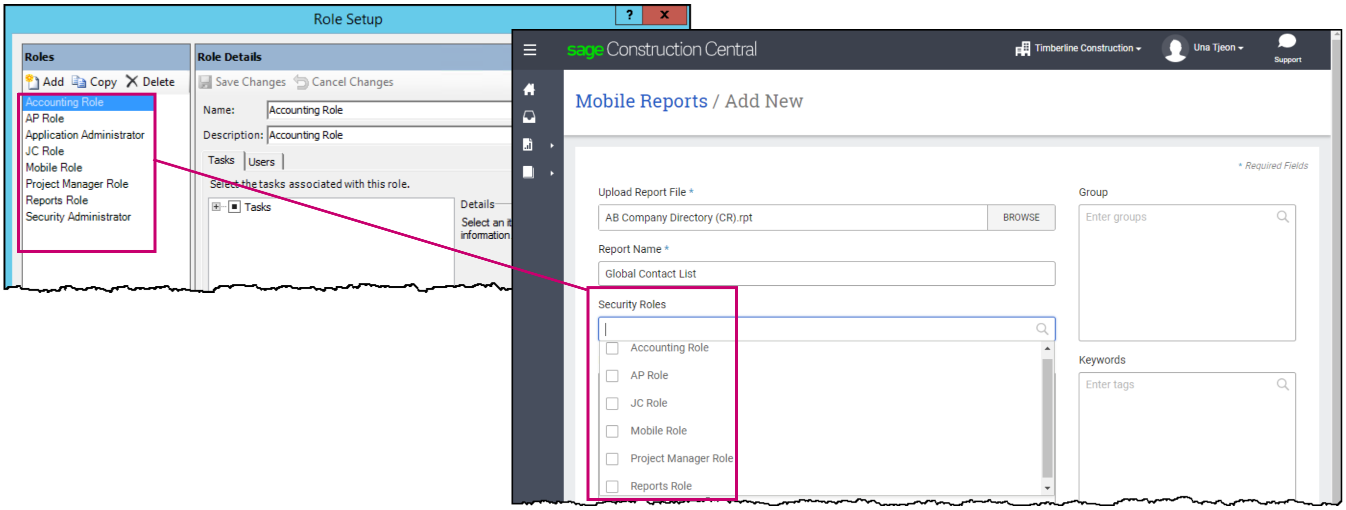
- **Mobile Intelligence** > **Reports**.
- **SQL Data Access**—allow all database tables or limit the ones that users can access.

In your organization, you must have at least one individual who has permissions to **Mobile Intelligence** > **Reports** > **Reports Manager** in addition to **SQL Data Access**. This allows the individual to add reports to the Mobile Reports menu and grant access to other users.

FOR MORE INFORMATION: See “Sage 300 Construction and Real Estate Security Administration” on page 7 and “License Administration” on page 9.



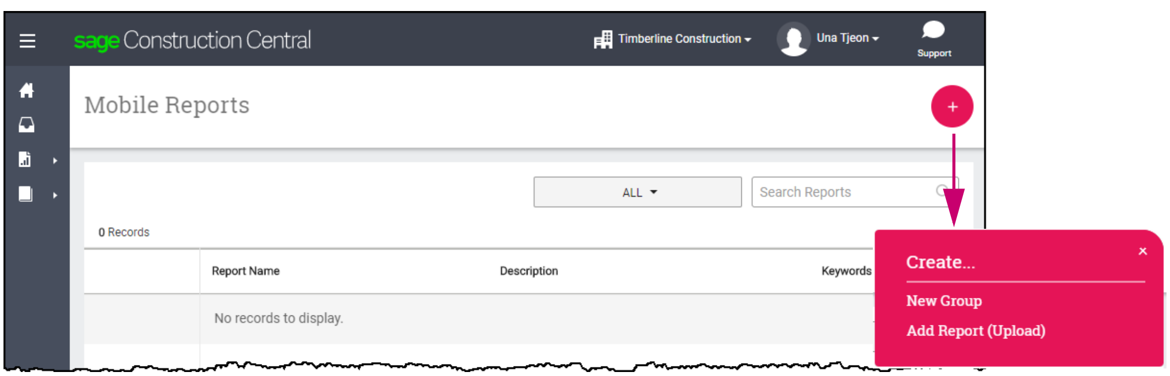
You can use Sage 300 Construction and Real Estate Security Administration roles to limit report access in Mobile Reports. See step 5 of “Add reports to Mobile Reports menu” on page 19.



Add reports to Mobile Reports menu

The instructions below explain how to add reports, grant access to others, and organize the reports in Mobile Reports. To perform these functions, your Sage 300 Construction and Real Estate user setup must be assigned to a role that has permissions to **Mobile Intelligence** > **Reports** > **Reports Manager**.

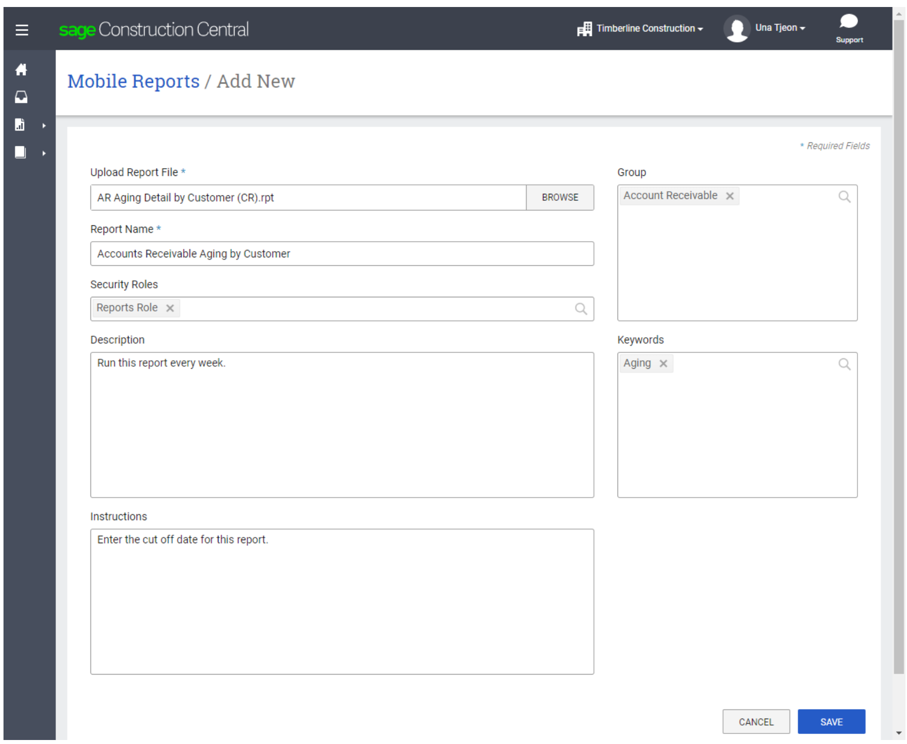
1. In the Sage Construction Central Home page, select **Intelligence** > **Mobile Reports** from the menu.
2. On the Mobile Reports page, click the plus symbol and click **Add Report (Upload)**.



3. In the **Add New** page, under **Upload Report File**, click **Browse** to locate the report design (*.rpt) file from your local machine or from a location on your network. When you save this page, the file will be uploaded and copied to the SQL Server database.

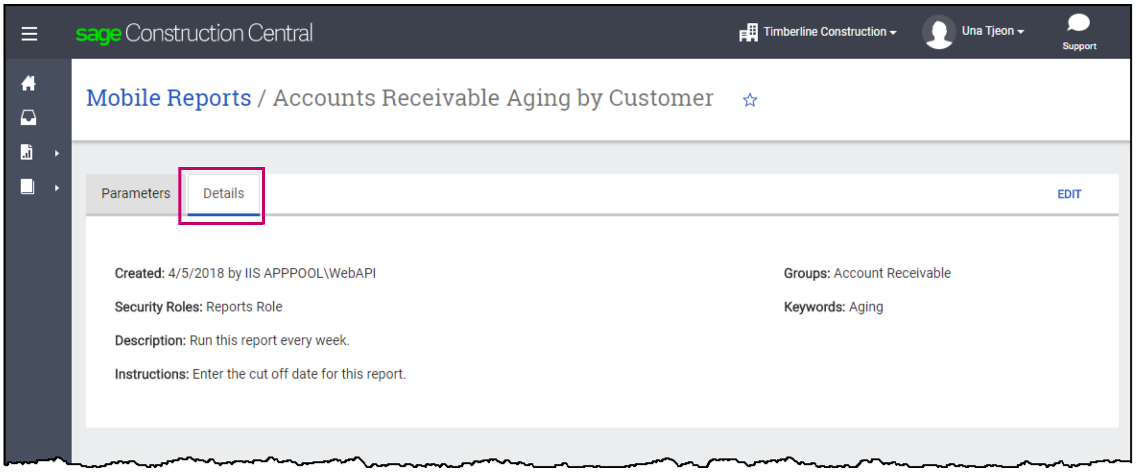
4. The **Report Name** is the name that will display in the Mobile Reports menu for users. Accept the existing name or enter a new one.
5. You can use **Security Roles** to limit the reports that users can access. Click in the box and select one or more roles from the list. Alternatively, type the name of the role. You must use a role that is already set up in Sage 300 Construction and Real Estate Security Administration.
6. For **Description** and **Instructions**, describe what this report is for and how to run it.
7. You can categorize reports into one or more groups. Click in the box under **Group** and enter a group name. Click **Add** to add an item.
8. You can use one or more keywords to tag a report. Click in the box under **Keywords** and enter the text. Click **Add** to add an item.

NOTE: Users can limit the reports shown on the Mobile Reports page by using the **Group** filter and **Keywords**. The Search box on the Mobile Report page searches for matching text in the **Keywords**, the **Report Name**, and **Description** columns.



9. Click **Save**.

10. Click the **Details** tab to view the information that you just entered. If needed, click **Edit** to make changes.

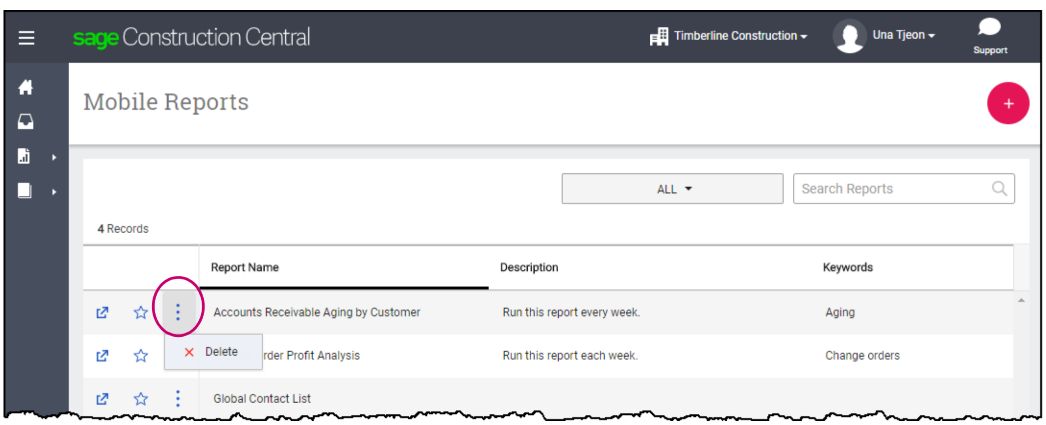


Manage reports in Mobile Reports

To edit or delete reports from Mobile Reports, your Sage 300 Construction and Real Estate user setup must be assigned to a role that has permissions to **Mobile Intelligence** > **Reports** > **Reports Manager**.

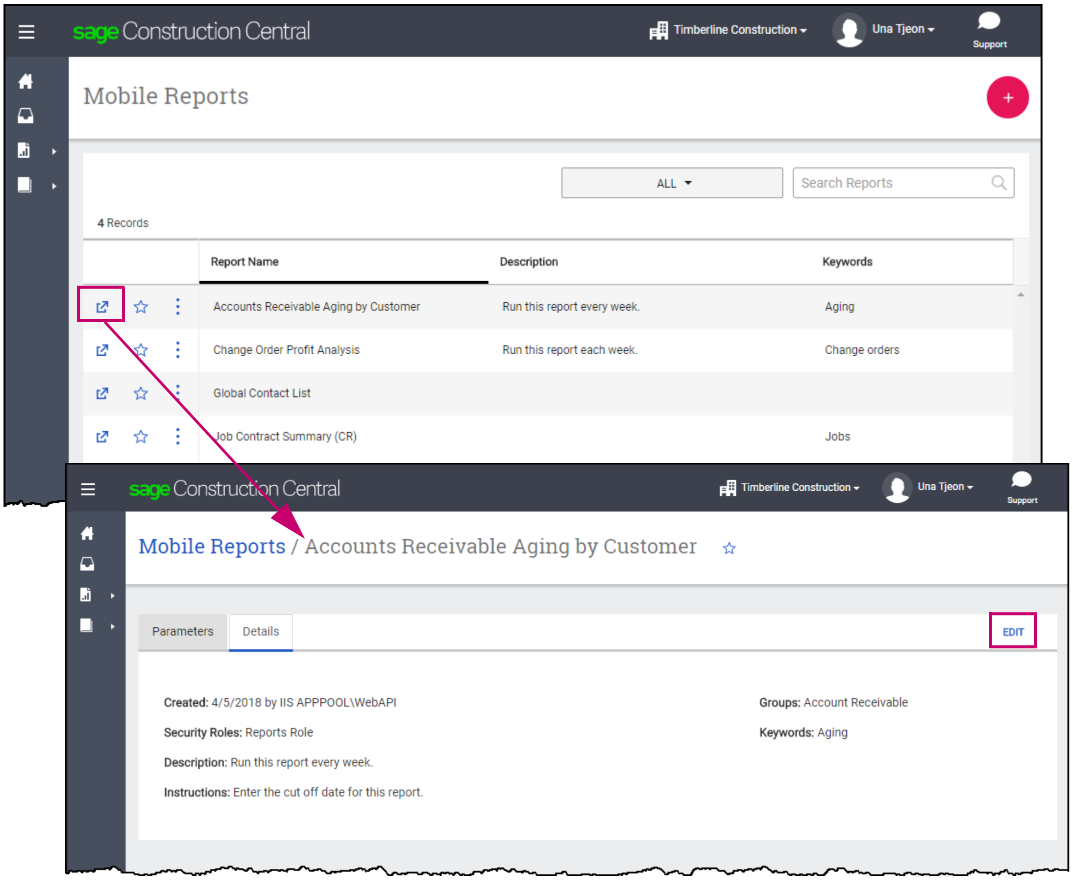
Delete a report

On the **Mobile Reports** page, find the report that you want to remove from the list. Click the ellipsis next to it and click **Delete**.



Edit a report

On the **Mobile Reports** page, click the Open icon to open the report. When the report page opens, click the **Details** tab and click **Edit**.



Make changes on **Details** tab as needed and click **Save** when you are done.

WARNING: If you edited the report design, upload the file again to replace the one stored in the SQL Server database.

- To remove the report from the Mobile Reports menu, click **Delete Report**.
- Click **Download RPT** if you want to download a copy of the report design to your machine or device.

Learn how to use Mobile Reports

You can learn how to use Mobile Reports by watching complimentary, short instructional videos posted on Sage University (www.sageu.com). On the Sage 300 Construction and Real Estate product page, find **Mobile Access** under **Training subjects**. Or, type “Mobile Intelligence” in the Search box.

Mobile Dashboards

In Mobile Dashboards, each dashboard is a collection of visualizations that provide insight into your company's overall performance and trends. You can use the report designer that comes with it to create reports for your dashboards or use the ones that Sage provides.

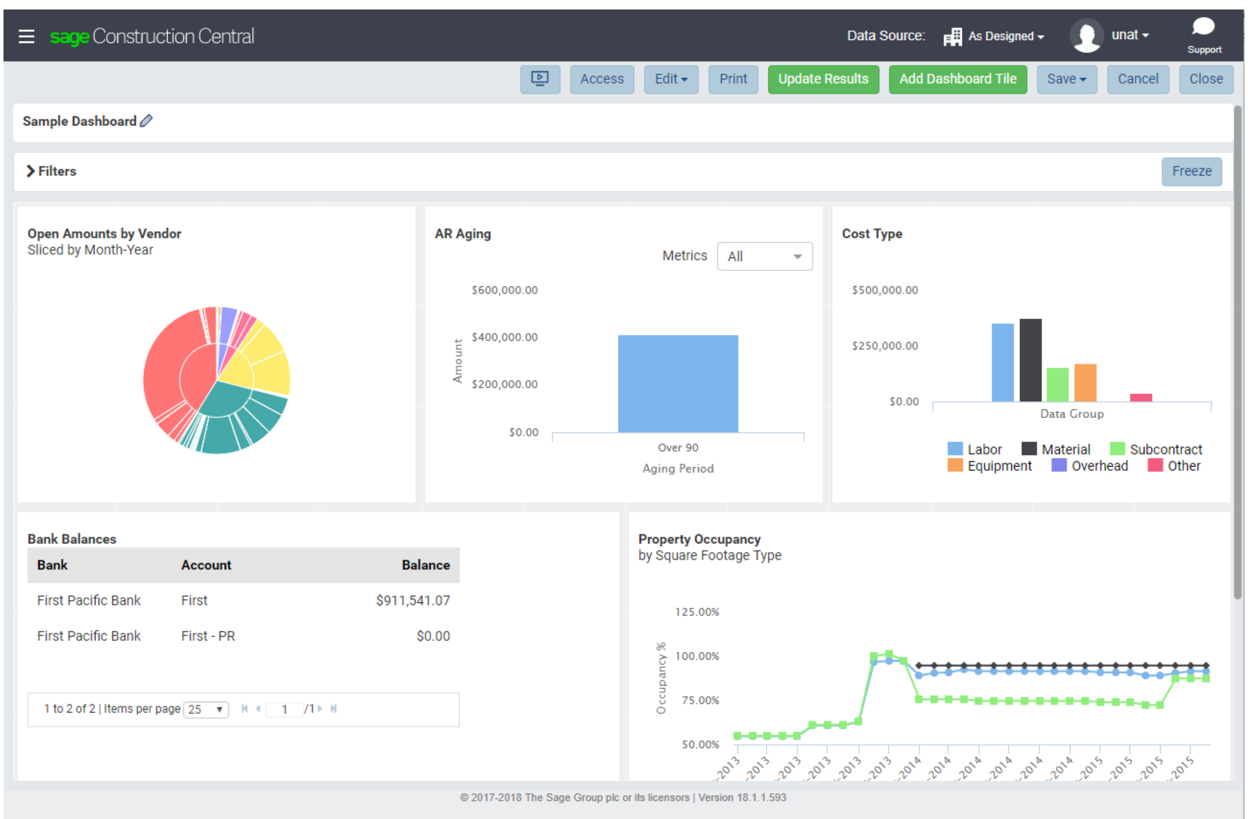
FOR MORE INFORMATION: For a list of Sage reports and their description, refer to the Release Notes and Mobile Dashboards Help (Sage Construction Central: **Support** > **Help**).

About dashboards and dashboard reports

Your Mobile Dashboards application is made up of ***dashboard reports***, ***reports parts***, and ***dashboards***.

The ***dashboard report*** defines where the information comes from. It is where the data source (the company database in SQL Server) and database views are specified. How the information is displayed in terms of visualization is a ***report part***, which can be one of these types: Grid, Gauge, Map, Form, and Chart. You can have any number of report parts for a report.

A ***dashboard*** is a collection of report parts from different dashboard reports, showing information from different data sources.

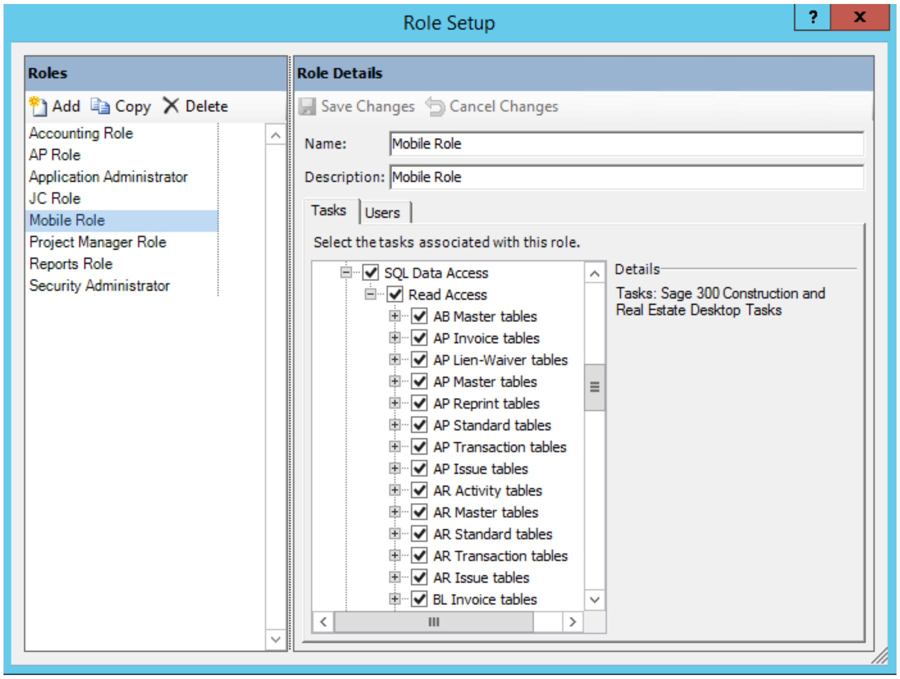


NOTE: For devices with a display resolution of 1024 pixels and below, the dashboard tiles appear stacked instead of side by side. This screen resolution does not support editing or creating dashboards or dashboard reports.

Access to Mobile Dashboards

FOR MORE INFORMATION: See “Sage 300 Construction and Real Estate Security Administration” on page 7 and “License Administration” on page 9.

In Sage 300 Construction and Real Estate Security Administration, Mobile Dashboard users must have permissions to **SQL Data Access**. You can allow all database tables or limit the ones that users can access.



A user’s software license determines the features that are available:

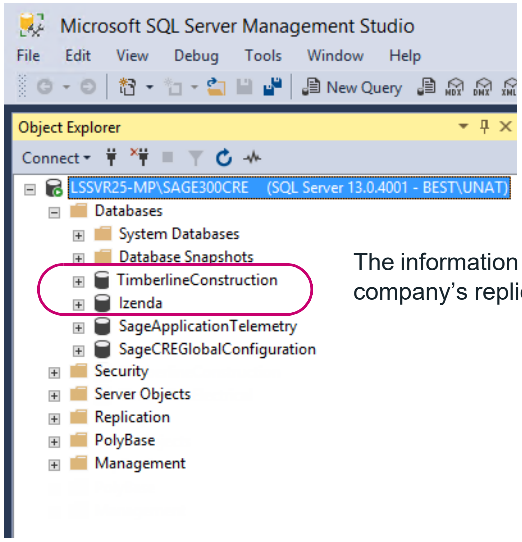
- Mobile Dashboard Viewer lets you view dashboards and individual reports.
- Mobile Dashboard Designer lets you:
  - Create and manage dashboards.
  - Use the Report Designer to create and edit dashboard reports and the associated report parts.
  - Use security to limit the reports and dashboards that users can access.
  - Use **Import Sage Reports and Dashboards** to copy all Sage reports and pre-built dashboards into your SQL Server database.
  - Use **Import Reports** to copy specific reports into your SQL Server database.
  - Export and download report designs.
  - Use the **Synchronize** function. This process is required for the initial setup.

There must be at least one individual in your organization with a license of Mobile Dashboard Designer.

WARNING: To use the **Synchronize** function, the user with the Mobile Dashboard Designer license must also have the **Application Administrator** role in Sage 300 Construction and Real Estate and a **sysadmin** role for your SQL Server database.

Implement Mobile Dashboards

The initial setup involves the **Synchronize** process which must occur before you can use Mobile Dashboards. The **Synchronize** process creates the Izenda schema, copying over the data model and stored procedures from your company's replicated data. Mobile Dashboards relies on both your company's replicated database(s) and the Izenda database stored in SQL Server to generate information.



The information you see in Mobile Dashboards comes from your company's replicated database(s) and the Izenda database.

The **Synchronize** process takes place automatically when a user with the appropriate credentials opens Mobile Dashboards for the first time. You must have:

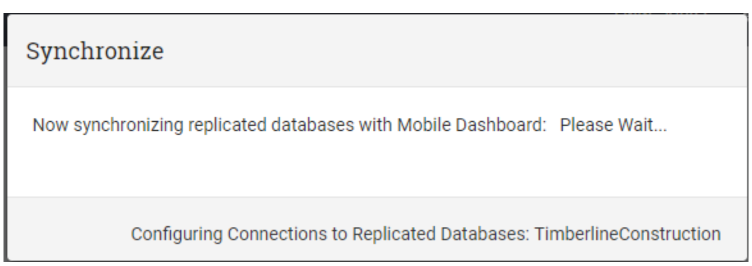
- A license of Mobile Dashboards Designer.
- An **Application Administrator** role in Sage 300 Construction and Real Estate.
- The SQL Server **sysadmin** role.

1. Log on to your Accounting server to access the Sage Construction Central website locally—in your web browser, type:

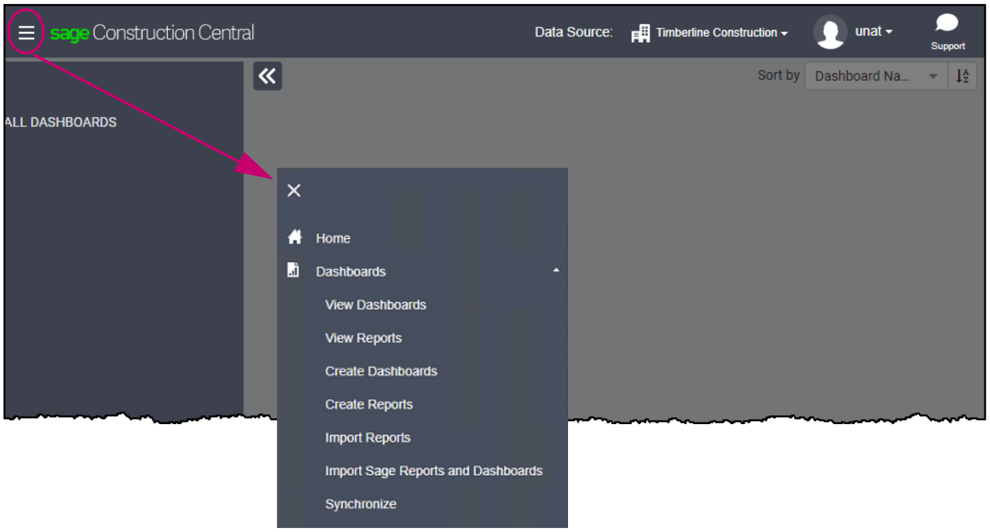
   `localhost:8080/mobiledashboard`

2. Log on to Sage Construction Central and select **Intelligence** > **Dashboards** from the menu to go to the Dashboards Home page.

3. As long as you logged on with the credentials listed above, synchronization will automatically take place. The **Synchronize** window appears, showing you the progress. After the process is finished, you can set up dashboards and dashboard reports.



Reasons to perform the Synchronize process after the initial setup



Occasionally, you will need to perform the **Synchronize** again. Reasons include:

- Changes in Sage 300 Construction and Real Estate security, such as the addition of new users or changes in a role setup.
- The addition of custom fields.
- Changes in **Custom Descriptions**, such as the customization of field names or changes in custom lists.
- The creation of new files when you use named files.

When any of the above occurs, first use **System Administrator** to re-restart (stop and start) the replication process or synchronize the security settings (click **Sync Security**), and then perform **Synchronize** in Mobile Dashboards.

Set up dashboard reports and dashboards

When the **Synchronize** process is finished, you can set up dashboards and dashboard reports.

For your convenience, Sage provides several reports and pre-built dashboards. All you have to do is to import them into your SQL Server database.

NOTE: Users with a Viewer license can view individual reports even if there are no dashboards.

The next topics show you how to:

- Import and view Sage dashboard reports and dashboards.
- Set up new dashboards.
- Assign permission on dashboards and dashboard reports.

To perform the steps shown, you must be a user with a license of Mobile Dashboards Designer.

Import reports and dashboards provided by Sage

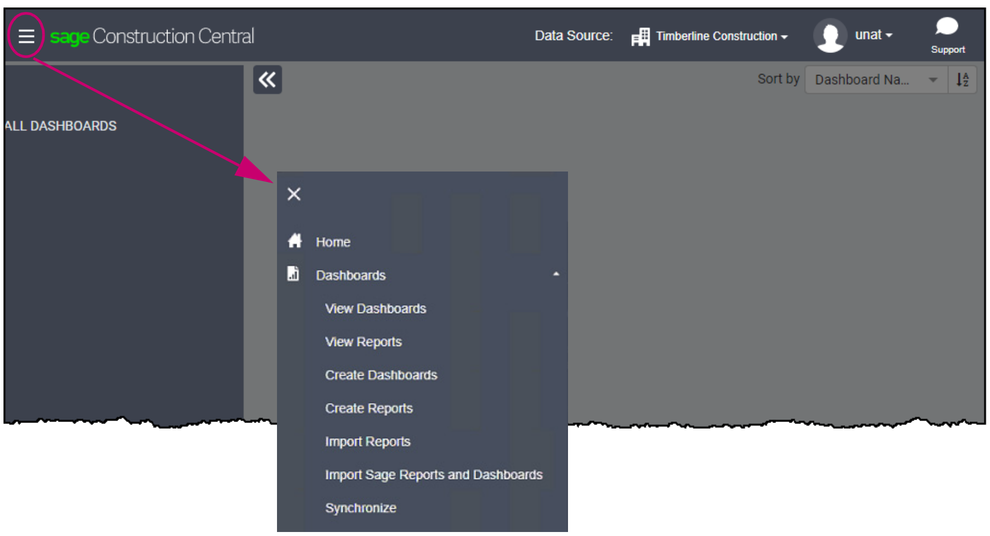
Dashboards and dashboard reports are installed with your Sage software but you can only use them in Mobile Dashboards after using the **Import Sage Reports and Dashboards** function to copy them into the Izenda database in SQL Server.

FOR MORE INFORMATION: For a list of the dashboards, dashboard reports and related report parts that Sage provides, refer to the Release Notes and Mobile Dashboards Help (Sage Construction Central: **Support** > **Help**).

The **Import Sage Reports and Dashboards** function imports all the reports and dashboards provided by Sage at the same time. To import specific reports, use **Import Reports**—this function lets you select reports (with a *birt file extension) from a location that you specify—see "Export and import a report design" on page 42.

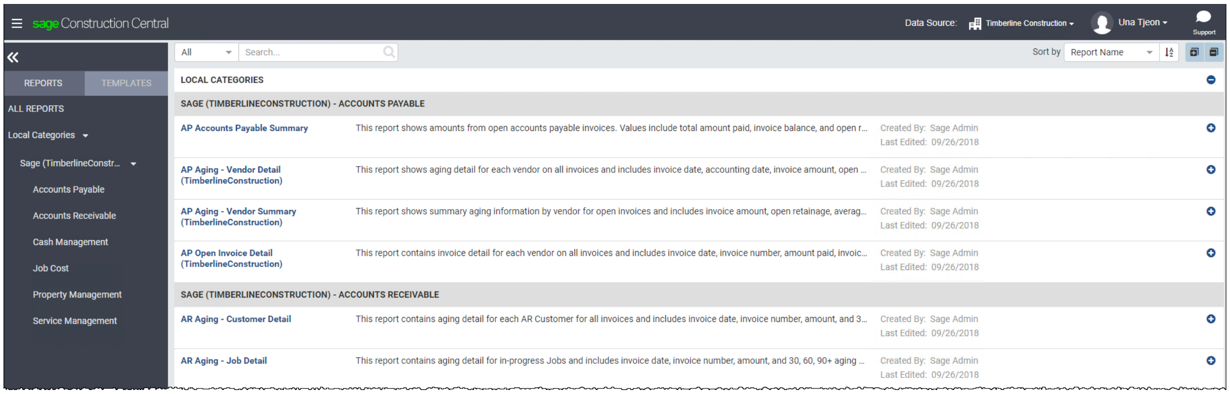
WARNING: To perform the steps below, you must log on to the Sage Construction Central website as a user with a license of Mobile Dashboards Designer.

1. On the Sage Construction Central Home page, select **Intelligence** > **Dashboards** from the menu to go to the Dashboards Home page.
2. Next to **Data Source**, select the company for which to import reports and dashboards. When you import reports, they are database-specific.
3. Open the Sage Construction Central menu and select **Import Sage Reports and Dashboards**. This process imports all the reports and dashboards provided by Sage.

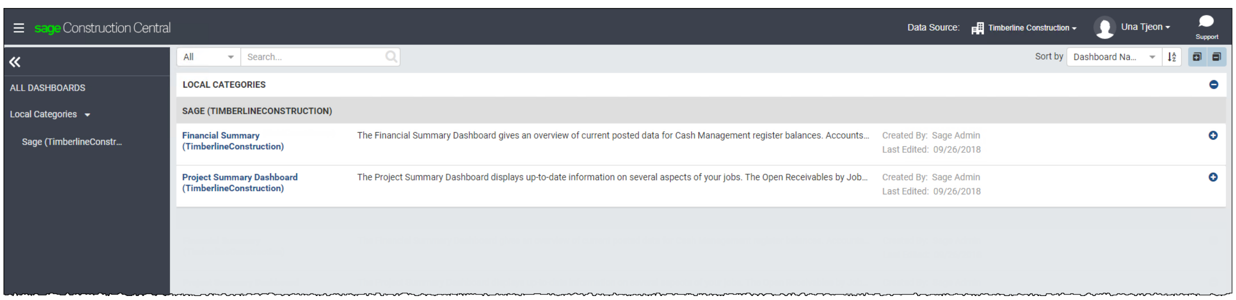


4. When the process is completed, open the Sage Construction Central menu to view the list of imported dashboard reports and dashboards.

- For dashboard reports, select **Dashboards > View Reports**. The reports provided by Sage are in a category called Sage, organized by sub-categories. The name of each report is appended with the name of the data source for which it was imported.



- For dashboards, select **Dashboards** > **View Dashboards**. The dashboards provided by Sage are in a category called Sage. The name of each dashboard is appended with the name of the data source for which it was imported.

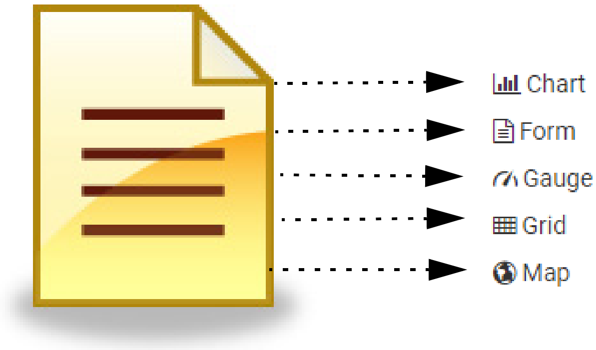


5. By default, the security for these reports and dashboards are set as follows:
   - All users with a Designer license have full permissions to view and edit.
   - All users with a Viewer license have view-only permissions.
6. If needed, select another company as your **Data Source** and repeat the steps shown above.

FOR MORE INFORMATION: To learn how to limit the dashboards and reports that users can access, see “Dashboard and dashboard report permissions” on page 37.

View reports and report parts

The dashboard report design defines where the information comes from—it specifies which views are used from a specific data source (company database). How the information is presented is in the report parts: as a chart, form, gauge, or grid.

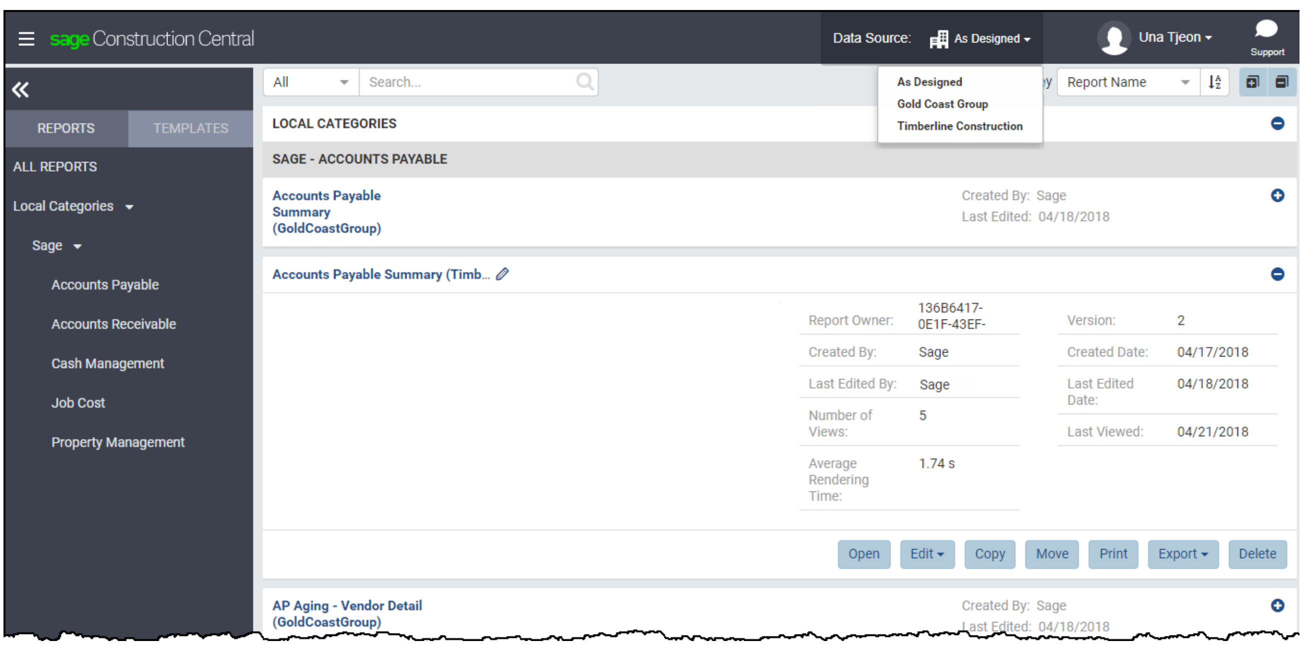


After the Sage reports are imported, anyone with a Designer or Viewer license can open them to examine the report parts.

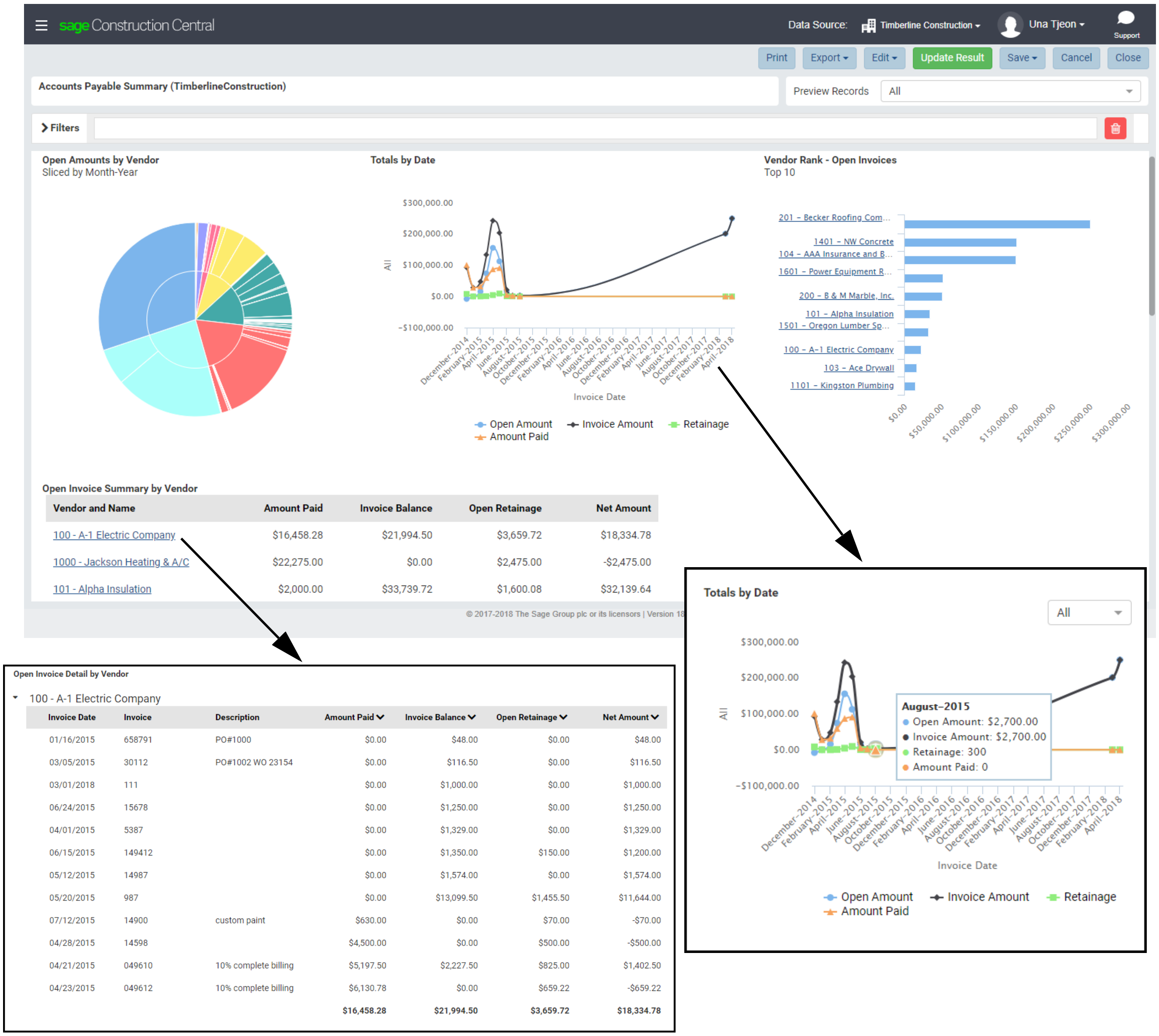
1. Open the Sage Construction Central menu and select **Dashboards > View Reports**.
2. Next to **Data Source**, select the data source to use for running a report. When you select **As Designed**, the report uses the data source specified on the report design.

   For example, for a report that was imported into the company called Timberline Construction, the data source specified on the design is Timberline Construction. When you set the **Data Source** to the company called Gold Coast, the report overrides the data source on the design and generates information from Gold Coast.
3. In the report list, click the report name, or click the expand icon (to the far right of the report name) and then click **Open**.

TIP: To refine the list on the page, use the Search box at the top of the page or select a category in the menu. Imported Sage reports are in the **Local** category called **Sage** and grouped into sub-categories by application.



4. Depending on the report, it may have one or several report parts. Some of the features in a report part includes:
   - When you move your mouse over a part or click on it, more information appears on the screen.
   - You can use a filter to show specific information. For some report parts, you are required to enter the filter values before any information is generated.
   - Some report parts contain a drill-down capability. When you click a link, it opens another report to show more details on a new tab.



5. Use the buttons at the top of the page to:
   - Print the report with the associated parts.
   - Export the report with the associated parts to a Word, Excel or PDF file.
   - Make changes to the report design, such as editing a report part or adding another report part.
   - Make a copy of the report.
   - Move the report into another Category or Subcategory.
   - Save any changes you make to the original report or save the report with another name.

FOR MORE INFORMATION: Report permissions settings determine the actions that are allowed. See “Dashboard and dashboard report permissions” on page 37.

View Dashboards

A dashboard is a collection of report parts from different dashboard reports, showing information from different data sources.

After the Sage dashboards are imported, anyone with a Designer or Viewer license can open them.

1. Open the Sage Construction Central menu and select **Dashboards > View Dashboards**.
2. Next to **Data Source**, select the data source to use for running the dashboard. When you select **As Designed**, all the report parts on the dashboard use the original data source specified on the report design.

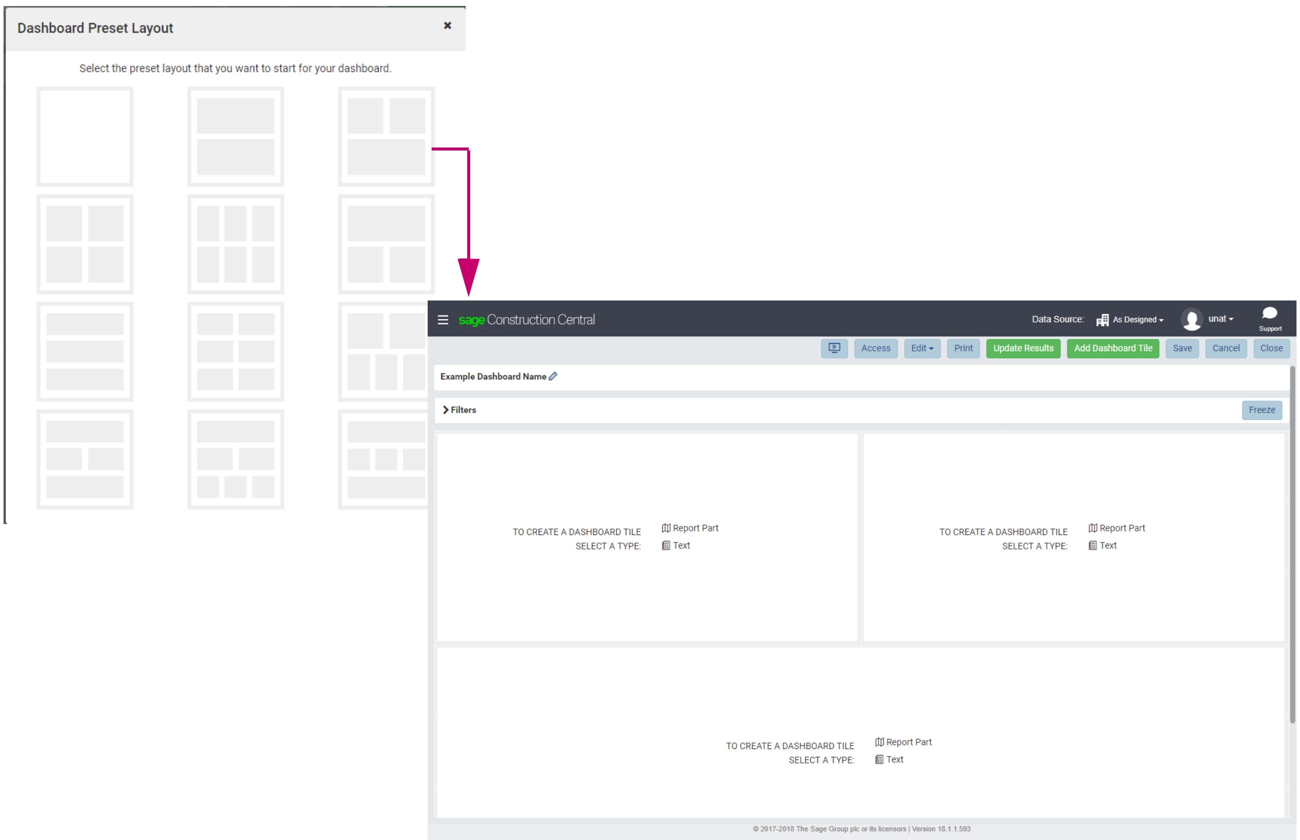
   For example, for a report that was imported into the company called Timberline Construction, the data source specified on the design is Timberline Construction. When you set the **Data Source** to the company called Gold Coast, the report overrides the data source on the design and generates information from Gold Coast.
3. In the report list, click the dashboard name, or click the expand icon (to the far right of the report name) and then click **Open**.

NOTE: When you view a dashboard that contains report parts from reports with different data sources, select **As Designed** as the **Data Source**. This ensures that each report part returns information from the original data source.

Create dashboards

NOTE: Anyone with a license of Mobile Dashboard Designer can perform these steps.

1. Open the Sage Construction Central menu and select **Dashboards** > **Create Dashboards**.
2. Select how the tiles in the dashboard are organized: each tile can contain text or a report part. Click to select a layout. Later, as you are designing your dashboard, you can change how the tiles are laid out: you can add, remove, and resize the tiles.



3. On the dashboard design page, click **Save** and enter the **Dashboard Name**, **Category** and **Subcategory**.
4. The next topics explain how to organize the tiles in the dashboard and how to use text or a report part in a tile. While you are designing the dashboard, remember to click **Save** to save your additions and changes.

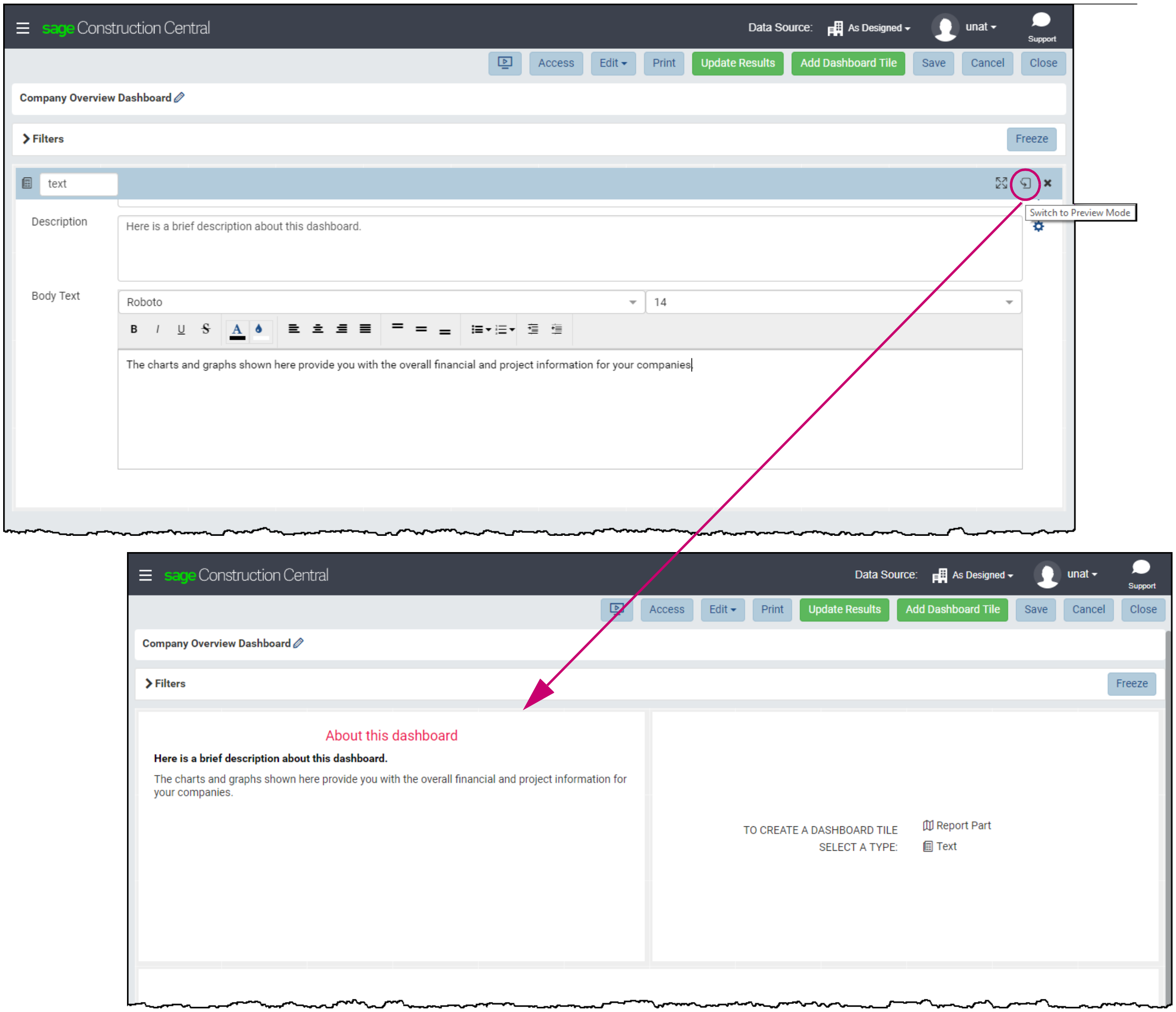
Organize the tiles in the dashboard

Even if you selected a preset layout for your dashboard, you can change how the tiles are organized. On the dashboard design page:

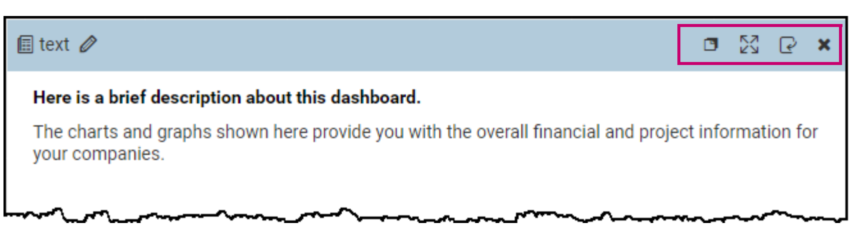
- To resize any tile, drag the corners or the sides.
- To insert additional tiles, use one of these methods:
  - Click **Add Dashboard Tile**. It will add a new tile to an empty space; you may need to scroll down the page to locate the newly added tile.
  - Go to any empty space on the dashboard (represented by the gray grid background) and click once.
- To delete a tile, hover your mouse at the top of the tile and click **x**.

Use text in a tile

1. On the dashboard design page, select a tile and click **Text**.
2. This switches you to Configuration Mode for the tile. Enter the **Title**, **Description**, and **Body Text**. Information from all three areas will appear in the tile. To format the text in the **Tile** and **Description** areas, click the settings icon ⚙.
3. When you are done, hover your mouse in the area over the **Title** until a toolbar appears. Click the switch icon to return to Preview Mode on the dashboard design page.



4. When you are on the dashboard design page and you hover your mouse at the top of this tile, a toolbar appears. Because this tile displays text, your toolbar options are: make a copy of the tile, display in full screen, switch to Configuration Mode to edit the text, delete the tile.

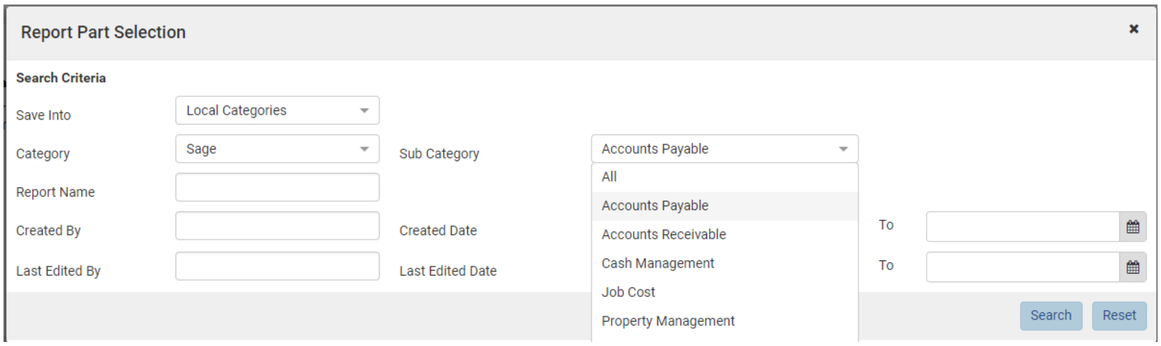


Use a report part in a tile

1. On the dashboard design page, select a tile and click **Report Part**.
2. The **Report Part Selection** window appears. Enter the search criteria to find reports and click **Search**.

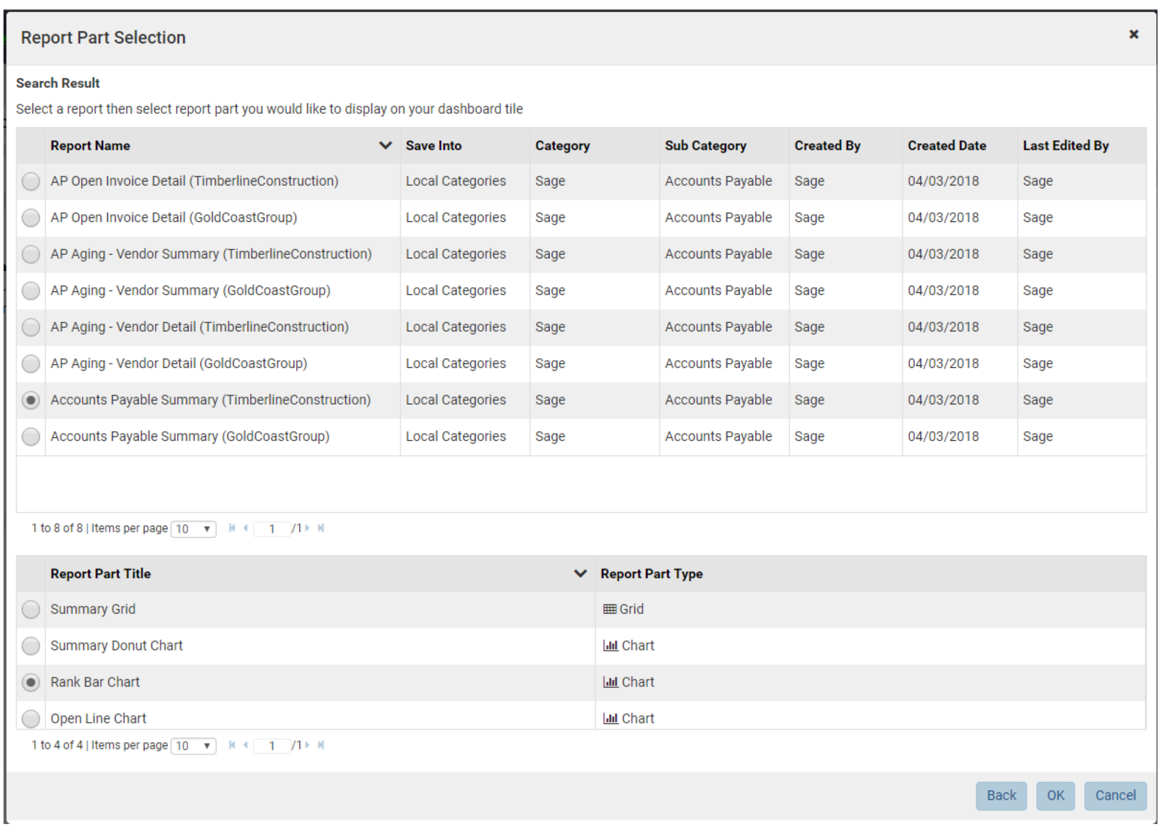
NOTE: For imported Sage reports, use **Local Categories** as the **Save Into** and **Sage** as the **Category**.

FOR MORE INFORMATION: For a list of Sage report names, their description and the associated report parts, refer to the Release Notes and Mobile Dashboards Help (Sage Construction Central: **Support** > **Help**).

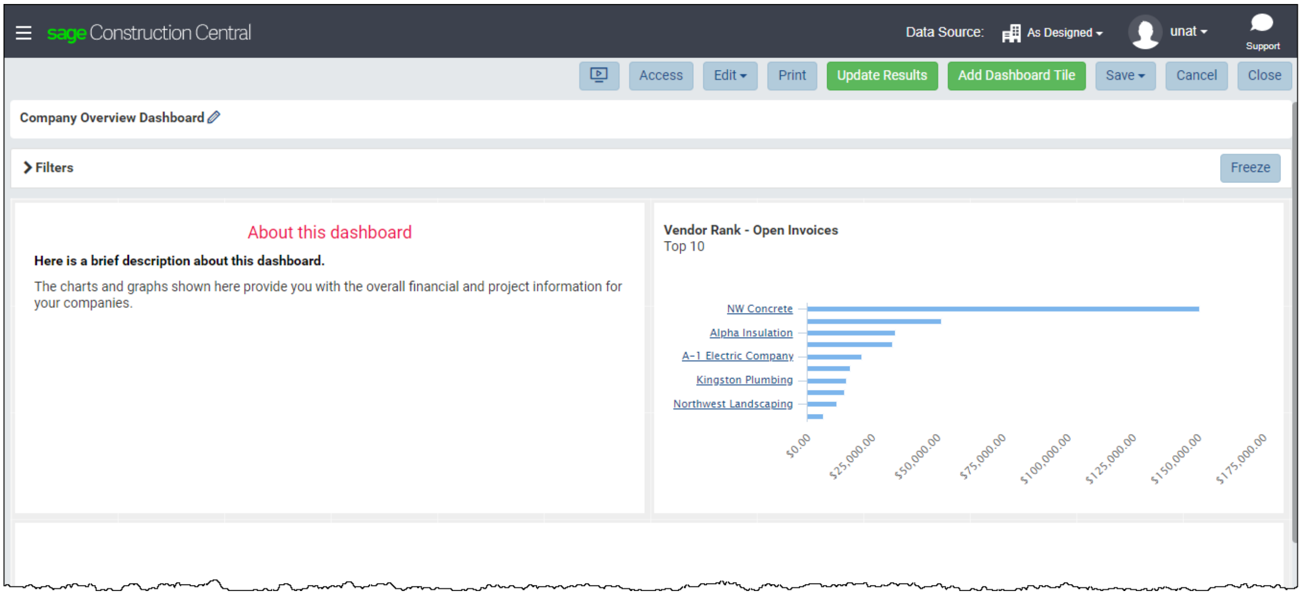


3. The **Report Part Selection** window returns a list of reports meeting your search criteria. Use the navigation tools at the bottom of the window to adjust the number of items displayed on a page and to move from page to page to view the reports.

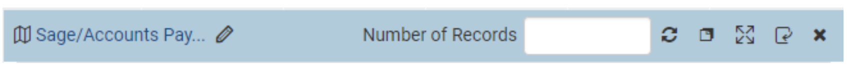
   When you select a report, the associated report parts display at the bottom of the window. Select a report part and click **OK**.



4. The report part now appears in the tile on the dashboard design page.



5. When you hover your mouse at the top of this tile, a toolbar appears. Because this tile displays a report part, there are several more options.



If you want to use another report part for this tile, click the Switch to Configuration Mode icon, and then click **Select Report Part**.

TIP: When you create a dashboard, you can add report parts from reports with different data sources. When viewing the dashboard, select **As Designed** as the **Data Source** to show information from each data source.

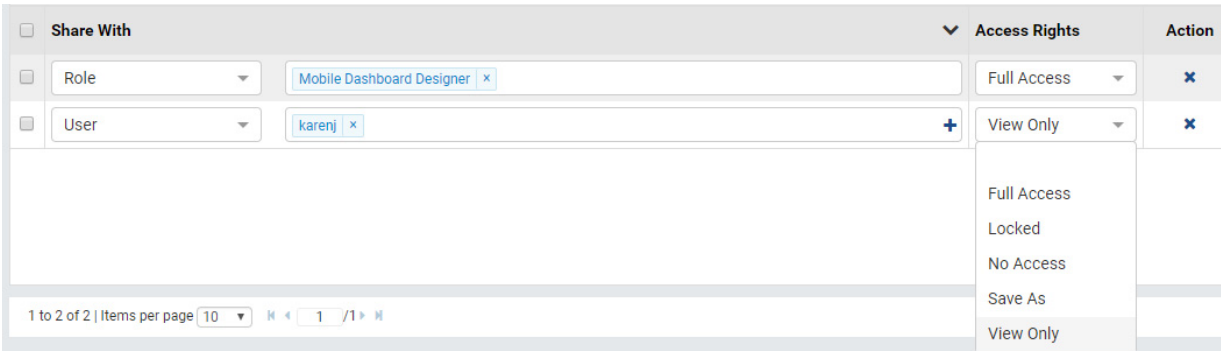
Dashboard and dashboard report permissions

Only users with a license of Designer can assign permissions to dashboards and dashboard reports.

Permissions are assigned by:

- **Role**—the type of Mobile Dashboard license: Designer or Viewer.
- **User**—the Sage 300 Construction and Real Estate user name.

The permissions range from having full access to make edits to the original design to view-only access.



The chart below demonstrates what is allowed with the types of permissions you can assign:

	Access Rights option					
Permissions	**Full Access**	**Locked**	**No Access**	**Quick Edit**	**Save As**	**View Only**
View with filter interaction available	Yes			Yes	Yes	Yes
View with no filter interaction		Yes				
Edit the report in Quick Edit mode	Yes			Yes	Yes	
Edit the report in the report designer	Yes				Yes	
Save changes to the original design	Yes					
Use the Save As function when saving	Yes				Yes	

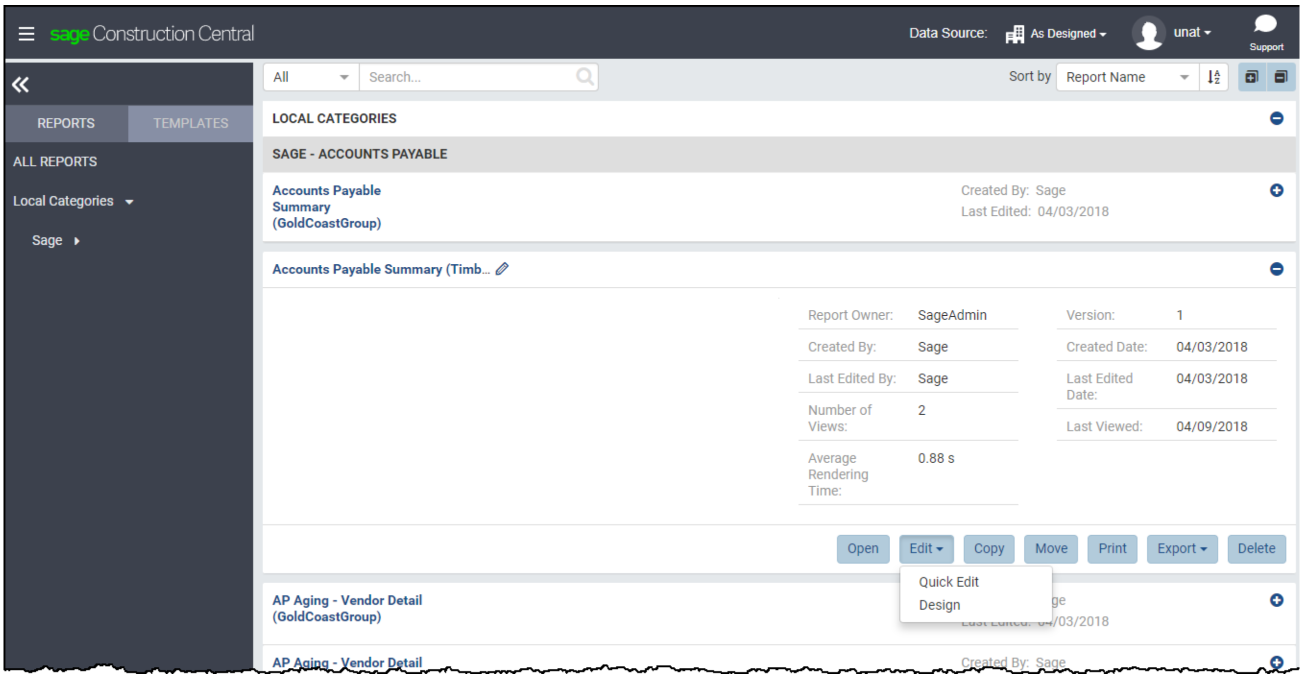
NOTES:

- The **Quick Edit** feature is available to all users, either with a Designer or a Viewer license.
- The **Quick Edit** feature is only available on dashboard reports, not on dashboards. The editing functions are limited. For example, you cannot change the data source or apply security settings to a report.

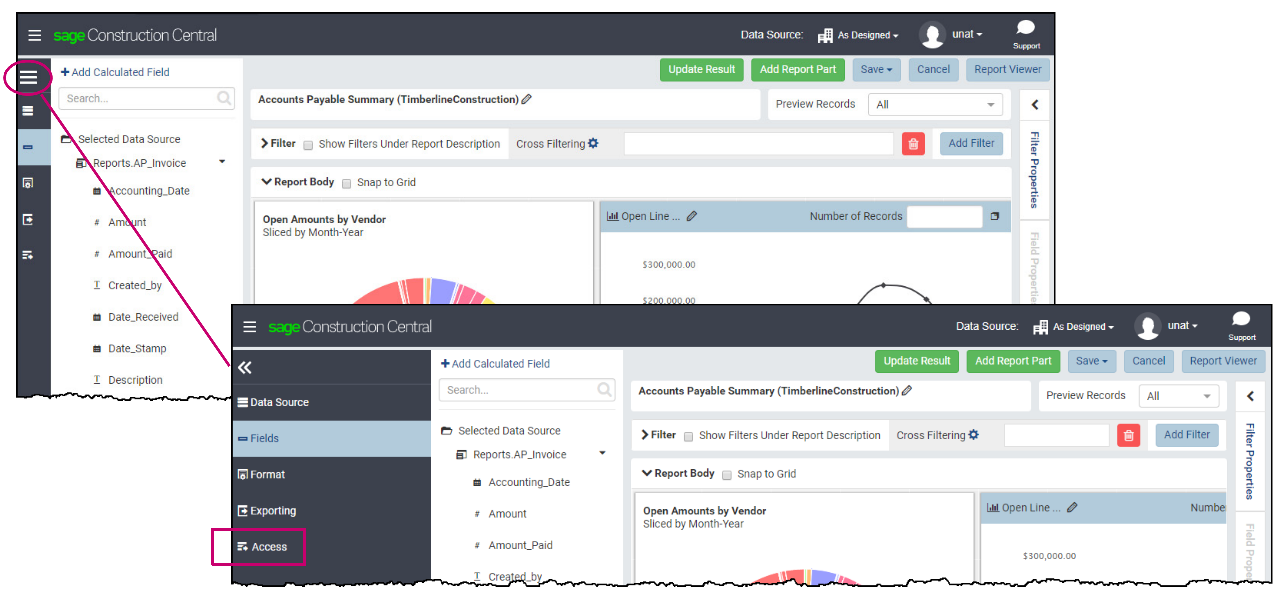
Define permissions on dashboard reports

When you specify the permissions settings on reports, they extend to all the associated report parts and will affect the information displayed on dashboards.

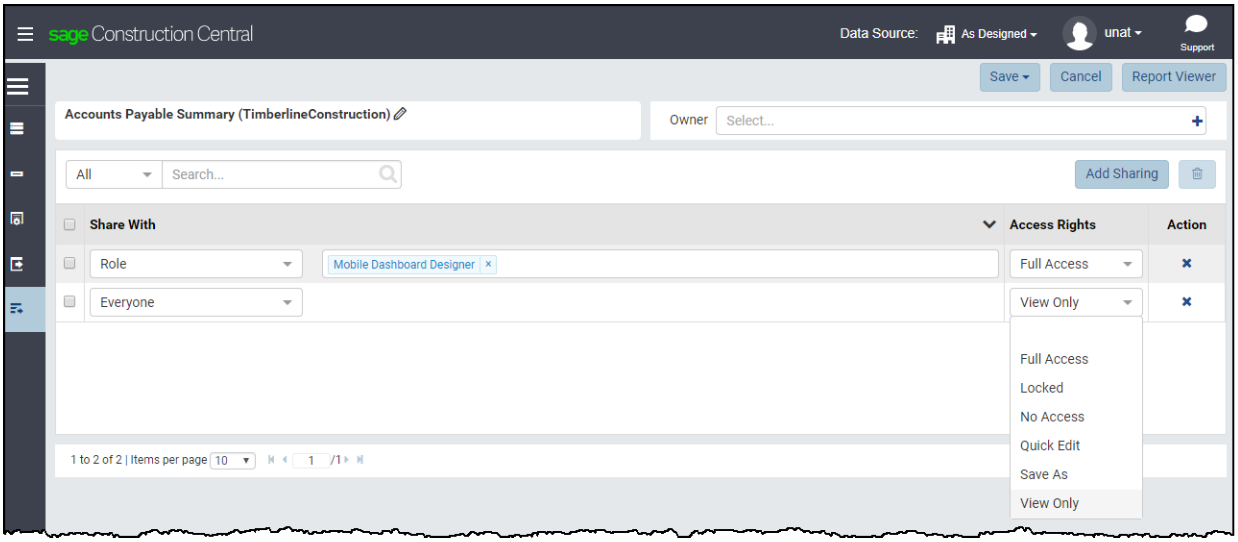
1. Open the Sage Construction Central menu and select **Dashboards > View Reports** to take you to the report list page. Locate the report from the list or use the filter at the top of the page to search for a specific report.
2. Click the expand icon (to the far right of the report name) to display the report details.
3. Click **Edit**, and then **Design**.



4. This takes you to the report designer for this report. Expand the menu located on the left to display the tabs or hover your mouse over the icons for a description. Click **Access**.



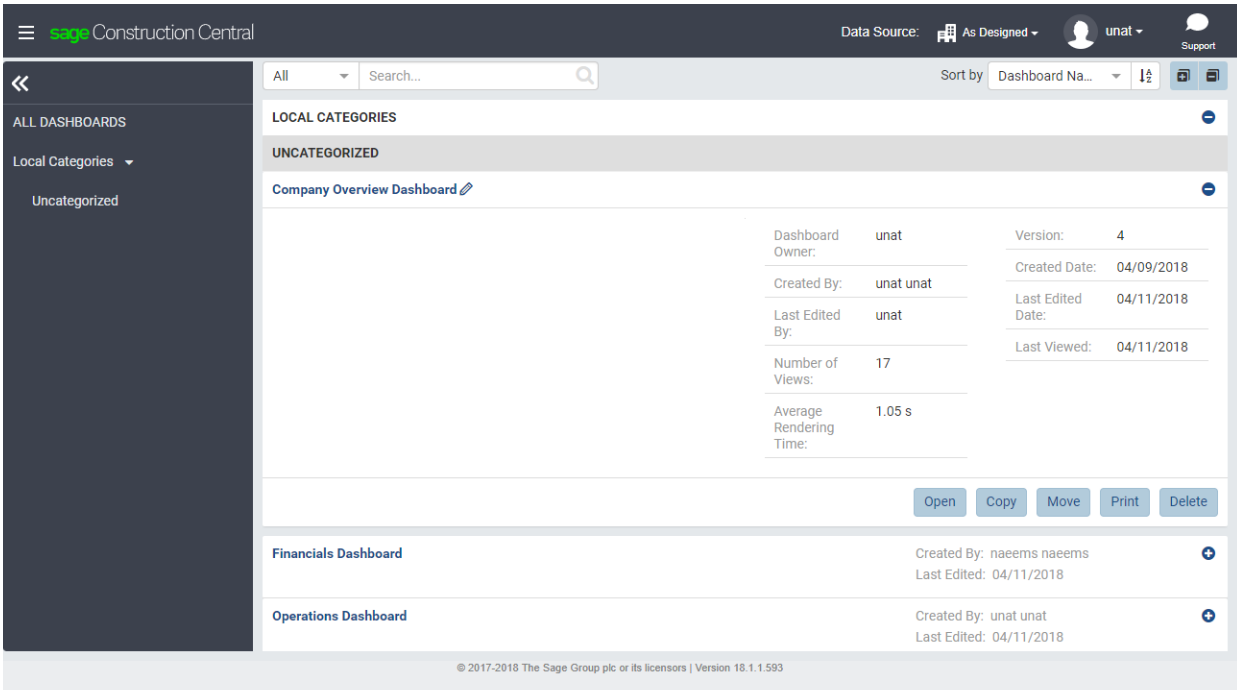
5. Report permissions are under **Share With**. Edit the existing permissions as needed. To delete a row, click the **x** in the **Action** column, To add a row, click **Add Sharing**.
   Refer to the table in “Dashboard and dashboard report permissions” on page 37 for an explanation of each **Access Rights** option.



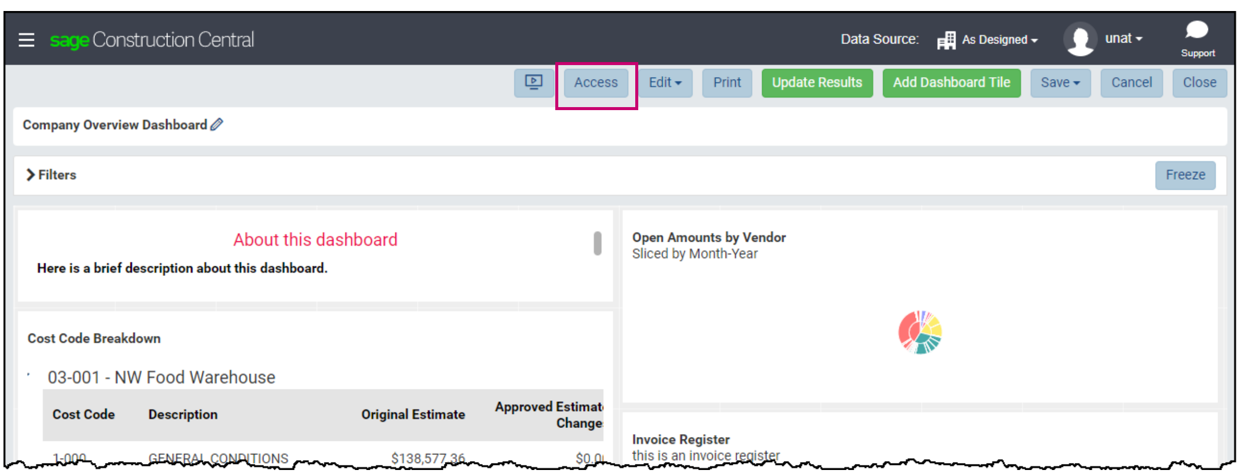
6. Click **Save** > **Save** when you are done.

Define permissions on dashboards

1. Open the Sage Construction Central menu and select **Dashboards > View Dashboards** to take you to the dashboard list page. Locate the dashboard from the list or use the filter at the top of the page to search for a specific dashboard.
2. Click the expand icon (to the far right of the report name) to display the dashboard details, and then click **Open**.



3. This takes you to the dashboard design page. Click **Access**.



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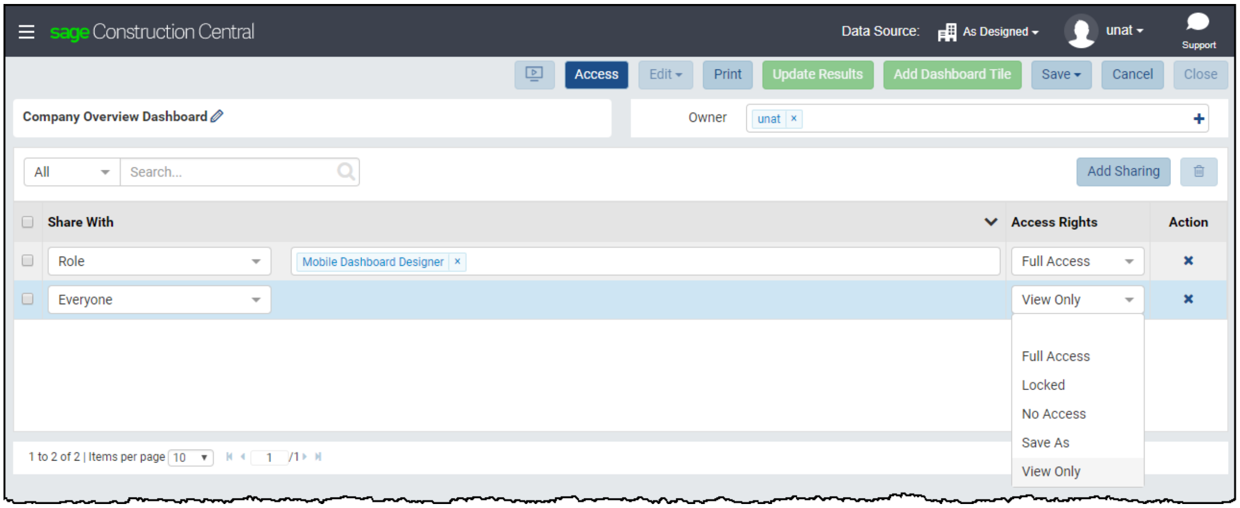


5. Click **Save** > **Save** when you are done.

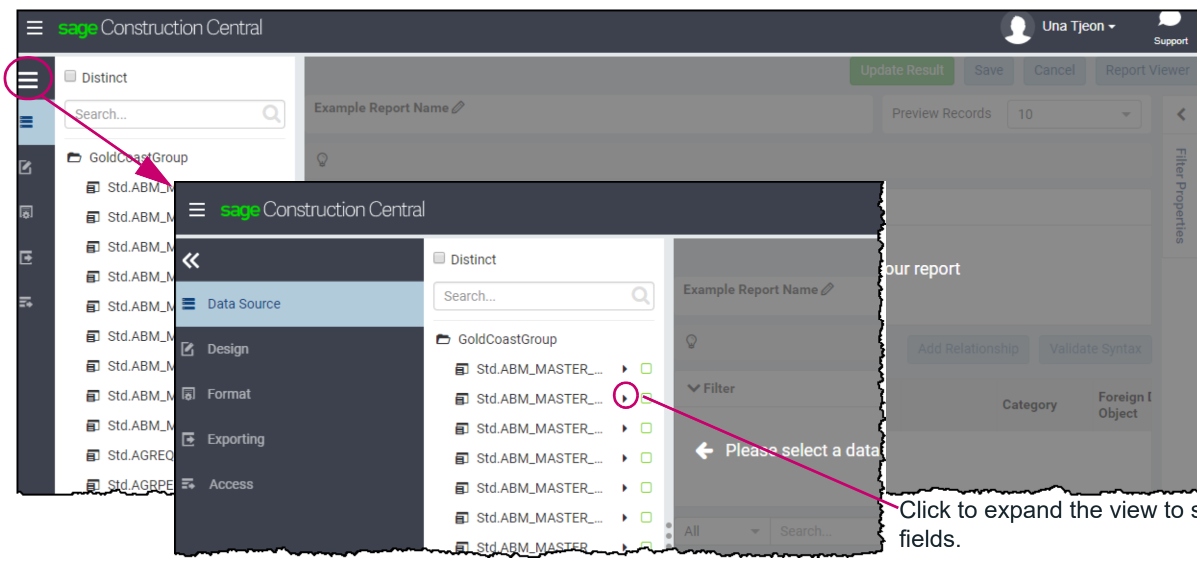
Create new dashboard reports

If you have a license of Mobile Dashboards Designer, you can create reports for your organization. This also requires an understanding of the information stored in your company's database.

WARNING: A device display resolution of 1024 pixels or below does not support editing or creating dashboard reports.

Creating dashboard reports for your organization requires an understanding of the information stored in your company's database and you must have a license of Mobile Dashboards Designer.

When you open the Sage Construction Central menu and select **Dashboards > Create Reports**, the steps for creating a report are shown on the left. If the menu is minimized, click to expand it.



Click to expand the view to show the fields.

The steps include:

- **Data Source**, where you select which views and stored procedures to use for the report. The middle panel displays Standard views (**Std**), Reports views (**Reports**), and stored procedures organized by company.

NOTE: You can download the list of Standard and Reports views from the Sage Knowledgebase. See article 91722.

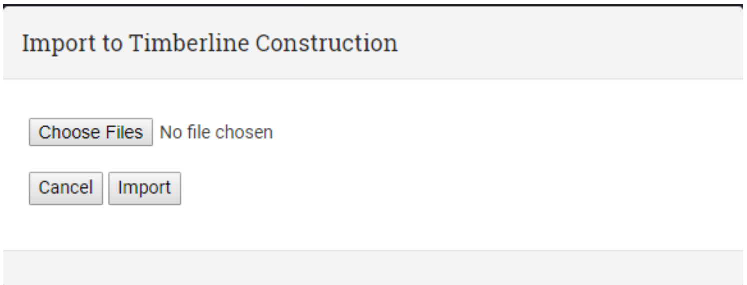
- **Design**, where you add filters and create report parts.
- **Format**, where you enter the report title, description, and the header and footer.
- **Exporting**, where you preview your report and edit the layout for exporting.
- **Access**, where you set the permissions for who can access and view the report.

Export and import a report design

You can download a dashboard report design. For example, you want to email the report design to someone.

1. Open the Sage Construction Central menu and select **Dashboards > View Reports**.
2. In the report list, locate the report name and click the expand icon (to the far right of the report name) and then click **Export**. Select **Definition** from the list. The *birt file is copied to the to the default download location of your machine.
3. To add a report that you received, select the company next to **Data Source** and use the **Dashboards** > **Import Reports** function.

4. In the **Import to** window, click **Choose Files**. Select one or more *.birt files and click **Open**. Click **Import**.



5. Imported reports are in a category named after the date and time of import. You can move a report to another category. In the report list, locate the report name and click the expand icon (to the far right of the report name) and then click **Move**.
6. In the **Move Report** window, select an existing category or subcategory, or create new ones.

Learn how to use Mobile Dashboards

You can learn how to use Mobile Dashboards by watching complimentary, short instructional videos posted on Sage University (www.sageu.com). On the Sage 300 Construction and Real Estate product page, find **Mobile Access** under **Training subjects**. Or, type “Mobile Intelligence” in the Search box.

FOR MORE INFORMATION: More information on how to use the Mobile Dashboards report designer will be available on Sage University soon.